



Customers and Service 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.

Document Control

Version	Date	Description	Author
0.1	17/09/2009	Initial version with revised layout	Jim Ritchie
0.2	21/09/2009	Added new screenshots to reflect updated UI	Jim Ritchie
0.3	21/09/2009	Added new content and sections for package subscriptions	Jim Ritchie and Paul Dundas
1.0	27/09/2009	Final Review	Paul Dundas
2.0	31/08/2012	Major revision to reflect latest system updates, and reformatted	Kathy Berkidge

Emersion® Umbrella System

The Emersion® Umbrella System was developed specifically to satisfy the needs of service providers selling complex products such as telephony, broadband and 3G mobile phone plans with bolt-ons to the wholesale and retail markets. The unique Emersion Umbrella Architecture allows products, services and packages to be created, provisioned, billed, and managed as an end to end process using our Thunder™ Workflow Manager. This single Umbrella System 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.




Note that other Emersion modules referred to in this manual are not described in detail in this document. Please refer the specific Emersion system manual for further information about each module if required.

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:

<i>Italics</i>	Indicates the name of a screen, field or setting. The capitalisation and punctuation are the same as displayed on the screen. For example: Complete the <i>Address</i> field.
Bold text	Bold text indicates either the name of a command, button or other interactive element. For example: Type the user's name in the <i>Customer Name</i> field, and then click Search .
BOLD CAPITALS	Text in bold capitals indicates the name of a key on a keyboard. For example: Type your password, and then press ENTER .
Navigation >	Menu options or navigation paths are described in shorthand using the following convention: Module > Functional Area > Option For example, selecting the Account Profile area can be described as: Select Admin > Settings > Account Profiles from the Menu.
Monospace text	Used to represent the text you may type in a field. For example Type <code>abc</code> in the <i>Search</i> field.
	The ⓘ 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.
- 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.

Customer Management

The Customer Management function allows you to create and manage customer accounts, along with all the account's information, services, purchases and transactions. Accounts are the system entities that all financial and service information is stored against. The system provides an *account creation* wizard that automates the process of creating new customer accounts.

Each customer will have a separate account in the system. An account can be recorded as an *organisation* (e.g. business, establishment, or company etc), or an individual (i.e. a residential or individual customer). An organisation is a legal entity. The system allows the organisation's name, ABN, CAN, RBN, TFN, business type, trading name, trustee details, and business address details to be recorded, along with contacts. Individuals are end customers, with the primary contact recorded as the account holder.

Contacts

An account has multiple *Contacts* recorded against it for various people and roles associated with the customer. Each account must have:

- a *Primary* contact that is responsible for the account, or the main account holder
- a *Billing* contact for all invoices and account correspondence. The system uses the address recorded against the billing contact on invoices generated, and emails the invoice to the email address recorded, depending on the account settings. The billing contact may be set to be the same as the Primary contact.

Multiple other or *Secondary* contacts can also be recorded against each account for other people associated with the customer or organisation that you may need to communicate with, such as a spouse, partners, support and operational staff of a business etc. Each contact can have separate address, phone number, email and personal authorisation & verification information (i.e. phone password and secret question etc) *metadata* objects recorded (see figure 1).



Figure 1. The overall *Account* structure showing Organisation and Individual account information

Account Information

The system holds a number of important settings against an account that control the way the customer's invoicing is processed. A summary of these fields is below.

- **Start Date** usually the date the account is created. The account will be active from this date and services cannot be created earlier than this date. As services are able to be *backdated*, you must ensure the account start date is before the earliest service start date. The Start Date will also be the opening date of the account's first invoice period.
- **Account Profile** indicates the account profile group the customer account is associated with. The account profile also determines how system events are processed against account (e.g. invoicing, overdue invoices, usage thresholds etc – see the Events Management User Manual for more information on event types. See the *Account Profile* section on page 96 for more details about managing account profiles).
- **Invoice Method** determines how invoices are sent to the customer. Invoice delivery methods available are:
 - Email
 - Post
 - Fax
 - Do Not Send
 - Email and Post
- **Account Invoice Template** the invoice template used by the system to format invoices that are created for the customer. The system allows you to set up multiple invoice templates and use different templates for different accounts. (see the Billing and Accounts User Manual for more information about invoice templates).
- **Invoice Itemisation** indicates whether service usage is itemised on the customer's invoice e.g. each phone call made by the customer is listed.
- **Account Billing Day** the day of the month the account period is closed and the customer's invoice is produced. This can only be set when the account is created. The initial access fee for new services will be prorated to this day, depending on the *Align Packages to Account* setting.
- **Credit Limit** the amount of credit extended to the customer, default is \$0.
- **Trading Due Days** the number of days between the invoice issue date and the invoice due date i.e. the account's payment or trading terms.
- **Period Length** the amount of time, in months, for the account's invoice period, usually 1 month but can be between 1 and 36. E.g. an *Account Billing Day* of 1, and the *Period Length* of 1 will result in the customer receiving an invoice around the 1st of every month.
- **Align Packages to Account** determines whether *package periods* are aligned to the account's billing period, which controls whether pro-rating occurs to bring the account and package access fees into the same billing period.

When aligned, the initial access fees of packages purchased by the customer are pro-rated for the part of the month between the date it was purchased and the account's billing date.
- **Export Reference** used if you identify the customer account by a difference number or ID in other systems etc. This value will be exported with other customer account information to import into other systems to identify the customer and their transactions.

➤ Account Status

The status of the account, as one of the following:

- Active – the account is active, billing is processed and the customer may make purchases
- Pre-active – the account has been created but not all required information has been set up
- De-active – the account has been disabled and can no longer be used
- Cancelled – the account is no longer active and services should have been cancelled.
- Suspended - the account has been temporarily disabled but existing services are still active, no new purchases can be made
- Restricted – the account has restrictions on services that may be orders and purchases that can be made

To Display Customers

The Customer List page appears once you log in to the system by default. From the *Customer List* page, you select a customer to view all their account details.

1. Select **Customers > Customer List** from the **Menu**. The *Customer List* page will appear showing a list of existing customer accounts.

Customer List

Account Number:

Customer Name:

Service Identifier:

Account Profile:

Account Status:

Billing Contact Name:

Upload Source Reference:

Export Reference:

Date Filtering:

From:

To:

Search

Add New Customer

Account Number	Customer Name	Account Type	Account Profile	Status	Billing Contact	Phone	Email Address	Start Date	End Date	Invoice Period Start	Invoice Period End	Account Balance	Create Order	Create Purchase	Manage User Portal
278951	Neil Brumby	INDIVIDUAL	EmersionTest Default Account Profile	Active	Neil Brumby	0386655555	neil@gov.voc.au	Jun 28, 2012		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
278636	Garth White	INDIVIDUAL	EmersionTest Default Account Profile	Active	Garth White	0386655555	gwhite@gmail.com	Jun 28, 2012		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
277085	Emma Maryman	INDIVIDUAL	EmersionTest Default Account Profile	Active	Emma Maryman	0392118312	emarry@emersion.com.au	Jun 21, 2012		21 Aug 2012	21 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
276676	Paul Test	INDIVIDUAL	EmersionTest Default Account Profile	Active	Paul Test	0397163906	pt@emersion.com.au	Jun 20, 2012		20 Aug 2012	20 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
276399	Kathy Beck	INDIVIDUAL	EmersionTest Default Account Profile	Active	Kathy Beck	0403999888	kbeck@gmail.com	Jun 19, 2012		19 Aug 2012	19 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
275486	Paul Dundie	INDIVIDUAL	EmersionTest Default Account Profile	Active	Paul Dundie	0397163906	pd@emersion.com.au	Jun 15, 2012		15 Aug 2012	15 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
269468	MyTel Pty Ltd	ORGANISATION	EmersionTest Default Account Profile	Active	Martin Kende	0404111222	mk@mytel.com.au	May 01, 2012		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
260535	Kate be	INDIVIDUAL	EmersionTest Default Account Profile	Active	Kate be	0346789124	kbe@address.com	Apr 13, 2012		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
232038	Test Customer	INDIVIDUAL	EmersionTest Default Account Profile	Suspended	Test Customer	0418123123	test@test.com	Jan 31, 2012		15 Aug 2012	1 Sep 2012	1,370.23	Create Order	Create Purchase	Manage User Portal
225654	Joe Smith	INDIVIDUAL	EmersionTest Default Account Profile	Active	Joe Smith	0398765432	test@test.com	Jan 01, 2012		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
216957	Test Customer3	INDIVIDUAL	EmersionTest Default Account Profile	Active	Test Customer3	0372165498	blah@blah.com.au	Oct 19, 2011		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
216956	Test Customer2	INDIVIDUAL	EmersionTest Default Account Profile	Active	Test Customer2	0398765321	blah@blah.com.au	Oct 19, 2011		1 Aug 2012	1 Sep 2012	72.00	Create Order	Create Purchase	Manage User Portal
159153	Test1 Person1	INDIVIDUAL	EmersionTest Default Account Profile	Active	Test1 Person1	0399999999		Mar 08, 2011		8 Aug 2012	1 Sep 2012	CR 7.40	Create Order	Create Purchase	Manage User Portal
157455	Tilly Baggs	INDIVIDUAL	EmersionTest Default Account Profile	Pre-active	Tilly Baggs	0392115636	tbaggs@gmail.com	Mar 01, 2011		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
157454	Tilly Baggs	INDIVIDUAL	EmersionTest Default Account Profile	Active	Tilly Baggs	0392115636	tbaggs@gmail.com	Mar 01, 2011		1 Aug 2012	1 Sep 2012	77.00	Create Order	Create Purchase	Manage User Portal
157453	John Lennon	INDIVIDUAL	EmersionTest Default Account Profile	Active	John Lennon	0392564523	jennson@thebeatles.com	Mar 01, 2011		1 Aug 2012	1 Sep 2012	0.00	Create Order	Create Purchase	Manage User Portal
157452	James Morrison	INDIVIDUAL	EmersionTest Default Account Profile	Active	James Morrison	0392114563	doors@gmail.com	Mar 01, 2011		1 Aug 2012	1 Sep 2012	CR 33.00	Create Order	Create Purchase	Manage User Portal
154253	My Org Pty Ltd	ORGANISATION	EmersionTest Default Account Profile	Active	Contact Name	0392118389	lg@emersion.com.au	Feb 01, 2011		1 Aug 2012	1 Sep 2012	264.00	Create Order	Create Purchase	Manage User Portal
154152	Emersion Test	INDIVIDUAL	EmersionTest Default Account Profile	Active	Emersion Test	0392118389		Oct 04, 2010		1 Aug 2012	1 Sep 2012	CR 20.28	Create Order	Create Purchase	Manage User Portal
133449	Joe Bloggs	INDIVIDUAL	EmersionTest Default Account Profile	Active	Joe Bloggs	0439367205	test@test.com	Sep 28, 2010		28 Jul 2012	28 Aug 2012	0.00	Create Order	Create Purchase	Manage User Portal
												Sum:	1127.53		

20 Results Found

50 100 150 200

Figure 2. The *Customer List* page

There are quick links beside each customer account to allow you to order a new package / service (Create Order), create a new product purchase (Create Purchase), and the manage the customer's user portal settings (Manage User Portal).

Search

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

- Account Number the system assigned customer account number
- Customer Name all or part of the customer's name
- Service Identifier the customer's service ID e.g. phone number or email address
- Account Profile select an account profile from the list
- Account Status Pre-active, Active, De-active, Cancelled, Suspended, or Restricted
- Billing Contact Name all or part of the contact's name
- Upload Source Reference if your customer records were imported from another system with a source reference number or ID
- Export Reference if you export your customer records to another system using a difference reference number or ID
- Date Filtering Start Date is Between, End Date is Between, Invoice Start Date is Between and Invoice End Date is Between.
- From related to the date filtering option, a calendar tool will appear to select the required date
- To related to the date filtering option, a calendar tool will appear to select the required date

To Create a New Customer Account

The *Create New Customer wizard* guides you through the process of creating a new customer account. The steps to create a new account used by the *Create New Customer wizard* are:

- **Create Account** set account type and billing information, and enter the organisation information and address details if required
- **Primary Contact** create the primary contact
- **Billing Contact** create the billing contact, or set as the primary contact
- **Secondary Contact** create a secondary contact if required
- **Payment Method** set the account's payment type and account details to use for automated payment processing
- **Point of Sale** create purchases of products, such as telephones, modems etc
- **Order Package/Services** order packages and services.

Create Account

1. Select **Customers > Create New Customer** from the **Menu**. The *Create New Account* page will appear showing the first page of the *Create New Customer wizard*.

Figure 3. The *Create New Account* page 1

2. Select whether the customer is an *Individual* or *Organisation* from the *Choose Account Type* drop list.

If you selected *Organisation*, the *Create New Account* page will update to show additional fields to enter information about the organisation.

Figure 4. The *Create New Account* page showing the additional *Organisation* fields

3. Select the date the customer account is active from in the *Start Date* field. A calendar tool will appear to allow you to select the required date. By default, this is set to the current date.
4. Select the *Account Profile* to associate with the account from the drop list.
5. The *Invoice Method* field will show the default invoice delivery method to apply to the new customer account.

To change the system default, tick the *Override?* check box beside the *Invoice Method* field. The *Invoice Method* drop list will become enabled for editing. Select the required invoice delivery method.

