

# Packages and Plan Management

# **User Manual**

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# About This Document

#### Purpose

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

#### **Intended Audience**

The intended audience for this user manual are sales, marketing or other administration staff of a service provider who manage packages, plans, rate cards, bolt ons and timetables within the Emersion System.

Version	Date	Description	Author
1.0	11/06/2009	First draft for discussion	Sandika Gandhi
2.0	23/06/2009	Some amendments made in Bolton, Rate card and time table modules.	Sandika Gandhi
3.0	26/06/2009	Added Bolt On charge profiles	Sandika Gandhi
3.1	28/09/2009	Added extra features of packages and service plans, creation of buy packages, service plans, and rate cards, linking packages to service plans and rate cards, added rating profiles and example package plans, service plans and bolt ons.	John Caval
4.0	22/08/2012	Major revision to reflect latest system updates, and reformatted	Kathy Berkidge

#### **Document Control**

## **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 allows service providers 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 solution interfaces with Australia's leading national carriers and aggregators making ordering, provisioning, and billing of data and telephony products and services effortless. The Umbrella system workflow 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.

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

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

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

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

#### Introduction

On behalf of the team at Emersion, we would like to take this opportunity to welcome you to Emersion. Emersion may update the system to improve your experience. Enhancement and new features and changes may be implemented 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.



Emersion, or your Wholesale Service Provider will provide you with a username and password to access the Emersion system. The Emersion system components are seamlessly integrated and you will access the Emersion Billing and Accounts modules, and all other Emersion system modules from a single Web interface through the Emersion Cumulus user interface.

#### **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 <b>Search</b> .
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.
(j)	The $\oplus$ 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 Billing and Accounts functions, the following assumptions have been made:

- You are familiar with the Emersion Customer Management module and you can competently use it.
- You have a computer that you can competently operate.
- $\succ$  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.

# **Understanding Packages and Plans**

Emersion's flexible architecture allows you to set up your service plans, rates, bolt ons and timetables to suit almost any billing requirement. Multiple service plans can be bundled together to create a package, which can allow you to create discounted or consolidated pricing to offer your customers great value for money. Packaging services together, combined with multiple rating models, can help you create a point of differentiation in the market leading to increased sales, better customer satisfaction, and a successful business.

To allow you to create great packages, and sell them to your customers, you should first gain an understanding of how packages and plans are structured in the system. Once you grasp the various components and how they fit together, you will be able to set up many packages, with many pricing models, to attract and retain customers.

This chapter provides an overview of all the packaging components and their structure. Details about creating and managing the package components in the system are provided in following chapters.

#### **Overall Package Structure**

Figure 1 below shows the overall structure and components of packages and plans.





#### **Package Components**

≻	Package Plan	links together one or more service plans:
		<ul> <li>buy package plans define the service costs from your upstream service providers, linked to buy service plans</li> </ul>
		<ul> <li>sell package plans are sold to your customers, which are linked to buy package plans and sell service plans</li> </ul>
>	Service Plan	contains a single service type with charging metrics (e.g. PSTN phone, mobile phone, ADSL2 etc)
>	Rate Card	attached to a service plan to define the charges associated with the service usage (e.g. phone call rates)
	Timetable	associated with a rate card to allow different service usage rates to be charged based on the day and time (e.g. reduced rates for phone calls made on weekends)
	Product Rate Card	attached to a service plan to define the service and equipment charges associated with a service (e.g. handset rental, call forwarding etc)
>	Bolt On	can be linked to a service plan to provide cost reductions for a particular service usage type (e.g. data allowance or voicemail retrieval on a mobile phone service)
	Contract	applied to a package plan to define the minimum length of time a package plan should be retained, along with exit fees if the contract is broken

The following sections describe each component in more detail. The *Buy and Sell Packages and Plans* section on page 18 and the Linking Package Plans and Service Plans section on page 20 provide details about the buy and sell relationships between the package components.

### Package Plan

Package plans are made up of one or many service plans. Both buy package plans and sell package plans need to be created in the system. If your upstream service provider uses the system to manage services that they supply to you, they will create buy package plans and make them available to you. For all other services you provide to your customers that are not supplied by a service provider within the system, you will create the buy package plans. Once you have buy package plans, you can create sell package plans. A sell package plan must be linked to a buy package plan before it can be sold to a customer (see the *Buy and Sell Packages and Plans* section on page 18 for further details). The sell package plan is what you sell to your customers.

Package plans have a number of settings for both buy and sell packages including:

- setup fee (optional) the fee charged when the package is sold to a customer or purchased from a supplier
- access fee (optional) the recurring fee charged each billing period
- default contract (optional) defines the contract that the customer will be on when they buy the package, or that you are on when you purchase the package
- discount (optional) apply a discount the setup and / or access fees
- billing period length how frequently the access fees are charged
- billing period alignment whether the package billing period is aligned to the account's billing period
- billing in advance determines whether the access fee is charged at the beginning or end of a billing period
- periods in advance the number of billing periods in advance the system will generate access fees
- pro-rata charging determines whether the initial access fee is pro-rated for part of a billing period, depending on the day in the billing cycle the package is sold, or purchased from a supplier

A sell package plan cannot be sold to a customer until it has been linked with at least one sell service plan and a buy package plan. Once a package plan is sold to a customer, the instance of the package plan is referred to as a *package subscription*.

An example of a package plan would be a PSTN telephony service, which is also bundled with an ADSL broadband service. The sell package plan would be linked with 2 sell service plans (i.e. a telephony service plan and an ADSL service plan), as well as the appropriate buy package plan that contains telephony and ADSL buy service plans.



A package plan must be linked to at least one service plan before it is able to be sold to a customer.

#### Package Plan Fees

When *setup* and *access* fees are defined on a package plan (i.e. are not left blank), they will override any setup and access fees defined on any service plans linked to the package plan. The system will only charge the setup and access fees defined at the package plan level, and ignore the setup and access fees defined on the service plans.

Alternately, if the setup and access fees are not defined on a package plan, the system will charge the setup and access fees defined on all the service plans that are linked to the package plan.

#### Service Plan

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A Service Plan contains a single service type, such as PSTN telephony, mobile phone, ADSL2, VOIP etc, which is linked to a package plan. The service plan contains the charging rules that define how a particular service is billed. Like package plans, both buy service plans and sell service plans need to be created in the system. Buy service plans are linked to buy package plans. Sell service plans are linked to sell package plans, which you can sell to customers.

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Service plans contain settings and components that control the service's charging metrics including:

	setup fee (optional)	the fee charged when the service is sold to a customer, or purchased from a supplier, based on the order type (e.g. new service, churned service etc)
	access fee (optional)	the recurring fee charged for the service during each billing period
	service period	how far in advance or arrears the service plan's access fees are charged and how frequently the access fees are charged
	cap (included value)	calls, or other service usage, that are included in the service plan access fee at no extra cost up to a <i>cap</i> value
	rate card	for telephony and other usage based services, rate cards are linked to the service plan to define the call or usage charges
	quota	for data services, the quotas define the included data usage e.g. 100GB, as well as the peak and off-peak data quotas
	bolt on	linked to the service plan for particular bonus or free service usage
>	product rate card	linked to a service plan to define charges relating to service and equipment e.g. voicemail, handset rental, caller ID etc.

#### **Service Plan Fees**

The *setup* and *access* fees defined on a service plan will be charged unless the package plan that the service plan is linked to has setup and / or access fees defined. Package plan setup and access fees take precedence over service plan setup and access fees.

#### Caps – Included Value

A *Cap*, known as *included value*, can be set on a service plan. It defines a dollar amount of service usage a customer can receive at no additional charge i.e. it is included in their service plan access fee. You can set what service usage is included in the cap, and what usage is excluded. For example, a PSTN telephony service that has \$50 of included value for local and national calls, but mobile and international calls are excluded from the cap. Call or usage types included and excluded from a cap are defined in the rate card, which is linked to the service plan.

#### Rate Card

A *Rate Card* is a group of *rates* and *tariffs*. A rate defines what the system should charge and also *how* the system should charge for a given call or usage type. A tariff defines each individual usage type (see *Tariffs* below). Rate cards are linked to service plans based on a service type, such as PSTN telephony, VOIP, or mobile phone services etc. *Time Tables* may be linked to a rate card to control different charging based on different days of the week and / or times of the day.

The system provides great flexibility in rating methods and configurations. It allows either very simple rating (e.g. markup) or very complex rating (tiered rating, caps etc). The following rating methods are supported:

	pass-through	the supplier charge from the usage file is passed through to the customer
>	markup %	increases the supplier charge from the usage file by the defined percentage
>	discount %	decreases the supplier charge from the usage file by the defined percentage
$\succ$	flat charge	applies a flat charge to the usage
>	rate per	applies a price per time interval, with a flagfall, minimum charge, charge interval, price per charge interval, and price interval
	excess	applies a price per time interval once the initial free time has been reached, with a flagfall, minimum charge, initial free time, charge interval, price per charge interval, and price interval
	simple cap	allows a maximum value to be applied to the usage, with minimum cost, maximum cost, maximum type (i.e. \$ or time), charge interval, price per charge interval, and price interval to be defined
>	capped	applies a price per time interval once the initial free time has been reached up to a maximum value, with a flagfall, minimum charge, maximum cost, maximum type (i.e. \$ or time), initial free time, charge interval, price per charge interval, and price interval
>	flagfall + markup %	applies a flagfall and increases the supplier charge by the defined percentage

In addition, some rating methods allow multiple tiers to be configured to charge at different rates at various usage limits on a single usage type (i.e. the rate per, excess, simple cap, and capped rating methods). For example, a *rate per* rating method for a telephony service, set with multiple tiers that may apply \$0.50c per minute for a call up to a value of \$10, and then apply \$0.30c per minute for the call from \$10.01 up to a value of \$30, and then apply \$0.18c per minute for the remaining call usage.

#### **Buy and Sell Rates**

Unlike package plans and service plans, rate cards are not set as either buy rates or sell rates. Instead, a rate card is linked to a service plan, and it's the service plan's type that is determines whether the rate is buy or sell.

#### Tariffs

A *Tariff* is an individual usage type. For example, tariffs for a PSTN telephony service would be defined for each call type i.e. local, national, mobile, Argentina landline, USA mobile, etc. External carriers (such as Telstra and Optus) provide usage files, such as Call Detail Records (CDRs), containing services and their usage e.g. all calls made by a particular phone service. Each usage record contains a *tariff key* that defines the usage type the service incurred. A tariff is mapped to the tariff key, and linked to a rate to determine the charge for that specific usage.

#### **Tariff Groups**

Tariffs are hierarchical and are grouped together in *tariff groups*. An example of a tariff group would be *International Calls* where all international tariffs to various countries are contained with the *International Calls* tariff group. The system allows you to assign rates to a particular tariff or to a tariff group. When a rate is assigned to a tariff group, all tariffs in that group that do not have an individual rate specifically applied will be rated (i.e. charged) per the rate set at the tariff group level.

For example, *International* is a tariff group for a PSTN telephony service containing the tariff *UnitedStatesOfAmerica* (see sample tariff group below). *UnitedStatesOfAmerica* is also a tariff group containing the tariffs *UnitedStatesOfAmerica* - *LandLine* and *UnitedStateOfAmerica* - *Mobile*.

```
* International - Charged at $4 per minute. $0.50 flagfall
 * UnitedStatesOfAmerica
 * UnitedStatesOfAmerica - LandLine
 * UnitedStatesOfAmerica - Mobile - Charged at $1.35 per minute,
       $0.50 flagfall
```

#### Figure 2. a sample tariff group

If a service on this rate card incurs the tariff: *UnitedStatesOfAmerica - Mobile*, they will be charged at the rate defined for *UnitedStatesOfAmerica - Mobile* (e.g. \$1.35 per minute and \$0.50c flagfall). However, if the service incurs the tariff *UnitedStatesOfAmerica - Landline*, which does not have a rate defined, the system would investigate the tariff group to find the next level up the tariff hierarchy to find the rate to charge for the call, which in our example is *UnitedStatesOfAmerica*. As there is no rate set for *UnitedStatesOfAmerica*, the system would find the next level up the tariff hierarchy to find the rate to charge, which would be *International*. As *International* has a rate defined, the system would charge the call usage according to the *International* rate (i.e. \$4 per minute and \$0.50 flagfall).

#### **Base Tariff**

The Base Tariff is a special tariff that is placed at the top of the tariff group hierarchy. All tariffs and tariff groups for each service type fall below the base tariff. You are able to set a rate at the base tariff level. This would result in all usage that has no rate defined further down the tariff group hierarchy to be charged at the base tariff rate, like a default rate. If the system cannot find a rate for a tariff encountered, and a base tariff is not set, the usage will fall into quarantine for manual investigation and correction.

#### **Typical Tariff Structure**

Typically, a group of tariffs for a telephony service type will be organised into the following tariff groups:

BASE TARIFF (\*)

- Local Calls (\*) ٠ •
- National Calls (\*)
  - ACT
  - NSW
  - NT
  - QLD SA
  - TAS
  - VIC
  - WA

  - National Calls (may be segregated by distance e.g. 0 to 50kms, 50 to 200kms etc)
  - Fixed to Mobile (\*)
- **Special Calls**

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•

- 1300 Calls •
- 1800 Calls
- InfoCalls
- International Calls (\*)
  - Argentina (\*)
    - Argentina
    - Argentina Mobile Carrier
  - Armenia (\*)
    - Armenia
    - Armenia Mobile Carrier

Mobile phone service tariffs may contain extra tariff groups, such as:

- SMS (\*) •
- MMS (\*)
- ROAM (\*) •



Figure 3. The tariff table structure

#### Time Table

Time tables define time bands for different times of the day and days of the week. Multiple time bands can be set up in each time table. A time table is linked to a rate card to allow different rates to be defined for each time band. For example, you can apply discounted phone call rates for peak and off peak times, or weekends, or a combination of these.

Time tables allow a single rate card to be set up that contains the rates for a service at various days and times, instead of maintaining multiple rate cards. However on data plans, only peak and off-peak time bands can be defined. During the bill run, the billing and rating engine applies the rate that is valid for the day of week and time of day that the usage took place, based on the time band set up in the time table attached to the service's rate card.

#### **Product Rate Card**

Product rate cards are used to define charges for additional services and equipment associated with certain service types e.g. telephone handset rental, voicemail, call forwarding etc. These vary between service types.

Unlike usage rates, the product rate is charged on a per use basis, or per instance. Similar to a usage rate card, product rate cards contain rate IDs, which identify each product and the rate to charge. External carriers provide service and equipment usage files (e.g. S&E files) that contain the service products each service incurred. The system charges for the service products based on the product rate ID and the rate set in the product rate card. Only two types of product rating methods are supported:

- markup % increases the supplier charge from the service and equipment usage file by the defined percentage
- price per unit applies a set price per instance

You can define buy product rate cards and sell product rate cards. Product rate cards are then linked to buy or sell service plans appropriately to allow you to manage your costs and margins.

#### Bolt On

A Bolt On is an addition to a service plan that allows you to provide savings to your customers for a particular service usage type. For example, 50 free SMSs or 2GB data on a mobile phone service. A bolt on *Bonus* can be defined to provide a block of free usage as a dollar value amount, usage time, data limit, or usage units. The bonus can be applied at the start of bolt on usage, or after the bolt on maximum usage limit has been reached.

Set up and access fees can be charged against a bolt on, as well as a *First Time Fee* that allows the bolt on fee to be charged only when a customer uses the bolt on usage type for the first time. Excess rates can be applied if the customer exceeds the maximum bolt on usage amount.

For some service types, bolt ons can be grouped together to only allow one bolt on in *the Bolt On Group* to be added to a service plan at a time

## Contract

A contract is an agreement entered into by you and your customer to define the terms of the service they purchase from you. It may define the elements of the service and what happens if the contract is broken. Contracts, in the context of legalities and obligations of you, your customer and / or your service provider are beyond the scope of this user manual.

In the system, a contract can be optionally attached to a package subscription to define the minimum length of time a service provided be retained by the customer, and the behaviour the system should perform in the event of a service cancellation or plan change. A contract can also be used to provide credits, or discounts, to the customer over the life of the contract. You can apply a contract against a package subscription at any time, even if the package is already active.

A contract contains various settings including:

$\triangleright$	length	the length of time in months or years the contract is in effect
≻	contract end method	the action the system should take once the contract has reached its end date (i.e. not cancelled), including:
		no contract – the contract will simply be cancelled and the service is not affected
		cancel service – the service is cancelled
		renew contract – the contract is renewed
		forced migrate – the package will be changed, or migrated, to another package
	break out method	the fee the system should charge if the customer breaks the contract (i.e. cancels the service), with options of:
		tiered – allows ranges of months and breakout fees to be defined
		fee – a flat amount which will be charged
		remaining value (current) – based on months left on the current package
		remaining value (initial) – based on months left of the initial package the customer purchased (i.e. ignores any plans changes, or migrations)
$\triangleright$	maximum breakout fee	the maximum fee to apply if the contract is broken
	credit	the credit amount to provide whilst the customer remains on the contract
	package pool	defines which package plans are available for the customer to change to whilst on this contract (see below)

plan change method the action and / or fee the system should apply if the customer upgrades, crossgrades, or downgrades their plan while on the contract.

#### Package Pool

A package pool, or contract pool, is a group of package plans that a contract can be active against. Each package in the pool has a *weighting* against it. The weighting is a figure between 1 and 100 that allows the system to determine whether a plan change is an upgrade (i.e. the new package has a higher weighting than the current package plan), downgrade (i.e. the new package has a lower weighting than the current package plan) or crossgrade (i.e. the new package has an equal weighting to the current package plan). You define the packages in a contract pool and each package's weighting. If the contract is broken, i.e. the customer cancels their service or changes their package plan, the system automatically applies breakout fees according to the break out method defined.

#### **Buy and Sell Packages and Plans**

Emersion provides a multi-tiered, hierarchical account structure that supports the relationship between a wholesaler and retail service provider, as well as the relationship between the retail service provider and end customer. The wholesaler, service provider and the customer can all exist within the system. Services are *purchased* from the upstream provider (i.e. the wholesaler) and *sold* to downstream to end customers.

The system allows both *buy package plans* and *buy service plans*, as well as *sell package plans* and *sell service plans* to be created and maintained. A *buy package plan* and *buy service plan* represent the service being sold to the service provider from an upstream supplier. The pricing in the *buy package plan* and *buy service plan* should reflect the service cost price, or rate the service is *purchased*. A *sell package plan* and *sell service plan* represent the service being sold downstream to a customer. A wholesaler will sell package plans to a service provider, who then sells package plans to their end customers with their own pricing. Usually, the service provider sells the services purchased from the wholesaler at a different price than they buy the service.

A *buy package* represents the cost price of the service(s).

A sell package represents the price actually being sold to the end customer.

By having this buy / sell structure, the system can create invoices for service usage and fees at each *level* of the hierarchy based on the buy and sell packages.

For example, a wholesaler sells PSTN telephony services to a service provider. The wholesaler would setup their buy price information in a buy package plan, as well as their sell price information in a sell package plan. The package plan is then sold to a service provider. At the service provider level, the package plan purchased from the wholesaler becomes their buy package plan. The service provider would setup one or many sell package plans to sell to their end customers linked to the buy package plan. During the bill run, the system would create an invoice from the wholesaler to the service provider using the wholesaler's sell package plan information to determine the service charges. The system would also create an invoice from the service provider to the end customer using the service provider's sell package plan information.

If the wholesaler does not exist in the system (i.e. the wholesaler does not use the system), the service provider creates the buy package plans and buy service plans, as well as the sell package plans and sell service plans.



Figure 4. example of buy and sell packages where the wholesaler does not exist in the system

**<sup>(</sup>i)** 

If the wholesaler exists in the system (i.e. the wholesaler uses the system to manage their services and invoicing) they will create buy package plan and buy service plan, as well as sell package plans and sell service plans. Once the wholesale sells their sell package plan to the service provider, the service provider will create their own sell package plans and sell service plans, and link them with the buy package plans purchased from the wholesaler.



Figure 5. example of buy and sell packages where the wholesaler exists in the system

#### Linking Package Plans and Service Plans

To support the wholesaler, service provider, and end customer hierarchical structure, and enable the system to create invoices with the correct pricing information at each level, sell package plans must be linked to buy package plans. In addition, both buy package plans and sell package plans must be linked to buy service plans and sell service plans respectively.

A buy package plan must be linked to at least one buy service plan.

A sell package plan must be linked to at least one buy package plan and at least one sell service plan.

Sell package plans may be linked to multiple buy package plans. The buy package plans that can be linked a sell package plan can be sourced from two locations:

buy package plans that you have created

**(i)** 

buy package plans that have been made available to you by your wholesaler



Figure 6. example buy and sell package plan relationship

Within a package plan, you select the service plans included by linking them to the package plan. In addition, you select whether each service is mandatory, as well as the service allowance, which is the number of each service that is provided in the package plan.

A mandatory service is one that is required to be activated before the package will be active (i.e. commence billing in the system). A non-mandatory service is considered optional that can be set up after the package has been sold to a customer. When a package is sold that contains non-mandatory services, the system will create non-active, *initialised* services for the non-mandatory services. The non-mandatory services can be activated at any time.

The service allowance defines the number of services that are created in a package plan. For example, you may want to create a package plan with an ADSL service and 5 mailboxes. When you link the ADSL service plan and the mailbox service plans to the package plan, you do not need to link the mailbox service plan five times. Instead you would link the mailbox service plan once and specify a service allowance of 5.

You can only set mandatory services and the service allowance when creating buy package plans. The sell package plan will inherit the mandatory services and service allowance from the linked buy package plan.



Figure 7. The buy and sell package relationship

You cannot link more than one service plan of the same service type to a package plan

The example in Figure 6 is incorrect, as there are two phone service plans linked to the package plan.



Figure 8. incorrect package example

The example in Figure 7 shows the correct package linking with a phone service plan with a service allowance of 2.



Figure 9. correct package example

#### Catalogue Management (Wholesale Providers only)

*Package Catalogues* and *Package Groups* allow wholesale service providers to manage different groups of sell package plans they provide to different downstream service providers. Note that package catalogues and groups only apply to wholesale service providers.

Sell package plans are placed into package groups. Different package groups may be created for groups of related service types, or various pricing tiers etc. A package catalogue is them mapped to a customer in the system (i.e. the wholesaler's downstream retail service provider) containing all the package groups provided to the customer. Even if every sell package is offered to all customers, the sell packages must be placed in a package group, and a package catalogue created for each downstream customer.

The retail service provider will only see the package plans contained in the package groups mapped to them by the wholesaler in the package catalogue. Those package plans become the service provider's buy package plans.



Figure 10. package catalogue mapping example

In the figure 9 above, all service providers can create package plans linked to sell package plans 1 and 3, as both package groups contain these package plans. Service provider 1 can create package plans linked to sell package plans 2 and 4, but not 5 and 6. Service provider 3 can create package plans linked to sell package plans 5 and 6, but not 2 and 4. Service provider 2 can create package plans linked to all the sell package plans, as they have both package groups mapped to them, which contain all sell package plans.

#### The Overall Package Creation Process

To create sell packages, you essentially create your buy components first, then your sell components, and then link them together. If you receive services from an upstream service provider that also uses the system, you will not need to create buy components, as these will be made available to you by your wholesaler.

If the services you provide do not require usage or products associated with them, you do not need to create timetables, rate cards, product rate cards, or bolt ons.



Figure 11. the overall package creation process

# **Package Plans**

A package plan links together one or more service plans, as well as contains a number of settings to control how the customer is charged when they purchase the package plan. Buy package plans define the service costs from your upstream service providers, which are linked to buy service plans. Sell package plans are sold to your customers, which are linked to buy package plans and sell service plans.

An instance of a package plan that is sold to a customer is referred to as a *Package Subscription*. The system creates *Service Subscriptions* for each instance of each service contained in the package plan.

#### To Display Package Plans

1. Select **Packages and Plans** > **Management** > **Package Plans** from the **Menu.** The *Package Plans list* page will appear showing a list of existing package plans.

