Emerson Software Systems Pty Ltd
System Training – Session 1

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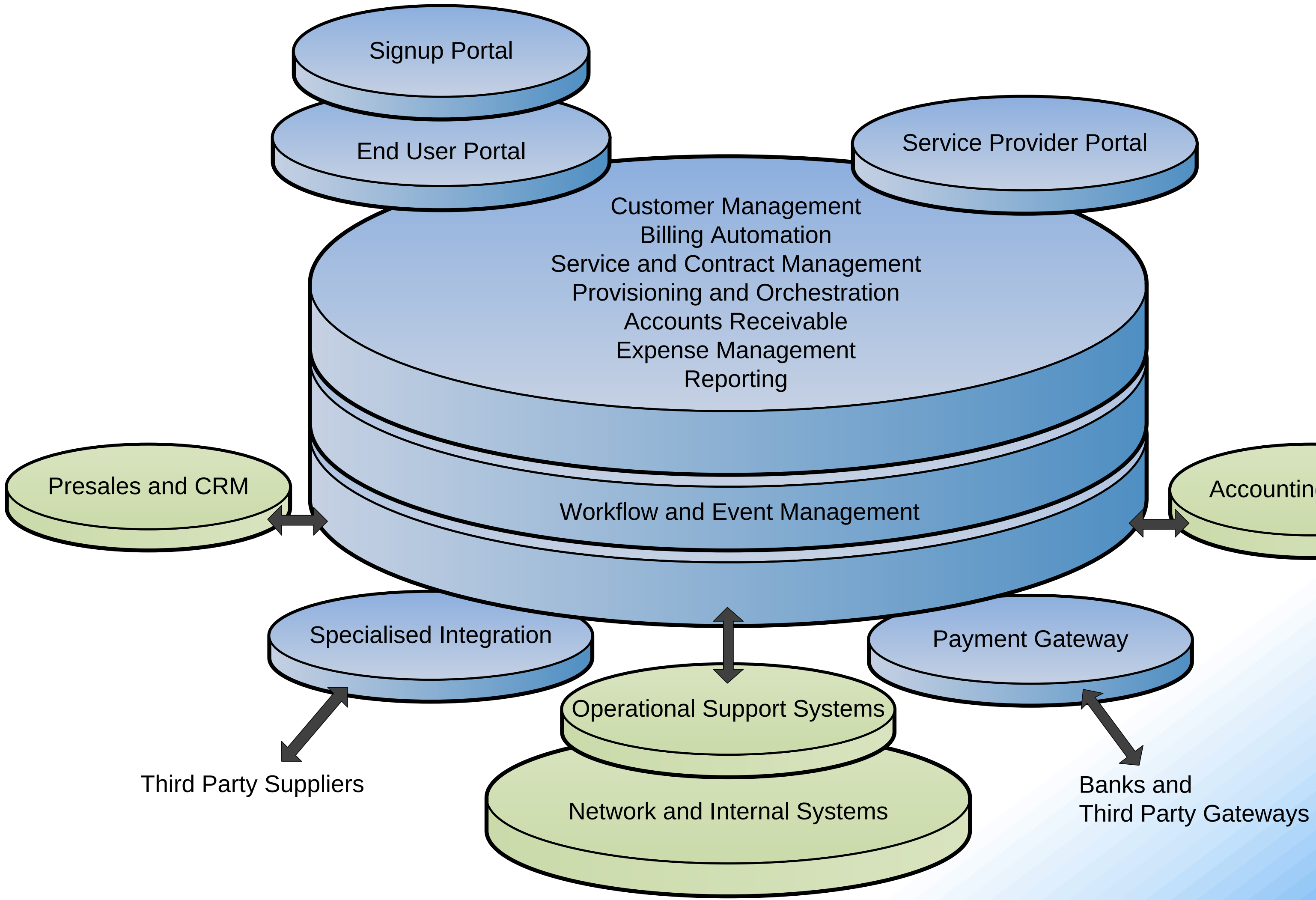
Session Contents

- Introductions
- System overview
- System basics
- Creating and managing accounts:
    - Account creation wizard
    - Contacts
    - Package and service subscriptions
    - Invoices and transactions
    - Account profiles
    - Orders and purchases
    - Payment plan
    - Payments
    - User Portal
    - Notes.