6. Select the invoice layout the system should use when creating invoices for the customer from the *Account Invoice Template* drop list.
7. The *Account Billing Day* field will show the default day of the month to invoice the new customer account.

To change the system default, tick the *Override?* check box beside the *Account Billing Day* field. The *Account Billing Day* field will become enabled for editing. Enter the required invoice day.

8. The *Credit Limit (\$)* field will show the default credit limit to apply to the new customer account.

To change the system default, tick the *Override?* check box beside the *Credit Limit (\$)* field. The *Credit Limit (\$)* field will become enabled for editing. Enter the required credit limit.

9. The *Trading Due Days* field will show the default number of days for invoices to become due for the new customer account.

To change the system default, tick the *Override?* check box beside the *Trading Due Days* field. The *Trading Due Days* field will become enabled for editing. Enter the required trading term days.

10. The *Period Length Months* field will show the default billing period, or billing cycle, in months to apply to the new customer account.

To change the system default, tick the *Override?* check box beside the *Period Length Months* field. The *Period Length Months* field will become enabled for editing. Enter the required billing period in months.

11. The *Align Pkgs to Acct* field will show the default setting for aligning packages purchased by the customer to their billing cycle.

To change the system default, tick the *Override?* check box beside the *Align Pkgs to Acct* field. The *Align Pkgs to Acct* drop list will become enabled for editing. Enter the required package billing alignment setting.

12. Enter an *Export Reference* value if required. This value will be exported with other customer account information for use by any other systems you use to identify the new customer.

13. If you selected the account type of *Individual*, skip to step 28.

For an *Organisation*, continue with the following steps.

14. Enter the company or organisation's name in the *Organisation Name* field.

15. Select the organisation type from the *Organisation Type* drop down list (e.g. Pty Ltd, Trust, Sole Trader etc).

16. Enter the organisation's *ABN*.

17. Enter a *Trading Name* for the organisation if different to the company name.

18. If the organisation is a trust, enter the *Trustee Name*.

19. If the organisation is a trust, select the type of trust from the *Trustee Type* drop down list (e.g. Pty Ltd, Partnership, Inc etc).

20. If you have other business number information for the organisation, select the type of information in the *Other Business # Type* drop list. Options available are:

- ACN Australian Company Number
- ABN Australian Business Number
- RBN Registered Business Number
- TFN Tax File Number

21. Enter the other business number of the organisation in the *Other Business #* field.

22. Enter the organisation's primary *Phone Number*.

23. Enter the organisation's *Fax number*.

24. Enter the organisation's primary *Email Address*.

25. Enter the organisation's website in the *Website http://: field*.

26. Select the format of the organisation's address to use from the *Choose Address Type* drop list. By default, the "*Standard Address (inc LOT)*" address type is displayed. The page will update to show the fields relevant to the address format type chosen.

Available address types include:

- Standard Address (inc LOT) a regular street address with street number range, lot number, street name, type and street suffix, suburb, postcode, state and country
- Unit / Complex / Campus a complex street address with building name, site details, unit type and number, level type and number street number range, lot number, street name, type and street suffix, suburb, postcode, state and country
- Postal Address (PO Box) a postal address with postal delivery type, box number, suburb, postcode, state and country
- Unstructured Address a simpler address with address line 1, address line 2, suburb, postcode, state and country.

Enter the organisation's address details in the appropriate address fields displayed according to the address format type selected.

27. Select the organisation's address type from the *Address Type* drop list. Options available are:

- Not stated / unknown
- Postal / Correspondence address
- Delivery address
- Residential
- Business
- Primary property address
- Secondary property address
- Temporary accommodation
- Address when Overseas
- Other.

28. Click the **Save & Next** button. The *Create New Account wizard* will display the *Primary Contact* page. A message will appear at the top of the page stating that the account was created in pre-active status.

Primary Contact

New account has been created successfully on PreActive status.
Account #314267 will be activated once you have completed all the step set.

Create New Account

Create Account Primary Contact Billing Contact Secondary Contact Payment Method Point of Sale Order Package/Service

Primary Contact

Personal Information

Salutation: Not Stated

* First Name:

Middle Name:

* Last Name:

Suffix: Not Stated

Job Title:

Job Code: Not Stated

Communication Information

* Phone Number: Ext.:

Alt. Phone Number: Alt. Ext.:

Mobile Number:

Fax:

* Email Address:

Website: http:// (e.g. www.websiteName.com)

Address Information

Copy Address from: Select Address

Choose Address Type: Standard Address (inc LOT)

Address Type: Not stated/unknown

Lot Number:

* Lot number or Street number are required

Street Number: -

* Street Name:

* Street Type: Street Street Suffix: Street Suffix

* Suburb:

* Postcode:

* Country: Australia

* State: Select One

Privacy & Verification Information

Notification: ☐ Do Not Call

Notification: ☐ Do Not Email

* Phone Password:

Secret Question 1: Not Stated

Secret Answer 1:

Secret Question 2: Not Stated

Secret Answer 2:

Date Of Birth:

Driver's Licence:

State Licence: Not Stated

License Expiry Date:

Userportal Login: ☒ Unlick to setup user portal login later

Userportal Login

Username accepts chars A-Za-z0-9_ and minimum of 4 characters

* Username: @bkb.net.au

Check Username

* Password:

Minimum number of characters is 6

* Retype Password:

Save & Next

Figure 5. The *Create New Account* page showing the *Primary Contact* page

29. Select the customer account's primary contact's title from the *Salutation* drop list.
30. Enter the primary contact's *First Name*.
31. Enter the primary contact's *Middle Name*.
32. Enter the primary contact's *Last Name*.
33. If required, select the primary contact's title Suffix (e.g. Jnr, Snr, II etc).
34. Enter the primary contact's *Job Title*, if required.
35. Select the primary contact's job type from the Job Code drop list, if required.
36. If the new customer account is an *Organisation*, the *Copy Address From* drop list will be available to allow you to copy the organisation's address to the primary contact's address.

Select the address to copy to the primary contact's address, if required. The address information fields will be updated to show the address details copied from the selected address. Skip to step 39.

You can enter a different address for the primary contact if required.

37. Select the format of the primary contact's address to use from the *Choose Address Type* drop list. By default, the "Standard Address (inc LOT)" address type is displayed. The page will update to show the fields relevant to the address format type chosen.

Available address types include:

- Standard Address (inc LOT) a regular street address with street number range, lot number, street name, type and street suffix, suburb, postcode, state and country.
- Unit / Complex / Campus a complex street address with building name, site details, unit type and number, level type and number street number range, lot number, street name, type and street suffix, suburb, postcode, state and country.
- Postal Address (PO Box) a postal address with postal delivery type, box number, suburb, postcode, state and country.
- Unstructured Address a simpler address with address line 1, address line 2, suburb, postcode, state and country.

Enter the primary contact's address details in the appropriate address fields displayed according to the address format type selected.

38. Select the primary contact's address type from the *Address Type* drop list. Options available are:

- Not stated / unknown
- Postal / Correspondence address
- Delivery address
- Residential
- Business
- Primary property address
- Secondary property address
- Temporary accommodation
- Address when Overseas
- Other.

39. Enter the primary contact's *Phone Number*. If the primary contact has a phone extension, enter it in the *Ext* field.

40. Enter the primary contact's *Alt Phone Number*, if available. If the primary contact has an alternative phone extension, enter it in the *Alt Ext* field.

41. Enter the primary contact's *Mobile Number*.

42. Enter the primary contact's *Fax number*.

43. Enter the primary contact's *Email Address*.

44. If the primary contact has multiple email addresses, click the (+) button beside the *Email Address* field. The *Alt Email Address* field will appear to allow you to enter additional email addresses for the primary contact.

* Email Address: primary.contact@myorg.com (+)

Alt. Email Address: (–)

Alt. Email Address: (–)

Website: http:// myorg.com
(e.g. www.websitename.com)

Figure 6. The *Primary Contact* page showing multiple email addresses

To add further email addresses, click the (+) to show additional *Alt Email Address* fields.

To remove an email address, click the (–) button beside the *Alt Email Address* field.

45. Enter the primary contact's website in the *Website http://:* field.
46. If the customer does not want any marketing or other information calls, tick the *Notification Do Not Call* check box.
47. If the customer does not want any marketing or other information emails, tick the *Notification Do Not Email* check box.
48. Enter a *Phone Password* that you can use to verify the customer over the phone i.e. for security and privacy reasons.
49. Select a *Secret Question 1* from the drop list if required. This can also be used verify the customer over the phone etc.
Enter the customer's answer to *Secret Question 1* in the *Secret Question 1* field.
50. Select another *Secret Question 2* from the drop list if required.
Enter the customer's answer to *Secret Question 2* in the *Secret Question 2* field.
51. Enter the primary contact's *Date of Birth* if known or given. A calendar tool will appear to allow you to select the required date.
52. Enter the primary contact's *Driver's License* number if provided.
53. Select the state the primary contact's driver's license was issued from the *State License* drop list.
54. Enter the primary contact's driver's *License Expiry Date*. A calendar tool will appear to allow you to select the required date.
55. Tick the *Userportal Login* check box to set up the customer's user portal details. Alternatively, clear the check box to set up the details later.
If checked, the *Userportal Login* fields will appear.

Figure 7. The *Primary Contact* page showing the *Userportal Login* fields

- a. Enter a user portal login name for the customer in the *Username* field.
 - b. Verify the username entered is not already used by another customer in the system by clicking the **Check Username** button. The system will display a message indicating whether the name is available. If not, enter another login name and re-check.
 - c. Enter a *Password* for the customer to use to access the user portal. This must be a minimum of 6 characters. A indicator bar will appear below the Password field to show the password strength (i.e. how likely it is to be guessed or figured out). It is best to select a password that is Medium or Very strong.
 - d. Re-enter the password in the *Retype Password* field for verification.
56. Click the **Save & Next** button. The *Create New Account wizard* will display the *Billing Contact* page.

Billing Contact

Create New Account ⓘ

Create Account Primary Contact **Billing Contact** Secondary Contact Payment Method Point of Sale Order Package/Service

Billing Contact

- Tick to make billing contact same as primary contact.
- Untick to customise billing contact.

☒ Same As Primary Contact

Back Save & Next

Figure 8. The *Create New Account* page showing the *Billing Contact* page

57. To record the customer's primary contact as the billing contact, leave the *Same As Primary Contact* check box ticked.
58. To record a different billing contact for the customer, clear the *Same As Primary Contact* check box. The page will update to show all the fields to record the billing contact details.

Create Account Primary Contact **Billing Contact** Secondary Contact Payment Method Point of Sale Order Package/Service

Billing Contact

- Tick to make billing contact same as primary contact.
- Untick to customise billing contact.

☐ Same As Primary Contact

Personal Information

Salutation: Not Stated
* First Name:
Middle Name:
* Last Name:
Suffix: Not Stated
Job Title:
Job Code: Not Stated

Communication Information

* Phone Number: Ext.:
Alt. Phone Number: Alt. Ext.:
Mobile Number:
Fax:
* Email Address:
Website: http://
(e.g. www.webstename.com)

Address Information

Copy Address from: Select Address
Choose Address Type: Standard Address (inc LOT)
Address Type: Not stated/unknown
Lot Number:
* Lot number or Street number are required.
Street Number: -
* Street Name:
* Street Type: Street Street Suffix: Street Suffix
* Suburb:
* Postcode:
* Country: Australia
* State: Select One

Privacy & Verification Information

Notification: ☐ Do Not Call
Notification: ☐ Do Not Email
* Phone Password:
Secret Question 1: Not Stated
Secret Answer 1:
Secret Question 2: Not Stated
Secret Answer 2:
Date Of Birth:
Driver's Licence:
State Licence: Not Stated
License Expiry Date:

Back Save & Next

Figure 9. The *Billing Contact* page showing all the *billing contact* fields

Repeat steps 29 to 55 to record all the billing contact's details required.

59. Click the **Save & Next** button. The *Create New Account* wizard will display the *Secondary Contact* page.

Secondary Contact

Create Account Primary Contact Billing Contact **Secondary Contact** Payment Method Point of Sale Order Package/Service

Secondary Contact

* This contact is optional.

* Select Save Option: ☒ New
☐ Skip Secondary Contact
☐ Same As Billing Contact
☐ Same As Primary Contact

Personal Information

Salutation: Not Stated
 * First Name:
 Middle Name:
 * Last Name:
 Suffix: Not Stated
 Job Title:
 Job Code: Not Stated

Communication Information

* Phone Number: Ext.:
 Alt. Phone Number: Alt. Ext.:
 Mobile Number:
 Fax:
 * Email Address:
 Website: http:// (e.g. www.website.com)

Address Information

Copy Address from: Select Address
 Choose Address Type: Standard Address (inc LOT)
 Address Type: Not stated/unknown
 Lot Number:
 * Lot number or Street number are required
 Street Number: -
 * Street Name:
 * Street Type: Street Street Suffix:
 * Suburb:
 * Postcode:
 * Country: Australia
 * State: Select One

Privacy & Verification Information

Notification: ☐ Do Not Call
 Notification: ☐ Do Not Email
 * Phone Password:
 Secret Question 1: Not Stated
 Secret Answer 1:
 Secret Question 2: Not Stated
 Secret Answer 2:
 Date Of Birth:
 Driver's Licence:
 State Licence: Not Stated
 License Expiry Date:

Figure 10. The *Create New Account* page showing the *Secondary Contact* page

60. To record a secondary contact for the customer, leave the *Select Save Option* selected as *New*.

Repeat steps 29 to 55 to record all the secondary contact's details required.