Customers	s Billing	Services	Packages and Plans	Products	Report	Finance	Events	Admin					
Manageme	nt Catalor	gue Managem	nent										
Package Pl	ans Service	Plans Rate	Cards Service and F	nuin Rate Cards	Product Pr	ricing Bolt (	os Bolt C	n Grouns	Time Tables Contracts	8			
Packas	o Plana					and the second s							
Fackag	e Fians												
	ID:			Status: A		~		Plan Type:	Sell Plans 🔥	Servic	e Type:		
-				Dr	aft			8 10	Buy Plans	AV Subscrip	tion	~	
	22			Pe	nding					Aegis Suppo	ort		
7	Name:			Se	leable	~			~	DFT RBT-AD	SL2	1000	
										DNS Hosting	2	~	
Exte	rnal Name:									2		Cearch	Clear
												ouron	
												Create Nev	N
DC Develop	- Farmed												
26 Results	srouna												_
ID		Name			External N	ame	P	eriod Lengt	h Periods in Advance	Access Fee ¥	Buy or Sell	Status	Created
109968	Datafast ADSL	.1 Test Plan (SE	EL)	Datafast ADSL1	Fest Plan (SE	:LL)	11	Ionth	1	0.00	Sell	Approved	28 Sep 2010
143548	M2 Dialup - Sel	ll Package Plan		M2 Dialup - Sell P	ackage Plan		11	Ionth		0.00	Sell	Approved	30 Mar 2012
143546	Web Hosting -	Sell Package Pl	an	Web Hosting - Se	II Package Pl	an	11	/lonth	1	0.00	Sell	Approved	30 Mar 2012
110766	Fixed wireless	test sell		Fixed wireless te	st sell		11	/lonth	1	0.00	Sell	Approved	5 Oct 2010
118272	ISPOne ADSL2	2 - Sell Package	Plan	SPOne ADSL2 -	Sell Package	Plan	11	Aonth		30.00	Sell	Approved	30 Dec 2010
138676	ISPhone PSTN	- Sell Package I	Plan	SPhone PSTN - S	Sell Package I	Plan	11	/lonth		30.00	Sell	Approved	29 Nov 2011
142976	M2 Inbound - S	Sell Package Pla	n	M2 Inbound - Sel	Package Pla	n	11	Ionth		30.00	Sell	Approved	13 Mar 2012
142978	Soul Inbound -	Sell Package Pl	lan	Soul Inbound - Si	II Package Pl	ian	11	/lonth		30.00	Sell	Approved	14 Mar 2012
142591	Grey Mouse Te	eleconference -	Sell Package Plan	Grey Mouse Tele	conference -	Sell Package I	Plan 11	Ionth		30.00	Sell	Approved	2 Mar 2012
142776	M2 MultiLine - S	Sell Package Pla	an	M2 MultiLine - Se	I Package Pla	in	11	/lonth		30.00	Sell	Approved	8 Mar 2012
135576	Domain Registr	ation - Sell Paci	kage Plan	Domain Registrat	on - Sell Pac	kage Plan	12	Months	1	30.00	Sell	Approved	11 Oct 2011
135476	Emersion Email	I Domain - Sell P	Package Plan	Emersion Email D	omain - Sell P	'ackage Plan	11	/lonth		30.00	Sell	Approved	11 Oct 2011
119468	Telstra PSTN (e	eBill) - Sell Pack	age Plan	Telstra PSTN (eB	.ll) - Sell Pack	age Plan	11	Ionth		30.00	Sell	Approved	17 Jan 2011
118282	Generic Email S	Service - Sell Pa	ackage Plan	Generic Email Se	vice - Sell Pa	ackage Plan	11	/lonth		30.00	Sell	Approved	30 Dec 2010
118280	Generic Spam	Service - Sell P	ackage Plan	Generic Spam Se	rvice - Sell P	ackage Plan	11	Ionth		30.00	Sell	Approved	30 Dec 2010
118278	Hosted Exchar	nge - Sell Packa	ige Plan	Hosted Exchange	e - Sell Packa	ige Plan	11	/lonth		30.00	Sell	Approved	30 Dec 2010
118276	Soul ADSL2 - S	Sell Package Pla	an	Soul ADSL2 - Se	I Package Pla	an -	11	Ionth		30.00	Sell	Approved	30 Dec 2010
118270	ISPOne ADSL -	- Sell Package F	Plan	SPOne ADSL - S	ell Package F	lan	11	Ionth	1	30.00	Sell	Approved	30 Dec 2010
118268	Nextep ADSL -	Sell Package P	Plan	Nextep ADSL - S	ell Package P	'lan	11	/lonth	1	30.00	Sell	Draft	30 Dec 2010
128174	Emersion Email	Mailbox - Sell F	Package Plan	Emersion Email M	ailbox - Sell F	ackage Plan	11	/lonth	1	30.00	Sell	Approved	7 Jun 2011
						8	12>					60 44	00 450 200
÷												50 [10	JO [[150 [[200]]

Figure 12. The Package Plans list page

#### Search

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

- > ID
- Name
- External Name
- Status all, draft, pending, approved, saleable, active and grandfathered
- Plan Type buy or sell
- Service Type allows you to locate a package by linked service types

#### To Create a Package Plan

1. On the *Package Plans list* page, click the **Create New** button. The *Edit Package Plan* page will appear.

* Name:	Setup Fee (\$)(Ex Tax): Override?	Date Created: 3 Aug 2012	
* External Name:	Access Fee (\$)(Ex Tax):	Created By: Emersion Support	
Reference Name:	*Note : Where a package access fee is not empty, it will override any servic	Date Modified: 3 Aug 2012	
Reference Key:	plan access tees that are defined. All amounts entered are to be exclusive of faxes	Modified By: Emersion Support	
Description:		* Saleable From:	
	* Period Length: 1 Month	Saleable To:	
	* Periods in Advance: 1	Approval Status: Draft 🕑	
Buy or Sell Sell	Bill in Advance: No 💉 🕠	Sell in User Portal	
Default Contract Type: None	Access Fee Pro-Rata: No 💌 💿	Sort Key:	
	* Bill Access Fees in: Select Billing Type 💙 🕕	0	
	Align Pkg Period to Invoice Period: 🛛 Yes 🗸 🚺 🔲 Override?		
	Current Default is 'Yes'		
	Discount (%): Override?	Sav	ve.

Figure 13. The Edit Package Plan page

- 2. Enter the internal name for the package plan in the Name field.
- 3. Enter the name of the package plan to display externally to customers (e.g. on invoices etc) in the *External Name* field.
- 4. Enter a *Reference Name* for the package plan, if required (e.g. another name the package plan may be known by on another system).
- 5. Enter a *Reference Key* for the package plan, if required (e.g. an ID for the package plan that may be used by another system).
- 6. Enter a *Description* of the package plan. This description is optional and only for internal use.
- 7. Select whether the package plan is a buy package plan or a sell package plan from the *Buy or Sell* drop list (see *Buy and Sell Packages and Plans* on page 18 for more information).
- 8. If required, select a default contract to apply to the package plan when it is sold to a customer from the *Default Contract Type* drop list. The list will contain all contracts in the system. Contracts can also be applied at the time the package is sold to a customer.
  - When *setup* and *access* fees are defined on a package plan (i.e. are not left blank), they will override any setup and access fees defined on any service plans linked to the package plan
- To charge a setup fee when the package is initially sold to a customer (i.e. when the package subscription is created), which will override any setup fees that exist against the service plans linked to the package plan, tick the *Override* check box beside the *Setup Fee* field. The *Setup Fee* (\$) (*Ex. Tax*) field will become enabled.

Enter the package plan setup fee amount excluding tax in the Setup Fee (\$) (Ex. Tax) field.

10. To charge an access fee every period (e.g. monthly or as defined in the package period length), which will override any access fees that exist against the service plans linked to the package plan, tick the *Override* check box beside the *Access Fee* (\$) (*Ex. Tax*) field. The *Access Fee* (\$) (*Ex. Tax*) field will become enabled.

Enter the package plan access fee amount excluding tax in the Access Fee (\$) (Ex. Tax) field.

11. Select the package plan *Period Length* from the drop list. The period length defines how frequently the package plan's access fees are charged. Options include 1 month, 2 months, 3 months, 6 months, 12 months, 24 months and 36 months.

12. Select the number of *Periods in Advance* to charge the package plan's access fee from the drop list. By default, this is set to 1. You can select up to 12 periods in advance to charge the package plan's access fees.

For example, if a package plan is setup to charge 2 periods in advance, with a period length of 1 month, a bill run on the 1/04/2012 would generate the package plan's access fee on the customer's invoice, but the period the access fee covers would be 1/05/2012 to 31/05/2012. If the package plan used 3 periods in advance, the access fee would cover the period 1/06/2012 to 30/05/2012.

- 13. Select whether the access fees are charged in advance from the *Bill in Advance* drop list. Options are No (i.e. to not charge in advance), 1 month, 2 months and 3 months.
- 14. Select whether the package plan's initial access fee is pro-rated for part of a billing period, (i.e. depending on the day in the billing cycle the package plan is sold to a customer) from the *Access Fee Pro-Rata* drop list.
- 15. Select whether to charge the package plan's access fees in advance or arrears from the *Bill Access Fees in* drop list (i.e. charge at the beginning or end of the billing period).
- 16. To override the default package billing period alignment to the account invoice period setting, tick the *Override* check box beside the *Align Pkg Period to Invoice Period* drop list. The *Align Pkg Period to Invoice Period* drop list will become enabled.

Select the required alignment option (i.e. either Yes or No) from the Align Pkg Period to Invoice Period drop list.

This setting will control the way that the package plan billing period is aligned to the customer's invoicing period setting, specifically relating to pro-rating. If the package plan billing period is not aligned to the customer's, the system will not pro-rata the initial package plan access fee.

17. To apply a discount to the setup and access fees, tick the *Override* check box beside the *Discount (%)* field. The *Discount (%)* field will become enabled.

If the package plan is using the setup and access fees defined on the linked service plans (i.e. are not overridden), the system will apply a percentage discount to the setup and access fees of all the linked service plans.

Enter the percentage to discount the setup and access fees in the Discount (%) field.

- 18. Enter the date the package plan is available to sell to customers in the *Saleable From* field. A calendar tool will appear to allow you to select the required date. The package plan will not be able to be sold until the date selected.
- 19. If required, enter the date the package plan should no longer be sold after in the *Saleable To* field. A calendar tool will appear to allow you to select the required date. The package plan will not be able to be sold to customers after the date selected. Once the date has been reached, the package plan will be grandfathered.
- 20. Select the Approval Status from the drop list. Options include:
  - Draft indicates the package plan is being finalised
  - Pending indicates the package plan is pending review and ready for approval
  - Approved approved for sale
- 21. Tick the *Sell in User Portal* check box to enable the package plan to be sold to customers via the end customer user portal.
- 22. If the package plan is available in the end customer user portal, enter the sort order the package plan should display in the list of all package plans in the end customer user portal in the *Sort Key* field. This enables you to control how the available package plans are displayed i.e. to show your best packages at the top of the list etc.
- 23. Click the **Save** button to create the package plan. The *Package Plans list* page will appear, showing the new package plan in the list.

**(**)

You cannot link a service plan to the package plan as it is created. After the package plan is saved, you should edit the package plan to link the required service plan and buy package plan.

#### To View or Edit a Package Plan

Modifying a package plan will not change any existing charges that have been invoiced to a customer. If you require a customer to be re-invoiced with updated package plan information, please contact the Emersion support team.

1. On the *Package Plans list* page, click the package plan link in the *ID* column of the list. The *Edit Package Plan* page will appear showing the selected package plan with all existing information.

Edit Package Plan 135476					
* Name:	Emersion Email Domain - Sell Package F	Setup Fee (\$)(Ex Tax):	70 🕕 🖸 Override?	Date Creal	red: 11 Oct 2011
* External Name:	Emersion Email Domain - Sell Package F	Access Fee (\$)(Ex Tax):	30 Øverride?	Created	By: Emersion Systems
Reference Name:		*Note : Where a package access fee	e is not empty, it will override any service pla	an Date Modif	ied: 11 Oct 2011
Reference Key:		access fees that are defined. All am	ounts entered are to be exclusive of taxes	Modified	By: Emersion Systems
Description:	Emersion Mail and Domain package	* Period Length:	1 Month	* Saleable Fr Saleable	om: 11 Jul 2011 To:
Buy or Self:	Sell	Bill in Advance:	No 💽	Approval Stat	tus: Approved
Default Contract Type:	None	Access Fee Pro-Rata:	No 💌 🛈 Advance 💌 🕕	Approved	By: System
		Align Pkg Period to Invoice Period:	Yes V () Current Default is 'Yes'	Sort K	iey:
Associated Service Plans		Discount (%):	U Override?		Save eeck
2 Results Found					
ID ≫ Name	External Name	Buy Package Plan	Buy Service Plan	Service Type Activation Fee Av	ailable Quantity Mandatory Action
125190 Emersion Email Mailbox - Sell Serv 132193 Emersion Email Domain - Sell Serv	vice Plan Emersion Email Mailbox - Sell Service Plan vice Plan Emersion Email Domain - Sell Service Plan	n Emersion Email Mailbox - Buy Package Plan Emersion Email Domain - Buy Package Plan	Emersion Email Mailbox - Buy Package Plan Emersion Email Domain - Buy Package Plan	Emersion Email Mailbox 5 Emersion Email Domain 1	No Manage Remove Plan Yes Manage Remove Plan
			1		50 100 150 200
					Link Service Plan

Figure 14. The Edit Package Plan page

- 2. Enter or modify the package plan information in the appropriate fields.
- 3. To link a sell service plan and a buy package plan to a sell package plan, or to link a buy service plan to a buy package plan, see the following section.

- 4. To set up an included value cap for all telephony services linked to the package plan, enter the included value amount, excluding tax, in the *Group Cap* (\$)(*Ex Tax*) field.
- 5. To view or modify a service plan linked to the package plan, click the link in the *ID* column of the required service plan in the *Associated Service Plans* list or click the **Manage** link of the required service plan. The *Service Plan* page will appear showing the selected service plan with all existing information.

Modify the service plan information as required (see the *Edit Service Plan* section on page 41). Click the **Back** button on the *Service Plan* page to return to the *Edit Package Plan* page.

- 6. To remove a service plan that is linked to the package plan, click the **Delete Plan** link of the required service plan in the *Associated Service Plans* list. The selected service plan will be removed from the list.
- 7. Click the **Save** button. The *Package Plan list* page will be displayed with an information box showing the package plan has been saved.

#### To Link a Service Plan to a Package Plan

As mentioned previously, a package plan links together one or more service plans. Buy package plans can only be linked to buy service plans. Sell package plans can be linked to buy package plans and sell service plans.

#### To Link a Buy Service Plan to a Buy Package Plan

1. On the *Edit Package Plans* page of a buy package plan, click the **Link Service Plan** button. The *Link Service Plan to 'Buy' Package Plan* page will appear.

Buy Package Plan D	letails	Search for Serv	ce Plans to add to B	Buy Package F	Plan
Package Plan Hame External Plan Hame Service Types In Use	KGB Special Buy KGB Special Buy • Telstra PSTN (eBill)	* Service Plan Name: Service Type:	All Service Types AV Subscription Aegis Support DFT RBT-ADSL2 DFT RBT-STS DNS Hosting		

Figure 15. The Link Service Plan to 'Buy' Package Plan page

- 2. If you know the buy service plan name to link to the buy package plan, enter its name, or part of the name, in the Service Plan Name field under the Search for Service Plans to add to Buy Package Plan heading.
- Alternatively, select the service type to link to the buy package plan in the Service Type list. Multiple service types can be selected by holding the CTRL key down as you make selections, or you can select 'All Service Types'.
- 4. Click the **Search for Service Plans** button. A list of buy service plans that match the criteria will display in the *Search Results* section.

Link Service Plan to 'Buy	' Package Plan		
When searching using the Servic	e Type filter, if you select multip	le service types it will only show you	service plans matching your criteria. If you select no service types, all will be searched
Buy Package Plan Detai	ls	Search for Serv	ice Plans to add to Buy Package Plan
Package Plan Ilame i External Plan Ilame i Service Types In Use	(GB Special Buy (GB Special Buy • Telstra PSTN (eBil)	* Service Flan Name: Service Type:	All Service Types All Service Types AV Subscription Aegis Support DFT ReT-ADSL2 DFT ReT-STS CNS Hosting  Search for Service Plans
Search Results			« Back
Service Plan: Super Test PLan		Mandatory? Oty to Allocate? Yes 💙 1	Link with Package Plan
Service Plan: Datafast ADSL1	Test Plan	Mandatory? Oty to Allocate?	Link with Package Plan
Service Plan: ISPOne ADSL - E	Buy Package Plan	Mandatory? Oty to Allocate?	Link with Package Plan
Service Plan: Hosted Exchange	e - Buy Package Plan	Mandatory? Oty to Allocate?	Link with Package Plan
Service Plan: Emersion Email M	tailbox - Buy Package Plan	Mandatory? Oty to Allocate?	Link with Package Plan
Service Plan: Emersion Email D	romain - Buy Service Plan	Mandatory? Oty to Allocate?	Link with Package Plan
<u></u>			

Figure 16. The Search Results section showing buy service plans

- 5. Locate the required buy service plan in the list.
- 6. Select whether the buy service plan is *Mandatory* from the drop list. If you nominate the service plan to be mandatory, the service must be activated before the package will be active.
- 7. Enter the service allowance (i.e. number of services that are created in the buy package plan) of the buy service plan in the *Qty to Allocate* field.
- 8. Click the **Link with Package Plan** button beside the buy service plan. The *Edit Package Plan* page will appear showing the selected buy service plan in the *Associated Service Plans* list.
- 9. Link other buy service plans to the buy package plan by repeating steps 1 to 8.
- 10. Click the **Save** button on the *Edit Package Plan* page.

#### To Link a Sell Service Plan and Buy Package Plan to a Sell Package Plan

1. On the *Edit Package Plans* page of a sell package plan, click the **Link Service Plan** button. The *Link Sell Service Plan and the Buy Service Plan from Package Plans I Buy* page will appear.

Link Sell Service Plar	and the Buy Service Plan from	Package Plans I 'Buy'			
When searching using the S	ervice Type filter, if you select multiple serv	vice types it will only show you packa	ges of which include ALL	selected service	e types. If you select no service types, all will be searched
Saleable Package Pl	an Details	Search for Pack	kage Plans Sold to i	me	
Package Plan Name External Plan Name Service Types In Use	KGB Special KGB Special • Telstra PSTN (eBill)	* Package Plan Name: Service Type;	All Service Types	^	
			Aegis Support DFT RBT-ADSL2 DFT RBT-STS DNS Hosting	~	
					Search for Packages
					« Back

Figure 17. The Link Sell Service Plan and the Buy Service Plan from Package Plans I Buy page

- 2. If you know the buy package plan name to link to the sell package plan, enter its name, or part of the name, in the *Package Plan Name* field under the *Search for Package Plans Sold to me* heading.
- 3. Alternatively, select the service type that is contained in a buy package plan to link to the sell package plan in the *Service Type* list. Multiple service types can be selected by holding the CTRL key down as you make selections, or you can select 'All Service Types'.

4. Click the **Search for Packages** button. A list of buy package plans that match the criteria will display in the *Search Results* section.

Link Sell Servici	e Plan and the Buy Service Plan fro	m Package Plans I 'Buy'				
When searching usin	ig the Service Type filter, if you select multiple s	ervice types it will only show you packag	es of which include Al	L selected service types.	If you select no service types, all will be searched	
Saleable Packa	ige Plan Details	Search for Packa	age Plans Sold to	me		
Package Plan Nam External Plan Nam Service Types In I	e KGB Special e KGB Special	* Package Plan [ Name:				
		Service Type:	DNS Hosting Datafast ADSL1 Datafast ADSL2 Datafast Dialup Domain Registration Emersion Email Domain	See	rch for Packages	
Search Results						
Buy Package Plan: Service Plans Pro	: Emersion Email Domain - Buy Package Plan vided with this Package Plan:	Service Type	Othy	Mandatory	Cell Service Plan Hame	Oty To Allocate: 1
132192	Emersion Email Domain - Buy Service Plan	Emersion Email Domain	1	Yes	Emersion Email Domain - Sell Service Plan	Aud to service Allowance
Buy Package Plan: Service Plans Pro	: Test domain vided with this Package Plan:					Oty To Allocate: 1
ID	Buy Service Plan Name	Service Type	Qty	Mandatory	Sell Service Plan Name	Add To Service Allowance
125189	Emersion Email Mailbox - Buy Package Plan	Emersion Email Mailbox	5	No	Emersion Email Mailbox - Sell Service Plan 💌	
132192	Emersion Email Domain - Buy Service Plan	Emersion Email Domain	1	Yes	Emersion Email Domain - Sell Service Plan 💌	
Buy Package Plan: Service Plans Pro	: Emersion Email Malibox - Buy Package Plan vided with this Package Plan:					Oty To Allocate: 1
ID	Buy Service Plan Name	Service Type	Qty	Mandatory	Sell Service Plan Name	Add To Service Allowance
125189	Emersion Email Mailbox - Buy Package Plan	Emersion Email Mailbox	1	No	Emersion Email Mailbox - Sell Service Plan 💌	

Figure 18. The Search Results section showing buy package plans with associated sell service plans

Below each buy package plan is a table showing the associated buy service plans, the service types, the service allocation and whether the service plan is mandatory. Sell service plans that match the service types in the buy package plan are shown in a drop list beside the buy package plan.

- 11. Locate the required buy package plan in the list that contains the required service types you wish to link to the sell package plan.
- 12. Select the required sell service plan from the *Sell Service Plan Name* drop list beside the required buy package plan.
- 13. If there are multiple service types in the buy package plan, select all the required sell service plans for each service type from the *Sell Service Plan Name* drop list.
- 14. Enter the number of buy package plans to link to the sell package plan in the *Qty to Allocate* field. The number of service plans linked to the buy package plan will be multiplied by this number.
- 15. Click the **Add to Service Allowance** button beside the buy package plan. The *Edit Package Plan* page will appear showing the selected buy package plan and sell service plan(s) in the *Associated Service Plans* list.
- 16. Link other buy package plans to the sell package plan by repeating steps 1 to 15.
- 17. Click the **Save** button on the *Edit Package Plan* page.

# **Service Plans**

A service plan is bound to a service type (e.g. PSTN telephone, mobile phone, VOIP, ADSL2, preselect, email, domain hosting etc) and controls how the customer is charged when they purchase a package plan that contains the service plan. Buy service plans define the service costs from your upstream service providers, which are linked to buy package plans. Sell service plans are linked to sell package plans, which you sell to customers. A service plan may be attached to multiple package plans.

Depending on the service type associated with a service plan, it may have the following components linked to it:

- Rate Card defines the charges associated with the service usage (e.g. phone call rates)
- Product Rate Card defines the service and equipment charges associated with a particular service type (e.g. handset rental, call forwarding etc)
  - Bolt On can provide bonus or cost reductions for a particular usage type (e.g. data allowance or voicemail retrieval on a mobile phone service)

An instance of a service plan that is sold to a customer within a package plan is referred to as a *service subscription*. The system creates *service subscriptions* for each instance of a service contained in the service plan.

#### To Display Service Plans

1. Select **Packages and Plans** > **Management** > **Service Plans** from the **Menu.** The *Service Plans list* page will appear showing a list of existing service plans.

Customer	s Billing Services Packages and Plans	Products Report Finance Events	Admin						
Manageme	ent Catalogue Management								
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Senice	Plane								
SCIVIC	i lans.								
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	Nono	AV Subscription		Draft			Buy Plans		
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138593	M2 Inhound - Sell Service Plan	M2 Inhound - Sell Service Plan	M2 Inbound	Lipitel Eived Lipe (Inhound)	1	0.00	Sell		13 Mar 2012
138393	M2 Multil ine - Sell Service Plan	M2 Multilline - Sell Service Plan	M2 Mutil ine	Lipitel Fixed Line	1	0.00	Sell		8 Mar 2012
138207	Grev Mouse Teleconference - Sell Service Plan	Grev Mouse Teleconference - Sell Service Plan	Grev Mouse Teleconference	GrevMouse Teleconference	1	0.00	Sell		2 Mar 2012
134993	ISPhone PSTN - Sell Service Plan	ISPhone PSTN - Sell Service Plan	ISPhone PSTN	ISPhone Fixed Line	1	0.00	Sell		29 Nov 2011
132293	Domain Registration - Sell Service Plan	Domain Registration - Sell Service Plan	Domain Registration	Domain Registration	1	0.00	Sell		11 Oct 2011
132193	Emersion Email Domain - Sell Service Plan	Emersion Email Domain - Sell Service Plan	Emersion Email Domain	Emersion Email Domain	1	0.00	Sell		11 Oct 2011
125190	Emersion Email Mailbox - Sell Service Plan	Emersion Email Mailbox - Sell Service Plan	Emersion Email Mailbox	Emersion Email Mailbox	1	0.00	Sell		7 Jun 2011
117884	M2 Mobile - Test - Sell	M2 Mobile - Test - Sell	M2 / Optus Mobile	Optus Mobile	1	0.00	Sell	Approved	18 Jan 2011
117684	Telstra PSTN (eBill) - Sell Service Plan	Telstra PSTN (eBill) - Sell Service Plan	Telstra PSTN (eBill)	Telstra eBill	1	0.00	Sell		17 Jan 2011
116598	Generic Email Service - Sell Service Plan	Generic Email Service - Sell Service Plan	Generic Email Service	Generic Email Services	1	0.00	Sell		30 Dec 2010
116596	Generic Span Service - Sell Service Plan	Generic Spam Service - Sell Service Plan	Generic Spam Service	Generic Email Services	1	0.00	Sell		30 Dec 2010
116594	Hosted Exchange - Sell Service Plan	Hosted Exchange - Sell Service Plan	Hosted Exchange	Generic Hosting Services	1	0.00	Sell		30 Dec 2010
116592	Soul ADSL2 - Sell Service Plan	Soul ADSL2 - Sell Service Plan	Soul ADSL2	Soul Data Services	1	0.00	Sell		30 Dec 2010
116590	Exetel ADSL2 - Sell Service Plan	Exetel ADSL2 - Sell Service Plan	Exetel ADSL2	Exetel Data Services	1	0.00	Sell		30 Dec 2010
116588	ISPOne ADSL2 - Sell Service Plan	ISPOne ADSL2 - Sell Service Plan	ISPOne ADSL2	ISPOne Data Services	1	0.00	Sell		30 Dec 2010
116586	ISPOne ADSL - Sell Service Plan	ISPOne ADSL - Sell Service Plan	ISPOne ADSL	ISPOne Data Services	1	0.00	Seli		30 Dec 2010
116584	Nextep ADSL - Sell Service Plan	Nextep ADSL - Sell Service Plan	Nextep Data	Nextep Data Services	1	0.00	Sell		30 Dec 2010
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								50	1.001.301200

Figure 19. The Service Plans list page

#### Search

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

- > ID
- > Name
- External Name
- Service Type allows you to locate a service plan by service type
- Service Type Category allows you to locate a service by a service category
- > Status all, draft, pending, approved, saleable, active and grandfathered
- Plan Type buy plans or sell plans

#### To Create a Service Plan

1. On the Service Plans list page, click the **Create New** button. The Create new Service Plan page will appear.

Please sele	ct a Service type for the :	service plan		
ervice Type:	AV Subscription	~		
			Continue	

Figure 20. The Create new Service Plan page

- 2. Select the Service Type to associate with the service plan from the drop list.
  - Once you have chosen a service type you cannot change it. Please contact the Emersion Support team if you are unsure.
- 3. Click the **Continue** button. The Service Plan page will appear.

