



Emersion Software Systems Pty Ltd

System Training – Session 1

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Session Contents

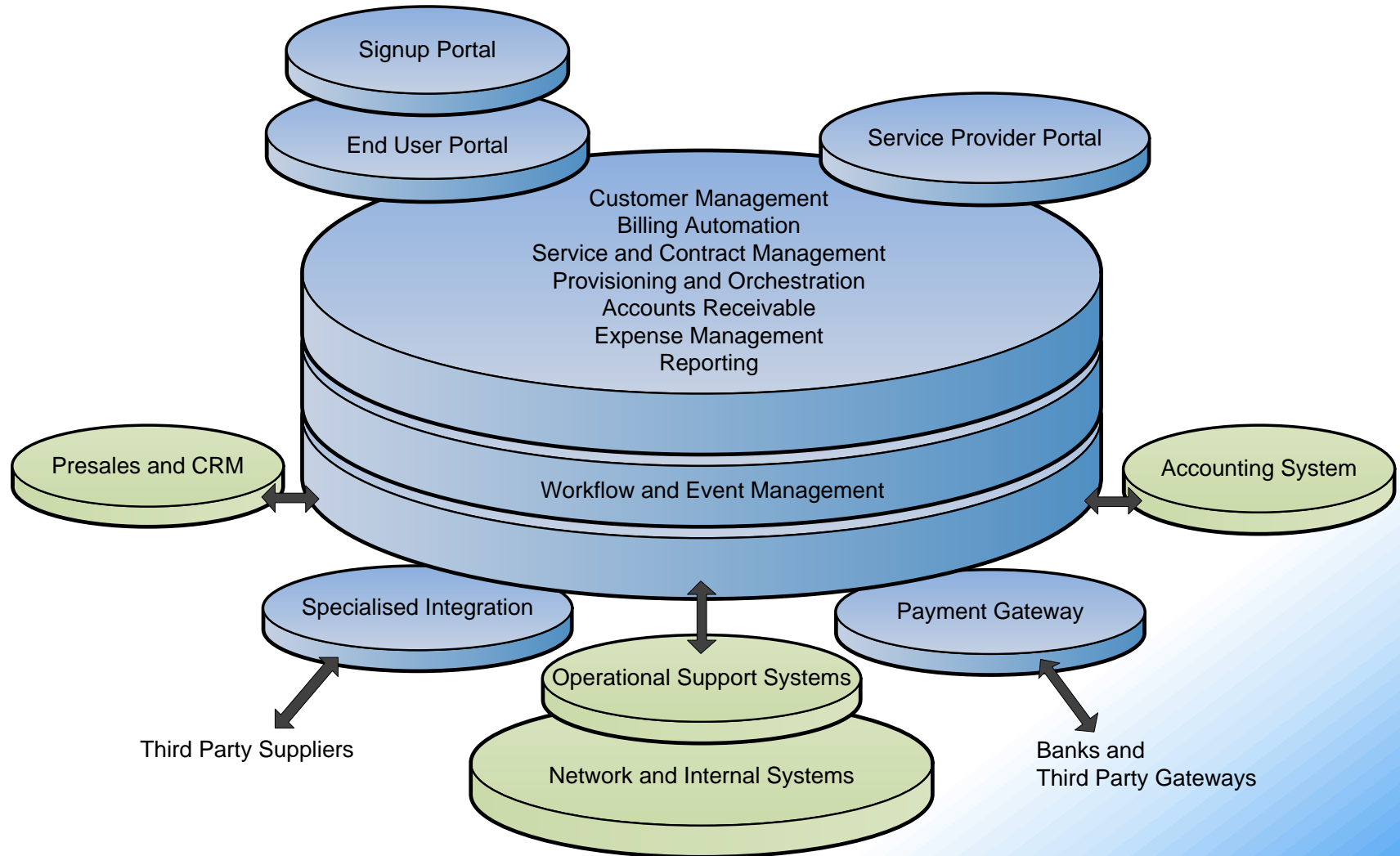


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System Overview

- Core system modules:
 - Account and customer management
 - Services and provisioning
 - Packages and plans
 - Product management
 - Finance and accounts
 - Reports
 - Events
- Batch Mediation System (BMS)
- Billing and rating engine
- Electronic Payment System (EPS)
- Operational support system (Cyclone).

System Overview



System Requirements

- Compatible Browser (Firefox, Safari, Google Chrome or Internet Explorer 9)
- Minimum 1024 x 768 Resolution
- Javascript enabled
- No Proxy Server (or if so, exception required for the system url).

Creating and Managing Accounts



- Each customer will have their own account
- An account can be of type organisation or individual
- There are special fields used to setup a new client
- There is an *account creation* wizard to help automate the process.

Creating and Managing Accounts



- When creating a new account, there are special fields which will form the basis for each account
- Select Customers > Create New Customer.