61. Alternately, select the *Select Save Option* for the secondary contact, as follows:

- Skip Secondary Contact no secondary contact will be created
- Save As Billing Contact the billing contact will be recorded as the secondary contact
- Save As Primary Contact the primary contact will be recorded as the secondary contact

The page will be updated to hide all the secondary contact fields.

Create Account Primary Contact Billing Contact **Secondary Contact** Payment Method Point of Sale Order Package/Service

Secondary Contact

* This contact is optional.

* Select Save Option: ☐ New
☒ Skip Secondary Contact
☐ Same As Billing Contact
☐ Same As Primary Contact

Figure 11. The *Secondary Contact* page showing the fields hidden

62. Click the **Save & Next** button. The *Create New Account* wizard will display the *Automated Payment Configuration* page.

Payment Method

Figure 12. The *Create New Account* page showing the *Automated Payment Configuration* page

63. Select whether automated payments should be processed for the new customer account from the *Status* drop list. Options available are as follows:
 - Disabled no automated payments will be processed
 - Enabled automated payments will be processed once the payment method details are correctly recorded
 - Suspended automated payment processing is temporarily suspended
 - Suspended by System automated payment processing has been suspended by the system i.e. if automated payments have failed.
64. Select the *Payment Type* to use for automated payments from the drop list, as follows:
 - Credit Card
 - Debit Card
 - BPAY
65. The *Min Payment Amount (\$)* field will show the system default minimum automated payment amount to process.
 To change the system default, tick the *Override?* check box beside the *Min Payment Amount (\$)* field. The *Min Payment Amount (\$)* field will become enabled for editing. Enter the required minimum payment amount.
66. The *Automated Payment Terms (Days)* field will show the system default number of days after the invoice due date to process automated payments.
 To change the system default, tick the *Override?* check box beside the *Automated Payment Terms (Days)* field. The *Automated Payment Terms (Days)* field will become enabled for editing. Enter the number of days required.
67. Click the **Save** button to save the automated payment details.

68. If you have enabled automated payment processing for the new customer account, you must record the payment method details before the system will process any automated payments. You can record the customer's credit card, debit card and Bpay payment details. The system will use the *Payment Type* selected in step 64 for automated payment processing.

The *Add Payment Method Details* section shows headings for *Credit Card Details*, *Direct Debit Details*, and *Bpay Details*. By default, these sections are compressed. Click the heading for the payment method required. The selected section will expand to show the relevant payment detail fields.

69. For Credit Card Details:

The screenshot shows a web form titled 'Credit Card Details'. At the top, there is a 'Current Credit Card' field with the value 'None'. Below this is a section titled 'Add New Credit Card Details'. This section contains several input fields: a dropdown for 'Card Type' with the text 'Select Card Type', text boxes for 'Name On Card', 'Credit Card No.', and 'CVV', and two dropdowns for 'Expiry Month' and 'Expiry Year' with the text 'Select Expiry Month' and 'Select Expiry Year' respectively. Below these are two more text boxes: 'Finance Charges (%)' and 'Finance Charges (\$)' with the value '0.00'. At the bottom of this section is a checkbox labeled 'Override Finance Charges'. A 'Save Credit Card Details' button is located at the bottom right of the form.

Figure 13. The *Automated Payment Configuration* page *Credit Card Details* section

- a. Select the credit *Card Type* from the drop list. Options include:
 - American Express
 - Diners
 - Master Card
 - Visa
- b. Enter the *Name On Card*.
- c. Enter the *Credit Card No*.
- d. Select the credit card's *Expiry Month* from the drop list.
- e. Select the credit card's *Expiry Year* from the drop list
- f. Enter the credit card CCV.
- g. The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to credit card payments.
 To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required credit card charges to apply.
- h. Click the **Save Credit Card Details** button.

70. For Direct Debit Details:

Direct Debit Details

Add New Direct Debit

* Bank: Select Bank

* Account Name:

* BSB:

* Account Number:

Finance Charges(%): 0.00

Finance Charges(\$): 0.00

☐ Override Finance Charges

Save Bank Account Details

Figure 14. The Automated Payment Configuration page Direct Debit Details section

- a. Select the *Bank* name from the drop list. The list contains most Australian banks and financial institutions. If the required bank does not appear in the list, please contact the Emersion support team.
- b. Enter the customer's bank account's *Account Name*.
- c. Enter the customer's bank account's *BSB* number.
- d. Enter the customer's bank *Account Number*.
- e. The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to direct debit payments.
To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required direct debit charges to apply.
- f. Click the **Save Bank Account Details** button.

71. For Bpay Details:

Bpay Details

Add New BPay Details

* Biller Code: 677021

* Reference: 03142676

Finance Charges(%): 0.00

Finance Charges(\$): 0.00

☐ Override Finance Charges

Auto Generate

Save BPay Account Details

Figure 15. The Automated Payment Configuration page Bpay Details section

- a. Select your Bpay *Biller Code* from the drop list.
 - b. Enter the Bpay *Reference* number to uniquely identify BPAY payments made by the customer. This reference number will appear on the account's invoice.
To automatically generate a Bpay *Reference* number using the new customer's account number and your Bpay settings, click the **Auto Generate** button. The system will generate the Bpay reference number and display in the *Reference* field.
 - c. The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to Bpay payments.
To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required Bpay charges to apply.
 - d. Click the **Save Bpay Account Details** button.
72. Once you have entered and saved the new customer account's payment information, click the **Continue to Point of Sale** button. The *Create New Account wizard* will display the *Purchase* page.

Point of Sale

Account id #314267 has been activated and ready to be used

Bpay Details Saved

Create New Account ⓘ

Create Account Primary Contact Billing Contact Secondary Contact Payment Method **Point of Sale** Order Package/Service

Purchase Type

* Select Purchase Type: ☐ Outright Purchase ☐ Installment Plan

Back Continue To Order Package/Service

Figure 16. The *Create New Account* page showing the *Purchase* page

This page will allow you to create a new purchase or instalment plan for your new customer as part of the new account creation process. See the *Create Purchase* section on page 70 for information about creating purchases.

Order Package/Service

73. Click the **Continue to Order Package Service** button. The *Create New Account wizard* will display the *Create Order* page, showing the service types you have set up in the system.

Create New Account ⓘ

Create Account Primary Contact Billing Contact Secondary Contact Payment Method Point of Sale **Order Package/Service**

Create Order

Please choose the Service Types you would like in this order:

<input type="checkbox"/> Emersion Email Mailbox	<input type="checkbox"/> Globe Inbound	<input type="checkbox"/> M2 / Optus Mobile	<input type="checkbox"/> M2 ADSL1	<input type="checkbox"/> M2 Dialup
<input type="checkbox"/> Optus PSTN Voice	<input type="checkbox"/> Optus RBT ADSL2	<input type="checkbox"/> RBT-STS	<input type="checkbox"/> Soul - EFM	<input type="checkbox"/> Soul ADSL2
<input type="checkbox"/> Soul Pre-Select	<input type="checkbox"/> Telstra 3G Mobile	<input type="checkbox"/> Telstra PSTN (eBill)	<input type="button" value="Submit"/>	

Possible Packages:
Packages which combine all selected:

Package ID	External Name	Internal Name
No Packages match the Service Combination		

Back Complete Wizard

Figure 17. The *Create New Account* page showing the *Create Order* page

This page will allow you to create a new service order for your new customer as part of the new account creation process. See the *Create Order* section on page 62 for information about creating service orders.

74. Click the **Complete Wizard** button. The *Account Information* page will display showing the new customer account details.

Customer: My New Organisation Pty Ltd (Account ID: 314267)

Summary | Detail | Organisation | Contacts | Package Subscriptions | Service Subscriptions | Pending Ledger Cardlines | Invoices | Transactions | Profile | Order | Purchase | Payment Methods | Receive Payment | Take Payment | Portal | Notes

Account Information

Account Owner: My New Organisation	Sales Person:
Account Type: End User	Sales Contact 1:
Account Status: Active	Sales Contact 2:
Account Status Reason:	Credit Manager:
Start Date: 24 Aug 2012	Referral Name:
End Date:	Upload Source:
Customer Since: 24 Aug 2012	Upload Reference:
	Export Reference:
Account Tax Rate: Australian GST (10%) (System Default)	
Invoice Method: Email (Provider Default)	
Default Account: My Invoice Layout (Provider Default)	
Invoice Template:	
Invoice Itemisation: On (System Default)	
<input type="checkbox"/> Auto-approve Invoices	

Profile Information

Name: My Default Account Profile

Description: My Default Account Profile

Organisation Details

* Organisation: My New Organisation Pty Ltd

Name:

Trading Name:

* ABN: 213 563 894

Trustee Details

Trustee Name:

Business Type:

Business Number:

Contact Details

Figure 18. The *Account* page showing the new customer's details

The account page will allow you to view all the customer's details, as well as a number of other functions. See the *View Customer Account* section on page 26 for further information.

To View a Customer Account

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will appear.
2. Locate the customer you wish to view using the *Search* function, or by using the page navigation links near the bottom of the list.
3. Click the customer account number link in the *Account Number* column, or click the account name in the *Customer Name* column. The account *Summary* tab page will appear showing the selected customer with all existing information. You will need to scroll down the page to see all details.

Customer: My New Organisation Pty Ltd (Account ID : 314267)

Summary Detail Organisation Contacts Package Subscriptions Service Subscriptions Pending Ledger Cardlines Invoices Transactions Profile Order Purchase Payment Methods Receive Payment Take Payment Portal Notes

Account Information

Account Owner: My New Organisation	Sales Person:
Account Type: End User	Sales Contact 1:
Account Status: Active	Sales Contact 2:
Account Status Reason:	Credit Manager:
Start Date: 24 Aug 2012	Referral Name:
End Date:	Upload Source:
Customer Since: 24 Aug 2012	Upload Reference:
	Export Reference:
Account Tax Rate: Australian GST (10%) (System Default)	
Invoice Method: Email (Provider Default)	
Default Account: My Invoice Layout (Provider Default)	
Invoice Template:	
Invoice Itemisation: On (System Default)	
<input type="checkbox"/> Auto-approve Invoices	

Profile Information

Name: My Default Account Profile
Description: My Default Account Profile

Organisation Details

* Organisation: My New Organisation Pty Ltd
Name:
Trading Name:
* ABN: 213 563 894

Trustee Details

Trustee Name:
Business Type:
Business Number:

Contact Details

Figure 19. The account *Summary* tab page

Across the top of the customer page, you will see *tabs* to access different information about the customer account. When clicked, each tab will display a different page with the related account information. The ability to view some of the tabs may be restricted according to your system permission settings.

The tab pages available and the information held in each are as follows:

- Summary shows the account's information summarised on a single page
- Detail the account summary, trading terms and security settings
- Organisation shows the organisation's details and company contact information (for organisation account types only)
- Contacts lists the primary, billing and other contacts
- Package Subscriptions lists all package plans purchased by the customer account – see the *Package Subscriptions* section on page 43
- Service Subscriptions lists all services obtained by the customer account - see the *Service Subscriptions* section on page 53
- Pending Ledger Cardlines shows all unallocated ledger cardlines held against the customer account – see the *Pending Ledger Cardlines* section on page 87
- Invoices displays all invoices generated by the system for the customer account – see the *Invoices* section on page 85
- Transactions lists all financial transactions held against the customer account (e.g. payments, invoices, debits, credits, refunds etc) – see the *Transactions* section on page 95
- Profile view or change the customer's account profile
- Order allows a new service order to be purchased – see the *Ordering & Provisioning* section on page 61
- Purchase lists the customer's previous purchases and allows new purchases to be made – see the *Purchase Management* section on page 79
- Payment Methods shows the customer account's payment information
- Receive Payment allows you to record a manual payment from the customer – see the *Receive Payment* section on page 90
- Take Payment allows you to process a payment from the customer via the automated EPS gateway – see the *Take Payment* section on page 92
- Portal manage the customer account's user portal access and settings
- Notes view and record notes against the customer account

To Edit a Customer Account

To update a customer account, you first need to navigate to the correct tab page of the account to view and edit the required information (see the following sections). The *Summary* page does not allow you to edit any information.

To Update Account and Billing Information

1. From the customer account's *Summary* page, click the **Detail** tab. The *Detail* tab page will appear showing the *Account Summary* and *Trading Terms* information.