* Name:	* Service Type: T	elstra PSTN (eBill)	Date Created:	8 Aug 2012
* External Name:	Period Length:	1 Month	Created By:	Emersion Support
Reference Name:		🔲 Period Requires Approval Before Closing 🚺	Date Modified:	8 Aug 2012
Reference Key:			Modified By:	Emersion Support
Description:	Rounding Type:	No Rounding	A Saleable From:	
	Rounding Precision:	0	Saleable To:	
			Approval Status:	Draft 🛛 🗹
Buy or Selt Sell 💌	New Service Setup Fee (\$)(Ex Tax):	0		Save
	Churn/Port Service Setup Fee (\$)(Ex Tax):			« Back
	Internal Churn Setup Fee (\$)(Ex Tax):			
	Access Fee (\$)(Ex Tax):			
	*Note : When this plan is put into a p this access fee will be ignored. A Pe fees.All amounts entered are to be e	ackage, if the Package Access Fee is not empty, ackage level setup fee will override all setup exclusive of taxes.		
	Usage Cap (\$)(Ex Tax):			

Figure 21. The Service Plan page

- 4. Enter the internal name for the service plan in the *Name* field.
- 5. Enter the name of the service plan to display externally to customers (e.g. on invoices etc) in the *External Name* field.
- 6. Enter a *Reference Name* for the service plan, if required (e.g. another name the service plan may be known by on another system).
- 7. Enter a *Reference Key* for the service plan, if required (e.g. an ID for the service plan that may be used by another system).
- 8. Enter a *Description* of the service plan. This description is optional and only for internal use.
- 9. Select whether the service plan is a buy service plan or a sell service plan from the *Buy or Sell* drop list (see *Buy and Sell Packages and Plans* on page 18 for more information).
- 10. Select the service plan *Period Length* from the drop list. The period length defines how frequently the service plan's access fees are charged. Options include 1 month, 2 months, 3 months, 6 months, 12 months, 24 months and 36 months.
- 11. Leave the Period Requires Approval Before Closing check box un-checked.

You should not tick the *Period Requires Approval Before Closing* option unless you are certain that you understand how it will impact on the service's usage rating and invoicing.

- The system calculates charges for the billing period automatically (i.e. as set in the service plan). At the end of the period, the system processes the billing period and generates charges for all usage that occurred in the period. However in circumstances where the service usage is not available by the end of period, you can set the service to require the period to be manually closed before the system generates invoices. In this case, the system will not process the billing period of the service until it is manually approved.
- 12. Select the rounding method to apply when usage is rated from the *Rounding Type* drop list. Options available are:
  - No Rounding the usage amount will not be rounded
  - Round Up the usage amount will rounded up e.g. a value of '\$3.529' would become '\$3.53'
  - Round Down the usage amount will rounded down e.g. a value of '\$3.529' would become '\$3.52'.
  - Round Half Up the usage amount will rounded up or down depending on the nearest whole value e.g. a value of '\$3.525' or above would round up to '\$3.53', whereas '\$3.524' or below would round down to '\$3.52'.
- 13. Enter the number of decimal places to round up or down usage amounts in the *Rounding Precision* field. If no value is entered, the system default of 7 will be used.
- 14. To charge a setup or installation fee when the service is activated (i.e. when the service subscription is created), you can enter a range of setup fees that can be different depending on the way the service is provisioned or activated, as follows:
  - a. Enter the setup fee amount excluding tax for a new service in the *New Service Setup Fee* (\$) (*Ex. Tax*) field.
  - b. Enter the setup fee amount excluding tax for a service that is churned from another service provider in the *Churn/Port Service Setup Fee* (\$) (*Ex. Tax*) field.
  - c. Enter the setup fee amount excluding tax for a service that churned from an internal service provider in the *Internal Churn Service Setup Fee (\$) (Ex. Tax)* field.

15. To charge an access fee every period (e.g. monthly or as defined in the linked package plan's period length), enter the service plan access fee amount excluding tax in the *Access Fee (\$) (Ex. Tax)* field.

- If the service plan is linked to a package plan that has setup and / or access fees set up, the system will ignore any setup and access fees set up in the service plan, and create charges based on the fees configured in the package plan.
- 16. To set up an included value cap for telephony service types only, enter the included value amount, excluding tax, in the Usage Cap (\$)(Ex Tax) field.

A *Cap* defines a dollar value of call usage a customer can receive at no additional charge. Call types included or excluded from the cap are defined in the rate card linked to the service plan. See the *Set Tariffs* section on page 57 for more details.

17. For telephone service types, to apply a discounted rate for calls from the service on this service plan to any other telephony service held by the same customer account, tick the *Intra Account Discounting Allowed* check box.

When active, a new tariff type, 'Intra Account', will be made available in the rate card attached to the service plan to allow you to set the required rate for the calls from the service to the other telephony services held by the customer. These calls will also appear separately on the customer's invoice.

- 18. Enter the date the service plan is available in the *Saleable From* field. A calendar tool will appear to allow you to select the required date. The service plan will not be able to be linked to a package plan until the date selected.
- 19. If required, enter the date the service plan should no longer be available in the *Saleable To* field. A calendar tool will appear to allow you to select the required date. The service plan will not be able to be linked to a package plan after the date selected. Once the date has been reached, the service plan will be grandfathered.
- 20. Select the Approval Status from the drop list. Options include:
  - Draft indicates the service plan is being finalised
  - Pending indicates the service plan is pending review and ready for approval
  - Approved approved for sale

**<sup>(</sup>i)** 

21. Click the **Save** button to create the service plan. The *Service Plan* page will expand to show additional options to link a rate card, link a bolt on and link a product rate card to the service plan.

For data service types (e.g. ADSL, ADSL2, dial up etc), the *Data Provisioning* section will appear to allow you to enter the radius and data billing attributes.

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tch for a Product Rate Card Search Name	Approval Status	AI Y						
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Figure 22. The Service Plan page showing the additional options

#### Radius Attributes on a Service Plan

When provisioning data products that are authenticated and accounting using Emersion's Radius system, you are able to add custom Radius attributes for each plan you wish to sell to your customers. This can allow you to control attributes such as DNS Servers, Control Lists and IP Pools. It is imperative that the format of the Radius attributes entered into the plan details are correct, or you will experience issues when your customers attempt authenticate.

Emersion uses Radiator as its Radius server, and as such support the dictionaries provided by Radiator, plus a few custom attributes. If you are not sure that the attributes you are trying to use are available, please contact the Emersion support team.

Radius attributes are entered into the *Radius Attributes* text field on the *Service Plan* page of data service types. The attribute key value pairs are delimited by commas.

An example set of key-value pairs, would be:

RB-Client-DNS-Primary="xxx.xxx.xxx", RB-Client-DNS-Secondary="xxx.xxx.xxx"

As each Carrier has support for different Radius Attributes it is your responsibility to confirm the correct syntax for the attribute key value pairs.



If you make changes to your service plan Radius attributes, and Emersion Support needs to investigate and / or repair these issues for you, the support time will most likely be chargeable.

#### **Dynamic IP Addressing**

If you have organised dynamic IP allocation within Emersion, you will have what is known as a *Pool Hint* allocated to you. To have a plan take advantage of Dynamic IP allocation, you will need to add "PoolHint=XXXX" to the Plan's Radius Attribute reply set, where XXX is the pool name allocated to you by Emersion.



If you wish to have dynamic IP allocation setup for your customers and configured within the Radius system, you will need to contact Emersion Support, who provide you with a pool hint.

An example set of key-value pairs including a pool hint is:

RB-Client-DNS-Primary="xxx.xxx.xxx", RB-Client-DNS-Secondary="xxx.xxx.xxx", PoolHint="MYPOOL"

#### Static IP Addressing

Emersion supports static IP addressing for Single Static IP's using the *Service Feature* function. This allows for charging for Single and Multiple IPs but only the allocation of single IPs. To add a group of IPs, you will need to set the Plan's Radius Attributes appropriately.

An example set of key-value pairs for assigning a group of IPs is:

RB-Client-DNS-Primary="202.55.XXX.5", RB-Client-DNS-Secondary="202.55.XXX.4", Framed-IP-Address = 202.55.XXX.201, Framed-IP-Netmask = 255.255.255.255, Framed-Route = "202.55.XXX.208/29 202.55.XX.201 1"
#### To Set the Radius Attributes

**(i)** 

1. On the Service Plan page, locate the Data Provisioning section, which is below the This Service Plan is linked to the following Packages section.

Properties of Se	vicePlan: #1391	41		
	Shaping Profile:	Select		
				Edit
This Service Plan is	s linked to the follow	ving Packages	12	
ID 😣		Name	External Name	
143523	iSeek - Al	DSL 2+ 1100	ADSL 2+ 1	
143607	iSeek - Al	DSL 2+ 1.11 1.11.1	ADSL 2+ 2002	
		1		50 100 150 200
Data Provisioning				<u></u>
Radius At	tributes to be set:  🕦	RB-Client-DNS-Primary="1_2,,0.187.1", RB-Client- DNS-Secondary="1_2,,0.187.2",PoolHint="k,de <:seek"		
Important clicking the	Note: Modifying this sentence of the sentence	etting is at your own risk. By putting invalid information in this field, you may d	isrupt all customers using this plan. Please ensure you read the c	locumentation by
Data Billing				Save
zata pinnig	Billing Type	O Time Based		
	Daning Type	O Volume Based		
		◯ Volume Based - Rolling 30 days usage		

Figure 23. The Service Plan page showing the Data Provisioning fields

2. Enter the required set of Radius key-value pairs in the Radius Attributes to be set text box.

If you make changes to a Radius attributes, and Emersion Support needs to investigate and / or repair these issues for you, the support time will most likely be chargeable.

3. Click the **Save** button below the *Radius Attributes* text box. The radius attributes will be saved in the service plan details.

#### Data Billing Attributes on a Data Service Plan

To calculate data usage quotas, excess charges and invoicing per period on data service plans, most data service providers use either volume based usage or time based usage. However, you can also invoice customers based on a 30 day rolling cycle. Rolling usage is independent of the service subscription billing period and measures data usage for the prior 30 days. That is, on any given day, the usage for the previous 30 days for a given data service determines whether the service is shaped or not.

The difference between a 'Rolling Usage' data service plan and a 'Volume Usage' data service plan is that the services on a 'Volume Usage' plan will have their usage meter reset to '0' at the end of the service subscription period (i.e. usually at the end of the billing period).

#### To Set the Data Billing Attributes

1. On the Service Plan page, locate the Data Billing section, which is below the This Service Plan is linked to the following Packages section.

ID 💝	Name			5	External llame	
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ovisioning						
Radius Attributes to be set: 🕦						
Important Note: Modifying this se	tting is at your own risk. By putting invalid info	 ormation in this field, you may disru	pt all customers using this plan. Ple	ase ensure you read the docum	entation by clicking the information icon.	
Important Note: Modifying this se	tting is at your own risk. By putting invalid info	ormation in this field, you may disru	pt all customers using this plan. Ple	ase ensure you read the docum	entation by clicking the information icon.	Save
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Figure 24. The Service Plan page showing the Data Billing section for Time Based billing

- 2. Select the method to calculate the data usage quota for the service from the *Billing Type* option buttons. The options available are:
  - > Time Based set a time based data quota per service subscription period
  - Volume Based set a volume based data quota per service subscription period
  - Volume Based Rolling 30 days usage

set a rolling 30 usage quota based on data volume

Depending on the *Billing Type* option selected, the page will update to show the relevant fields.

- 3. For Time Based billing:
  - a. Enter the time quota amount, in hours, in the *Quota* field.
  - b. To set up an included cap, enter the included value in the *Cap Amount* filed. The included cap defines value of data usage a customer can receive at no additional charge.
  - c. Enter the type of cap to use from the *Cap Type* drop list. Caps may be set by included hours or included dollar value.
  - d. Enter the cost to rate excess usage by in the Rate (\$) field.
  - e. Enter the time increment to rate excess usage by in the *Per: <value> Mins* field.
  - f. Enter the charge increment to charge excess usage in the *Charged in Increments of* <*value> Mins* field.

An example of *Time Based* data billing would be a data service with 100 hours quota, with an excess usage cap of 120 hours, with excess usage charged at \$1 per 30 mins, charged in 30 minute increments.

4.	For	Volume	Based	billina:
		voiunio	Duoou	oning.

Billing Type 🕕	<ul> <li>Time Based</li> <li>Volume Based</li> <li>Volume Based - Rolling 30 days usage</li> </ul>						
Tariff Handling Method:	~						
Billing Type : Volume Based							
Peak							
	Charge Download						
	Charge Upload						
Qua	a:	Mb	Charge Usage:	No Charge 💌			
Bonus Amou	t.	Mb	Applies:	AtStart 💌			
Action At En	d: Charge Excess 💌						
Normal Rate (S	j):		Per:		Mb	Charge in Increments of:	
Excess Rate (S	0:		Per :		Mb	Charge in Increments of:	
OffPeak	Charge Download	Mb	Charge Usage:	No Charge			
An Array of the Ar	-	Mb	Applies:	AtStart 💌			
Bonus Amou							
Bonus Amou Action At Er	d: Charge Excess 💙						
Bonus Amou Action At Er Normal Rate (S	d: Charge Excess 💌		Per:		Mb	Charge in Increments of:	

Figure 25. The Service Plan page showing the Data Billing section for Volume Based billing

- a. Select the *Tariff Handling Method* from the drop list. This dictates how the billing and rating engine treats usage data received from the upstream service supplier.
- b. Enter the required values for data usage metrics to apply during the service peak and offpeak periods in the corresponding fields in the *Peak* and *Off Peak* sections, as detailed in steps c to o below.
- c. Select whether to calculate usage for data downloads by ticking the *Charge Download* check box.
- d. Select whether to calculate usage for data uploads by ticking the *Charge Upload* check box.
- e. Enter the data quota amount, in MB, in the Quota field.
- f. Select whether to charge for regular usage (i.e. not excess) from the *Charge Usage* drop list, as either *No Charge* or *Charge at Normal Rate*.
- g. Enter any free or bonus data usage to provide at no additional cost in the *Bonus Amount* field if required.
- h. Select whether to apply the bonus data at the start or end of the data quota amount from the Applies drop list, as either *At Start* or *After Max*.
- i. Select the action to perform when the service reaches the data quota amount from the *Action At End* drop box. Options available are:
  - Charge Excess charge for excess data
  - > Cap cap the data amount
  - Shape reduce the service speed
- j. Enter the cost to rate regular usage (if any) by in the Normal Rate (\$) field.
- k. Enter the increment to rate regular usage by in the *Per: <value> Mb* field.
- I. Enter the charge increment to charge regular usage in the *Charged in Increments of* <*value> Mb* field.
- m. Enter the cost to rate excess usage by in the Excess Rate (\$) field.
- n. Enter the increment to rate excess usage by in the *Per: <value> Mb* field.
- o. Enter the charge increment to charge excess usage in the *Charged in Increments of* <*value> Mb* field.

	Billing Type 🕕	O Time Based		
		O Volume Based		
		💿 Volume Based - Rolling 30 days u	usage	
Billing	Type : Volume Based - F	colling 30 days usage		
- Pea	ik	280 29 27		Ĩ
		Charge Download		
		Charge Upload		
	Quot	a	Mb	
		15 17		
- OffF	<sup>p</sup> eak			
		Charge Download		
		Charge Upload		
	Quot	a:	Mb	
		- 8-		
			Source	

5. For Volume Based – Rolling 30 days usage billing:

- Figure 26. The Service Plan page showing the Data Billing section for Volume Based billing
- a. Enter the required values for data usage metrics to apply during the service peak and offpeak periods in the corresponding fields in the *Peak* and *Off Peak* sections, as detailed in steps b to d below.
- b. Select whether to calculate usage for data downloads by ticking the *Charge Download* check box.
- c. Select whether to calculate usage for data uploads by ticking the *Charge Upload* check box.
- d. Enter the data quota amount, in MB, in the Quota field.
- 6. Click the **Save** button below the *Data Billing section*. The billing attributes will be saved in the service plan details.

### To View or Edit a Service Plan

Modifying a service plan will not change any existing charges that have been invoiced to a customer. If you require a customer to be re-invoiced with updated service plan information, please contact the Emersion support team.

1. On the Service Plans list page, click the service plan link in the *ID* column of the list. The *Edit* Service Plan page will appear showing the selected service plan with all existing information.

rvice Plan: #117884					
* Name	M2 Moble - Test - Sel	* Service Type	M2 / Optus Mobile	Date	Created 18 Jan 2011
* External Name:	M2 Mobile - Text - Sell	Period Length	1 Month 💌	OH OH	atted By: Emersion Support
Reference Name:				Date	Modified 19 Apr 2011
Reference Key.		Period Requires Approval Defore Closing 📢		Mo	ated By Emersion Support
Description:				* Salea	die From: 1 Jan 2011
		Rounding Type	No-Rounding M	Sa	entrie To
		Rounding Precision		0 Approv	a Status. Approved
Buy or Set	Sel			Appro	end Date: 19 Apr 2011
		New Service Setup Fee (\$)(Ex Tax)		0	Store
		Oxen/Fort Service Setup Fee (\$)(Ex Tax)			- Back
		Internal Churn Setup Fee (\$)(Ex Tex):			1000
		Access Fee (\$)(Ex Tex)			
		Note : When this plan is put into a empty, this access fee will be igno	package, if the Package Access Fee is no red. A Package level setup fee will overrid	r e sat	
		setup tees All amounts entered an	e to be exclusive of taxes		
		Usage Cap (II)(Ex Tex)	0		
			IntroAccount Decounting Allowed?	8	
			Optus Ves Tine		
660 943	M2 Moble - Tert - Sel KOB Special II		M2 Mobile - Test MOB Special II	ંક્સ	
sociated Rate Cards	Ph.0017-5001		1		50 100 150
10 S Name	External	Name	Service Type Calingory	11	Date Iffective
		Not	ning Found		
			1		
loriated Bolt-Ons					Link Rate Cards
10	Bolt On Name	Bolt On V	anity Name	Behaviou	Action
		Not	ning Found		
					Lux But Co.
iociated Product Rate Clards					
03	Asme	External Name		Service Type Cate	gory
		Not	hing Found		
nk Product Rate Card	to Service Plan		1		
arch for a Product Rate Court					
Search Nam	e:	1			
Approval State	e Al 💘				
	A STATE OF THE OWNER				Find Product Rate Cards

Figure 27. The Edit Service Plan page

- 2. Enter or modify the service plan information in the appropriate fields.
- 3. To link a rate card, bolt on and/or product rate card to the service plan, see the following sections.
- 4. Click the **Save** button. A message will appear at the top of the *Service Plan* page stating the service plan has been saved.
- 5. Click the Back button to return to the Service Plan list page.

### To Link a Rate Card to a Service Plan

For telephony service types only, you should link a rate card that defines the phone call rates for various phone call types. If you link a rate card to a buy service plan, the rates in the rate card become your cost rates. If you link a rate card to a sell service plan, the rates in the rate card become your sell rates.



Once a rate card is linked to a service plan, it cannot be removed. To link a different rate card to a service plan, use this process to link the new rate card. The new rate card will supersede the previous rate card on the effective date.

1. On the Service Plan page, locate the Associated Rate Cards section, which is below the This Service Plan is linked to the following Packages section.

) Bo	alt On Name	Bolt On Van	ity Hame	Behaviour	Action
ted Bolt-Ons					
					Link Rate Cards
			1		
		Nothin	ig Found		
ID 🔻 Hame	External Ilan	ie	Service Type Category	2	Date Effective
ited Rate Cards					
		Nothin	ng Found		
ID 🌣	Name			External Name	
rvice Plan is linked to the follo	wing Packages		I In account Discounting Allowed?	U	
		Usage Cap (\$)(Ex Tax):	Intro & copy of Discounting Allowed		
		*Note : When this plan is put into a empty, this access fee will be ignor all setup fees.All amounts entered	package, if the Package Access Fee is r red. A Package level setup fee will overr are to be exclusive of taxes.	not ride	
		Access Fee (\$)(Ex Tax):	99		
		Internal Churn Setup Fee (\$)(Ex Tax):	75		
		Churn/Port Service Setup Fee (\$)(Ex Tax):	75		« Back
		New Service Setup Fee (\$)(Ex Tax):	100	0	Save
Buy or Sell:	: Sell			Approved Date	e: 14 Aug 2012
	al.	Rounding Precision:		Approval Statu:	s: Approved
Description.	My lease of liter 361 Vice Plan	Rounding Type:	No Rounding	Saleable Tro	n: 14 Aug 2012
Reference Key:	MuTert I Initel Service Plan			Modified Br	y 14 Aug 2012
Reference Name:		Period Requires Approval Before Closing		Date Modifie	± 14 Aug 2012
* External Name:	MyTest Unitel Service Plan	Period Length:	1 Month	Created B	y: Emersion Support
		Service Type.	Uniter PSIN	Date Creater	a rendgioni

Figure 28. The Service Plan page showing the Associated Rate Cards section

#### 2. Click the Link Rate Cards button. The Link Rate Card to Service Plan page will be displayed.

ID ≫	Name	External Name	Service Type Category	Date Effective	Action
			Nothing Found		
			1		
i for a Rate Car	rd		*		
Card Name:					
Status: A	u 👻				
					« Back
					End Date Could
					Find Rate C

Figure 29. The Link Rate to Service Plan page

3. To search for a rate card, enter the rate card name, or part of the name, in the *Rate Card Name* field, or leave blank to locate all rate cards.

4. Click the **Find Rate Cards** button. The *Link Rate Card to Service Plan* page will be updated to show all matching rate cards that are associated with the same service type of the service plan in the *Search Results* section.

Link Rate Card to Service Plan Associated Rate Cards				
ID ♥ Hame	External Name	Service Type Category	Date Effective	Action
		Nothing Found		
		1		
Rate Card Name: Status: All				
				« Back Find Rate Cards
earch Results				
Rate Card ID: 102532 Rate Card Name: Unitel Buy	* Effective Date:	14 Aug 2012	C	Link Rate Card
Rate Card ID: 102533 Rate Card Name: Home Basic	* Effective Date:	14 Aug 2012	[	Link Rate Card
Rate Card ID: 102534 Rate Card Name: Home InTouch	* Effective Date:	14 Aug 2012	[	Link Rate Card
Rate Card ID: 102535 Rate Card Name: Home Ultimate	* Effective Date:	14 Aug 2012	C	Link Rate Card
Rate Card ID: 102536 Rate Card Name: Business Basics	* Effective Date:	14 Aug 2012	[	Link Rate Card

Figure 30. The Link Rate to Service Plan page showing the Search Results section

- 5. Enter the date this rate card comes into effective in the *Effective Date* field. A calendar tool will appear to allow you to select the required date.
- 6. Click the **Link Rate Card** button beside the required rate card entry in the list. A message will appear at the top of the page stating the rate card was linked.
- 7. Click the **Back** button to return to the Service Plan page.

### To Link a Bolt On to a Service Plan

For most service types that have associated usage (e.g. telephony or data services), you can link a bolt on to provide a bonus or free amount of a particular service usage type. Buy bolt ons can only be linked to buy service plans. Sell bolt ons must be linked to a buy bolt on plan as well as to a sell service plan.

 $(\mathbf{i})$ 

A service plan may have multiple bolt ons linked to it.

If multiple bolt ons are linked to a service plan, depending on the bolt on behaviour configured (i.e. forced or optional), you will be able to select which bolt ons to active with the service during the service provisioning process. If the bolt ons linked to a service plan are held in a bolt on group, only one bolt on from the bolt on group will be allowed to be activated against the service.

#### To Link a Buy Bolt On Plan to a Buy Service Plan

1. On the Service Plan page of a buy service plan, locate the Associated Bolt Ons section, which is below the This Service Plan is linked to the following Packages section.

ervice Plan: #140007						
* Name:	MyTest Unitel Service Plan	* Service Type:	Unitel PSTN		Date Created:	14 Aug 2012
* External Name:	MyTest Unitel Service Plan	Period Length:	1 Month		Created By:	Emersion Support
Reference Name:					Date Modified:	14 Aug 2012
Reference Key:		Period Requires Approval Before Closing 🕕			Modified By:	Emersion Support
Description:	MyTest Unitel Service Plan				* Saleable From:	14 Aug 2012
		Rounding Type:	No Rounding 💌		Saleable To:	
	, id	Rounding Precision:		0	Approval Status:	Approved
Buy or Sell:	Sell				Approved Date:	14 Aug 2012
		New Service Setup Fee (\$)(Ex Tax):	100	0		Save
		Churn/Port Service Setup Fee (\$)(Ex Tax):	75			« Back
		Internal Churn Setup Fee (\$)(Ex Tax):	75			
		Access Fee (\$)(Ex Tax):	99			
		*Note : When this plan is put into a empty, this access fee will be ignor all setup fees.All amounts entered	cackage, if the Package Access Fee is r red. A Package level setup fee will overr are to be exclusive of taxes.	ide		
		Usage Cap (\$)(Ex Tax):				
his Service Plan is linked to the follow	ving Packages					
ID 💝	Name			External llame		
		Nothin	g Found			
			1			
ssociated Hate Cards						
ID V Hame	External llame	·	Service Type Category			Date Effective
in the second se		Nothin	a Found			Date Life and
			1			
						Link Rate Cards
ssociated Bolt-Ons						×
						5775.794
ID Bol	It On Name	Bolt On Vani	ity Name		Behaviour	Action
		Nothin	g Found			
			1			Link Balt Or
						LIN DOIL-ON

Figure 31. The Service Plan page showing the Associated Rate Cards section

2. Click the Link Bolt On button. The Link Bolt On Plan to Service Plan page will be displayed.

Link Bolt On Plan to Service Plan	
Search for a Bolt-On Plan to Buy	 
-/plan/service/linkboltonbuyplan/0/140009/FIND	 
Bott On Plan Name:	
Bolt On Category. All Categories	
	Find Bolt-On Plans

Figure 32. The Link Bolt On Plan to Service Plan page

3. To search for a bolt on, enter the bolt on plan card name, or part of the name, in the *Bolt On Plan Name* field, or leave blank to locate all bolt on plans.