A screenshot of a web browser showing the "Cumulus - Customers - Create New Customer" form. The browser address bar shows "https://cumulus.emersion.com.au/customer/account/create". The page has a blue header with the Emersion logo and a navigation menu with links: Home, Customers, Billing, Services, Packages and Plans, Report, Finance, Events, Admin. Below the navigation menu, there are tabs for "Customer List" and "Create New Customer". The "Create New Account" section is active, showing a progress bar with steps: Create Account (highlighted), Primary Contact, Billing Contact, Secondary Contact, Payment Method, Point of Sale, and Order Package/Service. The form fields include: "Choose Account Type" (dropdown menu set to "Individual"), "Account Type" (text field with "End User"), "* Start Date" (text field with "11 Nov 2011"), "Account Profile" (dropdown menu set to "EmersionTest Default Account Profile"), "Invoice Method" (dropdown menu set to "Do Not Send" with an "Override?" checkbox), "Account Invoice Template" (dropdown menu set to "Emersion Test Invoice Layout"), "Account Billing Day" (text field with "0" and an "Override?" checkbox), "Credit Limit (\$)" (text field with "0" and an "Override?" checkbox), "Trading Due Days" (text field with "14" and an "Override?" checkbox), "Period Length Months" (text field with "1" and an "Override?" checkbox), and "Align Pkgs to Acct" (dropdown menu set to "Yes" with an "Override?" checkbox). A "Save & Next" button is at the bottom right. The footer shows "Session: 2871028 | Copyright © 2005-2011 Emersion Software Systems Pty Ltd".

Creating and Managing Accounts



➤ Invoice Method

Defines the process used to send the customer's invoices

➤ Start Date

The day the customer's account is active from, services cannot be earlier than this

➤ Account Billing Day

The customer's billing day. This is only used at account creation. The customer's initial invoice will be prorated to this day

➤ Period Length

Most customers will use monthly invoices

➤ Trading Due Days

How many days from the invoice issue date to the invoice due date

➤ Align Packages to Acct

Whether the anniversary of all packages purchased aligns to the customer's invoicing cycle.

Creating and Managing Accounts



The *Account Creation* wizard has options to:

- Create a primary contact

A primary contact is always required

- Create Billing and Secondary contact

A billing contact will be used for invoicing instead of a primary contact

- Payment Method

Where applicable, assign payment details for your new customer

- Point of Sale

Allows sales of products, such as telephones, modems etc to be created

- Order Package / Service

Enables immediate ordering of services for the new customer.

Contacts



- Each account must have a primary and a billing contact, which can be the same contact
- Each account can have multiple other contacts
- Contact information includes:
 - Personal information
 - Address details
 - Communications information
 - Privacy and verification details
- All contacts are listed on the Contacts page of the account

Overall Account Structure



Creating and Managing Accounts



- To access a new account after it has been created, select Customers > Customer List
- Click or search for the account.

A screenshot of a web browser displaying the "Cumulus - Customers - Customer List" page. The browser's address bar shows the URL "https://cumulus.emersion.com.au/customer/account/list". The page has a blue header with the Emersion logo and a search bar. Below the header is a navigation menu with links: Home, Customers, Billing, Services, Packages and Plans, Report, Finance, Events, and Admin. The "Customers" link is selected, and the "Customer List" sub-link is active. The main content area shows the details for a customer named "Joe Bloggs" (Account ID: 133449). The "Account Information" section includes fields for Account Owner, Account Type, Account Status, Account Status Reason, Start Date, End Date, Customer Since, Invoice Method, Default Account, and Invoice Template. The "Profile Information" section includes fields for Name and Description. The "Payments" section includes fields for Last Payment Date, Last Payment, Outstanding Balance, Disputed Amounts, Last Invoice Number, Last Invoice Date, and Last Invoice. The "Billing Information" section includes fields for Current Invoice, Billing Cycle, Credit Limit, and Invoice Due Days. The page also includes a "Create New Customer" link and a "Search" button.

Packages and Services



- Packages Subscriptions are what you sell to your customer, which may contain one or many services
- Allows you to view and modify the package details, services within the package, and package periods history
- You can apply discounts to the customer using the Package Chain Info
- You can Cancel or Migrate a customer's package
- Service Subscription option allows you to view and manage the customer's services, including service properties, configuration and custom rates.

Invoices and Transactions



- Invoices lists all invoices created for a customer, which may be approved or pending
- Invoices may be managed or downloaded
- Pending ledger cardlines show charges generated for the customer that have not yet appeared on an invoice
- You can create manual charges against the account e.g. for service fees or other charges or credits
- Transactions show all invoices, payments, credits, refunds and other transactions recorded against the account.

View Orders and Purchases



- Orders allow you to create a new order for your customer for a service
- Depending on the service type, the system integrates to the upstream supplier to provision the service automatically
- You choose the package to sell your customer for the required service(s)
- Purchases list all purchases made by the account for products (not services), e.g. hardware etc.
- Allows you to create a new purchase, as either an outright purchase or an installment plan.

Payment Details and Payments



- Payment Methods allow you to store your customers payment details and set up automated payment processing
- Can store credit card, bank account details for direct debit processing, and Bpay information
- You can *Receive* a payment to record a manual payment made by the customer e.g. cash, cheque, and other non-integrated payment methods
- You can *Take* a payment to process a payment from the customer using the integrate Electronic Payment System (EPS), for credit card or direct debit payment methods.

User Portal



- The system allows you to set up a User Portal for your customers to log in and view their details, invoices, usage and make payments
- You can enable or disable each customer to access your user portal
- You can set / reset the customer's username and password.

Notes



- Notes allow you to record various information against your account
- Will contain system generated notes for various actions such as when an invoice was sent, if an overdue reminder was sent, or other service provisioning messages
- You can use them to record details of phone calls or customer contacts for easy reference.

Questions?