Customer: My New Organisation Pty Ltd (Account ID: 314267)

Summary **Detail** Organisation Contacts Packages Subscriptions Service Subscriptions Pending Ledger Cardlines Invoices Transactions Profile Order Purchase Payment Methods Receive Payment Take Payment Portal Notes

Account Summary

Account Owner: My New Organisation
 Account Type: End User
 Account Status: Active
 Account Status Reason:
 Start Date: 24 Aug 2012
 End Date:
 Customer Since: 24 Aug 2012
 Account Tax Rate: Australian GST (10%) (System Default)
 Invoice Method: Email (Provider Default)
 Default Account: My Invoice Layout (Provider Default)
 Invoice Template:
 Invoice Itemisation: On (System Default)
☐ Auto-approve Invoices

Sales Person:
 Sales Contact 1: Emersion Support
 Sales Contact 2: Emersion Support
 Credit Manager: Emersion Support
 Referral Name:
 Upload Source:
 Upload Reference:
 Export Reference:

Edit Account Summary

Trading Terms

Invoice Due Days: 7
 Credit Limit (\$): 10000
 Period Length: 1
 Months (1-36):
 Current Invoice: Wed 1 Aug 2012 - Fri 31 Aug 2012
 Period:
 Release note: Invoices are generated 2 days after the end of the account invoice period.
 Align Pigs To Acct: Yes
 Trading Review: 29 Aug 2012
 Last:
 Next Review: 29 Aug 2013

Security

Security Held:
 Security Value (\$): 0.00
 Security Note:

Edit Security

Edit Trading Terms

Figure 20. The account *Detail* tab page

2. Click the **Edit Account Summary** button. The page will update to show the *Account Summary* fields editable.

Account Owner: My New Organisation
 Account Type: End User
 Account Status: Active
 Account Status Reason:
 Start Date: 24 Aug 2012
 End Date:
 Customer Since: 24 Aug 2012
 Account Tax Rate: Australian GST (10%) (System Default)
 Invoice Method: Email (Provider Default)
 Default Account: My Invoice Layout (Provider Default)
 Invoice Template:
 Invoice Itemisation: On (System Default)
☐ Auto-approve Invoices

Sales Person:
 Sales Contact 1: Emersion Support
 Sales Contact 2: Emersion Support
 Credit Manager: Emersion Support
 Referral Name:
 Upload Source:
 Upload Reference:
 Export Reference:

Save Account Summary
 Cancel

Figure 21. The account *Detail* tab page showing *Account Summary* editable

3. To change the account's status, select the required status from the *Account Status* drop list.
4. Select the reason the account status has changed from the *Account Status Reason* drop list.
5. To update the account start date, enter the date in the *Customer Since* field. A calendar tool will appear to allow you to select the required date.
6. To change the account's applicable tax rate, select the required rate from the *Account Tax Rate* drop list. This will be applied to new purchases and orders created for the customer.

7. To change the account's invoice delivery method, select the required method from the *Invoice Method* drop list.
8. To change whether the customer receives detailed or summarised invoices, select the required setting from the *Invoice Itemisation* drop list. By default, all accounts receive itemised (i.e. detailed) invoices.
9. Tick the *Auto-approve Invoices* check box if you want invoices for this account to be automatically approved, instead of being created as *Pending* to be managed manually.
10. Enter the *Sales Person* who the customer deals with if required.
11. If required, select the member(s) of your staff that deal with this account from the *Sales Contact 1*, *Sales Contact 2* and *Credit Manager* drop lists. The drop lists will show all existing system users. These fields can be used to calculate commissions (please contact the Sales team for more information about commission based reporting).
12. If applicable, enter the name of the person that referred the customer to you in the *Referral Name* field.
13. Enter an *Export Reference* value if required. This value will be exported with other customer account information for import into other systems to identify the customer.
14. Click the **Save Account Summary** button. The page will update to show the *Account Summary* fields read only with a message at the top of the page stating that the account has been updated.
15. Click the **Edit Trading Terms** button. The page will update to show the *Trading Terms* fields editable.

The screenshot shows a web form titled "Trading Terms". It contains several input fields and checkboxes:

- Invoice Due Days:** A text box containing the number "7". To its right is a checkbox labeled "Override?".
- Credit Limit (\$):** A text box containing "10000". To its right is a checked checkbox labeled "Override?".
- Period Length Months (1-36):** A text box containing the number "1". To its right is a checkbox labeled "Override?".
- Current Invoice Period:** A text box containing "Wed 1 Aug 2012 - Fri 31 Aug 2012".
- Please note:** A block of text stating "Invoices are generated 2 days after the end of the account invoice period".
- Align Pkgs To Acct:** A dropdown menu showing "Yes" and a checkbox labeled "Override?".
- Trading Review Last:** An empty text box.
- Next Review:** An empty text box.
- Buttons:** At the bottom right, there are two buttons: "Save Trading Terms" and "Cancel".

Figure 22. The account *Detail* tab page showing *Trading Terms* fields editable

16. To change the trading terms of the account:
 - If the existing trading term is set to the system default, tick the *Override?* check box beside the *Invoice Due Days* field. The *Invoice Due Days* field will become enabled to enter the required trading term.
 - If the existing trading term is not set to the system default, the *Invoice Due Days* field will be enabled for editing. To re-set it to the system default tick the *Override?* check box beside the *Invoice Due Days* field.
17. To change the credit limit to apply to the account:
 - If the existing credit limit is set to the system default, tick the *Override?* check box beside the *Credit Limit* (\$) field. The *Credit Limit* (\$) field will become enabled to enter the required credit limit.
 - If the credit limit is not set to the system default, the *Invoice Due Days* field will be enabled for editing. To re-set it to the system default tick the *Override?* check box beside the *Credit Limit* (\$) field.

18. To change the billing period of the account:

- If the billing period is set to the system default, tick the *Override?* check box beside the *Period Length Months* field. The *Period Length Months* field will become enabled to enter the required billing period in months.
- If the billing period is not set to the system default, the *Period Length Months* field will be enabled for editing. To re-set it to the system default tick the *Override?* check box beside the *Period Length Months* field.

19. The *Current Invoice Period* field will show the dates of the account's current billing period. This field cannot be modified.

20. To change the package billing period alignment of the account:

- If the billing alignment is set to the system default, tick the *Override?* check box beside the *Align Pkgs to Acct* drop list. The *Align Pkgs to Acct* drop list will become enabled to select the required setting.
- If the billing alignment is not set to the system default, the *Align Pkgs to Acct* drop list will be enabled to select the required setting. To re-set it to the system default tick the *Override?* check box beside the *Align Pkgs to Acct* drop list.

21. Click the **Save Trading Terms** button. The page will update to show the *Trading Terms* fields read only with a message at the top of the page stating that the account has been updated.

22. To record security held against the account (e.g. for credit purposes etc), click the **Edit Security** button. The page will update to show the *Security* fields editable.

Figure 23. The account *Detail* tab page showing *Security* fields editable

23. Select the type of security from the *Security Held* drop list. Options include:

- No Security
- Authority
- Direct Debit Authority
- Pre-payment
- Deposit
- Director / Personal Guarantee
- Bank Guarantee

24. Enter the security amount in the *Security Value (\$)* field.

25. Enter any required information about the security in the *Security Note* field.

26. Click the **Save Security** button. The page will update to show the *Security* fields read only with a message at the top of the page stating that the account has been updated.

To Update the Organisation Information

1. From the organisation account's *Summary* page, click the **Organisation** tab. The *Organisation* tab page will appear showing the organisation's information.

Customer: My New Organisation Pty Ltd (Account ID: 314267)

Summary | **Organisation** | Contacts | Package Subscriptions | Service Subscriptions | Pending Ledger Cardlines | Invoices | Transactions | Profile | Order | Purchase | Payment Methods | Receive Payment | Take Payment | Portal | Notes

Organisation Details

* Organisation: My New Organisation Pty Ltd
Name:

Trading Name:

* ABN: 213 563 894

Trustee Details

Trustee Name:

Business Type:

Business Number:

Contact Details

* Phone Number: 0392114545

Fax: 0392114500

Email Address:

Website: myorg.com.au

Address: Post Office Box 569
Melbourne VIC 3000 Australia

Edit

Figure 24. The account *Organisation* tab page

2. Click the **Edit** button. The page will update to show all the fields editable.

* Organisation Name: My New Organisation

* Org Type: Pty Ltd

* ABN: 213 563 894

Trading Name:

Trustee Name:

Trustee Type: Select Type

Trustee Business # Type: Select Type

Trustee Business #:

Contact Details

* Phone Number: 0392114545

Fax: 0392114500

Email Address:

Website: myorg.com.au

Address Details

Copy Address From:

Choose Address Type: Postal Address (PO Box)

Address Type: Postal/Correspondence address

* Postal Delivery Type: Post Office Box

* Number: 569

* Suburb: Melbourne

* Postcode: 3000

* Country: Australia

* State: Victoria

Save

Cancel

Figure 25. The account *Organisation* tab page showing the fields editable

3. Click the **Edit** button. The page will update to show all the fields editable.
4. Enter or modify the organisation's name, type, trading name and trustee information in the appropriate fields as required.
5. Enter or modify the organisation's contact details in the appropriate fields as required.
6. Enter or modify the organisation's address in the appropriate address fields as required.
7. Click the **Save** button. The page will update to show the *Organisation* fields read only with a message at the top of the page stating that the organisation details have been updated.

To Update Contacts

1. From the customer account's *Summary* page, click the **Contacts** tab. The *Contacts List* tab page will appear showing a list of exiting contacts.

Customer: My New Organisation Pty Ltd (Account ID : 314267)

Summary Detail Organisation **Contacts** Package Subscriptions Service Subscriptions Pending Ledger Cardlines Invoices Transactions Profile Order Purchase Payment Methods Receive Payment Take Payment Portal Notes

Contact List

2 Results Found

<input type="checkbox"/>	ID	Name	Phone	Contact Type	Email	Action
<input type="checkbox"/>	293839	Tom Jones	0392111111	Primary	primary.contact@myorg.com	View Edit Delete
<input type="checkbox"/>	293925	Sam Jones	0392115656	Billing	sam.jones@email.com.au	View Edit Delete

1

50 100 150 200

Delete Selected Contact

Add New Contact

Figure 26. The account *Contacts List* tab page

From the *Contacts List* page, you can add, edit or delete contacts as required. You can add as many contacts against an account as required.

To Add a New Contact

1. From the *Contacts List* tab page, click the **Add New Contact** button. The *Contact Details* page will appear.

Contact Details

Set Contact As: ☐ Primary ☐ Billing

Personal Information

Salutation: Not Stated

* First Name:

Middle Name:

* Last Name:

Suffix: Not Stated

Job Title:

Job Code: Not Stated

Communication Information

* Phone Number: Ext:

Alt. Phone Number: Alt. Ext:

Mobile Number:

Fax:

* Email Address:

Website: http:// (e.g. www.webstename.com)

Address Information

Choose Address Type: Standard Address (inc LOT)

Address Type: Not stated/unknown

Lot Number:

Street Number: -

* Street Name:

* Street Type: Street Street Suffix: Street Suffix

* Suburb:

* Postcode:

* Country: Australia

* State: Select One

Privacy & Verification Information

Notification: ☐ Do Not Call

Notification: ☐ Do Not Email

* Phone Password:

Secret Question 1: Not Stated

Secret Answer 1:

Secret Question 2: Not Stated

Secret Answer 2:

Date Of Birth:

Driver's Licence:

State Licence: Not Stated

License Expiry Date:

Save

Cancel

Figure 27. The *Contacts Details* page

2. Select whether this new contact is the account's Primary or Billing contact from the *Set Contact As* check boxes.

Note that this contact will replace any existing Primary or Billing contact that may already exist on the account.

3. Select the contact's title from the *Salutation* drop list.
4. Enter the contact's *First Name*.
5. Enter the contact's *Middle Name*.
6. Enter the contact's *Last Name*.
7. If required, select the contact's title Suffix (e.g. Jnr, Snr, II etc).
8. Enter the contact's *Job Title*, if required.
9. Select the contact's job type from the Job Code drop list, if required.
10. Select the format of the contact's address to use from the *Choose Address Type* drop list. By default, the "*Standard Address (inc LOT)*" address type is displayed. The page will update to show the fields relevant to the address format type chosen.

Available address types include:

- Standard Address (inc LOT) a regular street address with street number range, lot number, street name, type and street suffix, suburb, postcode, state and country.
- Unit / Complex / Campus a complex street address with building name, site details, unit type and number, level type and number street number range, lot number, street name, type and street suffix, suburb, postcode, state and country.
- Postal Address (PO Box) a postal address with postal delivery type, box number, suburb, postcode, state and country.
- Unstructured Address a simpler address with address line 1, address line 2, suburb, postcode, state and country.

Enter the contact's address details in the appropriate address fields displayed according to the address format type selected.

11. Select the contact's address type from the *Address Type* drop list. Options available are:
 - Not stated / unknown
 - Postal / Correspondence address
 - Delivery address
 - Residential
 - Business
 - Primary property address
 - Secondary property address
 - Temporary accommodation
 - Address when Overseas
 - Other.
12. Enter the contact's *Phone Number*. If the contact has a phone extension, enter it in the *Ext* field.
13. Enter the contact's *Alt Phone Number*, if available. If the contact has an alternative phone extension, enter it in the *Alt Ext* field.
14. Enter the contact's *Mobile Number*.
15. Enter the contact's *Fax number*.
16. Enter the contact's *Email Address*.

17. If the contact has multiple email addresses, click the (+) button beside the *Email Address* field. The *Alt Email Address* field will appear to allow you to enter additional email addresses for the contact.

* Email Address: primary.contact@myorg.com (+)

Alt. Email Address: (-)

Alt. Email Address: (-)

Website: http:// myorg.com
(e.g. www.websiteName.com)

Figure 28. The *Contact* page showing multiple email addresses

To add further email addresses, click the (+) to show additional *Alt Email Address* fields.