To search for a particular bolt on by category, select the required category from the *Bolt On Category* drop list.

4. Click the **Find Bolt On Plans** button. The *Link Bolt On Plan to Service Plan* page will be updated to show all matching buy bolt on plans that are associated with the same service type of the service plan in the *Search Results* section.

Beach for a Bolt-On Plan to Buy/plan/service/linkboltonbuyplan/0/140009FIND- Bot On Plan Neme: Bot On Category: All Categories ♥  Find Bot-On Plans Search Results Bot On Plan (Buy):	Link Bolt On Plan to Service Plan		
-/plan/service/linkbottonburg/lan/00140000FIND         Bot On Plan Name:         Bot On Category:       All Categories         Search Results         Bot On Plan (Bury):	Search for a Bolt-On Plan to Buy		
Bot On Plan Name Bot On Category: Al Categories Find Bot-On Plans	r /plan/service/linkboltonbuyplan/0/140009/FIND		
Bot On Category:       All Categories         Find Bot-On Plane         Search Results         Bot On Plan (Buy):       Add Bot-On Allowance         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 300 Mb - Buy (100324)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 750 Mb - Buy (100324)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 750 Mb - Buy (100325)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 1 Gb - Buy (100325)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 2 Gb - Buy (100326)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 2 Gb - Buy (100326)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 2 Gb - Buy (100326)         Behaviour:       Forced, tremovable V         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 2 Gb - Buy (100326)         Behaviour:       Forced, tremovable V       Add Bot-On Allowance         Bot On Plan (Buy):       - Data Pack - Mobile Broadband 2 Gb - Buy (100326)	Bott On Plan Name		
Search Results         Boit On Plan (Buy):	Bott On Category: All Categories		
Search Results         Boit On Plan (Buy):	10 SUL-		
Bearch Results Boit On Plan (Buy):			Find Bott-On Plans
Beard Results Bolt On Plan (Buy):			
Bolt On Plan (Buy):	Search Results	·	
Bolt On Plan (Buy):	Bolt On Plan (Buy):	Behaviour: Forced, irremovable	Add Bolt-On Allowance
Bot On Plan (Buy): Data Pack - Mobile Broadband 750 Mb - Buy (100324) Behaviour: Forced, Irremovable V Add Bot-On Allowance Bot On Plan (Buy): Data Pack - Mobile Broadband 1 Gb - Buy (100325) Behaviour: Forced, Irremovable V Add Bot-On Allowance Bot On Plan (Buy): Unlinted Local Standalone - Buy (100331) Behaviour: Forced, Irremovable V Add Bot-On Allowance Add Bot-On Allowance Bot On Plan (Buy): Unlinted Local Standalone - Buy (100331) Behaviour: Forced, Irremovable V Add Bot-On Allowance			
Bot On Plan (Buy): , - Data Pack - Mobile Broadband 1 Gb - Buy (100325) Behaviour: Forced, Irremovable V Add Bot-On Allowance Bot On Plan (Buy): , - Data Pack - Mobile Broadband 2 Gb - Buy (100326) Behaviour: Forced, Irremovable V Behaviour: Forced, Irremovable V Add Bot-On Allowance Bot On Plan (Buy): , Unlimited Local Standalone - Buy (100331) Behaviour: Forced, Irremovable V Add Bot-On Allowance	Bolt On Plan (Buy):	Behaviour: Forced, Irremovable 💌	Add Bolt-On Allowance
Bolt On Plan (Bury): , - Data Pack - Mobile Broadband 1 Gb - Bury (100325) Behaviour: Forced, Irremovable 💌 Add Bolt-On Allowance Bolt On Plan (Bury): , - Data Pack - Mobile Broadband 2 Gb - Bury (100326) Behaviour: Forced, Irremovable 💌 Add Bolt-On Allowance Bolt On Plan (Bury): , Unlimited Local Standalone - Bury (100331) Behaviour: Forced, Irremovable 🔍 Add Bolt-On Allowance			
Bolt On Plan (Buy): , - Data Pack - Mobile Broadband 2 Gb - Buy (100326) Behaviour: Forced, Irremovable V Bolt On Plan (Buy): , Unlimited Local Standalone - Buy (100331) Behaviour: Forced, Irremovable V Add Bolt-On Allowance	Bolt On Plan (Buy): Data Pack - Mobile Broadband 1 Gb - Buy (100325)	Behavlour: Forced, Irremovable 💌	Add Bolt-On Allowance
Bolt On Plan (Bury): Data Pack - Mobile Broadband 2 Gb - Bury (100326) Behaviour: Forced, Irremovable 💙 Add Bolt-On Allowance			
Bolt On Plan (Buy): Unlimited Local Standalone - Buy (100331) Behaviour: Forced, Irremovable 🗸	Bott On Plan (Buy): - Data Pack - Mobile Broadband 2 Gb - Buy (100326)	Behaviour: Forced, Irremovable	Add Bolt-On Allowance
Bolt On Plan (Buy): Unlimited Local Standalone - Buy (100331) Behaviour: Forced, Irremovable 🗸			
	Bolt On Plan (Buy): Unlimited Local Standalone - Buy (100331)	Behaviour: Forced, Irremovable 💌	Add Bolt-On Allowance

Figure 33. The Link Bolt On Plan to Service Plan page showing the Search Results section

- 5. Select the required action of the bolt on once it is attached to a service plan and sold to a customer in the *Behaviour* drop list. Options available are:
  - Forced, Irremovable the bolt on will be automatically attached to the service and cannot be removed
  - Forced, Removable the bolt on will be automatically attached to the service but can be removed if required.
  - Completely Optional the bolt on will not be automatically attached to the service and can be added manually as required.
- 6. Click the **Add Bolt On Allocate** button beside the required bolt on plan entry in the list. The *Service Plan* page will appear, showing a message at the top of the page stating the bolt on was linked.

### To Link a Sell Bolt On Plan and Buy Bolt On Plan to a Sell Service Plan

1. On the Service Plan page of a sell service plan, locate the Associated Bolt Ons section, which is below the This Service Plan is linked to the following Packages section.

iated Bolt-Ons ID B	olt On Name	Bolt On Van	ity llame		Behaviour	Action
clated Bolt-Ons						
						Link Rate Cards
			1			
		Nothin	g Found			
ID V Hame	External lian	ne	Service Type	Category		Date Effective
ciated Rate Cards			1			
		Nothin	g Found			
ID 💝	Hame	e		Externa	al Name	
service Plan is linked to the folic	wing Packages					
			IntraAccount Discounting	g Allowed? 🕕		
		Usage Cap (\$)(Ex Tax):				
		*Note : When this plan is put into a empty, this access fee will be ignor	oackage, if the Package Acce ed. A Package level setup fer	ess Fee is not e will override		
		Access Fee (\$)(Ex Tax):	99			
		Internal Churn Setup Fee (\$)(Ex Tax):	75			
		Churn/Port Service Setup Fee (\$)(Ex Tax):	75			« Back
		New Service Setup Fee (\$)(Ex Tax):	100	0		Save
Buy or Sel	: Sell			U	Approved Date:	14 Aug 2012
	ad.	Rounding Precision:			Saleable 10.	Amoround
Description	MyTest Unitel Service Plan	Rounding Type:	No Rounding		* Saleable From:	14 Aug 2012
Reference Key		Penod Requires Approval Before Closing U			Modified By:	Emersion Support
Reference Name	c				Date Modified:	14 Aug 2012
* External Name	MyTest Unitel Service Plan	Period Length:	1 Month		Created By:	Emersion Support
	my lest Unitel Service Plan	* Service Type:	Unitel PSTN		Date Created:	14 Aug 2012

Figure 34. The Service Plan page showing the Associated Bolt Os section

#### 2. Click the Link Bolt On button. The Link Bolt On Plan to Service Plan page will be displayed.

Link Bolt On Plan to Service Plan	
Search for a Bolt-On Plan to Sell	
Indext Service/linkbolton/0/140007/FIND Bolt On Plan Name: Bolt On Category: All Categories	
	Find Bolt-On Plans

Figure 35. The Link Bolt On Plan to Service Plan page

3. To search for a bolt on, enter the bolt on plan card name, or part of the name, in the *Bolt On Plan Name* field, or leave blank to locate all bolt on plans.

To search for a particular bolt on by category, select the required category from the *Bolt On Category* drop list.

4. Click the **Find Bolt On Plans** button. The *Link Bolt On Plan to Service Plan* page will be updated to show all matching buy bolt on plans that are associated with the same service type of the service plan, as well as all sell bolt on plans, in the *Search Results* section.

Link Bolt On Plan to	Service Plan		
Search for a Bolt-On Pla	an to Sell		
-/plan/service/linkbolto	on/0/140007/FIND		
Belt On Den Nemer			
Deli On Catavana			
Boil Officategory. [2	Hi Cucyonos 🙀		
			Find Bot-On Plans
Search Results		Para at lange and the	
Bolt On Plan (Buy):	- Data Pack - Mobile Broadband Stut Mb - Buy (100323)	Behaviour: Porcea, irreniovable	Add Bolt-On Allowance
Bott On Plan (Sell):	Data Pack - Mobile Broadband 6 Gb (100322)		
Bolt On Plan (Buy):	- Data Pack - Mobile Broadband 750 Mb - Buy (100324)	Behaviour: Forced, Irremovable 💌	Add Bolt-On Allowance
Bolt On Plan (Sell):	Data Pack - Mobile Broadband 6 Gb (100322)		
Bolt On Plan (Buy):	Data Pack - Mobile Broadband 1 Gb - Buy (100325)	Behaviour: Forced, Irremovable	Add Bott-On Allowance
Bott On Plan (Sell):	Data Pack - Mobile Broadband 6 Gb (100322)		
Bolt On Plan (Buy):	- Data Pack - Mobile Broadband 2 Gb - Buy (100326)	Behaviour: Forced, Irremovable 💌	Add Bolt-On Allowance
Bott On Plan (Sell):	Data Pack - Mobile Broadband 6 Gb (100322)		<u></u>
Bolt On Plan (Buy):	- Unlimited Local Standalone - Buy (100331)	Behaviour: Forced, Irremovable	Add Bott-On Allowance
Bolt On Plan (Sell):	- Unlimited Local (when bundled with Unlimited STD) (100337) 💌		

Figure 36. The Link Bolt On Plan to Service Plan page showing the Search Results section

- 7. Locate the required buy bolt on plan you wish to link to the sell bolt on and sell service plan.
- 8. Select the required sell bolt on plan from the *Bolt On Plan (Sell)* drop list below the required buy bolt on plan.
- 9. Select the required action of the bolt on once it is attached to a service plan and sold to a customer in the *Behaviour* drop list. Options available are:
  - Forced, Irremovable the bolt on will be automatically attached to the service and cannot be removed
  - Forced, Removable the bolt on will be automatically attached to the service but can be removed if required.
  - Completely Optional the bolt on will not be automatically attached to the service and can be added manually as required.
- 10. Click the **Add Bolt On Allowance** button beside the required buy bolt on plan entry in the list. The *Service Plan* page will appear, showing a message at the top of the page stating the bolt on was linked.

#### To Remove a Bolt On Plan from a Service Plan

1. On the Service Plan page of a service plan, locate the Associated Bolt Ons section, which is below the This Service Plan is linked to the following Packages section.

ISSUCIALED MALE	Calus				
1 Results Found					
ID 💝	Name	External Name	Service Type	Category	Date Effective
102540	Wireless Broadband Sell	Wireless Broadband Sell	Optus Mobile		1 Jul 2010
		1	Aug.	~	50 100 150 200
					Link Rate Cards
Associated Bolt-	Ons				
1 Results Found					
ID	Bolt On Name	Bolt 0	n Vanity Name	Behaviour	Action
100322	Data Pack - Mobile Broadband 6 Gb	Data Pack - Mobile Broadband 6 Gb		Forced, Irremovable	Delete
	30	1			20 50 100 150 200
					Link Bolt-On
Associated Produ	luct Rate Cards				

Figure 37. The Service Plan page showing the Associated Bolt Os section

2. Click the **Delete** link in the *Action* column of the bolt on you wish to remove in the list of bolt ons linked to the service plan. A message will appear at the top of the page status the bolt on was unlinked from the service plan..

### To Link a Product Rate Card to a Service Plan

For most service types, you can link a product rate card that defines charges for service and equipment associate with the service. The products available in the product rate card are dependent on the service type and service provider. Buy product rate cards can only be linked to buy service plans. Sell product rate cards can only be be linked to a sell service plan.



Once a product rate card is linked to a service plan, it cannot be removed. To link a different product rate card to a service plan, use this process to link the new product rate card. The new product rate card will supersede the previous product rate card on the effective date entered.

1. On the Service Plan page, locate the Associated Product Rate Cards section, which is below the Associated Bolt Ons section.

				Link Rate Cards
Associated Bolt	t-Ons			
1 Results Found	d			
ID	Bolt On Name	Bolt On Vanity Name	Behaviour	Action
100322	Data Pack - Mobile Broadband 6 Gb	Data Pack - Mobile Broadband 6 Gb	Forced, Irremovable	Delete
				20 50 100 150 200
				Link Bolt-On
Associated Pro	duct Rate Cards			-
-				
ID S	5 Name	External Name	Service Type Category	
		Nothing Found		
		1		
Link Prod	luct Rate Card to Service Plan			
Search for a Pr	roduct Rate Card			
	Search Name:			
	Approval Status: All			
	Line Line			Find Product Rate Cards

Figure 38. The Service Plan page showing the Associated Product Rate Cards section

- 2. To search for a product rate card, enter the product rate card name, or part of the name, in the *Search Name* field, or leave blank to locate all product rate cards plans.
- 3. Click the **Find Product Rate Cards** button. The page will be expanded to show all matching product rate cards that are associated with the same service type of the service plan in the *Search Results* section.

For a sell service plan, only sell product rate cards will display. For a buy service plan, only buy product rate cards will display.

ID 💝	Hame	External Name		Service Type Category	
		Nothing	Found		
		1			
Product Rat	te Card to Service Plan				
(Troductria	te odru to dervice i fall				
ch for a Product Rate	e Card				
	Search Name:				
	Annroval Status				
					1
					Find Product Rate Car
h Results					
Pro	duct Rate Card. Unitel Residential Service Features Monthly	* Effective Date:			Link to Service Plan
		154 5 5 1			

Figure 39. The Service Plan page showing the Product Rate Cards Search Results

- 4. Enter the date this product rate card comes into effective in the *Effective Date* field. A calendar tool will appear to allow you to select the required date.
- 5. Click the **Link to Service Plan** button beside the required product rate card entry in the list. A message will appear at the top of the *Service Plan* page stating the product rate card was linked.

# **Rate Cards**

A Rate Card is a group of rates and tariffs attached to a service plan that define the charges associated with a service's usage (e.g. phone call rates). A rate defines how and what the system should charge and for a given call or usage type. A tariff defines each individual usage type. Rate cards are linked to service plans based on a service type, such as PSTN telephony, VOIP, or mobile phone services etc. *Time Tables* may be linked to a rate card to control different charging based on different days of the week and / or times of the day.

When a rate card is linked to a buy service plan, it becomes the service's buy rates, which defines the service usage costs from your upstream service providers. When linked to a sell service plan, it becomes the service's sell rates that you charge to your customers. A rate card may be attached to multiple service plans.

The system provides a number of rating methods to calculate service usage. Each individual tariff in a rate card can be set with a rating method, or you can set the rating method at the tariff group level to apply the rate to all tariffs below the tariff group in the hierarchy that do not have an individual rate specifically set. You can also set a rate at the base tariff level, which means in all usage that has no rate defined further down the tariff hierarchy to be charged at the base tariff rate, like a default rate.

# **Rating Methods**

There are many methods to apply rates to your service's usage. Each method allows you to set various rating method parameters, which vary depending on the selected rating method. The rating parameters are described below:

- Markup % the percentage to markup the usage charge
- Discount % the percentage to discount the usage charge
- Flagfall the initial usage fee applied when the usage occurs regardless of the usage duration
- Minimum Charge the minimum value applied to the usage
- Maximum Charge the maximum limit applied to the usage as either a dollar amount or usage time in seconds
- Price Per the charge amount applied in time intervals e.g. \$0.60c per minute
- Price Interval the time, in seconds, to charge the price per
- Charge Interval the amount of time, in seconds, the usage charge is broken down by, or block of time to charge by e.g. \$0.60c per minute, with a charge interval of 1 will result in the system charging 1/60<sup>th</sup> of the \$0.60c for each second of usage, which is \$0.01c per second
- Initial Free the amount of time, in seconds, that has no usage charge applied
- In Cap indicates whether the tariff's charge is included in the cap amount of the service plan associated with the rate card

For some rating methods, the system allows you to configure multiple pricing tiers to calculate different charges at various usage limits. E.g. charge \$0.50c per minute up to a value of \$10, and then apply \$0.30c per minute from \$10.01 up to a value of \$30, and then apply \$0.18c per minute for the remaining usage. The *rate per*, *excess*, *simple cap*, and *capped* rating methods allow multiple tiers to be set up.

The rating methods are described in the following section.

#### Pass-through

The charge contained in the usage file from your upstream service provider is passed through to the customer. E.g. a 1900 call type with a charge of \$12:95 in the CDR will be passed through to your customer at the same value.

#### Markup %

The charge contained in the usage file from your upstream service provider is increased by the defined percentage to charge to your customer. E.g. a call to the USA with a charge of \$1.50 in the CDR with a markup rate of 10% will be charged to your customer at \$1.65.

#### Discount %

The charge contained in the usage file from your upstream service provider is decreased by the defined percentage to charge to your customer. E.g. a call to the USA with a charge of \$1.50 in the CDR with a discount rate of 10% will be charged to your customer at \$1.35.

#### Flat charge



The system will apply the defined flat charge (i.e. flagfall) to the usage. E.g. a local call that has a flat rate of \$0.50c for the entire call duration.

Rate per



The system applies a set charge per time interval. You can set a flagfall amount as well as set a minimum charge. The amount to charge per time interval, the time interval, and the price interval can be defined.

E.g. a call to the UK with a flagfall of \$1.00, minimum charge of \$2.00, set at \$1.00 per minute, charged in 10 second blocks.

#### Excess



The system applies a set charge per time interval once an initial free, or bonus, time has been reached. You can set a flagfall amount, a minimum charge, and the initial free time. The amount to charge per time interval, the time interval and the price interval can be defined.

E.g. a call to the UK with a flagfall of \$1.00, minimum charge of \$2.00, 2 minutes initial free time, set at \$1.00 per minute, charged in blocks of 10 seconds.





The system applies a set charge per time interval up to a maximum value. You can set a minimum cost, as well as the maximum limit as either a dollar amount or usage time. The amount to charge per time interval, the time, and the price interval can be defined.

E.g. a call to France with a minimum charge of \$1.00, set at \$1.00 per minute, charged in blocks of 30 seconds, up to a maximum value of \$15.00.





The system applies a charge per time interval once an initial free, or bonus, time has been reached, up to a maximum value. You can set a flagfall amount, a minimum charge, the initial free time as well as the maximum limit as either a dollar amount or usage time. The amount to charge per time interval, the time interval, and the price interval can be defined.

E.g. a call to Germany with a flagfall of \$1.00, minimum charge of \$2.00, 3 minutes initial free time, set at \$1.00 per minute, charged in blocks of 10 seconds up to a maximum value of \$20.00.

#### Flagfall + markup %



The system charges a flagfall, and then increases the charge contained in the usage file from your upstream service provider by the defined percentage.

E.g. a call to the USA with a charge of \$1.50 in the CDR with a markup rate of 10% will be charged to your customer at \$1.65 along with a flagfall.

# To Display Rate Cards

1. Select **Packages and Plans** > **Management** > **Rate Cards** from the **Menu.** The *Rate Cards list* page will appear showing a list of existing rate cards.

ustomers	Billing Services Packages and Plans Product	s Report Finance Events Admin			
lanagement	Catalogue Management				
Package Plans	Service Plans Rate Cards Service and Equip Rate Car	ds Product Pricing Bolt Ons Bolt On Groups Time Tables	Contracts		
Rate Card	s				
I tate Gara	10				
	ID:	Service Type All	Status:		
	Name	Category: Emersion Email Mailbox	D	raft	
	Name.	Domain registration	A	pproved	
External	I Name:		s	aleable 🖌	
					Create New
					Saarch
					Joan
20 Results Fo	und				
in X	Hame	External Name	Saruica Tima Catagony	Statue	Data Effective
102532	I Initel Busy	I Intel Briv	Lintel Fixed Line	Status	1.612
102533	Home Basic	Home Basic	Lintel Fixed Line		1.0125
102534	Home InTouch	Home InTouch	Unitel Fixed Line		1 Jul 20
102535	Home Ultimate	Home Ultimate	Unitel Fixed Line		1 Jul 20
102536	Business Basics	Business Basics	Unitel Fixed Line	Approved	1 Jul 20
102537	Mobile Buy	Mobile Buy	Optus Mobile		1 Jul 20
102538	Mobile Sell	Mobile Sell	Optus Mobile		1 Jul 20
102539	Wreless Broadband Buy	Wireless Broadband Buy	Optus Mobile		1 Jul 20
102540	Wreless Broadband Sell	Wreless Broadband Sell	Optus Mobile		1 Jul 20
103631	Inbound 1300/1800	Inbound 1300/1800	Unitel Fixed Line (Inbound)	Approved	1 Jul 20
103632	Inbound 1300/1800 Buy Plan	Inbound 1300/1800 Buy Plan	Unitel Fixed Line (Inbound)	Approved	21 Feb 20
100002					
110536	Mobile Sell [SuperCap]	Mobile Sell	Optus Mobile	Draft	1 Oct 20
110536 110561	Mobile Sell [SuperCap] Business Essentials	Mobile Sell Business Essentials	Optus Mobile Unitel Fixed Line	Draft	1 Oct 20 1 May 20
110536 110561 110563	Mobile Sell [SuperCap] Business Essentials Home Starter	Mobile Sell Business Essentials Home Starter	Optus Mobile Unitel Fixed Line Unitel Fixed Line	Draft	1 Oct 20 1 May 20 1 Mar 20
110536 110561 110563 110565	Mobile Sell [SuperCap] Business Essentials Home Starter Home Amped	Mobile Sell Business Essentials Home Starter Home Amped	Optus Mobile Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line	Draft	1 Oct 20 1 May 20 1 Mar 20 1 Mar 20 1 Mar 20
11 0536 11 0561 11 0563 11 0565 11 0565	Mobile Set [SuperCap] Business Essentials Home Starter Home Amped Home Everyday	Mobile Sell Business Essentials Home Starter Home Anged Home Everyday	Optus Mobile Untel Fixed Line Untel Fixed Line Untel Fixed Line Untel Fixed Line	Draft	1 Oct 20 1 May 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20
110536 110561 110563 110565 110567 110569	Mobile Sell [SuperCap] Business Essentials Home Starter Home Amped Home Everyday Home Advartage	Mobile Sell Business Essentials Home Starter Home Avread Home Everyday Home Advartage	Optus Mobile United Fixed Line United Fixed Line United Fixed Line United Fixed Line United Fixed Line	Draft	1 Oct 2 1 May 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20
110536 110561 110563 110565 110567 110569 110571	Mobile Sell [SuperCap] Business Essentials Home Starter Home Amped Home Everyday Home Advardage Home Extreme	Mobile Sell Business Essentials Home Stater Home Amped Home Everyday Home Avardage Home Extreme	Optus Mobile Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line	Draft	1 Oct 20 1 May 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20 1 Mar 20
110536 110561 110563 110565 110567 110567 110571 110571 110715	Mobile Sell [SuperCap] Dualness Essentials Home Starter Home Anped Home Advantage Home Extreme test rate card 222	Mobile Sell Business Essentials Home Starter Home Anged Home Exervalay Home Advantage Home Extreme test rate card 222	Optus Mobile Unite Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Unitel Fixed Line Optus Mobile	Dreft Dreft	1 Oct 2 1 May 22 1 Mar 20 1 Mar 2

Figure 40. The Rate Cards list page

#### Search

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

- > ID
- Name
- External Name
- Service Type Category allows you to locate a rate card by a service category
- Status all, draft, pending, approved, saleable, active and grandfathered

# To Create a Rate Card

1. On the *Rate Cards list* page, click the **Create New** button. The *Create new Rate Card* page will appear.

Creating new Rate	e Card		
* Name:		Service Type Emersion Email Mailbox	* Saleable From: 15 Aug 2012 14:50:21
External Name:		Category.	Save
Reference Name:		Scalus. With	« Back
Reference Key:			
Description:			

Figure 41. The Create new Rate Card page

- 2. Enter the internal name for the rate card in the Name field.
- 3. Enter the name of the rate card to display externally to customers in the External Name field.
- 4. Enter a *Reference Name* for the rate card, if required (e.g. another name the rate card may be known by on another system).
- 5. Enter a *Reference Key* for the rate card, if required (e.g. an ID for the rate card that may be used by another system).
- 6. Enter a *Description* of the rate card. This description is optional and only for internal use.
- 7. Select the Service Type Category of the rate card from the drop list.
- 8. Select the Status from the drop list. Options include:
  - > Draft indicates the rate card is being finalised
  - Pending indicates the rate card is pending review and ready for approval
  - Approved approved for sale
- 9. Enter the date this rate card comes into effective in the *Saleable From* field. A calendar tool will appear to allow you to select the required date. The rate card will not be able to be linked to a service plan until the date selected.
- 10. Click the **Save** button to create the rate card. The *Rate Cards list* page will appear, showing the new rate card in the list.
  - (

You cannot create rates for the tariffs when the rate card is initially created. After the rate card is saved, you should edit the rate card to set your rates and rating methods.