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

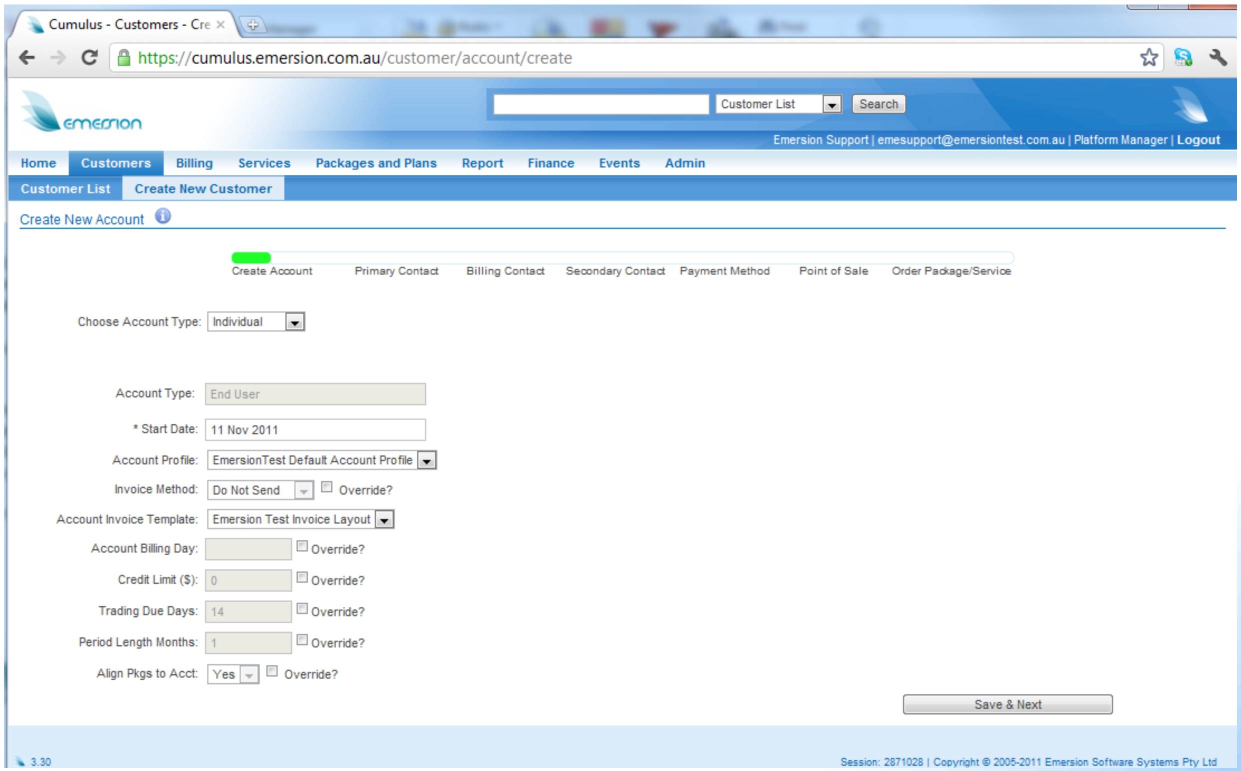
- Compatible Browser (Firefox, Safari, Google Chrome or Internet Explorer 9)
- Minimum 1024 x 768 Resolution
- Javascript enabled
- No Proxy Server (or if so, exception required for the system url).

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.



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

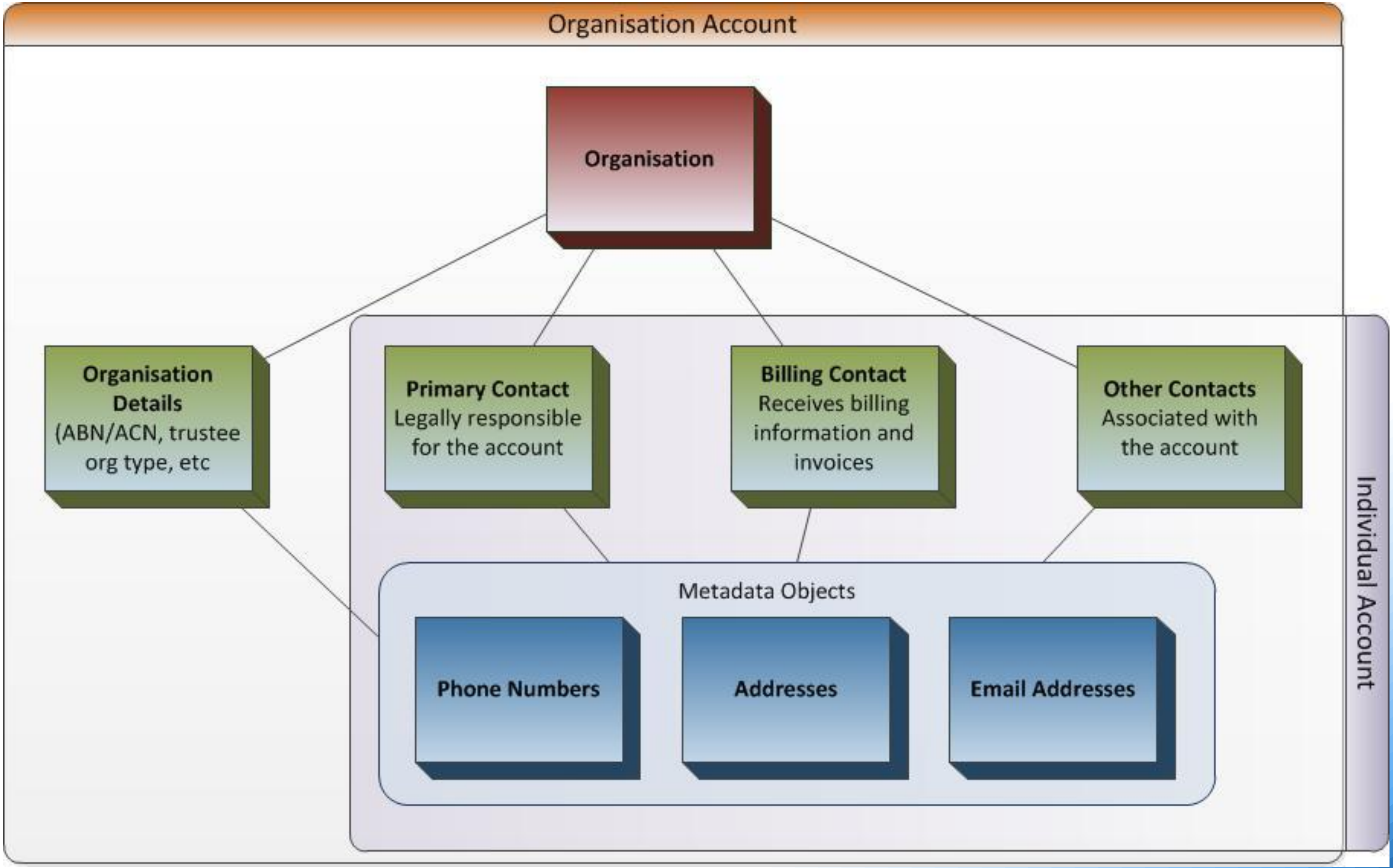
The *Account Creation* wizard has options to:

- 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

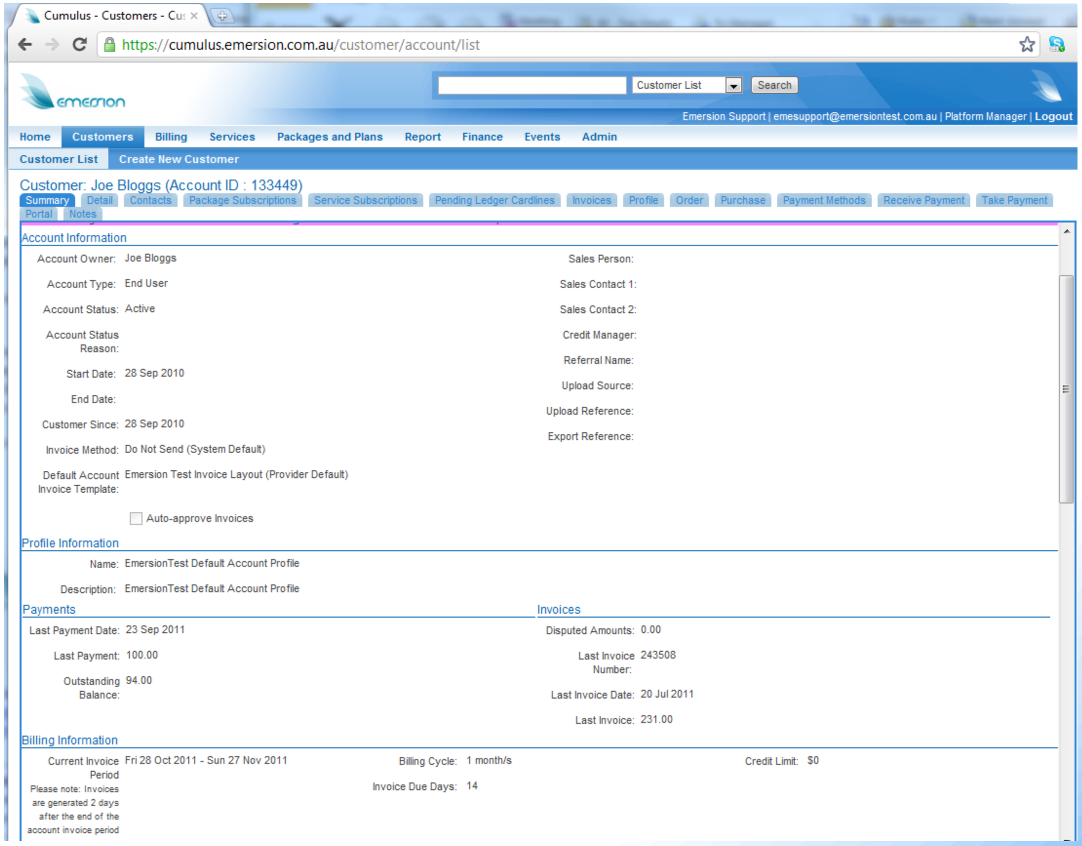
- Each account must have a primary and a billing contact, which can be the same contact
- Each account can have multiple other contacts
- Contact information includes:
  - Personal information
  - Address details
  - Communications information
  - Privacy and verification details
- All contacts are listed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



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?