To remove an email address, click the (-) button beside the *Alt Email Address* field.

18. Enter the contact's website in the *Website http://: field*.
19. If the contact does not want any marketing or other information calls, tick the *Notification Do Not Call* check box.
20. If the contact does not want any marketing or other information emails, tick the *Notification Do Not Email* check box.
21. Enter a *Phone Password* that you can use to verify the contact over the phone i.e. for security and privacy reasons.
22. Select a *Secret Question 1* from the drop list if required. This can also be used verify the customer over the phone etc.
Enter the customer's answer to *Secret Question 1* in the *Secret Question 1* field.
23. Select another *Secret Question 2* from the drop list if required.
Enter the customer's answer to *Secret Question 2* in the *Secret Question 2* field.
24. Enter the contact's *Date of Birth* if known or given. A calendar tool will appear to allow you to select the required date.
25. Enter the contact's *Driver's License* number if provided.
26. Select the state the contact's driver's license was issued from the *State License* drop list.
27. Enter the contact's driver's *License Expiry Date*. A calendar tool will appear to allow you to select the required date.
28. Click the **Save** button. The *Contacts List* tab page will appear showing the new contact in the list of contacts.

To View an Existing Contact

1. From the *Contacts List* tab page, either click the **View** link in the *Action* column of the required contact, or click the contact number in the *ID* column. The *Contact Details* page will appear showing the contact's details.

Figure 29. The view *Contacts Details* page

2. Click the **Edit** button to modify the contact's details.
3. Click the **Back** button to return to the *Contact List* page.

To Edit an Existing Contact

1. From the *Contacts List* tab page, click the **Edit** link in the *Action* column of the required contact. The *Contact Details* page will appear showing the contact's details available for editing.

Figure 30. The edit *Contacts Details* page

2. Enter or modify the contact's name, address, contact information and privacy and verification details in the appropriate fields as required.
3. Click the **Save** button. The *Contacts List* tab page will appear showing the updated contact in the list.

To Modify the Account Profile

1. From the customer account's *Summary* page, click the **Profile** tab. The *Profile* tab page will appear showing the customer's current account profile.

Figure 31. The account *Profile* tab page

2. Select the required account profile from the *Name* drop list.
3. Click the **Save** button. The page will show a message at the top of the page stating that the account profile was updated.

To Modify the Payment Methods

1. From the customer account's *Summary* page, click the **Payment Methods** tab. The *Automated Payment Configuration* page will appear displaying the customer's existing payment details.

Figure 32. The account's *Automated Payment Configuration* page

2. Modify the automated payment processing option in the *Status* drop list if required.
3. If required, update the *Payment Type* to use for automated payments from the drop list:
4. If required, update minimum automated payment amount to process.
5. Update the number of days after the invoice due date to process automated payments as required.
6. Click the **Save** button to save the updated automated payment details.
7. If you have enabled automated payment, you must record the payment method details before the system will process any automated payments.

The *Add Payment Method Details* section shows headings for *Credit Card Details*, *Direct Debit Details*, and *Bpay Details*. By default, these sections are compressed. Click the heading for the payment method required. The selected section will expand to show the relevant payment detail fields.

8. For Credit Card Details:

Credit Card Details

Current Credit Card: None

Add New Credit Card Details

* Card Type: Select Card Type

* Name On Card:

* Credit Card No:

* Expiry Month: Select Expiry Month

* Expiry Year: Select Expiry Year

CVV:

Finance Charges(%):

Finance Charges(\$): 0.00

☐ Override Finance Charges

Save Credit Card Details

Figure 33. The Automated Payment Configuration page Credit Card Details section

- Select the credit *Card Type* from the drop list.
- Enter the *Name On Card*.
- Enter the *Credit Card No*.
- Select the credit card's *Expiry Month* from the drop list.
- Select the credit card's *Expiry Year* from the drop list
- Enter the credit card *CCV*.
- The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to credit card payments.

To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required credit card charges to apply.

- Click the **Save Credit Card Details** button.

9. For Direct Debit Details:

Direct Debit Details

Add New Direct Debit

* Bank: Select Bank

* Account Name:

* BSB:

* Account Number:

Finance Charges(%): 0.00

Finance Charges(\$): 0.00

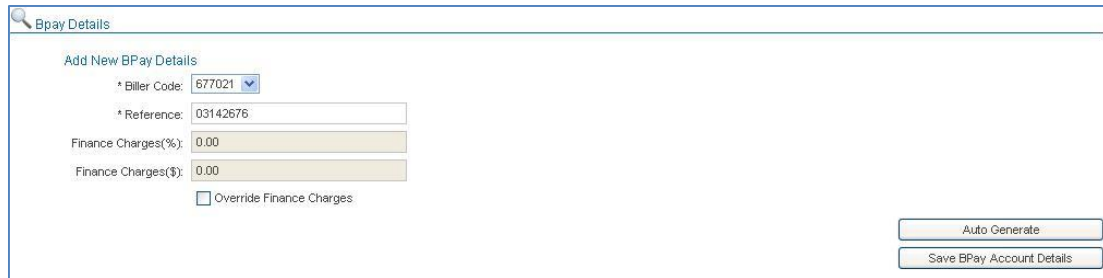
☐ Override Finance Charges

Save Bank Account Details

Figure 34. The Automated Payment Configuration page Direct Debit Details section

- Select the *Bank* name from the drop list. The list contains most Australian banks and financial institutions. If the required bank does not appear in the list, please contact the Emersion support team.
 - Enter the customer's bank account's *Account Name*.
 - Enter the customer's bank account's *BSB* number.
 - Enter the customer's bank *Account Number*.
 - The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to direct debit payments.
- To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required direct debit charges to apply.
- Click the **Save Bank Account Details** button.

10. For Bpay Details:



The screenshot shows a web form titled "Bpay Details". At the top left, there is a link "Add New BPay Details". Below this, the form contains the following fields and controls:

- * Biller Code: A dropdown menu showing "677021".
- * Reference: A text input field containing "03142676".
- Finance Charges(%): A text input field containing "0.00".
- Finance Charges(\$): A text input field containing "0.00".
- Below the Finance Charges(\$ field, there is a checkbox labeled "Override Finance Charges" which is currently unchecked.
- At the bottom right, there are two buttons: "Auto Generate" and "Save BPay Account Details".

Figure 35. The Automated Payment Configuration page Bpay Details section

- a. Select your Bpay *Biller Code* from the drop list.
- b. Enter the Bpay *Reference* number to uniquely identify BPAY payments made by the customer. This reference number will appear on the account's invoice.

To automatically generate a Bpay *Reference* number using the new customer's account number and your Bpay settings, click the **Auto Generate** button. The system will generate the Bpay reference number and display in the *Reference* field.
- c. The *Finance Charges (%)* and *Finance Charges (\$)* fields will show the system default charges to apply to amount to Bpay payments.

To change the system default, tick the *Override Finance Charges* check box below the fields. The *Finance Charges (%)* and *Finance Charges (\$)* fields will become enabled for editing. Enter the required Bpay charges to apply.
- d. Click the **Save Bpay Account Details** button.

To Modify the User Portal Settings

Emersion provides a User Portal for your customers to log in and view their details, invoices, usage and make payments. To set up the user portal for access by your customers, contact the Emersion Sales team. You can enable or disable each customer's access to the user portal.

1. From the customer account's *Summary* page, click the **Portal** tab. The *User Portal Management* page will appear displaying the customer's existing user portal access.

Customer: My New Organisation Pty Ltd (Account ID : 314267)

Summary Detail Organisation Contacts Package Subscriptions Service Subscriptions Pending Ledger Cardlines Invoices Transactions Profile Order Purchase Payment Methods Receive Payment Take Payment **Portal** Notes

UserPortal Management View

Access

☒ User Portal access enable

Portal Access Granted

Access since: 24 Aug 2012

Configure Access

Figure 36. The account's *User Portal Management* page

2. Click the **Configure Access** button. The *User Portal Management* page will update to show additional fields for editing.

UserPortal Management Edit

Access

☒ User Portal access enable

Portal Access Granted

Access since: 24 Aug 2012

Login

Username accepted characters A-Za-z0-9_ and minimum 4 characters

Username: myorg @ .net.au

Password:

Retype Password:

Cancel Save

Figure 37. The account's *User Portal Management* page showing additional fields

3. Tick the *User Portal access enable* check box to allow the customer to access the end user portal. Alternatively, clear the check box to disable access to the end user portal.
4. Enter or modify a user portal login name for the customer in the *Username* field.
5. Enter a *Password* for the customer to use to access the user portal. This must be a minimum of 6 characters.
6. Re-enter the password in the *Retype Password* field for verification.
7. Click the **Save** button. The *User Portal Management* page will update and show a message at the top of the page stating that the user portal details were modified.

To View and Enter Notes

The Notes function allows you to record various information against your customer's account. The system also generates notes for various actions performed against the account, such as when an invoice was sent, if an overdue reminder was sent, or other service provisioning messages. You can use notes to record details of phone calls or other customer correspondence for easy reference.

To View Notes

1. From the customer account's *Summary* page, click the **Notes** tab. The *Notes list* page will appear displaying a list of existing notes previously recorded against the customer account.

Customer: Emma Maryman (Account ID : 277085)

Notes

Subject:

Details:

Type:

2 Results Found

ID	Author	Created	Type	Category	Subject	Details	Private
139508	emesupport@emersiontest.com.au	29 Aug 2012	Account	Support	Service Issue	The customer has reported buzzing sounds on their phone line. A support case has been opened with th...	YES
139508	emesupport@emersiontest.com.au	29 Aug 2012	Account	General	Customer Away	The customer will be overseas from 1 September until 21st September. Hold invoices until they return...	NO

1

Figure 38. The account's *Notes list* page

Search

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

- **Subject** the subject of the note
- **Details** text contained in the note details
- **Type** The category or type of note i.e. Invoice, Invoice Overdue, Service, Account, Organisation, Contact, Plan, Manual Payment, Credit Card Expiry, Payment Failed

To Create a New Note

1. From the *Notes list* page, click the **Create New** button. The *New Note* page will appear.

New Note

Author:

Created:

* Type/Category:

Object Type Value:

Object Type Value is numeric only (Eg: SERVICE_ID, ACCOUNT_ID)

* Subject:

Details:

☐ Private

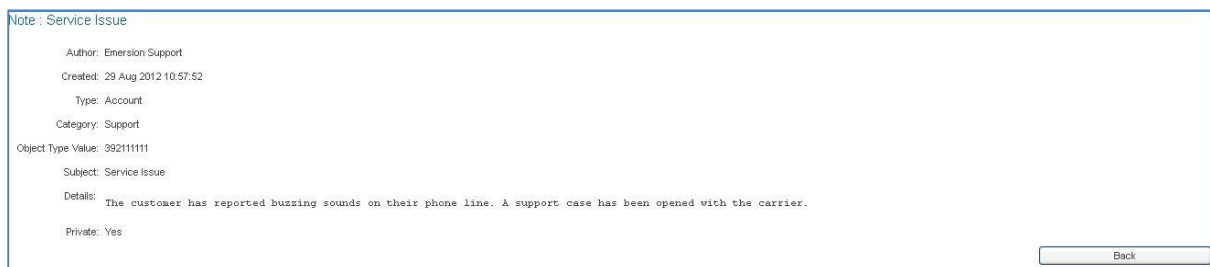
Figure 39. The *New Note* page

The *Author* and *Created* date fields will be automatically set to your system user name and the current date respectively. These details cannot be changed.

2. Select the note *Type/Category* from the drop list. Options available are:
 - Account – General
 - Account - Finance
 - Account - Support
 - Contact - General
 - Credit Card Expiry
 - Invoice
 - Invoice Overdue
 - Manual Payment
 - Organisation - General
 - Payment Failed
 - Plan - General
 - Service.
3. Enter the number or ID of the service, invoice, payment (i.e. associated with the type category selected) related to the note in the *Object Type Value* field. This must be a numeric value.
4. Enter the *Subject* of the note (up to 100 characters).
5. Enter the note information in the *Details* field. The field can accommodate multiple lines and a large amount of text.
6. Tick the *Private* check box to disable the note from appearing to the customer in the User Portal. Alternatively, leave the *Private* check box un-marked to show the note to the customer in the User portal.
7. Click the **Save** button. The *Notes list* page will display showing the new note in the list.

To View a Note

1. From the *Notes list* page, click the note number link in the *ID* column of the required note. The *view Note* page will appear showing the note details.



The screenshot shows a web form titled "Note : Service Issue". It contains the following fields and values:

- Author: Emersion Support
- Created: 29 Aug 2012 10:57:52
- Type: Account
- Category: Support
- Object Type Value: 392111111
- Subject: Service Issue
- Details: The customer has reported buzzing sounds on their phone line. A support case has been opened with the carrier.
- Private: Yes

A "Back" button is located in the bottom right corner of the form.

Figure 40. The *view Note* page

2. Click the **Back** button to return to the *Notes list* page.

Package and Service Management

Services, such as a PSTN phone, mobile phone, VOIP, ADSL2, mobile broadband, domain hosting etc, are sold to your customers via a package plan that contains one or more service plans bundled together. You sell a package plan to a customer using the *Order* function (see the *Order and Purchase Management* section on page 61).