# To View or Edit a Rate Card

Modifying a rate card will not change any existing charges that have been invoiced to a customer. If you require a customer to be re-invoiced with updated rates, please contact the Emersion support team.

1. On the *Rate Cards list* page, click the rate card link in the *ID* column of the list. The *Rate Card Management Plan* page will appear showing the selected rate card with all existing information.

Plant Prevelocit		10	tenelar#					24 Oct 2
00		Name	External Nam			Date Effectiv	10	
						B. 4. B.B		
Luse this Rate Card								
			12					50 100 150
ALC PRECORE	Place Per	Ten manana per en Second(s), charges i	1	NA NA		Amarianan 051	PNO .	view Edit Des
02 National	Bate Ser	NO 700000 per ED Second(s) character	(I) Second a) Market (Althematics and of th	000000		Australian 051	No	View Edit Des
Calls to 13 Numbers	Fist Churge	Fild criwge of \$0.17273		NOA		Australian OST	NIO NIO	View Edit Del
23 Calls to 1800 Numbers	Flid Charge	This Tariff has a Flat Charge of \$0.		N/A.	-	Australian 05T	No	View Edit Del
144 Intra Account National	Rate Per	\$0.90909 per 60 Second(s), charged in	60 Second(s) blocks. With minimum cost of \$0	90909 N/A		Australian OST	No	View Edit De
142 Intra Account Fixed to Mobile	Rate Per	\$0.22727 per 60 Second(s), charged in	60 Second(s) blocks. With minimum cost of \$0	22727 N/A		Australian 057	No	View Edt De
43 Intra Account Local	Flat Charge	Flat charge of \$0 17273		N/A		Australian 057	No	View Edt De
134 Fixed To Mobile	Rate Per	\$0.22727 per 60 Second(s), charged in	60 Second(s) blocks. With minimum cost of \$0	22727 N/A		Australian OST	No	View Edit De
19 Special Calls	Markup %	This rate is marked up by 30%.		NA	1	Australian GST	No	Vew Edt De
21 Energency Service	Fint Charge	This Tariff has a Flat Charge of \$0.		N/A		Australian 051	No	View Edit De
01 Local	End Charge	Fat charge of \$0.17273		N/A		Australian OST	No	View Edit Del
WA International	The fire To	This rate is marked on her 2000.	COW FAMILIA CHIECO	hine of	no nereo nace	Luninger COT	in Cap	Manu Edit Dat
loes not have a Base Rate set.								
ucture Hierarchy						L	Equ	d Roles
recise (*) Select lavitt. (Select						-		
Note M Course Turner Calcula	v							
Date Card							« B	lack
							S	sve -
				Approved By	-			
				Approved Date:	24 Oct 2011			
				Approval Status	Approved			
n .				* Saleable From	24 Oct 2011			
n:								
*				Modified By				
e Preselect				Date Modified	24 Oct 2011			
e: Soul Preselect		Category		Created By	1226			
D 108235		Service Type So	a Telephony 🛛 🖌	Date Created				
te .								
				Service type Sout Prevents Service type Sout Prevents Service type Sout Prevents Service type Sout Prevents Pr	B     Service Type     Survice Type     Survice Type     Dete Created By Created By Determined       Presence     Presence     Created By Determined     Created By Determined       Presence     Presence     Satebility Presence     Created By Determined       Presence     Presence     Satebility Presence     Satebility Presence       Presence     Presence     Presence     Satebility Presence       Presence     Presence     Presence     Presen	B b 1 1025 b c c c c c c c c c c c c c c c c c c		Image: Service Spectral Spe

Figure 42. The Rate Card Management page

- 2. Enter or modify the rate card information in the fields in the Rate Card Details section.
- 3. To view the tariff hierarchy, set a base rate and set rates for tariffs, see the following sections.
- 4. Click the **Save** button to save the changes made to the rate. A message will appear at the top of the page stating the rate card was saved.
- 5. Click the **Back** button to return to the *Rate Card list* page.

### To View the Tariff Hierarchy

1. On the *Rate Card Management* page click the **Tariff Structure Hierarchy** button. The *Tariff Structure Hierarchy* window will appear showing shows all tariffs and tariff groups in the rate card.



Figure 43. The Tariff Structure Hierarchy window

- 2. Scroll through the list to view all tariffs and tariff groups in the tariff table hierarchy as required.
- 3. To view only the tariff groups, click the **Show Just Rates** button. The window will update to just show the tariff groups.

ariff Structure Hierarchy		3
BG ( <u>2300</u> ) Content ( <u>2160</u> ) Data ( <u>2200</u> ) Hossages ( <u>2120</u> ) Mobile Broadband ( <u>2350</u> ) Koram ( <u>2100</u> ) Wreless Broadband ( <u>2260</u> )		
Cancel	Show All	Print

Figure 44. The Tariff Structure Hierarchy window showing just tariff groups

- 4. To print the tariff structure hierarchy, click the **Print** button. Your system's print window will appear to allow you to select the printer and other print settings.
- 5. Click the **Cancel** button to dismiss the *Tariff Structure Hierarchy* window.

# To Set the Base Tariff

1. On the *Rate Card Management* page click the **Set Base Rate** button. The *Create New Rate for* <*service type> Base Tariff* window will appear.

Step 1 Simple Cap 💌	Min Price	Price	Price Interval	Charge Interval	Max Value	Max Type Dollars 💉	In Cap	
8					Add Another Ra	te Step		
.e :								

Figure 45. The Create New Rate window

- 2. Select the rating method to use for the base tariff from the drop list under *Step 1*. Options available are:
  - pass-through
  - > markup %
  - discount %
  - flat charge
  - rate per
  - excess
  - simple cap
  - capped
  - flagfall + markup %
- 3. Depending on the rating method selected, the fields on the *Create New Rate* window will be updated to allow the various rating method parameters to be set.
- 4. Set the rating method parameters in the corresponding fields.
- 5. To set up another rating tier for the *rate per*, *excess*, *simple cap*, or *capped* rating methods, click the **Add Another Rate Step** link. The *Create New Rate* window will be updated to show an additional set of rating method fields.

Select the rating method for the next rating tier and enter the rating method parameters required.

To set further rating tiers, click the Add Another Rate Step link below the last rate defined.

To remove an existing rating tier, click the **Remove Last Step** link.

- 6. Select whether usage charges associated with the base tariff is included in the cap included value of the service plan that is linked with the rate card.
- 7. Enter any notes or other information about the base tariff rate in the **Note** field.
- 8. Click the **Save Rate** button to save the base tariff rate. The *Rate Card Management* page will appear, showing the base tariff rate in the table with all other rates set.

### To Set Rates against a Tariff

- 1. On the *Rate Card Management* page in the *Rates Under This Rate Card* section, select the tariff required from the *Select Tariff* drop list. The system will check the tariff table and display the *Add Tariff* button beside the *Select Tariff* drop list.
- 2. If the tariff selected has tariffs below it in the tariff table hierarchy, another drop list will appear beside the tariff selected containing all *child* tariffs.

Time Tabl	e: None	Select Tariff: International	💌 <	Add Tariff	Select Next Tariff	~
Tariff 'his Rate Ca Set	Structure H rd does not Base Rate	ierarchy have a Base Rate set.			Select Next Tariff Afghanistan Albania Algeria American Samoa Andorra	
2 Results F	ound	Tariff	Profile		Anguila Anguilla Antarctica Antigua and Barbuda	_
Rate IU 🕸	Tarm IU	Tarini	rionic		Argentina	w
180854	425060	International	Markup %	This rate is	Argentina Armenia	W
180855	425060 425001	International Local	Markup % Flat Charge	This rate is Flat charge	Argentina Armenia Aruba	w
Rate ID 👽 180854 180855 180857	425060 425001 425021	International Local Emergency Service	Markup % Flat Charge Flat Charge	This rate is Flat charge This Tariff I	Argentina Armenia Aruba Ascension Island Austria	w
Rate ID 180854 180855 180857 180858	425060 425001 425021 425019	International Local Emergency Service Special Calls	Markup % Flat Charge Flat Charge Markup %	This rate is Flat charge This Tariff This rate is	Argentina Armenia Aruba Ascension Island Austria Azerbaijan	
Rate ID 180855 180855 180857 180858 180859	425060 425001 425021 425019 425034	International Local Emergency Service Special Calls Fixed To Mobile	Markup % Flat Charge Flat Charge Markup % Rate Per	This rate is Flat charge This Tariff This rate is \$0.22727 p	Argentina Armenia Aruba Ascension Island Austria Azerbaijan Bahamas Datusia	<b>w</b> #(s
Rate ID 180854 180855 180857 180858 180859 180860	425060 425001 425021 425019 425034 425043	International Local Emergency Service Special Calls Fixed To Mobile Intra Account Local	Markup % Flat Charge Flat Charge Markup % Rate Per Flat Charge	This rate is Flat charge This Tariff This rate is \$0.22727 p Flat charge	Argentina Armenia Aruba Ascension Island Austria Azerbaijan Bahamas Bahrain Bandiadesh	<b>w</b> #(s

Figure 46. The Rates Under this Rate Card section showing the child tariffs drop list

Select the child tariff required from the next drop list if required. The system will check the tariff table and display the *Add Tariff* button beside the drop list.

If the child tariff selected has further tariffs below it in the tariff table hierarchy, another drop list will appear beside the child tariff containing all *child* tariffs.

- 3. Select tariffs to display the tariff drop list(s) until the *Add Tariff* button is beside the tariff you wish to set. You can set the rate against a tariff at any level of the tariff table hierarchy required.
- 4. Click the Add Tariff button. The Create New Rate for: <tariff> window will appear.

Step 1 Simple Cap 💌	Min Price	Price	Price Interval	Charge Interval	Max Value	Max Type Dollars 💌	In Cap		
4				į	Add Another Ra	te Step			
le :									

Figure 47. The Create New Rate For <tariff>window

- 5. Select the rating method to use for the tariff from the drop list under *Step 1*. Options available are:
  - pass-through
  - > markup %
  - discount %
  - flat charge
  - > rate per
  - excess
  - simple cap
  - capped
  - flagfall + markup %
- 6. Depending on the rating method selected, the fields on the *Create New Rate* window will be updated to allow the various rating method parameters to be set.
- 7. Set the rating method parameters in the corresponding fields.
- 8. To set up another rating tier for the *rate per*, *excess*, *simple cap*, or *capped* rating methods, click the **Add Another Rate Step** link. The *Create New Rate* window will be updated to show an additional set of rating method fields.

Select the rating method for the next rating tier and enter the rating method parameters required.

To set further rating tiers, click the Add Another Rate Step link below the last rate defined.

To remove an existing rating tier, click the **Remove Last Step** link.

- 9. Select whether usage charges associated with the tariff is included in the cap included value of the service plan that is linked with the rate card.
- 10. Enter any notes or other information about the rate in the **Note** field.
- 11. Click the **Save Rate** button to save the tariff rate. The *Rate Card Management* page will appear, showing the tariff rate set in the rate table with all other rates set.

# To View a Rate against a Tariff

1. On the *Rate Card Management* page, in the table of rates set under the *Rates Under This Rate Card* section, click the **View** link in the *Options* column of the required tariff. The *Editing Rates For: <tariff>* window will appear showing the rate parameters set for the selected tariff.

Step 1	Flactal	Min Price	Price Per	Price Interval	Charge Interval	In Can	
Rate Per	\$ 0.0909091	\$ 0.0909091	\$ 0.0909091	30	30	Yes	

Figure 48. The Editing Rates For <tariff> window

2. Click the **Cancel** button to dismiss the window and return to the *Rate Card Management* page.

### To Edit a Rate set against a Tariff

1. On the *Rate Card Management* page, in the table of rates set under the *Rates Under This Rate Card* section, click the **Edit** link in the *Options* column of the required tariff. The *Editing Rates For:* <*tariff>* window will appear showing the rate parameters set for the selected tariff.

diting Rate Fo	or : Mobile to PS	TN					
Step 1 Rate Per 💌	Flagfall \$ 0.3181818	Min Price	Price Per	Price Interval	Charge Interval	In Cap	
e:				J	dd Another Rate	Step	
184							

Figure 49. The Editing Rates For <tariff> window

- 3. If required, change the rating method to use for the tariff from the drop list under *Step 1*. Depending on the rating method selected, the fields on the *Editing Rate* window will be updated to corresponding to the rating method selected.
- 4. Edit and/or set the rating method parameters in the corresponding fields as required.
- 5. To set up another rating tier for the *rate per*, *excess*, *simple cap*, or *capped* rating methods, click the **Add Another Rate Step** link. The *Editing Rate* window will be updated to show an additional set of rating method fields.

Select the rating method for the next rating tier and enter the rating method parameters required.

To set further rating tiers, click the Add Another Rate Step link below the last rate defined.

To remove an existing rating tier, click the **Remove Last Step** link.

- 6. Select whether usage charges associated with the tariff is included in the cap included value of the service plan that is linked with the rate card.
- 7. Enter any notes or other information about the rate in the **Note** field.
- 8. Click the **Save Rate** button. The *Rate Card Management* page will appear, showing the updated tariff rate set in the rate table with all other rates set.

#### To Delete a Rate against a Tariff

1. On the *Rate Card Management* page, in the table of rates set under the *Rates Under This Rate Card* section, click the **Delete** link in the *Options* column of the required tariff. A message will appear prompting you to confirm that you want to delete the rate.

Delete Confirmation	. ×
Are You Sure You Wish	To Delete Tariff
#2057 ( Calls to 0500	vumpers ) ?

Figure 50. The Delete Rate confirmation message

- 2. Click the **Delete** button. A message will display at the top of the screen stating that the rate was deleted.
- 3. To discontinue the deletion click the **Cancel** button. You will be returned to the *Rate Card Management* page.

### To Set Rates against a Tariff with a Time Table

1. On the *Rate Card Management* page in the *Rates Under This Rate Card* section, select the time table required from the *Time Table* drop list.

lime lable:	None	Select Tariff:	Select	*
	None			A.C. 197
Tariff Str	MyTime			

Figure 51. The Rates Under this Rate Card section showing the time table drop list

- 2. Select the tariff required from the *Select Tariff* drop list. The system will check the tariff table and display the *Add Tariff* button beside the *Select Tariff* drop list.
- 3. If the tariff selected has tariffs below it in the tariff table hierarchy, another drop list will appear beside the tariff selected containing all *child* tariffs.

Select the child tariff required from the next drop list if required. The system will check the tariff table and display the *Add Tariff* button beside the drop list.

If the child tariff selected has further tariffs below it in the tariff table hierarchy, another drop list will appear beside the child tariff containing all *child* tariffs.

- 4. Select tariffs to display the tariff drop list(s) until the *Add Tariff* button is beside the tariff you wish to set. You can set the rate against a tariff at any level of the tariff table hierarchy required.
- 5. Click the **Add Tariff** button. The *Create New Rate for: <tariff>* window will appear, showing the time bands as set up in the timetable selected.

MyTime	
Step 1     Min Price     Price     Price Interval     Charge Interval     Max Value     Max Type     In Cap       Simple Cap V     \$     \$     Dollars     Dollars     Dollars	
Add Another Rate Step	
Step 1     Min Price     Price     Price Interval     Charge Interval     Max Value     Max Type     In Cap       Simple Cap V     \$     \$       Dollars	
Add Another Rate Step	

Figure 52. The Create New Rate For <tariff> window showing time bands

#### 6. For each time band:

- a. Select the rating method to use from the drop list under Step 1.
- b. Set the rating method parameters in the corresponding fields as required.
- c. To set up another rating tier click the Add Another Rate Step link.

To set further rating tiers, click the **Add Another Rate Step** link below the last rate defined. To remove an existing rating tier, click the **Remove Last Step** link.

- d. Select whether usage charges associated with the tariff during the time band is included in the cap included value of the service plan that is linked with the rate card.
- 7. Scroll down to display other time bands and the remainder of the *Create New Rate for: <tariff>* window.
- 8. Enter any notes or other information about the rate in the Note field.
- 9. Click the **Save Rate** button. The *Rate Card Management* page will appear, showing the updated tariff rate set in the rate table with all other rates set.

## To Copy a Rate Card

1. On the *Rate Card Management* page, at the top right of the page, click the **Duplicate Rates** button.

Rate Card Mana	gement		Duplicate Rotes
Rate Card Details			
ID:	110717	Service Type Optus Mobile	Date Created: 16 Aug 2012
t Nono-	MBB.Rate Card	Category:	Oriented Bur Emerging Support

Figure 53. The Rates Card Management page showing the Duplicate Rates button

- 2. The *Rate Cards list* page will be displayed, showing a message at the top of the page stating that the rate card was duplicated.
- 3. Locate the copied rate card in the *Rate Cards list* page. It will have the same name as the original rate card with the text 'DUP' at the end.
- 4. Click the rate card link in the *ID* column of the list. The *Rate Card Management Plan* page will appear showing the selected rate card with all the information as copied from the original rate card.

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Figure 54. The Rate Card Management page

- 5. Enter or modify the rate card information and set rates as required.
- 6. Click the **Save** button to save the changes made to the rate card. A message will appear at the top of the page stating the rate card was saved.
- 7. Click the **Back** button to return to the *Rate Card list* page.

# **Product Rate Cards**

A Product Rate Card is a group of rates for services and equipment product types attached to a service plan e.g. telephone handset rental, voicemail, call forwarding etc. The product rate card defines the charges for the services and equipment. The services and equipment available vary depending on the service type.

Each product *rate* is charged on a per use basis, or per instance. Similar to a usage rate card, product rate cards contain rate IDs, which identify each product. The system charges for the products based on the product rate ID and the rate set in the product rate card.

Buy product rate cards define the service and equipment costs from your upstream service providers, which are linked to buy service plans. Sell product rate cards are linked to sell service plans, which you sell to customers. A product rate card may be attached to multiple service plans.

# **To Display Product Rate Cards**

1. Select **Packages and Plans** > **Management** > **Service and Equip Cards** from the **Menu.** The *Product Rate Cards list* page will appear showing a list of existing rate cards.

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Results Four 10 \$ 00020 00078 00333 05968	nd STS P DSL P Test D iTeleco	oduct Rate Caro oduct Rate Caro efault Rate Card m RBT STS	Name 1-RRP 1-RRP (Ent 01)		STS P DSL P Enterp RBT S	roduct Rate roduct Rate rise 01 TS Product	Exte Card -RRP Card -RRP Rate Card	rnal Name		Optu Optu Dom: iSeel	Se is Fixed Line is RBT Data ain Registrat k PSTN Voic	ion e	Category	S /	Search Search Search Search Search	Clear Buy Plan
Results Four 00020 00078 00333 05968 05969	nd STS P DSL P Test D iTelecr Telstra	oduct Rate Carc oduct Rate Carc efault Rate Card m RBT STS PSTN Product R	Name I-RRP I-RRP (Ent 01) Rate Card		STS P DSL P Enterp RBT S Telstra	roduct Rate roduct Rate rrise 01 TS Product a PSTN Proc	Exte Card -RRP Card -RRP Rate Card uct Rate Card uct Rate Card	rnal Narne d		Optu Optu Domi iSeel Telst	Se is Fixed Line is RBT Data ain Registrat k PSTN Voic ra eBill	ion e	Category	s /	Search Search Search Search Search Search Search	Buy Plan
Results Four 00020 00078 00333 05968 05969 07006	nd STS P DSL P Test D Telstra Telstra Telstra	oduct Rate Carc oduct Rate Carc efault Rate Card m RBT STS PSTN Product R Features	Name 4-RRP 4-RRP (Ent 01) (ate Card		STS P DSL P Enterp RBT S Telstra Telstra	roduct Rate roduct Rate rise 01 TS Product a PSTN Proc a Features	Exte Card -RRP Card -RRP Rate Card uct Rate Card	rnal Name d		Optu Optu Dom iSeel Telst Telst	Se is Fixed Line is RBT Data ain Registrat k PSTN Voic ra eBill ra 3G Mobile	ion	Category	s /	Search Search Search Search Search Search Search Search Search	Buy Plan
Results Four 100020 100078 100333 105968 105969 107006	nd STS P DSL P Test D iTeleco Telstra Telstra	oduct Rate Carc roduct Rate Carc efault Rate Card im RBT STS PSTN Product R Features	Name           I -RRP           (Ent 01)           kate Card		STS P DSL P Enterp RBT S Telstra Telstra	roduct Rate roduct Rate rise 01 TS Product a PSTN Proc a Features	Exte Card -RRP Card -RRP Rate Card uct Rate Card uct Rate Card 1	rnal Name d		Optu Optu Dom iSeel Telst Telst	Se is Fixed Line is RBT Data ain Registrat k PSTN Voic ra eBill ra 3G Mobile	ion e	Category	S /	Sel Sel Sel Sel Sel Sel Sel	Buy Plan

Figure 55. The *Product Rate Cards list* page

#### Search

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

buy product rate cards or sell product rate cards

- > ID
- Name
- External Name
- Service Type Category allows you to locate a product rate card by a service category
- Plan Type

# To Create a Product Rate Card

1. On the *Product Rate Cards list* page, click the **Create New** button. The *Rate Card Details* page will appear.

* Name:	* Service Type Select Service Type Category 💌 Category:	
Buy: Sell 💌	Default Markup (%):	Create

Figure 56. The Rate Card Details page

- 2. Enter the internal name for the product rate card in the *Name* field.
- 3. Enter the name of the product rate card to display externally to customers in the *External Name* field.
- 4. Select whether the product rate card is a buy or sell product rate from the Buy drop list.
- 5. Select the Service Type Category of the product rate card from the drop list.
- 6. Enter a default percentage to mark up all service and equipment charges on the product rate card in the *Default Markup (%)* field.
- 7. Click the **Create** button to create the product rate card. The *Rate Card Details* page will expand to show additional options to create rates.

Rate Card Details						
Product rate card o	details -					
* Name:	My Test Product Rate Card	* Service Type	Telstra 3G Mobile	Date Created:	16 Aug 2012	
* External Name:	My Test Product Rate Card	Category:	40	Created By:	Emersion Support	
Buy	Sel	Detaut Hankup (%).	10	Date Modified Modified By: * Saleale From Approvel Status:	16 Aug 2012 Emersion Support	Save
Rates under this F	Rate Card					Back Add Rate Export Rates
Rate	B ID ≫	Product ID Prod	uct Name	Markup (%)	Price per Unit	Тах
			Nothing Found			
[			1			0

Figure 57. The *Rate Card Details* page showing the additional rate options

8. Click the **Back** button to return to the *Product Rate Cards list* page.

## To Set a Rate against a Product

1. On the *Rate Card Details* page in the *Rates Under This Rate Card* section, click the Add Rate button. The *Rate Card Details* page will expand to show the fields to set the product rate.

ate Card Details					
roduct rate card d	etails				
* Name: * External Name: Buy:	My Test Product Rate Card My Test Product Rate Card Sell	* Service Type Tetstra 3G Mobile Category: Defeutt Markup (%): 10	Date Created 1 Created By: E Date Modified 1 Modified By: E * Sateale From Approvel Status:	6 Aug 2012 imersion Support 6 Aug 2012 imersion Support Dratt	Save Back
ates under this R	ate Card				
Produc Please er Markup (% Price per Uni * Gty Tao	Select Product  ter either a Markup (%) or Price per Unit belov  ter either a Markup	w.			Save Rote
Rate	ID 🎖 Product ID	Product Name	Markup (%)	Price per Unit	Тах
		Nothing Found			
		1			

Figure 58. The Rate Card Details page showing the additional rate field

- 2. Select the *Product* to set the rate against from the drop list. All products associated with the selected service type will be shown.
- 3. Enter the percentage to mark the product in the Markup (%) field.
- 4. Alternatively, enter the Price per Unit.
- 5. Select the Tax applicable to the product.
- 6. Click the **Save Rate** button. The rate will be saved and appear in the table under the *Rates Under This Rate Card* section.

ate Card Details						
roduct rate card d	etails					
* Name: * External Name: Buy:	My Test Product Rate Card My Test Product Rate Card Sell	* Service Type Telst Category. Default Markup (%): 10	ra 30 Mobile	Date Created: 16 A Created By: Eme Date Modified: 16 A Modified By: Eme * Saleale From: Approval Status: Dre	Aug 2012 rsion Support Aug 2012 rsion Support	Save
ates under this R	ate Card					Back Add Rate Export Rates
Rate ID ∛	Product ID	Product Name	Markup (%)	Price per Unit	Тах	
111415	1704249	Telstra Mobile Bar Premium SMS	25		Australian GST	Edit Rate
			1			50 100 150 20

Figure 59. The *Rate Card Details* page showing the rate

# To Edit a Product Rate

1. On the *Rate Card Details* page in the *Rates Under This Rate Card* section, click the **Edit Rate** link of the required tariff in the table. The *Rate Card Details* page will expand to show the fields to edit the product rate.

ate Card Details						
roduct rate card d	letails					
* Name: * External Name: Buy:	My Test Product Rate Card My Test Product Rate Card Sell	* Service Type Category: Default Markup (%):	Telstra 3G Mobile	Date Created: Created By: Date Modified: Modified By: * Saleale From: Approval Status:	16 Aug 2012 Emersion Support 16 Aug 2012 Emersion Support Draft V	Save Back
(ates under this R	ate Card					
Produc Please e Markup (% Price per Un * Ot Ta 1 Results Found	t: Telstra Mobile Bar Premium S riter either a Markup (%) or Price t t t t t t t t t t t t t t t t t t t	per Unit below			(	Save Rate
Date ID X	Drodust ID	Broduct Name	Morton (9)	Drice per Unit	Tau	
111415	1704249	Telstra Mobile Bar Premium SMS	25	Price per unit	Australian GST	Edit Rate
	d		1		Lasarentiistation	50 100 150 2

Figure 60. The *Rate Card Details* page showing the rate fields

- 2. Edit the product rate information in the corresponding fields as required.
- 3. Click the **Save Rate** button. The rate will be saved and appear in the table under the *Rates Under This Rate Card* section.