When you sell a package plan to your customer, the system creates a *package subscription*. The package subscription holds information such as:

- the customer account that purchased the package
- the package plan definition that defines package level billing metrics such as access fees and package discounts
- the package billing periods
- the package subscription start and end dates
- the package status
- links to all services contained in the package plan.

For each service plan contained in the package plan sold to the customer, the system creates a *service subscription*. The service subscription defines the service level billing metrics including access fees, rates, caps, bolt ons and timetables. The service subscriptions are linked to the package subscriptions.

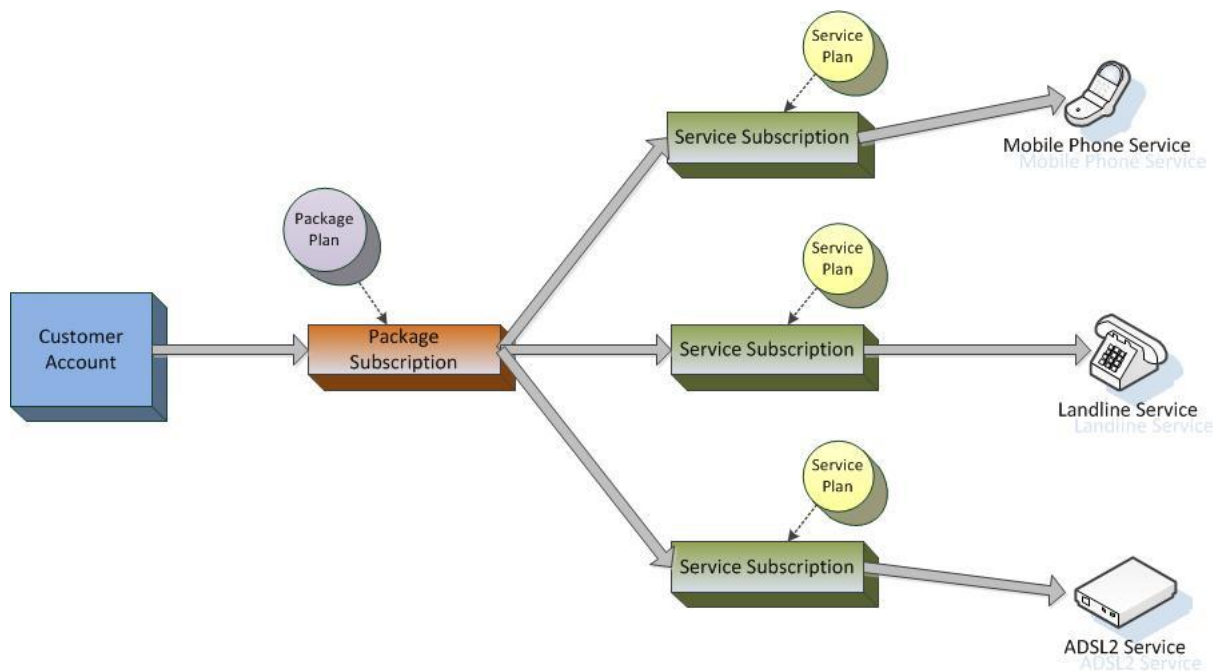


Figure 41. example *Package Subscription* structure

To manage a customer's package subscriptions and service subscriptions, you need to navigate to the correct tab page of the customer account to access the required function. The following package and service management functions are available from the customer's account page:

- **Package Subscriptions** allows you to view and manage package subscriptions purchased by the customer
- **Service Subscriptions** allows you to view and manage services obtained by the customer.

Package Subscriptions

To View an Account's Package Subscriptions

1. From the customer account's *Summary* page, click the **Package Subscriptions** tab. The *Packages list* page will appear displaying a list of all package subscriptions purchased by the customer.

Customer: My Org Pty Ltd (Account ID : 154253)

Summary Detail Organisation Contacts **Package Subscriptions** Service Subscriptions Pending Ledger Cardlines Invoices Transactions Profile Order Purchase Payment Methods Receive Payment Take Payment Portal Notes

Packages

Package Subscription ID:

Package Name:

Status:

Active
Cancelled
PreActive
NonPayment
Suspended

Search Clear

3 Results Found

Package Subscription ID	Package Name	Status	Start Date	End Date	Contract Name	Contract End Date
378592	Emersion Email Mailbox - Sell Package Plan	Active	7 Jun 2011			
466503	Soul ADSL2 - Sell Package Plan	Active	9 Mar 2012			
470510	Soul Inbound - Sell Package Plan	PreActive				

1 50 100 150 200

Figure 42. The account *Packages list* tab page

Search

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

- Package Subscription ID
- Package Name text contained in the note details
- Status all, active, cancelled, pre-active, non-payment, suspended, pending cancellation, pending prov cancel, initialised, Pending, Aborted

To View a Package Subscription

1. From the *Package list* page, click the package ID link in the *Package Subscription ID* column of the required package. The *view package subscription* page will appear showing the package details.

Customer: Joe Bloggs (Account ID: 132493)

Subscriptions | Details | **Package Subscriptions** | Service Subscriptions | Pending Ledger Credits | Process | Transactions | Profile | Order | Purchase | Payment Methods | Receive Payment | Time Payment | Portal | Notes

Package Sub ID: 291090
 Package Plan Name: M2 Mobile - Test - Sell
 Status: Active
 Start Date: 1 Jan 2011
 End Date:
 View Customer

Current Package: 01-Aug-2012 - 01-Sep-2012
 Billing Period:
 Upload Order Form:

Package Chain Information:
 Chain Started: 18 Jan 2011
 Chain Ended:
 Discount on Usage: N/A
 Discount on Each Service: N/A
 Access Fee:
 Discount applied each Package Period (3): \$ 0.00
 Edit Package Chain Info

Contract Details: No Contract
 Add Contract

Allocated Service Subscriptions

1 Results Found

ID	Service Identifier	Service Plan	Service Type	Status	Start Date	End Date
324851	61422...2222	M2 Mobile - Test - Sell	M2 / Optus Mobile	Active	2011-01-01 00:00:00	

Package Subscription Management

Migrate Package Subscription
 Cancel Package Subscription

Subscription Period History

Below is a list of the Package Subscription Periods which have been created for the current Package Subscription. As periods come due for processing, you will see the status of each change accordingly. When they are processed, the status is also updated.

20 Results Found

ID	Period Start Date	Period End Date	Processed Start Date	Processed End Date	Period Start Status	Period End Status	Period Length Modified
2004931	2011-01-01 00:00:00	2011-02-01 00:00:00	Completed	Completed	Processed	Processed	
2065982	2011-02-01 00:00:00	2011-03-01 00:00:00	Completed	Completed	Processed	Processed	
2234445	2011-03-01 00:00:00	2011-04-01 00:00:00	Completed	Completed	Processed	Processed	
2329795	2011-04-01 00:00:00	2011-05-01 00:00:00	Completed	Completed	Processed	Processed	
2424993	2011-05-01 00:00:00	2011-06-01 00:00:00	Completed	Completed	Processed	Processed	
2526429	2011-06-01 00:00:00	2011-07-01 00:00:00	Completed	Completed	Processed	Processed	
2645922	2011-07-01 00:00:00	2011-08-01 00:00:00	Completed	Completed	Processed	Processed	
2761577	2011-08-01 00:00:00	2011-09-01 00:00:00	Completed	Completed	Processed	Processed	
2863148	2011-09-01 00:00:00	2011-10-01 00:00:00	Completed	Completed	Processed	Processed	
2959297	2011-10-01 00:00:00	2011-11-01 00:00:00	Completed	Completed	Processed	Processed	
3034139	2011-11-01 00:00:00	2011-12-01 00:00:00	Completed	Completed	Processed	Processed	
3111844	2011-12-01 00:00:00	2012-01-01 00:00:00	Completed	Completed	Processed	Processed	
3189850	2012-01-01 00:00:00	2012-02-01 00:00:00	Completed	Completed	Processed	Processed	
3266052	2012-02-01 00:00:00	2012-03-01 00:00:00	Completed	Completed	Processed	Processed	
3322487	2012-03-01 00:00:00	2012-04-01 00:00:00	Completed	Completed	Processed	Processed	
3376543	2012-04-01 00:00:00	2012-05-01 00:00:00	Completed	Completed	Processed	Processed	
3425641	2012-05-01 00:00:00	2012-06-01 00:00:00	Completed	Completed	Processed	Processed	
3573602	2012-06-01 00:00:00	2012-07-01 00:00:00	Completed	Completed	Processed	Processed	
3625362	2012-07-01 00:00:00	2012-08-01 00:00:00	Completed	Completed	Processed	Processed	
3730298	2012-08-01 00:00:00	2012-09-01 00:00:00	Completed	Not Processed	Processed	Not Due	

Figure 43. The *view package subscription* page

The following package subscription details are displayed:

- Package Subscription ID the system assigned identifier
- Package Plan Name the package plan
- Status the package subscription status:
 - Active
 - Cancelled
 - Pre-active – provisioning of a mandatory service associated with the package is in progress

- Non-payment – not used
- Suspended – not used
- Pending cancellation – the package subscription is in the process of being cancelled
- Pending prov cancel – the system is waiting for a provisioning action to cancel the package subscription
- Initialised – waiting for provisioning to commence
- Pending – waiting to be activated
- Aborted – provisioning of a mandatory service associated with the package subscription failed
- Start Date of the package subscription
- End Date if the package was cancelled
- Current Billing Period the dates of the package's current billing period
- Package Chain Information shows any discounts applied to the package subscription
- Current Contract if the package subscription is associated with a contract, the contract name, status, and contract start and dates will be shown
- Allocated Service Subscriptions lists all service subscriptions linked to the package subscription with the service identifier, service plan name, service type and service start date.
- Subscription Period History displays a list of billing periods created for the service subscription, with period dates and statuses.

Actions

From the package subscription page, you can perform a number of actions:

- View Customer click the **View Customer** button to display the customer account *Summary* page
- Upload Order Form click the **Browse** button to display the File Upload window to select the order form file to upload and store against the package subscription e.g. to load the customer order or authorisation form
- Edit Package Chain Information to apply a discount to the package subscription (see *Package Chain Discounts* below)
- Add Contract to apply a contract to the package subscription (see *Managing Contracts* below)
- Edit Contract Dates to modify the contract dates if the package subscription is associated with a contract (see *Managing Contracts* below)
- Breakout Contract to break or cancel a contract associated with the package subscription – the package subscription is not cancelled (see *Managing Contracts* below)
- Migrate Package Subscription to change the customer's package plan (see *Package Migrations* below)
- Cancel Package Subscription to cancel the package (see below)
- View service plans in the *Allocated Service Subscriptions* list, click the service plan number in the *ID* column to view the service plan.

Package Chain Discounts

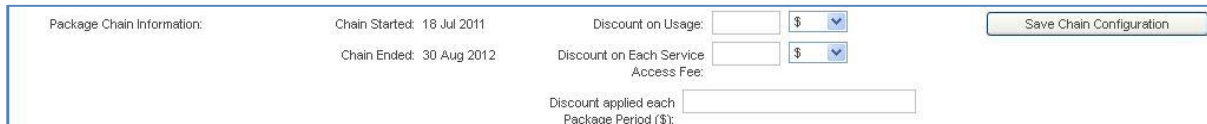
Package discounts may be used to provide a discount to a customer on their access fees and / or service usage charges. Instead of creating multiple package plans and service plans with different pricing, you can maintain a set of package plans and service plans, and simply discount the required elements to suit your individual customers.

The following discount methods are available:

- package access fee to discount the recurring access fee of the package subscription by a dollar amount
- service access fee to discount the recurring access fee of each service plan linked to a package subscription by a percentage or dollar amount
Note that the same dollar amount will be discounted from each service plan access fees
- usage to discount the usage charges of each service linked to a package subscription by a percentage or dollar amount.

To Apply a Package Chain Discount

1. From the *view package subscription* page, click the **Edit Package Chain Info** button. The *view package subscription* page will update to show the package discount fields.



The screenshot shows a form titled 'Package Chain Information:'. It contains the following fields and controls:

- Chain Started:** 18 Jul 2011
- Chain Ended:** 30 Aug 2012
- Discount on Usage:** A text input field followed by a dropdown menu with '\$' selected.
- Discount on Each Service Access Fee:** A text input field followed by a dropdown menu with '\$' selected.
- Discount applied each Package Period (\$):** A text input field.
- Save Chain Configuration:** A button.

Figure 44. The *view package subscription* discount fields

2. To discount the service usage, enter the discount to apply in the *Discount on Usage* field.
Select the discount type to apply to the usage from the drop box. Options are '\$' to apply a fixed dollar amount discount, or '%' to apply a percentage discount.
3. To discount each service access fee, enter the discount to apply in the *Discount on Each Service Account Fee* field.
Select the discount type to apply to each service access fee from the drop box. Options are '\$' to apply a fixed dollar amount discount, or '%' to apply a percentage discount.
4. Enter a discount amount to apply to the package access fee per period in the *Discount applied each Package Period (\$)* field.

Managing Contracts

A contract can be optionally attached to a package subscription to define the minimum length of time the package subscription should be retained by the customer, and the behaviour the system should perform in the event of cancellation or plan change. A contract can also be used to provide credits, or discounts, to the customer over the life of the contract.

Package plans can be configured with a default contract. A default contract will be automatically applied to a package subscription once it is active against a customer account.

Contracts can be applied against a package subscription at any time, even if the package is already active. However, only contracts that have the required package plan set up in the contract's *package pool* can be applied (see the Packages and Plans User Manual for details about setting up contracts and package pools). Contracts may also be modified or broken at any time. The system will automatically calculate any break out fees and apply them to the customer's account.



To cancel a contract without charging any break out fee, first modify the contract end date to the current date, and then cancel the contract.

To Add a Contract to a Package Subscription

1. From the *view package subscription* page, click the **Add Contract** button. The *view package subscription* page will update to show a list of available contracts with the contract information, as well as contract date fields.

Start Date: 30 Aug 2012
 End Date: ☐ Automatically set End Date

Type Id	Contract Name	Length (months)	Breakout	Credit on Contract	
1436	Test Contract	24	0	0	<input type="radio"/>

Add Selected
 Cancel

Figure 45. The *view package subscription* page contract fields

Note that if the package subscription's package plan is not associated with any contract pools, the Add Contract button will not appear. You should check the contract required and ensure the package plan is contained in the contract's package pool.

2. The *Start Date* will show the current date to commence the contract. Enter the contract start date as required. A calendar tool will appear to allow you to select the required date.
3. Enter the contract's *End Date*. A calendar tool will appear to allow you to select the required date. Alternatively, you can tick the *Automatically Set End Date* check box to allow the system to determine the contract end date based on the contract's settings.
4. Select the contract you wish to add to the package subscription by clicking the option button of the required contract in the list.
5. Click the **Add Selected** button. The *view package subscription* page will be updated to show the contract information selected.

Current Contract: Name: Test Contract
 Status: Active
 Start Date: 30 Aug 2012
 End Date: 30 Aug 2014
 Original Start Date: 30 Aug 2012
 Original End Date: 30 Aug 2014

Figure 46. The *view package subscription* page contract information

To View a Package Subscription Contract

1. On the view *package subscription* page, the *Current Contract* section will show the contract information associated with the package subscription.

Note that if the package subscription does not have an associated contract, this information will not be displayed.

2. Click the magnifying glass icon beside the contract name. The view *package subscription* page will be updated to show further information about the contract, such as the contract length, breakout method, plan change methods and maximum breakout fee.

The screenshot shows the 'Current Contract' section with the following details:

- Name:** Test Contract
- Status:** Active
- Start Date:** 30 Aug 2012
- End Date:** 30 Aug 2014
- Original Start Date:** 30 Aug 2012
- Original End Date:** 30 Aug 2014
- Contract Details:**
 - Contract Length: 24 months
 - Breakout Method: Fee [\$0]
 - Max Amount: Not Used [Not Set]
 - [View Packages in this Contract Pool](#)
- Upgrade Method:** Not Used[\$0]
- Downgrade Method:** Break Contract[\$0]
- Crossgrade Method:** Break Contract[\$0]
- Buttons:** Edit Contract Dates, Breakout Contract (\$0)

Figure 47. The *view package subscription* page contract information

3. Click the magnifying glass icon again to hide the contract information.

To Edit a Contract

1. On the view *package subscription* page in *Current Contract* section, click the **Edit Contract Dates** button. The view *package subscription* page will be updated to show the contract date fields enabled for editing.

The screenshot shows the 'Current Contract' section with the following details:

- Name:** Test Contract
- Status:** Active
- Start Date:** 30 Aug 2012
- End Date:** 30 Aug 2014
- Original Start Date:** 30 Aug 2012
- Original End Date:** 30 Aug 2014
- Buttons:** Save Contract Dates, Cancel Edit Contract

Figure 48. The *view package subscription* page contract date fields

2. Enter the contract *Start Date* as required. A calendar tool will appear to allow you to select the required date.
3. Enter the contract *End Date*. A calendar tool will appear to allow you to select the required date.
4. Click the **Save Contract Dates** button. A message will appear at the top of the page stating that the contract details were saved.

To Cancel or Break a Contract

1. On the view *package subscription* page in *Current Contract* section, click the **Breakout Contract** button. A message window will appear prompting you to confirm that you wish to break the contract.

The screenshot shows a 'Contract Breakout' message window with the following details:

- Title:** Contract Breakout
- Text:** Are you sure you wish to breakout of this contract
- Buttons:** Yes, No

Figure 49. The *break contract* message

2. Click the **Yes** button. The system will process the contract cancellation and generate a new pending cardline for any applicable contract break fees. The view *package subscription*, *Current Contract* section will show the *Contract Status* as *Expired*.

Package Migration (Plan Change)

The Package Migration processed is used to change a customer's existing package plan subscription to another package. For example, if the customer wishes to upgrade to another package plan to allow greater usage, or obtain other services etc.

When you migrate a package subscription to another package, mandatory services defined in the original package plan will be retained. The service itself will not be altered. Only the service billing will be affected depending on the new package plan and its linked service plan. You will only be able to migrate the package subscription to other packages that contain the mandatory service plans. Non-mandatory services of the package plan may be discontinued and new services can be provided, as defined in the new package plan.

To Migrate a Package Subscription

1. On the view *package subscription* page in the *Package Subscription Management* area, click the **Migrate Package Subscription** button. The *Migrate Package Subscription* page will be displayed.

Migrate Package Subscription: 469778

Add Service Types

Please choose the Service Types you would like to add to this package. If you don't want to add any, just press submit.
 Note: Service in the existing package will be pre-checked.
 services that cannot be removed will not be editable.

☐ M2 / Optus Mobile ☐ Soul ADSL2

☒ Telstra PSTN (eBill)

Possible Packages

Packages which contain all selected: Telstra PSTN (eBill)

Package ID	External Name	Internal Name
143943	KOB Special II	KOB Special II
119466	Telstra PSTN (eBill) - Sell Package Plan	Telstra PSTN (eBill) - Sell Package Plan

Figure 50. The *Migrate Package Subscription* page

The *Migrate Package Subscription* page will show all available service types with a check box beside each. Service types linked to the existing package subscription will appear ticked. Mandatory services linked to the existing package subscription cannot be removed, and will display greyed out and disabled.

2. To add services to be obtained by the customer in the new package, tick the check box beside the required additional services types. The list of *Possible Packages* will be updated to show all package plans that contain all the service types selected.
3. To discontinue any non-mandatory services in the new package, clear the check box beside the required existing service types. The list of *Possible Packages* will be updated to show all package plans that contain all the service types selected.
4. Click the **Submit** button. The *Migrate Package Subscription* page will update to show the existing service subscriptions in the original package subscription, and list available new package plans.

Migrate Package Subscription: 73438

Service Subscriptions

As this package only has one service, you cannot cancel it. To do so, cancel the whole package.

Service Type	Service Subscription	Service ID	
Telstra PSTN (eBill)	Telstra PSTN (eBill) - Sell Service Plan	6139666666	Keep

Available Packages

Package ID	External Name	Internal Name	Select
143943	KOB Special II	KOB Special II	<input type="radio"/>
119466	Telstra PSTN (eBill) - Sell Package Plan	Telstra PSTN (eBill) - Sell Package Plan	<input type="radio"/>

Figure 51. The *Migrate Package Subscription* page showing service subscriptions

5. For each existing service subscription listed, select the migration action to perform from the drop list beside the service details.
6. Select the new package plan to migrate to by clicking the option button of the required package plan in the *Available Package* list.

7. Click the **Select** button. The *Migrate Package Subscription* page will update to show the Service Allocation as well as Migration Date fields.

Migrate Package Subscription: 73438

Service Allocation

Old Package: Telstra PSTN (eBill) - Sell Package Plan (Subscription: 469778)

Service Type	Service Subscription	Service ID	
Telstra PSTN (eBill)	Telstra PSTN (eBill) - Sell Service Plan	6139666666	Migrating

New Package: KGB Special II

Service Type	Service Subscription	Origin
Telstra PSTN (eBill)	Telstra PSTN (eBill) - Sell Service Plan	Package:514440 1
M2 / Optus Mobile	M2 Mobile - Test - Sell	1

Configuring Order

SO Type	Order Type

Migration Date

* Migrate When?:

☐ Migrate Now
☐ Migrate at End of Today
☐ Migrate at End Of Last Day in Period (27 Sep 2012)
☐ Migrate at End of Specific Date

Migrate Date: 31 Aug 2012

This migration will submit immediately once you have confirmed the above information.

Figure 52. The *Migrate Package Subscription* page showing service allocation

8. Select when the package migration is to take place from the *Migrate When* option buttons. Options available are:
- **Migrate Now** the migration will process immediately and the new package plan fees and structure will take effect straight away
 - **Migrate at End of Today** the migration will process at midnight so the new package plan fees and structure will take effect the following day
 - **Migrate at End of Last Day in Period** the migration will process at the end of the current package billing period so the new package plan fees and structure will take at the beginning of the next billing period
 - **Migrate at End of Specific Date** the migration will process at midnight on the specified date
9. If you selected the *Migrate at End of Specific Date* option, enter the required date in the Migrate Date field. A calendar tool will appear to allow you to select the required date.
10. Click the **Complete Migration** button. The *Migrate Package Subscription* page will update and show a message at the top of the page stating that the migration is set to occur per the option you selected.

Cancelling Packages

Package subscriptions can be cancelled for a number of reasons e.g. if a customer chooses to terminate their services with you etc. When a package subscription is cancelled, all service subscriptions linked to the package are first cancelled. The package status will be updated to 'Pending Cancellation' while the system is processing the cancellation of all the linked services. The system processes each service cancellation according to the provisioning processes set up for the service type, which could be manual or automated with the service provider. Once all the service subscriptions have been cancelled, the package subscription will be cancelled.

Non-mandatory service subscriptions can be cancelled individually without cancelling the linked package subscription. For example, a package that has a mandatory ADSL2 service and a non-mandatory hosted email service; the hosted email service can be cancelled and the package subscription would continue to be active with only the ADSL service.

If a mandatory service is churned away (i.e. the customer moves their service to another service provider) that is processed via the automated provisioning process, the service subscription will be cancelled. The system will detect the cancellation and send an email notification (depending on the service set up). The package subscription will not be automatically cancelled.

Once the package subscription cancellation is complete, the billing engine will process the final usage fees for the cancelled service subscriptions and adjust the final access fees of the service plan or the package plan (i.e. pro-rata the fee for part of the billing period as required which could result in charges or credits depending on the billing metrics set up). The charges or credits for the final adjusted access fees and usage will be generated approximately 2 days after the package subscription cancellation date entered when you create the package cancellation. If a package cancellation is back dated to more than 2 days ago, the billing engine will create the final adjustments immediately.

To Cancel a Package Subscription

1. On the view *package subscription* page in the *Package Subscription Management* area, click the **Cancel Package Subscription** button. The *package subscription* page will update to show the *Cancel Package Subscription* section.

Package Subscription Management
Cancel Package Subscription

* Cancel Reason:

Cancel Comments:

Please Note:
Backdating a cancellation will cause access fees to be adjusted accordingly, and credits will be applied where appropriate. This does not apply to usage. You will be required to make an appropriate cardline for the usage difference using the Pending Cardlines interface under the customer.

If you backdate a cancellation, and the change requires a provisioning outcome with a supplier, the system will mark the event as backdated in the system, but the provisioning outcome will be forwarded to the supplier immediately and will only be effective today.

Subscription Start Date: 30 Dec 2010

* Cancel Time Frame:

☐ Cancel Immediately

☐ Cancel End Of Today

☐ Cancel End Of Last Day in Period (1 Sep 2012)

☐ Cancel Start of First Day in Period (2 Aug 2012) (All usage rated since then will NOT be automatically refunded)

☐ Cancel On End of Specific Date

:

☒ Skip Manual Provisioning and process cancellation straight away

Figure 53. The *Cancel Package Subscription* section

2. Select the *Cancel Reason* from the drop list. Options include:
 - Customer CPE not compatible
 - Customer Death
 - Going on Extended Holiday / Moving Overseas
 - Prefers Competitors Products/Pricing
 - Technical Reasons
 - Move – Does not want to recontract
 - Normal.
3. Enter any notes about the cancellation in the *Cancel Comments* field.
4. Select when the package cancellation is to take place from the *Cancel Time Frame* option buttons. Options available are:
 - Cancel Immediately the cancellation will process immediately
 - Cancel End of Today the cancellation will process at midnight of the current day
 - Cancel End of Last Day in Period the cancellation will process at the end of the current package billing period
 - Cancel Start of First Day in Period the cancellation will process at the beginning of the next package billing period
 - Cancel on End of Specific Date the cancellation will process at midnight on the specified date.
5. If you selected the *Cancel on End of Specific Date* option, enter the cancellation date in the associated field. A calendar tool will appear to allow you to select the required date.
6. To mark the package subscription as cancelled immediately and by-pass any manual provisioning actions, tick the *Skip Manual Provisioning and process cancellation straight away* check box. The effect of using this option will vary depending on the service type and the provisioning actions configured.
7. Click the **Confirm Cancel** button. The view *package subscription* page show a message at the top of the page stating that the package cancellation is set to occur per the option you selected.

Service Subscriptions

The *Service Management* module allows you view all details of a customer's service, or a *service subscription*. A *service subscription* is simply an instance of a service plan that has been sold to a customer. The service plan is the object that controls the billing parameters of a particular service type.