# To View or Edit a Product Rate Card

Modifying a product rate card will not change any existing charges that have been invoiced to a customer. If you require a customer to be re-invoiced with updated product rates, please contact the Emersion support team.

1. On the *Product Rate Cards list* page, click the product rate card link in the *ID* column of the list. The *Product Rate Card Details* page will appear showing the selected product rate card with all existing information.

a blain ar	DSI Dreduct Boto Cord	PPD Commiss True Contra PDT Da		Data Occate to 2	0.4.2000		
* Name: External Name: Buy:	DSL Product Rate Card	RRP 'Service Type Optus RBT De Category: RRP Default Markup (%):	la	Date Created 2 Created By: E Date Modified 2 Modified By: E *Saleale From: [ Approval Status; ]	Oct 2009 mersion Systems Oct 2009 mersion Systems Draft		
							Back
es under this F Results Found Rate ID ❤	ate Card	Product liame	Markuo (%)	Price per Unit		Tax	Add Rate Export Rates
es under this F Results Found Rate ID V	rate Card Product ID 1101	Product Name	Markup (%)	Price per Unit	Australian GS	Tax	Add Rate Export Rates
tesults Found Rate ID ¥ 2991 2992	tate Card  Product ID  1101  1251	Product Name DSL Early Contract Termination Entry Level DSL High Use Charge	Markup (%)	Price per Unit 136.03031 0	Australian OS Australian G	Tax ST ST	Add Rate Export Rates Edit Rate Edit Rate
es under this F Results Found Rate ID ¥ 2991 2992 3581	rate Card  Product ID  1101  1251 1001	Product Ilame DSL Early Contract Termination Entry Level DSL High Use Charge DSL Standatone New Setup	Markup (%)	Price per Unit 136.03091 0 90	Australian GS Australian G Australian G	Tax ST ST	Add Rate Export Rates Edit Rate Edit Rate Edit Rate
Results Found Results Found Rate ID ¥ 12991 12992 13581 13582	Product ID 1101 1251 1001 1002	Product Name DSL Early Contract Termination Entry Level DSL High Use Charge DSL Standalone New Setup DSL Standalone Port Setup	Markup (%)	Price per Unit 136.03061 0 90	Australian OS Australian OS Australian OS Australian OS	Tax ST ST ST ST	Add Rate Export Rates Edit Rate Edit Rate Edit Rate Edit Rate
as under this F Results Found Rate ID 22991 12992 13581 13582	tate Card  Product ID  1101  1251  1001  1002  1003	Product Name DSL Early Contract Termination Entry Level DSL High Use Charge DSL Standalone New Setup DSL Standalone Churs Setup DSL Standalone Churs Setup	Markup (%)	Price per Unit 136.09031 0 90 90 50	Austrelian OS Austrelian OS Austrelian OS Austrelian OS Austrelian OS	Tax ST ST ST ST ST ST	Add Rate Export Rates Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate
es under this F Results Found Rate ID 22992 13581 13582 13584	Product ID 1101 1251 1001 1002 1003 1004	Product Ilame DSL Early Contract Termination Entry Level DSL High Use Charge DSL Standalone New Setup DSL Standalone Churn Setup DSL Standalone Relocate Setup	Markup (%)	Price per Unit 136.00031 0 90 90 50 90 90	Australian OS Australian OS Australian OS Australian OS Australian OS	Tax ST ST ST ST ST ST	Add Rate Export Rates Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate
es under this F Results Found Rate ID >> 02991 02992 03581 03582 03583 03584 03585	Product ID 1101 1251 1002 1003 1004 1150	Product Name DSL, Early Contract Termination Entry Level DSL High Use Charge DSL Standalone New Setup DSL Standalone Port Setup DSL Standalone Relocate Setup DSL Standalone Relocate Setup DSL Order Concellation prior to PONR.	Markup (%)	Price per Unit 136.08081 0 90 90 50 50 18.13636	Australian GS Australian GS Australian GS Australian GS Australian GS Australian GS Australian GS	Tax ST ST ST ST ST ST ST ST	Add Rate Export Rates Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate Edit Rate

Figure 61. The Product Rate Card Details page

- 2. Enter or modify the product rate card information in the fields in the *Product Rate Card Details* section.
- 3. To set product rates, see the previous section.
- 4. Click the **Save** button to save the changes made to the product rate card. A message will appear at the top of the page stating the product rate card was saved.
- 5. Click the **Back** button to return to the *Product Rate Card list* page.

# **Bolt Ons**

A Bolt On is an addition to a service plan that allows you to provide savings to your customers for a particular service usage, or tariff, type. For example, 50 free SMSs or 2GB data on a mobile phone service. A bolt on *Bonus* can be defined to provide a block of free usage as a dollar value amount, usage time, data limit, or usage units. Bolt ons can also be used to override the normal rates set in linked the service plan's rate card.

Buy bolt ons define the bolt on bonuses and costs you receive from your upstream service providers, which are linked to buy service plans. Sell bolt ons must be linked to a buy bolt on as well as a sell service plans. A bolt on may be attached to multiple service plans. A service plan may be linked to multiple bolt ons. When a service is provisioned, you will be able to select which bolt on to activate against the service plan, depending on the bolt on behaviour set up.

(j)	Bolt ons must be configured specifically against a tariff, or tariff group, of a telephony service type. To have bolt ons set up for your telephony service, contact
•	the Emersion Support team.

#### **Bolt On Groups**

Bolt ons of selected service types (i.e. mobile phone services) can be grouped together in a *Bolt On Group.* Each bolt on of the group is still linked to the service plan. However, when the service is provisioned, only one bolt on from the bolt on group will be allowed to be activated against the service. Please contact the Emersion sales team if you require more information about bolt on groups and services.

### **Bolt On Charging Profiles**

There are many methods to apply bolt on pricing and bonuses. The flexibility available in the system can cater to almost any bolt on requirement. Some basic bolt on charging profiles are shown below.



The customer will be charged the bolt on access fee per period, and then all usage associated with the bolt on tariff will be at no charge.

Time / Usage



The customer will be charged a bolt on fee the first time the bolt on usage is used, and receive free usage up to a maximum value, after which the usage will charged at an excess rate.



The customer will be charged the bolt on access fee per period, and receive a block of free usage at the start of each period. After the free usage amount is reached, the usage will be charged at a normal rate up to a maximum value, after which the usage will be at no charge.



The customer will be charged the bolt on access fee per period, and the usage will be charged at a normal rate up to a maximum value, after which the usage will be at no charge.

# **To Display Bolt Ons**

1. Select **Packages and Plans** > **Management** > **Bolt Ons** from the **Menu.** The *Bolt Ons list* page will appear showing a list of existing bolt ons.

ustomers	Billing Services Packa	ges and Plans Products Report	Finance Events Ac	lmin						
lanageme	nt Catalogue Management									
Package Pl	ans Service Plans Rate Cards	Service and Equip Rate Cards Product Prici	ng Bott Ons Bott On G	roups Time Tables	Contracts					
Bolt On	S		a second	21. VV.V						
Exte	ID:Name:	Service Type: 21 N2 00 Telstra	otus Mobile 3G Mobile PSTN (eBili)		Status: Al Aratic Pending Approved Saleable		Plan "	Type: Sell Plans Buy Plans	Search Create	Clear
ID 💝	Name	External Name	Service Type	Time Period	Tariff	Pro Rata	Access Fee	Buy or Sell	Status	Created
100211	3G Cap - 500MB	3G Cap - 500MB	M2 / Optus Mobile	Per Month	Standard GPRS 1	Yes	0.00	Sell	Approved	16 Jun 201
100214	3G Cap - 2GB	3G Cap - 2GB	M2 / Optus Mobile	Per Month	Standard GPRS 1	Yes	0.00	Sell	Approved	16 Jun 201
100216	3G Cap - 300MB	3G Cap - 300MB	M2 / Optus Mobile	Per Month	Standard GPRS 1	Yes	0.00	Sell	Approved	16 Jun 201
100517	MBB - Usage 6GB - 2011 01	Mobile Broadband - Usage 6GB	M2 / Optus Mobile	Per Month	Mobile Broadband Usage	Yes	40.86	Sell	Approved	24 Jan 201
100617	MBB - Usage 3GB - 2011 01	Mobile Broadband - Usage 3GB	M2 / Optus Mobile	Per Month	Mobile Broadband Usage	Yes	27.23	Sell	Approved	25 Jan 201
100618	MBB - Usage 1GB - 2011 01	Mobile Broadband - Usage 1GB	M2 / Optus Mobile	Per Month	Mobile Broadband Usage	Yes	18.14	Sell	Approved	25 Jan 201
100619	MBB - Usage 200MB - 2011 01	Mobile Broadband - Usage 200MB	M2 / Optus Mobile	Per Month	Mobile Broadband Usage	Yes	13.59	Sell	Approved	25 Jan 201
		Teleformer oppletenden en een nederaartek en		1		1			50	

Figure 62. The Bolt Ons list page

### Search

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

- > ID
- > Name
- External Name
- Service Type Category allows you to locate a bolt on by a service category
- Plan Type buy bolt ons or sell bolt ons

# To Create a Bolt On

1. On the Bolt Ons list page, click the Create New button. The new bolt on page will appear.

	* Service Type:	M2 / Optus Mobile 💌		
	Buy or Sell:	Sell 💌		
	Bolt On Category:	Local Calls 🛛 💌		
	* Tariff:	Select a Tariff	*	
17.00				Submit
				« Back
		* Service Type: Buy or Self Bolt On Category: * Tariff:	* Service Type: [M2.7 Jptus Moole ] Buy or Selt Sell Bolt On Category: Local Calls * Tariff: Select a Tariff	* Service Type Mc2 / Optus Mobile V Buy or Sett: Sett Sett Bott On Category: Local Calls V * Tarriff: Select a Tarriff V

Figure 63. The *new bolt on* page

- 2. Enter the internal name for the bolt on in the *Name* field.
- 3. Enter the name of the bolt on to display externally to customers in the *External Name* field.
- 4. Enter a Reference Name for the bolt on, if required.
- 5. Enter a *Reference Key* for the bolt on, if required.
- 6. Enter a Description of the bolt on. This description is optional and only for internal use.
- 7. Select the *Service Type of* the bolt on from the drop list. Only telephony service types (e.g. landline, PSTN, mobile VOIP etc) that have been enabled to use bolt ons will display.
- 8. Select whether the bolt on is a buy or bolt on from the *Buy or Sell* drop list.
- 9. Select the type of bolt on from the Bolt On Category drop list. Options available are:
  - Local Calls
  - Blackberry
  - Instant Messaging
  - Wireless Connect
  - > Voicemail
  - Mobile Data
  - National Calls
  - International Calls
  - Mobile Calls
  - > SMS
- 10. Select the *Tariff* type to apply the bolt on usage against. This list will only show the tariffs enabled to use bolt ons.



11. Click the **Submit** button to create the bolt on. The *Bolt On Management* page will expand to show additional fields to configure the bolt on.

Bolt On Manage Bolt On Details	ment								
ID: Name External Name: Reference Name: Reference Key: Description:	101916 My Test Bot On My Test Bot On My Test Bot On	Service Type: Buy or Sell Bot On Category: Tariff: Does Bot On Require Provisioning Key for Suppler:	Tetstra 30 Mobile 🔍 Self Mobile Data 💌 Data 💌	* Saleable From Saleable To: Approval Statut	Draft 💌				
Sahin and Arrace	Faas	······································	matian						
Setup Fee Access Fee Time Period	Per Hour	Bonus Type Bonus Bonus	No Bonus V						
First BotOn instance Fee Pro Rata	0 No	Maximum Unit Type:	Dollars V						
		Charge Usage Before Maximum Normal Rate \$	No Charge 💉	Charge Excess After Maxanum Excess Rate \$	Charge Excess at Ra	lecard Rate 💌			
		Charge Increment	Save	Charge Increment	Can	cel			
Time Table	re Herarchy	Teritt Select							
Tariff ID ∛	Teriff	Profile How Te	riff is Billed 1 Nothi	ime Band ng Found	Tiered Rate	Tax	In Cap	Valid Date	Option
Service Plan B	olt On			1					
10	Ser	vice Plan Name		Service Plan	Vanity Name			Behavic	sur
			Nothi	ng Found					
Bolt On Groups	58								
1 Results Found	Group Id		Name of Group			Ser	vice Type Name		
100001		TestT30M	104000 1140 10000	Telstra 30	Mobile			9	0 100 150 200

Figure 64. The Bolt On Management page showing additional fields

- 12. Select whether the bolt on requires provisioning from the *Does Bolt On Require Provisioning* drop list.
- 13. If the bolt on requires provisioning, enter the bolt on key, or service ID, required by your upstream provider in the *Provisioning Key for Supplier* field.
- 14. Enter the date the bolt on is available in the *Saleable From* field. A calendar tool will appear to allow you to select the required date. The bolt on will not be able to be linked to a service plan until the date selected.
- 15. If required, enter the date the bolt on should no longer be available in the *Saleable To* field. A calendar tool will appear to allow you to select the required date. The bolt on will not be able to be linked to a service plan after the date selected. Once the date has been reached, the bolt on will be grandfathered.
- 16. Select the Approval Status from the drop list. Options include:
  - Draft indicates the bolt on is being finalised
  - Pending indicates the bolt on is pending review and ready for approval
  - Approved approved for sale
- 17. Enter a once off fee to charge when the bolt on is activated or provisioned in the Setup Fee field, if required.

- 18. Enter the bolt on access fee, excluding tax, in the Access Fee field, if required,
- 19. If a bolt on access fee is being charged, select the frequency the system should charge the bolt on access fee from the *Time Period* drop list. Options include:
  - per hour
  - per day
  - per week
  - per month.
- 20. To charge a fee only when a customer uses the bolt on usage for the first time, enter the amount, excluding tax, in the *First Bolt On Instance Fee* field.
- 21. Select whether the bolt on's initial access fee is pro-rated for part of a billing period, (i.e. depending on the day in the billing cycle the bolt on is activated) from the *Pro-Rata* drop list.
- 22. Select the bolt on *Bonus Type* from the drop list. Options available are:
  - No Bonus no free usage will be applied
  - At Start the free usage applies at the beginning of the usage period
  - After Max the free usage applies once a maximum usage amount has been reached.
- 23. Enter the bonus usage amount in the Bonus field.
- 24. Select the type of bonus usage that is applied in the *Bonus Unit Type* drop list. The options available will vary depending on the tariff the bolt on is associated with. Options available are:
  - Dollars free usage is applied to rated usage charges
  - Seconds free usage is applied to seconds of usage time
  - Kilobytes free usage is applied to KBs of data usage
  - Units free usage is applied to instances of the usage
- 25. Enter a maximum limit for the usage. This effects how the usage is charged around any bonus usage applied.
- 26. Select the type of usage applied to the maximum limit in the *Maximum Unit Type* drop list. Options available are:
  - Dollars the maximum is applied to rated usage charges
  - Seconds the maximum is applied to seconds of usage time
  - Kilobytes
     the maximum is applied to KBs of data usage
  - Units the maximum is applied to instances of the usage
- 27. Select how the system should charge for usage that occurs before the maximum usage limit is reached from the *Charge Usage Before Maximum* drop list. Options available are:
  - No Charge the usage is not charged
  - Charge at Normal Rate the usage is charged at the rate set in the Normal Rate fields (below)
  - Charge at Ratecard Rate the usage is charged at the regular rate as set in service's rate card.
- 28. If usage that occurs before the maximum limit is charged at the normal rate:
  - a. Enter the amount to charge per time interval, excluding tax, in the *Normal Rate (\$)* field (e.g. \$1.40 per minute).
  - b. Enter the time, in seconds, to charge the *Normal Rate,* in the *Per* field.
  - c. Enter the amount of time, in seconds, the usage charge is broken down by in the *Charge Increment* field (e.g. \$1.40c per minute, with a charge interval of 1 will result in the system charging 1/60<sup>th</sup> of the price for each second of usage).
- 29. Select how the system should charge for usage that occurs after the maximum usage limit is reached from the *Charge Usage After Maximum* drop list. Options available are:
  - No Excess Charge the usage is not charged
  - Charge Excess at Excess Rate the usage is charged at the rate set in the Excess Rate fields (below)
  - Charge Excess at Ratecard Rate the usage is charged at the regular rate as set in service's
- 30. If usage that occurs after the maximum limit is charged at an excess rate:
  - a. Enter the excess amount to charge per time interval, excluding tax, in the *Excess Rate* (\$) field (e.g. \$1.40 per minute).
  - b. Enter the time, in seconds, to charge the *Excess Rate,* in the *Per* field.
  - c. Enter the amount of time, in seconds, the excess usage charge is broken down by in the *Charge Increment* field (e.g. \$1.40c per minute, with a charge interval of 1 will result in the system charging 1/60<sup>th</sup> of the price for each second of usage).
- 31. Click the **Save** button to save the bolt on information entered. A message will appear at the top of the page stating that the bolt on was saved.

#### To Create a Bolt On Rate Override

>

A bolt on rate override will supersede the configured tariffs' regular rates, as set in the rate card linked to the service plan that the bolt on is also linked to. This will allow you to provide a bonus or discount for the usage associated with the bolt on as well as other discounted rates for other usage associated with the service.

- 1. On the *Bolt On Management* page in the *Plan Bolt On Rate Override* section, select the tariff required from the *Select Tariff* drop list. The system will check the tariff table and display the *Add Tariff* button beside the *Select Tariff* drop list.
- 2. If the tariff selected has tariffs below it in the tariff table hierarchy, another drop list will appear beside the tariff selected containing all *child* tariffs.

Time Table:	None	*	Tariff:	Global Roaming	~	Global Roaming Inbound 🔽	< Add Tariff
ariff Structur	e Hierarchy						
Tariff II	) ×	Tai	iff	Profile		How	fariff is Billed

Figure 65. The Plan Bolt On Rate Override section showing the child tariffs

Select the child tariff required from the next drop list if required. The system will check the tariff table and display the *Add Tariff* button beside the drop list.

If the child tariff selected has further tariffs below it in the tariff table hierarchy, another drop list will appear beside the child tariff containing all *child* tariffs.

3. Select tariffs to display the tariff drop list(s) until the *Add Tariff* button is beside the tariff you wish to set. You can set the rate against a tariff at any level of the tariff table hierarchy required.

4. Click the Add Tariff button. The Create New Rate Override for: <tariff> window will appear.

Create New Rat Valid Date From :	e Override For : Global Roamin	ı Inbound		
Step 1 Simple Cap 💌	Min Price Price \$\$	Price Interval Charge Interval	Max Value Max Type Dollars 💌	In Cap
lote :			Add Another Rate Step	
	Cancel			Save Bolt On Rate

Figure 66. The Create New Rate Override For <tariff>window

- 5. Select the rating method to use for the tariff from the drop list under *Step 1* (see the *Rating Methods* section on page 49 for more information). Options available are:
  - pass-through
  - markup %
  - discount %
  - flat charge
  - > rate per
  - excess
  - simple cap
  - capped
  - flagfall + markup %
- 6. Depending on the rating method selected, the fields on the *Create New Rate Override* window will be updated to allow the various rating method parameters to be set.
- 7. Set the rating method parameters in the corresponding fields.
- 8. To set up another rating tier for the *rate per*, *excess*, *simple cap*, or *capped* rating methods, click the **Add Another Rate Step** link. The *Create New Rate Override* window will be updated to show an additional set of rating method fields.

Select the rating method for the next rating tier and enter the rating method parameters required.

To set further rating tiers, click the Add Another Rate Step link below the last rate defined.

To remove an existing rating tier, click the **Remove Last Step** link.

- 9. Select whether the bolt on rate override usage type is included in the cap included value of the service plan.
- 10. Enter any notes or other information about the rate override in the **Note** field.
- 11. Click the **Save Bolt On Rate** button to save the tariff rate. The *Bolt On Management* page will appear, showing the tariff set in the rate table with any other bolt on rate overrides set.

## To View or Edit a Bolt On

1. On the *Bolt Ons list* page, click the bolt on link in the *ID* column of the list. The *Bolt On Management* page will appear showing the selected bolt on with all existing information.

		2401-0115-01 844		2511011.70-e-e-e-					
Ð	100205	Service Type	M2 / Optus Mobile 💌	* Saleable From	1 Apr 2010				
Nome:	MBB - Usage 008	Buy or Selt	Sell	Saleable To:	26 Jan 2011				
External Name:	Mobile Broadband - Usage 008	Bot On Category:	Wireless Connect	Approval Status:	Grandfathered				
Reference Name:		Tariff	Mobile Broadband	Approved Date:	1 Apr 2010				
Reference Key:		Does Bolt On	No 💌						
Description		Require Provisioning?							
		Provisioning Key for Suppler							
ebup and Access	Fees	Bonus/Usage Infor	mation				2		
Setup Feet	0	Bonus Type	AtStart 💌						
Access Fee:	13.59	Bonus	1000000						
Time Period	Per Month 👻	Boreus (Ind Turne	Kilobytes 💌						
rst BotOn instance	0	Builds or a type.	Considera Pall						
Fee		Macomum	1000000						
Pro Rate.	Yes 💌	Maximum Unit Type:	Kilobytes 💌						
		Charge Usage Before Maximum	Charge at Normal Rate M	Charge Excess After Maximum	Charge Excess at Exce	os Rate 💌			
		Normal Rate \$	0.10	Excess Rite \$	0.1				
		Per	1000	Per:	1000				
		Charge Increment	1	Charge Increment	1				
			E State Stat				12		
			save		Cence	1			
an Bolt On Rate	e Override 👔		Save		Cance	14			
an Bolt On Rate	e Override 🚺 None 💌 Tarif	e Select V	Save		Cance	7			
an Bolt On Raty Time Table. [ Tarit! Structure	e Override 🕖 None 💌 Tarif Hierarchy	t Select 💌	Save		Cance	7			
an Bolt On Rate Tine Table [ Taritt Structure Taritt ID &	e Ovérride 🕢 None 💌 Tarif Henarchy Tariff Profil	e Now Tar	Sive If is Billed	Time Band	Cance Tiered Pate	Tax	n Cap	Valid Date	Option
an Bolt On Rate Time Table Taritr Structure Taritr ID S	e Override 📦 None 💌 Tarit Henrachy Taritt Profil	e How Tar	Save #TisBilled Not	Time Band ving Found	Cence Tiered Pate	Tax	in Cap	Valid Date	Option
an Bolt On Rate Time Table Tarit? Structure Tarit? ID V	e Override 📦 None 💌 Tarit Henrachy Taritt Profil	e How Tar	Save aff is billed Not	Time Band sing Found	Cance	Tax I	in Cap	Valid Date	Option
an Bolt On Rate Time Table: Taritr Structure Taritr ID S rvice Plan Bolt	e Override 📦 None 💌 Tarit Henrachy Taritt Profit	e Kow Tar	Save aff is Billed Not	Time Band ving Found	Tiered Pate	Tax	in Cap	Valid Date	Option
In Bolt On Rate Time Table   Taritr Structure Taritr 10 %	e Override 📦 None 💌 Terri Henwohy ] Tacritt Profit t On	e Kow Tar	Save aff is Billed Not	Time Band ving Found	Tiered Rate	Tex: 1	in Cap	Valid Date	Option
Time Table: Time Table: Taritt Structure Taritt 10 % rvice Pilan Bolt	e Override 📦 None 💌 Tarit Henwchy Taritt Profit t On Service Plan	e How Tar	Save #FisBilled Not	Time Band ving Found 1 Service Plan V	Tiered Rate	Tax	in Cap	Valid Date Behavi	Option
an Bolt On Rate Time Table: Taritt Structure Taritt 10 % Rvice Pilan Bolt	e Override 📦 None 💌 Terif Herwichy Tariff Profil t On Service Plan	r Select 💌 e How Tar	aff is Billed Not	Time Band ving Found 1 Service Plan V ving Found	Tiered Pate	Tax	n Cap	Valid Date Behavi	Option
In Bolt On Rab Time Table: Taritr Structure Taritr ID & Invice Plan Bolt ID	e Override  None None Territ Hersarchy Tartit Profil t On Service Plan	r Select 💌 e How Tar	Save #T is Billed Not	Time Band ving Found 1 Service Plan V ving Found 1	Tiered Pate	Tax I	n Cap	Valid Date Behav	Option
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Ine Table: Time Table: Tarit? Structure Tarit? Structure Tarit? To Structure Tarit? To Structure Tarit? To Structure Tarit? To Structure Tarit? Structure Tarit? Structure Tarit? Structure Tarit? Structure Tarit? Structure Tarit? Structure Tarit? Structure Tarit? Structure	e Override 📦 None 💌 Terri Hensechy Tarriff Profile t On Service Plan	e How Tar	eff is billed Not	Time Band tring Found 1 Service Plan V tring Found 1	Tiered Pate	Tax I	n Cap	Valid Date Behav	Option our

Figure 67. The Bolt On Management page

- 2. Enter or modify the bolt on information in the fields in the Bolt On Details section as required.
- 3. Modify the Setup and Access Fees, and / or change the Bonus/Usage Information as required
- 4. To set rate overrides for tariffs, see the previous section.
- 5. Click the **Save** button to save the changes made to the bolt on. A message will appear at the top of the page stating the bolt on was saved.
- 6. Click the **Cancel** button to return to the *Bolt Ons list* page.

## **Bolt On Groups**

Depending on the service type, bolt ons can be grouped together to only allow one bolt on in *the Bolt On Group* to be added to a service at a time

### To Display Bolt On Groups

1. Select **Packages and Plans** > **Management** > **Bolt On Groups** from the **Menu.** The *Bolt On Group Management list* page will appear showing a list of existing bolt on groups.

ustomers	Billing Services	Packages and Plans	Products R	teport F	inance I	vents Admin						
lanagement	Catalogue Manager	nent										
Package Plans	Service Plans Rate	Cards Service and Equ	ip Rate Cards Pi	roduct Pricin	ng Bolt On	Bott On Group	Time Tables	Contracts	91 1			
Bolt On Gr	oun Management		in ist				-					
Dontonion	oup management											
Service 4 Results Foun	Type: 740 70 ptus Mobil Telstra 3G Mobil Telstra PSTN (eE										Search Create New	Clear
ID 💛		Name of Group			Servic	e Type for Group			Number of	Members ir	Group	
100001	TestT3GM			Telstra 30	) Mobile		ŀ	1				
100002	test Telstra PSTN Bo	otton group		Telstra PS	STN (eBill)		1	)				
100004	My test bolt on grou	р		Telstra 30	> Mobile		1	)				
100005	Optus Bolt On Group	р		M2 / Optu	is Mobile			3				
	1					1					50 10	0 150 200

Figure 68. The Bolt On Group Managemnt list page

#### Search

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

Service Type allows you to locate a bolt on group by a service category

#### To Create a Bolt On Group

1. On the *Bolt On Group Management list* page, click the **Create New** button. The *Add* New *Bolt On Group* page will appear.

Add New Bolt Or	n Group			
* Provide a name for the group:				
* Select a service type to choose bolt	Choose Service Type 💌			
Once you p able to add	rovide the above details and click ' bolt ons to the group	Add Group" you will be taken to t	the edit screen to be	
		A	dd Group	

Figure 69. The Add New Bolt On Group page

- 2. Enter the name for the bolt on group in the *Provide a Name* field.
- 3. Select the *Service Type of* the bolt on group from the drop list. Only service types set up to use bolt on groups will be available.
- 4. Click the **Add Group** button. A message will display prompting you to confirm that you want to create the new bolt on group.

		>
Are you sure you wish t	to create this g	roup?
		[]

Figure 70. The Bolt On Group message

5. Click the **Yes** button. The page will update to show a list of existing bolt ons set up for the selected bolt on group service type.

Edit Bolt On Group		
The selected bolt ons	are grouped together	Save Selected Bolt Ons to Group
in a way that only one	of them can be active	Return to List
against an end user s	ubscription of this	
service type at any gr	ven unie.	
Group Name: Mobile Bol	t On Group	
Service Type: M2 / Optus	s Mobile	
Soloot Bolt Ope for		
Group:		
Wireless Broadband - Sell	~	
MBB - Usage 0GB		
MBB - Usage 1GB		
MBB Lisage 3GB		
MBB - Usage 6GB		
3G Cap - 500MB		
3G Cap - 2GB		
3G Cap - 300MB		
MBB - Usage 3GB - 2011 01		
MBB - Usage 1GB - 2011 01		
MBB - Usage 200MB - 2011 01		
MBB - Usage 6GB - 2011 01	~	

Figure 71. The Bolt On Group page showing the list of bolt ons

- 6. In the Select Bolt Ons for Group list, select the bolt ons required to be grouped together by highlighting the bolt on name in the list. Select multiple bolt ons by holding the CTRL key down on your keyboard and clicking the bolt on name.
- 7. Once all required bolt ons are selected in the list, click the **Save Selected Bolt Ons to Group** button. A message will appear at the top of the page stating the bolt ons were saved to the group.
- 8. Click the **Return to List** button to return to the *Bolt On Group Management list* page.

#### To View or Edit a Bolt On Group

1. On the *Bolt Ons Group Management list* page, click the bolt on group link in the *ID* column of the list. The *Edit Bolt On Group* page will appear showing the selected bolt on group with all existing bolt ons.

The selected bolt ons are grouped together in	Save Selected Bolt Ons to Group
a way that only one of them can be active	
against an end user subscription of this	Return to List
service type at any given time.	
Group Name: Mobile Bolt On Group	
Service Type: M2 / Optus Mobile	
Select Bolt Ops for	
Group:	
Mreless Broadband - Sell	
188 - Usage 0G8	
IBB - Usage 1GB	
188 - Usage 2GB	
188 - Usage 3GB	
188 - Usage 6GB	
G Cap - 500MB	
IG Cap - 2GB	
G Cap - 300MB	
188 - Usage 3GB - 2011 01	
188 - Usage 1 GB - 2011 01	
188 - Usage 200MB - 2011 01	
/BB - Usage 6GB - 2011 01	

Figure 71. The Edit Bolt On Group page

- 2. In the Select Bolt Ons for Group list, select the bolt ons required to be added to the bolt on group, or de-select the bolt ons required to be removed from the bolt on group together by clicking the bolt on name in the list.
- 3. Click the **Save Selected Bolt Ons to Group** button to save the changes made to the bolt on group. A message will appear at the top of the page stating the bolt on group was saved.
- 4. Click the Return to List button to return to the Bolt Ons Group Management list page.

## **Time Tables**

Time tables are linked to rate cards to define alternative rates for different times of day and / or days of the week. Multiple time bands can be set up in each time table. Different rates can be defined in the rate card for each time band. For example, you can apply discounted phone call rates for off peak times, or weekends, or a combination of these. To attach a time table to a rate card and sets for each time band, see the *To Set Rates against a Tariff with a Time Table* section on page 60.

## To Display Time Tables

1. Select **Packages and Plans** > **Management** > **Time Tables** from the **Menu.** The *Time Tables list* page will appear showing a list of existing time tables.

Customers Billing Management Catalo	Services Packages	and Plans	Products	Report	Finance	Events Adn	in				_	_
Package Plans Servic	e Plans Rate Cards Se	rvice and Equi	p Rate Cards	Product P	ricing Bolt	Ons Bott On Gro	ps Time Tables	Contracts				
Time Tables												
ID:							Status	Pending Approved Saleable Active Grandfathered				
											-	
3 Results Found											Search Create Ne	Clear
3 Results Found		Name				Timebands		Created		[	Search Create Ne	Clear
3 Results Found ID ≫ 100004	DSL Peak/OffPeak	Name			2	Timebands		Created	15 Apr 2010 Approve		Create Ne Create Ne A Delete	Clear
3 Results Found 10 ♥ 100004 100234	DSL Peak/OffPeak WeekendTime	Hame			2 3	Timebands		Created	15 Apr 2010 Approve 13 Jul 2012 Draft	Status ed	Create Ne Create Ne Delete Delete	Clear
3 Results Found 10 ♥ 100004 100234 100235	DSL Peak/OffPeak WeekendTime MyTime	Hame			2 3 2	Timebands		Created	15 Apr 2010 Approve 13 Jul 2012 Draft 24 Jul 2012 Draft	 Status ed	Search Create Ne Delete Delete Delete	Clear

Figure 72. The *Time Tables list* page

#### Search

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

- > ID
- Name
- Status all, draft, pending, approved, saleable, active and grandfathered

## To Create a Time Table

1. On the *Time Tables list* page, click the **Create New** button. The *Create New Time Table* page will appear.

reate New Time	e Table
* Time Table Name:	(
* First Band Name:	
* Service Type [ Class:	Select Service Type Class 💌
Service Type [ Category:	Select Service Type Category 💙
Approval Status:	Draft 👻

Figure 73. The Create New Time Table page

- 2. Enter the Time Table Name.
- 3. Enter the name for the first time band in the *First Band Name* field. All days and times will be initially set to this time band.
- 4. Select the *Service Type Class* to associate with the time table from the drop list. Available options are:
  - Data
  - > Telephony.
- 5. Select the *Service Type Category* of the time table. The options will vary depending on the service type class selected and the service types enabled in the system.
- 6. Select the Approval Status from the drop list. Options include:
  - > Pending indicates the time table is pending review and ready for approval
  - Approved ready to be applied to a rate card
- 7. Click the **Create** button to create the time table. The *Create Time Table* page will expand to show additional fields and the *Schedule*.

Details																								
	* Name:	Weekend	Saver		1								Approval S	atus: Dra	ift 💌	]								
																						Save 1	fimetable Na	ame
																							Back	
Bands																								
1 Results I	Found																							
	ID	*				Hame Coverage Total Hours							Action											
100248			W	eekend Sav	/er						100%				16	68								
												1										Ĩ	50 100	160 200
	and the second second	-			1																			100 [[200]]
* New Bar	nd Name:				_																_			
_																							Add	
Schedule																								
	12am -	1am -	2am -	3am -	4am -	5am -	6am -	7am -	8am -	9am -	10am -	11am -	12pm -	1pm -	2pm -	3pm -	4pm -	5pm -	6pm -	7pm -	8pm -	9pm -	10pm -	11pm -
		1	J		J			Juni		Tourn		1.pm	- ipin	spin	opin	-q/m	spin	opin	- ipin	opin	opin	Topin	- npm	
								-					<u> </u>											
10.0																								
WED																								
(тни )															1									
1201				1																				
	<u> </u>				<u> </u>			<u> </u>							<u> </u>									i – – – I
341															-									
SUN																								
Week	end Saver																							
Inform	ation																							
Select a	a band from	n the bottor	n. then clic	k on the de	sired time:	s. To select	t a day, clic	k on the d	av name.															
							1.000															Save	e Schedule	

Figure 74. The *time table Details* page showing the additional fields

The *Schedule* shows a grid of days and times. Initially, all days and times are set to the first time band created.

- 8. To set up further time bands, enter the name for the next time band in the *New Band Name* field. Click the **Add** button. The added time band will appear in the list of time bands.
- 9. To delete a time band, click the **Delete** link in the *Action* column of the required time band. You will only be able to delete time bands that have no days and times associated with them in the *Schedule*.
- 10. To set the days and times of each time band:
  - a. Select the required time band name in the legend that appears below the *Schedule*. The time band name will become highlighted.
  - b. Click the day and time to include in the time band in the schedule's grid. The *Schedule* will show the selected day and time block in the colour associated with the time band in the legend.



c. Click all days and times required in the time band schedule.

Figure 75. The time table page showing the Schedule

- 11. Click the **Save Schedule** button to save the time table schedule. The list of bands will be updated to show the coverage (percentage of time) and total hours or each time band.
- 12. Click the Save Time Table Name button to save the time table details.
- 13. Click the **Back** button to return to the *Time Tables list* page.

## To View or Edit a Time Table

1. On the *Time Table list* page, click the time table link in the *ID* column of the list. The *Time Table details* page will appear showing the selected time table with the time bands and schedule.



Figure 76. The Time Table details page

- 2. Enter or modify the time table Name or Approval Status as required.
- 3. Add or remove time table bands as required.
- 4. Modify the *Schedule* by clicking the days and times to include in the time band in the schedule as required
- 5. Click the **Save Schedule** button to save the updated time table schedule. The list of bands will be updated to show the coverage (percentage of time) and total hours or each time band.
- 6. Click the Save Time Table Name button to save the updated time table details.
- 7. Click the **Back** button to return to the *Time Tables list* page.

## To Delete a Time Table

1. On the *Time Table list* page, click the **Delete** link in the *Action* column of the time table you wish to delete. The system will delete the time table and display a message at the top of the page stating the time table was deleted.

# Contracts

A Contract defines the minimum length of time the services provided within a package plan should be retained by the customer, and the behaviour the system should perform in the event the service is cancelled, the contract is broken, or the customer changes the service's package plan. A default contract can be set up on a package plan (see the *Create Package Plan* section on page 25). When the package is sold, the default contract will be bound to the *package subscription* and will remain active against the customer even if the customer changes their package plan.

You can apply or cancel a contract against a package subscription at any time, even if the package is already active. To apply a contract against a package subscription, you must first create the required contract, and ensue the required package plan is set up in the contract's package pool, which define the package plans the contract can be set against (see *Package Pools* below).

A contract can also be used to provide credits, or discounts, to the customer over the life of the contract. Note that the contract credit is separate to a package chain discount where discounts are applied against the package regardless of a contract being active. It is possible to create both a contract with credits as well as a package chain discount against a package subscription.

## Package / Contract Pools

A package pool, or contract pool, is a group of package plans that a contract can associated with. The contract will only be able to be associated with package plans defined in the contract's pool. Each package plan in the contract pool is assigned a *weighting*, which is a figure between 1 and 100 that allows the system to determine the plan change type as an upgrade (i.e. the new package has a higher weighting than the current package plan), or crossgrade (i.e. the new package has an equal weighting to the current package plan). If the customer changes their package plan, the system will automatically apply the plan change method according to the plan change type (i.e. upgrade, downgrade or cross grade) as determined by the package plan's weighting.

Plan	Weighing
DSL Plan1 – 2GB	20
DSL Plan 2 – 3GB	40
DSL Plan 3 – 10GB	60
DSL Plan 4 – 5GB Peak / 5 GB Off-peak	60
DSL Plan 5 – 10 GB	80

For example, a contract with the following contract pool for DSL broadband services:

DSL Plan1 plan has the lowest *weighted* value. If this plan is migrated to any other plans in the contract pool, the plan change will be an *Upgrade*.

If DSL Plan 5 is migrated to DSL Plan 3, the plan change will be considered a *Downgrade*, as DSL Plan 3 has a lower weighted value (60) than the DSL Plan 5 (80).

If DSL Plan 3 is migrated to DSL Plan 4, this would be considered a *Crossgrade,* as the weighted value of both these plans is the same (60).

### Plan Change Method

You can define the action the system performs if the customer changes their plan while on the contract. For each plan change type, the system can be set to break the contract and apply the contract break out fee, charge a plan change fee, or perform no action.

## **Contract End Methods**

The contract end method defines the action the system performs when the contract ends at the end of the contract period as expected i.e. without being cancelled. A number of options are available as follows:

>	No contract	the contract will simply be cancelled and all services associated with the package plan are not affected. The package subscription will not be affected. However, any contract credits set up will no longer apply.
	Cancel service	at the end of the contract, the package subscription will be cancelled, along with all services linked to the package plan.
	Renew contract	the contract is automatically renewed for the same length of time with the same conditions and credits.
>	Forced migrate	the package plan will be changed, or migrated, to a new package plan, which is defined with this contract end method. The contract is not renewed or applied to the new package plan.

## **Contract Break Fees**

If the customer breaks a contract attached to their package subscription, the system can automatically apply a contract break out fee, or cancellation fee. The contract's *Break Out Method* defines how the system should calculate the fee to charge the customer. You can define a maximum breakout fee to apply to use as a safeguard against charging exorbitant fees.

The break out methods available are:

$\succ$	Fee	a flat amount will be charged
	Pro rata fee	the fee calculated is pro-rated based on the initial contract length and how long the contract was held. For example, a twelve month contract that is cancelled after 8 months, with \$100 pro rata fee, will attract a break out fee of $33.633$ (i.e. $(12-8 = 4) / 12$ months * \$100)
	Tiered	a range of months and breakout fees associated with each range are defined to charge different fees based on how long the contract was held (see below)
>	Remaining value (initial)	the fee is calculated based on the access fees of the package plan the customer purchased initially and the number of months remaining of the contract (i.e. if the customer has changed plans from when they initially commended the service, the fee is based on the initial package plan, not the new or changed package plan)
	Remaining value (current)	the fee is calculated based on the access fees of the package plan the customer is currently on, and the number of months remaining of the contract

#### **Tiered Fees**

*Tiered fees* allow you to define break out fees against a range of months to apply if the contract is broken. For example, if the contract is broken within 4 months of the contract commencement charge a certain fee, if the contract is broken after 4 months of the contract commencement but within 8 months, charge a lesser fee, and if the contract is broken after 8 months but before the end of the contract, charge a smaller fee etc. Multiple *Tiered Rates* can be defined to allow different sets of fees and months to be charged for different break out methods.

## **To Display Contracts**

1. Select **Packages and Plans** > **Management** > **Contracts** from the **Menu.** The *Contract Types list* page will appear showing a list of existing contracts.

nagemen	nt Catalo	gue Management								
ckage Pla	ans Service	Plans Rate Cards	Service and Equ	ip Rate Cards Pr	duct Pricina Bo	t Ons Bolt On Gro	ups Time Tables	Contracts		
ontract 7	Types									
0	ontract ID:									
	Name:									
Exter	rnal Name:									
										Search
									C	
									Create	e New Contract Type
	2 75								Create	e New Contract Type
Results F	Found								Create	e New Contract Type
Results F	Found		Name		5V		External Name	e	Creat	e New Contract Type
Results F ID 29	Found	th Contract	Hame		12 Month	Contract	External Nam	9	Creat	Length
Results F ID i29 i30	Found 12 Mon ADSL 6	th Contract Month Contract	Name		12 Month 6 Month	Contract Contract	External Nam	9	Creat	Length Months
Results F ID 29 30 31	Found 12 Mon ADSL 6 NetSticl	th Contract Month Contract ( 24mth Contract	Hame		12 Month 6 Month NetStick	Contract Contract 24mth Contract	External Ham	9	Creat	Length Months Months
Results F 10 529 530 531 532	Found 12 Mon ADSL 6 NetSticl NetSticl	th Contract Month Contract 24mth Contract 42mth Contract	Hame		12 Month 6 Month NetStick NetStick	Contract Contract 24mth Contract 24mth Contract	External Ham	9	Create 12 6 M 24 24	Length Months Months Months Months
Results F 10 i29 i30 i31 i32 i335	Found 12 Mon ADSL 6 NetSticl NetSticl ADSL 1	th Contract Month Contract (24mth Contract \$1D 24mth Contract 2 month	Hame		12 Month 6 Month NetStick NetStick ADSL 12	Contract Contract 24mth Contract 24mth Contract month	External Ham	9	Create 12 6 M 24 24 12	Length Months Months Months Months Months
Results F 10 29 30 31 32 335 337	Found 12 Mon ADSL 6 NetSticl ADSL 1 ADSL 1 24mths	th Contract Month Contract (24mth Contract (\$10 24mth Contract 2 month - Remaining Value	Name		12 Month 6 Month NetStick ADSL 12 24 Month	Contract Contract 24mth Contract 24mth Contract month - Remaining Months	External Nam	9	Create 12 6 M 24 24 24 24 24 24	Length Months Months Months Months Months Months
Results F 10 29 30 31 32 335 337 338	Found 12 Mon ADSL 6 NetSticl ADSL 1 ADSL 1 24mths 36mths	th Contract Month Contract (24mth Contract (\$10 24mth Contract 2 month - Remaining Value - Remaining Value	Hame		12 Month 6 Month NetStick NetStick ADSL 12 24 Month 36 Month	Contract Contract 24mth Contract 24mth Contract month s - Remaining Months s - Remaining Months	External Ham	9	Creat 12 6 M 24 24 24 24 24 36	Length Length Months Mo

Figure 77. The Contract Types list page

#### Search

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

- Contract ID
- Name
- External Name

### **To Create a Contract**

1. On the *Contract Types list* page, click the **Create New Contract Type** button. The *Create Contract Type* page will appear.

		Breskout
* Contract Type Name:		breakout
* External Name:		Break out method: Fee
Description:		Break out Fee: 0.00
		Maximum methodi Not Used 💌
		Plan Change
AL epoth:		I lograde method Break Contract
Longer		Cross wethout Break Contract
Length Unit:		Cross method.
Tax: Australian GST 🚩		Downgrade method: Elreak Contract
		Special Contract Features
		Per Perind Credit: 0.00
		(For each package period processed, whist on contract, this amount (excs.) ) will be applied Create Contract Type
kage Pool		(For each paokage period processed, whilst on contract, this amount (exus) () will be applied) Create Contract Type Cancel
skage Pool ect a Package Plan from the available list, then click A known in this Contract Pool	dd. All weight values must be between 1 (Lowest) to 99 (h	(pror each package period processed, whilst on contract, this amount (excs) ) will be applied) Create Contract Type Cancel eightest)
kage Pool ct a Package Plan from the available list, then click A cages in this Contract Pool m	dd. All weight values must be between 1 (Lowest) to 99 (h	eightest)  Available Packages Filter  Name
kage Pool ct a Package Plan from the available list, then click A cages in this Contract Pool <b>ID</b> ackages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Name Weight	ID     ID     Idame      ID     Idame
kage Pool ct a Package Plan from the available list, then click A kages in this Contract Pool 0 0 9ackages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Name Weight	ipor each package penoa processea, whilst on contract, this amount (excs) () will be appled)  Create Contract Type Cancel  aightest)  Available Packages Filter
kage Pool ct a Package Plan from the available list, then click A kages in this Contract Pool Dockages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Hame Weight	ightest)  Available Packages Filter  Available
kage Pool at a Package Pian from the available list, then click A ages in this Contract Pool backages in this pool	dd, All weight values must be between 1 (Lowest) to 99 (h Name Weight	eightest)
kage Pool t a Package Plan from the available list, then click A ages in this Contract Pool D ackages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Name Weight	eightest)      Available Packages Filter      Create Contract Type Cancel      intermediate Contract Contract Type Cancel      intermediate Contract Contrect Contract Contermed Contract Contract Contrect Contract Contrec
kage Pool It a Package Plan from the available list, then click A kages in this Contract Pool <b>ID</b> ackages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Name Weight	(ror each package period processed, whilst on contract, this amount (excisit) will be appled)      (reate Contract Type     Cancel      (ancel
(age Pool t a Package Plan from the available list, then click A ages in this Contract Pool ackages in this pool	dd. All weight values must be between 1 (Lowest) to 99 (h Name Weight	(ror each package period processed, whilst on contract, this amount (excisit) will be appled)      (reate Contract Type     Cancel      (ancel

Figure 78. The Create Contract Type page

- 2. Enter the Contract Type Name.
- 3. Enter the name of the contract to display externally to customers (e.g. on invoices etc) in the *External Name* field.
- 4. Enter the *Description* of the contract. This description is optional and only for internal use.
- 5. Enter the contract Length.
- 6. Select the contract length type from the *Length Unit* drop list. Options available are either *Months* or *Years*.
- 7. Select the tax to apply to the contract's fees (i.e. breakout or plan change fees etc) from the *Tax* drop list.
- 8. Select the contract break out fee, or cancellation fee; from the *Break out method* drop list. Available options are:
  - Fee
  - Prorata Fee
  - Tiered
  - Remaining Value (initial)
  - Remaining Value (current).
- 9. For Fee and Prorata Fee break out methods, enter the amount to charge, excluding tax, in the Break out Fee field.
- 10. For the *Tiered* break out method, you need to select which tier structure to use. However, you must first create the tier (see step 19).
- 11. Select the maximum break out fee to charge from the *Maximum method* drop list. Available options are:
  - > Fee charges the maximum fee
  - Not used no maximum break out fee is applied.
- 12. Select the plan change fee to charge for a plan upgrade from the *Upgrade method* drop list. Available options are:
  - > Fee the defined plan upgrade fee will be applied
  - Break Contract Fee the contract will be broken and the contract break out fee will be charged
  - Not used no plan upgrade fee is applied
- 13. For the Fee upgrade method, enter the amount to charge, excluding tax, in the Upgrade Fee field.
- 14. Select the plan change fee to charge for a plan crossgrade from the *Cross method* drop list. Available options are:
  - Fee the defined plan cross fee will be applied
  - Break Contract Fee the contract will be broken and the contract break out fee will be charged
  - Not used no plan cross grade fee is applied
- 15. For the Fee cross grade method, enter the amount to charge, excluding tax, in the Cross Fee field.
- 16. Select the plan change fee to charge for a plan downgrade from the *Downgrade method* drop list. Available options are:
  - Fee the defined plan down grade fee will be applied
    - Break Contract Fee the contract will be broken and the contract break out fee will be charged
  - Not used no plan downgrade fee is applied
- 17. For the *Fee downgrade* method, enter the amount to charge, excluding tax, in the *Downgrade Fee* field.

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- 18. Enter any credit, or discount amount to apply to the package plan while the contract is active, excluding tax, in the *Per Period Credit* field. This amount will be credited to the customer during each billing period (i.e. per month etc).
- 19. If the *Tiered* break out method was selected in step 10, the *Create Contract* page will be updated to show the Tiered Fees section to allow tiered break out fees to be set up.

		es	iered Fees
	nis Contract Type.	owing Tiered Rates can be used in t	The followi
		New Tiered Rate	Ne
	10		i
Remove this Tiered Rate	Add another Tier		Name:
	Fee:	Within: Months	2020201

Figure 79. The Tiered Fees section

- a. Click the New Tiered Rate button. Additional fields will become visible.
- b. Enter the name of the tiered rate in the *Name* field.
- c. Enter the first range of months for the tier in the *Within <x> Months* field.
- d. Enter the fee to apply for the first range of months in the *Fee* field.
- e. To add more ranges for the tiered rate, click the **Add another Tier** button. Another set of tier fields will become visible. Enter the range of months and the fee per step c and d.
- f. To delete a range from the tiered rate, click the **Remove** button beside the range you wish to delete. A message will appear prompting you to confirm that you want to delete the tier. Click the OK button to confirm, or click the Cancel button.
- g. To add another tiered rate (i.e. set of ranges and fees), click the **New Tiered Rate** button. Repeat steps b to e to set up the new tiered rate information.
- h. To delete a tiered range, click the **Remove this Tiered Rate** button. A message will appear prompting you to confirm that you want to delete the tiered rate. Click the OK button to confirm, or click the Cancel button
- i. To use a set Tiered Rate, under 'Break out Method' (or whatever method you have selected for Tiered Rates), choose the Tiered Rate required.
- j. Once you have created the required tiered rate, select the required tier rate name from the *Break out Rates* drop list, below the *Break out method* field.
- 20. In the *Package Pool* section, tick the check box beside each package plan ID you wish to associate with the contract from *the Available Packages* list (i.e. on the right side of the page). Multiple package plans can be selected.

All package plans can be selected by ticking the check box in the list's heading row. The check boxes beside all package plans will be ticked.

21. Click the **<< Add** button. The selected package plans will be made available in the *Packages in this Contract Pool* list (i.e. on the left side of the page).

			- 10	 090400-000-099	
] ID	Name	Weight	<u> </u>	ID	Name
100684	ADSL2 Shaped 5G & STS Bundle - Standard & STS Bundle - Standard	10	. 844	100693	ADSL2 Shaped P/OP 150B/200B & STS Bundle - Standard & STS Bundle - Standard
100685	ADSL2 Shaped 10G & STS Bundle - Standard & STS Bundle - Standard	20	Remove »	100694	ADSL2 Shaped P/OP 25GB/25GB & STS Bundle - Standard & STS Bundle - Standard
100686	ADSL2 Shaped 15G & STS Bundle - Standard & STS Bundle - Standard	20		100695	ADSL2 Shaped P/OP 40GB/40GB & STS Bundle - Standard & STS Bundle - Standard
100687	ADSL2 Shaped 25G & STS Bundle - Standard & STS Bundle - Standard	30		100696	ADSL2 Shaped 5G & STS Bundle - Preferred
100688	ADSL2 Shaped 40G & STS Bundle - Standard & STS Bundle - Standard	40		100697	ADSL2 Shaped 10G & STS Bundle - Preferred
100689	ADSL2 Shaped 60G & STS Bundle - Standard & STS Bundle - Standard	50		100698	ADSL2 Shaped 15G & STS Bundle - Preferred
100690	ADSL2 Shaped 80G & STS Bundle - Standard & STS Bundle - Standard	60		100699	ADSL2 Shaped 25G & STS Bundle - Preferred
	1 Monte and a for contraction of the set	kan sa	1	100700	ADSL2 Shaped 40G & STS Bundle - Preferred
				100701	ADSL2 Shaped 60G & STS Bundle - Preferred
				100702	ADSL2 Shaped 80G & STS Bundle - Preferred

Figure 80. The Package Pool section showing package plans

- 22. Enter the *Weight* of each package plan in the field beside the package plan in the *Packages in this Contract Pool* list. These weights will determine whether plan changes between the nominated package plans are upgrades, cross grades or downgrades.
- 23. To remove a package from the contract package pool, tick the check box beside the package plan in *the Packages in this Contract Pool*. Multiple package plans can be selected. All package plans can be selected by ticking the check box in the list's heading row. The check boxes beside all package plans will be ticked.

Click the **Remove** >> button. The selected package plans will be made removed from the *Packages in this Contract Pool* list.

- 24. Click the **Save** button to save the contract details. A message will appear at the top of the page stating the contract type was created.
- 25. Once the contract is saved, the *Contract End Method* drop list will appear. Select the required contract end method from the drop list. Available options are:
  - No Contract
  - Cancel Service
  - Renew Contract
  - Forced Migrate.
- 26. Click the **Save** button to save the contract end method details. A message will appear at the top of the page stating the contract type was created.
- 27. Click the **Back** button to return to the *Contract Types list* page.

## To View or Edit a Contract

1. On the *Contract Types list* page, click the contract link in the *ID* column of the list. The *Contract Types detail* page will appear showing the selected contract with all details set up.

Contract Types Contract Type #2840							^
* Contract Type Name:	My Contract	0		-Breakout-			
* External Name:	My Contract				Break out meth	hod: Tiered	
Description:	My Contract				Break out rat	ates: None selected 💌	
					Maximum meth	hod: Fee	
				-Plan Chang	16		
் Length:	: 18				Upgrade meth	hod: Not Used	
Length Unit:	Months 💌				Cross meth	hod: Fee	
Tax	Australian GST 💌				Cross F	Fee: 45.00	
Contract End Method:	No Contract				Downgrade meth	hod: Fee 💙	
					Downgrading F	Fee: 80.00	
				-Special Co	ntract Features	3	
					Per Period Cre	edit: 5.98	
				[Fo	or each package j	period processed, whilst on contract, this amount (exCST) will be applied]	
						Save	
						« Back	
Package Pool							
Select a Package Plan from the a	vailable list, then click Add. All weight value	es must be between 1 (Lowest) to 99 (height	est)				
Packages in this Contract Po	ol				Available Packa	ages Filter	_
D ID	Name		Weight		D ID	Name	
100684 ADSL2 Shaped	d 5G & STS Bundle - Standard & STS Bund	le - Standard	10	bbA »	100693 A	ADSL2 Shaped P/OP 15GB/20GB & STS Bundle - Standard & STS Bundle - Standard	
100685 ADSL2 Shaped	d 10G & STS Bundle - Standard & STS Bun	die - Standard	20	Remove »	100694 /4	ADSL2 Shaped P/OP 25GB/25GB & STS Bundle - Standard & STS Bundle - Standard	
100686 ADSL2 Shaped	d 15G & STS Bundle - Standard & STS Bun	die - Standard	20		100695 /	ADSL2 Shaped P/OP 40GB/40GB & STS Bundle - Standard & STS Bundle - Standard	
D 100687 ADSL2 Shaped	d 25G & STS Bundle - Standard & STS Bun	die - Standard	30		100696 /4	ADSL2 Shaped 5G & STS Bundle - Preferred	
TI 100698 ADSI 2 Shener	A 400 8 STS Rundle Standard 8 STS Run	dia Standard	40		100697 /	ADSL2 Shaped 10G & STS Bundle - Preferred	*

Figure 81. The Contract Types detail page

- 2. Enter or modify the contract details, such as name and length, as required.
- 3. Select or modify the *Contract End Method* if required.
- 4. Enter or modify the break out method and fees, plan change fees, and credits to apply.
- 5. Add or remove tiered rates as required.
- 6. Modify the *Package Pool* by adding or removing package plans from the list as required.
- 7. Click the **Save** button to save the updated contract details.
- 8. Click the **Back** button to return to the *Contract Types list* page.

# **Further Information**

For further information about Emersion's Invoice functions, or other Emersion system modules, please contact Emersion.

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

#### **Emersion**

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### **Emersion Web Site:**

www.emersion.com.au

## **Glossary of Terms and Abbreviations**

**ACMA** means the Australian Communications and Media Authority, a Commonwealth regulatory authority for telecommunications and radio communications established under the Australian Communications Authority Act 1997. The ACMA Controls Access Numbering, radio spectrum, enforces Carrier license conditions and service provider rules.

**ACCC** means the Australian Competition and Consumer Commission, a Commonwealth regulatory body with responsibilities derived from the *Trade Practices Act 1974*. The ACCC enforces the trade practises act (TPA) and its related codes.

**ACIF** means the Australian Communications Industry Forum. ACIF is a member-funded organisation established to facilitate communications self-regulation in the interests of both industry and consumers. ACIF is responsible for developing standards, codes of practice and service specifications.

ACIF Code means an industry code registered with the ACMA under the *Telecommunications Act* 1997.

Access Number means an IP Address, PSTN, ISDN, Mobile or VOIP number, or the like, for providing access to a Network.

Access Port means a physical connection at the network boundary that is to be connected to an Access Tail.

Access Tail or Access Link means a transmission service for carrying communications by means of guided or unguided electromagnetic or optical energy, to deliver Voice Traffic or Data Bandwidth to a Customer Premises or Customer Equipment.

Access Transmission Rate or Access Rate means, in respect of an Access Port, the maximum data transfer capacity (measured in kilobits per second) that the Access Port has been configured.

Account means a billing account held with a party which is identifiable by an Account Number.

**Account Number** means the numbers in the system, or other parties billing system, against which Charges for Products or Services, products or services are charged.

Account Type means the category of an account, either an individual or organisation.

Account Profile means a grouping of accounts for reporting purposes, as well as for invoice template setup and event mapping.

Account Period means the frequency that the account is invoiced e.g. monthly, quarterly etc.

**ADSL** means Asymmetrical Digital Subscriber Line, a technology for the transmission of digital information at high bandwidths on twisted metallic pairs.

**AEST** means Australian Eastern Standard Time.

**API** means an Application Programming Interface to Emersion's or other parties' software Systems.

B2B means Business to Business.

**B-End** or **B-Party** means the Customer specified second or other site, or terminating party to a transaction such as a telephone call.

**Bandwidth** means the Access Transmission Rate relative to the size of the Access Tail and / or the Access Port.

**Bar** means blocking the supply of one or more services (e.g. on a phone line) so that the End user is unable to acquire the blocked service(s), **Barring** has a corresponding meaning.

Bill Issue Date is the date that any bill or invoice shall be issued to the Account.

Billing Day means the date set for each Customer at which the Billing Period Starts.

Billing Dispute means a dispute relating to a charge or an invoice issued.

**Billing Period** means the period from the Billing Day to the next Billing Day as defined in months by for each Account.

Bill Run is a group of the Account invoices processed on the same day.

**Bit** means the smallest unit of information, which is a computational quantity that can take on one of two values, 0 and 1.

BMS means Batch Management System, part of the Emersion Architecture.

**BPAY** means the Australian banking industry's network of electronic payment services.

**Broadband** means an always-on Broadband Service over Unconditioned Local Loop (ULL) aggregating data to/from customers to a state or national point-of-interconnect.

**Broadband Churn** means a Churn Order to transfer a Broadband Service from one service provider to another.

**Business Day** means any day from Monday to Friday (inclusive) other than a day which is gazetted or otherwise declared or made a Public Holiday.

**Business Hours** means 09:00 to 17:00 Australian Eastern Standard Time (GMT +10 hours) or Australian Eastern Daylight Saving Time (GMT +11 hours) when in effect, in Melbourne, Victoria, Australian on Business Days.

**Byte** means a sequence of 8 Bits (enough to represent one character of alphanumeric data) processed as a single unit of information.

**CA** means Customer Authorisation.

Calendar means the Gregorian calendar.

Calendar Day means the period of time commencing at midnight and ending 24 hours later.

Calendar Month means one of the twelve (12) divisions of the Calendar Year.

**Calendar Year** means the year (reckoned from January 1 to December 31) according to Gregorian calendar.

**Call** means a communication carried by a Network or a system and where the context permits, includes an attempt to establish communication.

**Call Details Record** means a data record that contains information related to a telephone call, such as the origination and destination addresses of the call, the time the call started and ended, the duration of the call, the time of day the call was made and any toll charges that were added through the network or charges for operator services, among other details of the call.

**Caller** means the person originating a call using a telecommunications service.

Cancel Order means an order created to terminate an existing service.

**Calling Line Identity** means the data generated by a network which relates to the telecommunications Service of the originating call. Also known as Calling Line Identification.

**Calling Number Display** means the option available to a customer regarding whether they would like their number to be shown or kept hidden from the party they are calling. Also known as Caller ID.

**Cardline** is an item within the system used to record any financial action, such as charges, payments, credits, fees etc that appears on a customer's invoice.

Carriage Service means a carriage service as defined in section 7 of the Telecommunications Act.

**Carriage Service Provider** or **CSP** means a carriage service provider as defined in section 87 in the Telecommunications Act.

**Carrier** means a carrier as defined in section 7 of the Australian Telecommunications Act. A Carrier is the holder of a telecommunications carrier licence in force under the Telecommunications Act.

CDR means Call Details Record.

Change Order means the option available to change an existing order.

**Churn** means the transfer (authorised or unauthorised) of a service from one Service Provider to another.

Churn CA means a Local Call Churn CA and/or a Broadband CA.

**Churn Order** means an order created where the customer wishes to transfer a Local Service and/or Broadband.

CLI means Calling Line Identity or Calling Line Identification.

Clear Business Day means a period of time commencing at 09.00 on the next Business Day.

CND means Calling Number Display.

CND Code means ACIF Code C5222: Calling Number Display as registered by the ACMA.

**Cooling Off Period** means any period available by law to a customer to rescind or otherwise avoid any agreement under which that customer agrees to acquire the Service.

Contract means a contract entered into by the party with another.

Credit means a refund to Account for a billing error or omission.

Credit Limit means the maximum amount the Account may be outstanding.

**CSG** means Customer Service Guarantee.

**Customer** means any party that acquires or purchases from another party products or services (or part thereof) and uses those services with or without The Client Authorisation. E.g. The Client is a Customer of Emersion and an End User would be a Customer of the Client, the Customer may or may not be an End User.

**Customer Authorisation** means an authorisation by the customer, or their authorised agent, containing the minimum mandatory required information as required by the relevant ACIF code.

**Customer Service Guarantee** means the *Telecommunications (Customer Service Guarantee) Standard 2000 (No. 2)* which is legislation aimed at encouraging improvements in Service and to guard against poor Service by requiring phone companies to meet minim standards for Service connection, fault rectification and appointment keeping in relation to the supply of Standard Telephone Services.

**Data** means numbers, characters, images, or other method of recording, in a form which can be assessed by a human or (especially) input into a computer, stored and processed there, or transmitted on some digital channel. Computers nearly always represent data in binary.

**Directory Listing** means a listing in a telephone directory including, but not limited to, the White Pages.

**Directory Preference** means the preference stated by the customer with respect to whether they want a Directory Listing or an Unlisted Number.

**Dispute** means any dispute or claim raised against an invoice for charges believed to be in error.

DSL means Digital Subscriber Line. See also ADSL.

DSL Tail means a DSL Access Tail

**Dynamic IP Address** means an IP Address that is not guaranteed to remain allocated to the same End User or Access Tail, and may therefore change at any time.

**DSLAM** means Digital Subscriber Line Access Multiplexer, a mechanism at a phone company's central location that links many customer DSL connections to a single high-speed line.

**EFT** means Electronic Funds Transfer.

**Email** means Electronic Mail, the system for sending and receiving messages electronically over a computer network or the Internet.

**EPS** means a system module, the Electronic Payment System, which integrates to the system to enable automated collection of payment from the customers.

**Emersion** is the system described in this user manual, which is the system used to provision and bill individual services for customers.

**End customer / Customer** means the person whose name is on the account and has authorised the provision of the Service through a Customer Authorisation.

**End User Portal (EUP)** The End User Portal is the user interface used by your end customer that allows you to offer your customers a branded web-based account management and self-care tool where your customers can securely login from your website to view & edit their account information, view invoices & service usage and make payments to you.

**Event** means a set of pre-defined triggers that automatically initiate system actions when the particular condition is detected, such as send an email when an invoice is overdue etc.

**FNN** means Service Number or Full National Number - a fully qualified (10-digits in Australia including the Area Code or other calling prefix) the telephone number which is an alphanumeric number that uniquely identifies a Service Number.

**FTP** means File Transfer Protocol.

Gaining Service Provider or GSP means the Service Provider that receives the customer's service as a result of a port or churn.

*Gigabyte* or *GB* means a unit of data where  $1 \text{ GB} = 10^9 \text{ Bytes}$ .

**GST** and **GST Law** have the same meaning as defined in *A New Tax System (Goods and Services Tax) Act 1999* (Cth), subject to any amendment to that definition made pursuant to applicable rulings, determinations or advice issued by the Commissioner of Taxation or a decision from any tribunal or court.

**Installation Charge** means a once-off charge for labour, equipment, Number connection and associated cabling to cover the expense for initial installation of the Products or Services.

**Integrated Public Number Database** means the database contemplated in schedule 2, Part 4 of the Act that contains specified customer information for all public numbers as defined in the IPND Code.

**IPND** means Integrated Public Number Database.

**IPND Code** means ACIF Code C555:2002 Integrated Public Number Database (IPND) Data Provider, Data user and IPND Manager as registered by the ACMA as amended from time to time.

**Internet** means the interconnected system of networks that connects computers around the world via the TCP/IP protocol.

Internet Access or Internet Traffic means access to Internet Content via a TCP/IP connection.

Invoice means the bill sent to customers for products and services received

**Invoice Template** means the logo, colours, billing information, and company information that appear on your invoices.

**IP** Address(es) means Internet Protocol Address(es), the Internet addressing standard which describes the address of all devices physically located within the global Internet.

**ISDN** means **Integrated Services Digital Network** means a digital transmission technique for both voice and data..

**LD** means Long Distance.

**LD Carrier** means Long Distance Carrier.

LD Churn means a change in LD Pre-selection.

**LD Reseller** means non-carrier providers of Pre-selection services, using equipment owned by existing carriers.

**Ledger** is the principal book or computer file for recording and totalling monetary transactions by account, with debits and credits etc.

**Ledger Code** is an accounting code used to record transactions depending on financial accounts involved in different transaction type, assigned to account groups such as receivables and payables etc.

Line Blocking Status means the status of a particular telecommunications Service in relation to whether it has in place a **Permanent Line Block** or enabled **CND**.

Listed Number means a telecommunications Service Number which is listed in a public number directory.

LNP means Local Number Portability.

LNP Code means ACIF C540:2006.

**Local Number Portability** Code as registered by the ACMA.

Local Call/Broadband means Local Call and/or Broadband Services.

**Local Call/Broadband Churn Reversal** means the reinstatement of a customer's Service to a Losing service Provider following an Unauthorised Local Call/Broadband Churn.

Local Call Churn means the transfer of a Local Service (including service number) between service providers.

Local Call/Broadband Churn means Local Call Churn and/or Broadband Churn.

**Local Number Portability (LNP)** means the Porting of a Service Number associated with the provision of a Local Service between different Carrier networks.

Local Service has the same meaning as given in the Telecommunications Numbering Plan 1997.

Local Time means the time in the state or territory in which the Customer Premises are located.

Long Distance means Long Distance Pre-selection.

**Long Distance Carrier** means a Carrier that provides carriage of Pre-selectable Calls originating from a Local Service.

**Long Distance Pre-selection** means the ability of a customer to automatically have their lines switched to the LD Provider of their choice for Pre-selectable calls.

Long Distance Provider means an SP that resells LD.

**Losing Service Provider** or **LSP** means the Service Provider that loses the customer's service as a result of a port or churn.

**MBps** means megabits per second - a unit of data where 1 Mbps = 1,048,576 Bits per second.

Mbyte or MB means a unit of data where 1 Mb = 1, 048,576 bytes.

**MDF** means Main Distributor Frame. This is where the incoming telephone lines from the street terminate within a building. Depending on the size of the building the MDF could be a small plastic box on the wall or a large room.

**MDU** means Multiple Dwelling Unit e.g. apartment building of more than 3 floors, or block of units greater than 10 units.

*Miscellaneous Charge* means any charge other than the core charges for a Products or Services, usually for moves, additions or changes to a Service.

**NBP** means the Network Boundary Point.

**Network Boundary Point** is the customer's first and main socket for houses, or the Main Distributor Frame for a Multi Dwelling Unit (MDU).

New Service Order means a request, made by the SP, to provision service to a customer address.

Order means one of the following:

- a) New Service Order.
- b) Churn Order.

**Order Number** means the reference number supplied to the SP following the submission of an order. Also referred to as Reference Number.

**Order Process** means the process by which you can request a Telstra service to a customer location.

**Order Reference Number** means the reference number supplied following the submission of an order. Also Referred to as Order Number.

Package Plan means a collection of one or more Service Plans grouped together and sold as a Package.

Pending Order means an order which has been submitted but not yet completed.

**Period** means the increment of time specified by Emersion during which Charges will accrue and the subsequent frequency of the Client Invoice (generally a Calendar Month).

**Ping** means a protocol that sends a message to another computer and waits for acknowledgement, often used to check if another computer on a network is reachable.

**POTS** means Plain Old Telephony Service.

**Point to Point Protocol** means protocol that allows the transport of packets between the customer and the Retail Carrier. The Retail carrier can authenticate the user with PAP or CHAP authentication.

**Pre-selectable Call** has the same meaning as given in ACIF C515:2003 Pre-selection Industry Code and includes calls from a local Service to:

- i. a geographic number or local number that is not a local call;
- ii. an international direct dial service;
- iii. operator service for which the *Telecommunication Number Plan 1997* specifies the use of a shared selectable number;
- iv. a carriage service that is both a ring back price service and an international service;
- v. a public mobile telephone service.

**Pre-selection** means the selection of a carrier for Pre-selectable Calls and includes service made available by you to a customer for a Local Service which will:

- i. permit designation by the customer of a LD Provider for that Local Service;
- ii. allow billing for Pre-selectable Calls by the Long Distance Provider;
- iii. allow billing for calls made using and Access Override Code to LD Providers;
- iv. allow the customer to change from time to time designation of their LD Provider for that Local Service.

Pre-selection Code means ACIF Code C522: Pre-selection as registered by the ACMA.

**Products** are the products sold to a customer, such as physical items like hardware, or other billable items.

**PSTN** means the **Public Switched Telecommunications Network** - A public telecommunications network for which a carrier is responsible and which provides services to the public.

**Public Holiday** means any day on which transfer activity is not available. Public Holidays will be issues via the service review on an annual basis.

**RADIUS** stands for Remote Authentication Dial-In User Service, which is a client/server protocol and software that enables remote access servers to communicate with a central server to authenticate users and authorise (authenticate) their access (by verifying user names and passwords) to the requested system or service.

Rate defines, for a given call type, what and how the system should charge for this usage.

Rate Card means a group of rates and charging metrics to be applied to the usage data.

RC means Retail Carrier.

Recurring Charge means any Charge that occurs regularly per Period.

**Relocation Order** means an order created to initiate the relocation of a customer Service to a new customer address.

**Retail Carrier** has the same meaning as a "Service Provider" as defined in section 86 of the Telecommunications Act 1997.

*Services* are the services provides to the customer, which may include land line telephony, mobile phone, pre-selection, data access etc.

Service Bolt On means a method of providing bonus features on a particular service, such as a certain amount of free usage.

Service Number means an identifier for a service, such as land line or mobile phone number.

Service Plan means a billing object that is used to control billing for a single service.

**Service Provider** means the party that is a customer of a wholesaler or aggregator (such as Telstra) that sells products and services to end customers directly or through the use of sales agents i.e. reseller of telephony and/or broadband services.

**Service Qualification** means the determination of whether means the act of checking whether a service is able to be provided.

Setup Fees means the relevant charges or fees to install or activate a service.

Simple Telephone Service means a local service which comprises a:

(a) Standard Telephone Service; and

(b) Service number

where a one-to-one relationship exists between the service number and the relevant access line to the Standard Telephone Service.

SIR's mean Service Information Records

SLA means Service Level Agreement.

SP means a Service Provider.

**Standard Telephone Service** has the meaning given by section 6 of the *Telecommunications* (*Consumer Protection and Service Standards*) *Act 1999.* 

#### Standard Time means:

(a) Eastern Standard Time (GMT +10 hours); or

(b) Eastern Daylight Saving Time (GMT + 11 hours) when in effect in Victoria.

**Static IP Address** means an IP Address that has a fixed value for the term of the individual services session of the connection.

SQ means Service Qualification.

**Supplier** means any provider of products or services to a party. Emersion is, for the purposes of this Agreement, the Supplier of Products or Services to The Client.

Telecommunications Act means the Australian Telecommunications Act 1997 (Cth).

**Telecommunications (CPSS) Act** means the Australian Telecommunications (Consumer Protection and Service Standards) Act 1999.

Telstra means Telstra Corporation Limited.

**TIO** means the **Telecommunications Industry Ombudsman** - An industry-funded independent dispute resolution service for consumers who are unable to resolve individual complaints with their telecommunications carriers and carriage service providers. The TIO manages complaints from consumers (residential and small business about telecommunications services).

TPA means the Australian Trade Practices Act 1974 (Cth).

**Trading Terms** means the terms of trade (with respect to the financial relationship) between the Client and Emersion. These may include the time to pay, Credit Limit, Security required and any other special clauses, as detailed in the MSA - Trading Terms Schedule.

**ULL** means Unconditioned Local Loop, a pair of wires (normally copper) from the Exchange to the End User Premises. A ULL is used to deliver voice services and potentially DSL or other data services to the end customer.

**ULLS** means Unconditioned Local Loop Service.

**ULLS Code** means ACIF C569: 2005 Unconditioned Local Loop Service Ordering, Provisioning, and Customer Transfer as registered by the ACMA.

**Unauthorised Broadband Churn** means a Broadband Churn Order that has been submitted without a valid CA:

- (a) which resulted from a processing error;
- (b) a CA is determined to be unauthorised

**Unauthorised Local Call Churn** means a Local Call Churn Order that has been submitted without a valid CA::

- (a) which resulted from a processing error;
- (b) where a CA is determined to be unauthorised.

**Unauthorised Local Call/Broadband Churn** means Unauthorised Local Call Churn and/or Unauthorised Broadband Churn.

**Unauthorised LD Churn** means an LD Churn that has been submitted without a valid CA as described in this manual:

- (a) which resulted from a processing error;
- (b) where a CA is determined to be unauthorised.

Unauthorised Port means a Port Order that has been submitted without a valid CA:

- (a) which resulted from a processing error;
- (b) where a CA is determined to be unauthorised.

**Unauthorised ULL Churn** means the acquisition of a new copper pair in association with a Port, Relocation or New Service Order where the order has been submitted without a valid ULL CA:

- (a) which resulted from a processing error;
- (b) where a CA is determined to be unauthorised.

**Unlisted Number** means a Service Number that the customer has requested not be listed in public telephone directory (including, but not limited to, the White Pages).

**Unwelcome Call** means the use of a Standard Telephone Service in a menacing, offensive or harassing manner, but which is not currently a Life Threatening Call, and which may be intentional on the part of the caller or unintentional.

**USB** means Universal Serial Bus, a widely used hardware interface for attaching peripheral devices.

User means a natural person or System that uses the Systems or Services.

User ID means a unique, personal, identifier of a User or System, on that System.

**User Interface or UI** means a system interface that provides access to the services and is interacted with by a natural person.

**Username** means a User ID for a natural person.

**Voice Traffic** means the load on a telecommunications device or System. Traffic is generally the movement of voice Packets or streams carrying communications by means of guided or unguided electromagnetic or optical energy.

**VOIP** means Voice Over Internet Protocol.

Wholesale Account Number means the account number between the Losing carrier and another service provider who is rebilling the customer.

WLMS means White Label Managed Service, a totally rebranded Cumulus interface.

**xDSL** is a general term for digital subscriber line (DSL) technologies. Different versions of a family of DSL technologies, such as ADSL, HDSL, SDSL, VDSL and similar solutions that provide a high bandwidth digital connection over communications cable.