To View an Account's Service Subscriptions

1. From the customer account's *Summary* page, click the **Service Subscriptions** tab. The *Service list* page will appear displaying a list of all service subscriptions obtained by the customer.

Customer: Joe Bloggs (Account ID: 133449)

Summary | Detail | Contacts | Package Subscriptions | **Service Subscriptions** | Pending Ledger Cardlines | Invoices | Transactions | Profile | Order | Purchase | Payment Methods | Receive Payment | Take Payment | Portal | Notes

Service

Service Subscription ID:

EMEID:

Status:
Initialised
SCPPortCancel
Pending
Aborted

Service Identifier:

Service Type:

☐ Provisioning Halted ⓘ

25 Results Found

ID	Service ID	Service Identifier (SID)	Service Plan	Package Subscription ID	Package Plan	Service Type	Status	Start Date (SID)	End Date (SID)	Modified
507659	370866	#Order: 2080021	M2 MultiLine - Sell Service Plan	466495	M2 MultiLine - Sell Package Plan	M2 MultiLine	PreActive			22 May 2012
472659	335051	0298761111	Datafast ADSL1 Test Plan (SELL)	435295	Datafast ADSL1 Test Plan (SELL)	Datafast ADSL1	Active	2 Oct 2011 00:00:00		11 Oct 2011
507661	370867	0378111111	ISOne ADSL - Sell Service Plan	466497	ISOne ADSL - Sell Package Plan	ISOne ADSL	PreActive			22 May 2012
317755	238450	0387411111	ISOne ADSL2 - Sell Service Plan	284294	ISOne ADSL2 - Sell Package Plan	ISOne ADSL2	Active	30 Dec 2010 00:00:00		30 Dec 2010
317757	238451	0387411111	Exetel ADSL2 - Sell Service Plan	284296	Exetel ADSL2 - Sell Package Plan	Exetel ADSL2	PreActive			22 May 2012
317759	238452	0387411111	Soul ADSL2 - Sell Service Plan	284298	Soul ADSL2 - Sell Package Plan	Soul ADSL2	Active	30 Dec 2010 00:00:00		30 Dec 2010
317753	238449	0387411111	ISOne ADSL - Sell Service Plan	284292	ISOne ADSL - Sell Package Plan	ISOne ADSL	Cancelled	30 Dec 2010 00:00:00	31 Aug 2012 00:00:00	30 Aug 2012
317751	238448	0387451111	Nextep ADSL - Sell Service Plan	284290	Nextep ADSL - Sell Package Plan	Nextep Data	Cancelled	30 Dec 2010 00:00:00	3 Oct 2011 23:59:59	7 Oct 2011
507461	370377	0399111111	Soul ADSL2 - Sell Service Plan	466297	Soul ADSL2 - Sell Package Plan	Soul ADSL2	PreActive			22 May 2012
507563	370868	6138511111	M2 MultiLine - Sell Service Plan	466499	M2 MultiLine - Sell Package Plan	M2 MultiLine	PreActive			22 May 2012
514440	366701	6139666111	Telstra PSTN (eBill) - Sell Service Plan	469778	Telstra PSTN (eBill) - Sell Package Plan	Telstra PSTN (eBill)	Active	15 Aug 2012 00:00:00		15 Aug 2012
389351	265148	6140011111	M2 Mobile - Test - Sell	354890	M2 Mobile - Test - Sell	M2 / Optus Mobile	PreActive			22 May 2012
389953	264749	6140011111	M2 Mobile - Test - Sell	354492	M2 Mobile - Test - Sell	M2 / Optus Mobile	PreActive			22 May 2012
527449	305753	6141811111	M2 Mobile - Test - Sell	479323	M2 Mobile - Test - Sell	M2 / Optus Mobile	Active	30 Aug 2012 11:28:15		30 Aug 2012
437059	305753	6141831111	M2 Mobile - Test - Sell	401897	M2 Mobile - Test - Sell	M2 / Optus Mobile	Cancelled	25 May 2011 00:00:00	30 Aug 2012 11:28:15	30 Aug 2012

1 2 >

20 50 100 150 200

Figure 54. The account *Packages list tab* page

Search

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

- Service Subscription ID
- EMEID the system internal service identifier
- Status all, active, cancelled, pre-active, non-payment, suspended, pending cancellation, pending prov cancel, initialised, Pending, Aborted
- Service Identifier e.g. the phone number or email address of the service
- Service Type the service type, such as PSTN phone, mobile phone, VOIP, ADSL2 etc.
- Provisioning Halted to find any services where provisioning has been stalled or an error detected

To View a Service Subscription

1. From the *Service list* page, click the service ID link in the *ID* column or the service identifier in the *Service Identifier SID* column of the required service. The *view service subscription* page will appear showing the service details.

Configure Service Properties | Configure Service Features | Cancel Service Subscription | View Notes / History / Log

Service Subscription: 514440
 ID: 6139666666
 Service ID: 396701
 Service Identifier: 6139666666
 Service Type: Telstra PSTN (e80)
 Service Plan: Telstra PSTN (e80) - Sell Service Plan
 Current Service: 28-Aug-2012 - 28-Sep-2012
 Subscription Billing Period
 Package: 489778
 Subscription ID
 Package Plan: Telstra PSTN (e80) - Sell Package Plan

Start Date: 15 Aug 2012
 End Date
 Status: Active
 Transfer Type: CHURN
 Authorisation Date: 20 May 2012
 Authorisation Type: Verbal Recording
 Authorisation: 235609
 Reference

View Usage
 View Service & Equipment
 View Package Subscription

Service Properties

Choose an Action: [View Service](#)

By default the property sections are compressed - click the panel name, or the hourglass to expand/compress these actions. These properties will expand by default if you choose the edit service action.

Service Details
 Identifier: 6139666666

Configuration
 Vanity Identifier: bob home phone
 Loss Provider Code
[Back to top](#)

Add Service Features

Select New: [Select](#)
 Unallocated Feature:
 Identifier:
 Note: if a feature is not listed in the dropdown above, it is probably already installed. You can configure it below.

[Add Feature To Service](#)

Only active subscriptions will show here. To add a new one, use the form above.
 To turn a feature or service barring option on, choose 'Disable' or untick the option and save it. It will disappear from the below options.

Edit Service Features
[Back to top](#)

Custom Rate Override

Time Table: [None](#)
 Select Tariff: [Select](#)
[Tariff Structure Hierarchy](#)

1 Results Found

Tariff ID	Tariff	Profile	How Tariff is Billed	Time Band	Tiered Rate	Tax	In Cap	Valid Date	Option
485487	SDN 2 Enhanced Plus - Tele Local (HDD1) Time / Weather	Flat Charge	Flat charge of \$0.5	N/A		Australian GST	No	15 Aug 2012 - 24 Aug 2012	View Edit Delete

[20](#) [50](#) [100](#) [150](#) [200](#)

Cancel Service

This service is mandatory against the package and cannot be independently cancelled.

[Back to top](#)

[Create New Note](#)

NOTE ID	Author	Created	Subject	Details
Nothing Found				

[Click here to toggle the display of feature history / notes / provisioning log and subscription history logging.](#)

Below this point is the service feature history list, a list of notes attached to the service, the provisioning log against the service and the subscription period history detailing all payments against the service subscription. These are hidden on page load. Clicking the link above will display all those lists for use.

Service Feature History

Below is a list of historical service features that were attached to the service subscription.

Subscription Start Date	Subscription End Date	Feature Name	Feature Option	Status
Nothing Found				

[Notes attached to this service](#)

[Create New Note](#)

NOTE ID	Author	Created	Subject	Details
Nothing Found				

Provisioning Log

[Provisioning Log](#)

Log ID	Service Identifier	Request Type	Transfer Type	Task Status	Created	Updated	Result
1							

Subscription Period History

Below is a list of the Service Subscription Periods which have been created for the current Service Subscription. As periods come due for processing, you will see the status of each change accordingly. When they are processed, the status is also updated.

2 Results Found

ID	Period Start Date	Period End Date	Processed Start Date	Processed End Date	Period Start Status	Period End Status	Period Length Modified
4206748	2012-08-15 00:00:00	2012-08-28 00:00:00	Completed	Completed	Not Due	Processed	
4220764	2012-08-28 00:00:00	2012-09-28 00:00:00	Completed	Not Processed	Not Due	Not Due	

[50](#) [100](#) [150](#) [200](#)

Figure 55. The Service Details page

The following service subscription details are displayed:

- Service Subscription ID the system assigned identifier of the service subscription
- Service ID the internal system service identifier
- Service Identifier the service's identifier, such as a phone number or email address
- Service Type the type of service e.g. PSTN, Mobile etc
- Service Plan the name of the associated service plan
- Service Subscription Billing Period the dates of the service's current billing period
- Package Subscription ID the ID of the linked package subscription
- Package Plan the name of the linked package plan
- Start Date of the service subscription
- End Date i.e. if the service was cancelled
- Status the service subscription status:
 - Active
 - Cancelled
 - Pre-active – provisioning is in progress
 - Non-payment – not used
 - Suspended – not used
 - Pending cancellation – the service subscription is in the process of being cancelled
 - Pending prov cancel – the system is waiting for a provisioning action to cancel the service subscription
 - Initialised – waiting for provisioning to commence
 - Pending – waiting to be activated
 - Aborted – provisioning failed
- Transfer Type (i.e. Churn or New)
- Authorisation Date the date of the customer's authorisation, recorded during the provisioning process
- Authorisation Type the type of customer authorisation recorded
- Authorisation Reference the reference number of the customer authorisation
- Service Feature History lists service feature history attached to the service subscription
- Provisioning Log displays information about all provisioning requests on the service and their status
- Subscription Period History displays a list of billing periods created for the service subscription, with period dates, processing dates, and statuses

Service Feature History, Notes, Provisioning Log, and Subscription History

This section shows a list of previous requests, either completed or in progress, including the initial provisioning request, any change requests, as well as notes. By default, these sections are compressed. To display the details, click the '[Click here to toggle the display...](#)' link to expand or compress these details.

Actions

From the service subscription page, you can perform a number of actions:

- View Usage click the **View Usage** button to display the service usage, such as calls made or data used etc
- View Service & Equipment click the **View Service & Equipment** button to display any service and equipment charges incurred against the service
- View Package Subscription click the **View Package Subscription** button to display the package subscription details to edit package chain information, add a contract, or migrate the package etc
- Service Properties view and edit specific service information that vary per service type – see below.
- Rate Override for telephony services, allows you to override a particular rate from service plan's rate card (see the *Custom Rate Override* section below)
- Cancel Service for services that are not mandatory in the linked package subscription, you can cancel the service subscription (see the *To Cancel a Service* section below)
- View and create Notes displays any notes attached to the service. To add a note, click the *Create New Note* button. The *New Note* section will appear where you can enter the note *Subject* and *Details* text. Click the *Save* button to save the note.

Service Properties

The *Service Properties* section shows the service configuration. By default, the service property sections are compressed. To display the details, click each panel name to expand or compress these details. The properties available are:

- Service Details displays the service identifier – this cannot be modified
- Configuration displays the service's configuration and *Vanity Identifier*. These details will vary depending on the service type. Refer to each service type's provisioning manual for specific details.

To Modify the Service Properties

1. Select *Edit Service* from the *Choose an Action* drop list under the *Service Properties* section heading. The service property fields will update and be enabled for editing.
2. Enter or update the service property fields as required.
3. Click the **Save** button.

Custom Rate Override

The Custom Rate Override section lists any rate overrides set on the service subscription. The system will create usage charges at the override rates set on the service subscription instead of the rates set in the service plan's associated rate card. You create a custom rate override for each tariffs (i.e. each specific usage or call type) required. For example, the standard rate for phone calls made to the USA in the rate card of the telephony service plan may be \$1.00 per minute, but you wish to charge this particular customer \$0.75c per minute, and charge other phone call rates at the standard rate. Instead of creating a new rate card and service plan, you would create a rate override for the USA phone call tariff.

To Set a Rate Override

1. In the *Custom 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.

The screenshot shows the 'Custom Rate Override' interface. At the top, there are fields for 'Time Table' (set to 'None'), 'Select Tariff' (set to 'International'), and an '<< Add Tariff' button. Below this is a 'Tariff Structure Hierarchy' section with a message 'This Rate Card does not have a Base Rate set.' and a 'Set Base Rate' button. A table titled '12 Results Found' displays a list of tariffs with columns: Rate ID, Tariff ID, Tariff, Profile, and This rate is. To the right of the table, a 'Select Next Tariff' drop list is open, showing a list of countries including Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Ascension Island, Austria, Azerbaijan, Bahamas, Bahrain, Bangladesh, and Barbados.

Rate ID	Tariff ID	Tariff	Profile	This rate is
180854	425060	International	Markup %	This rate is
180855	425001	Local	Flat Charge	Flat charge
180857	425021	Emergency Service	Flat Charge	This Tariff
180858	425019	Special Calls	Markup %	This rate is
180859	425034	Fixed To Mobile	Rate Per	\$0.22727
180860	425043	Intra Account Local	Flat Charge	Flat charge
180861	425042	Intra Account Fixed to Mobile	Rate Per	\$0.22727

Figure 56. The *Custom Rate Override* 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 Override for: <tariff>* window will appear.

The screenshot shows the 'Create New Rate Override For: OnRamp Corporate - Telephony NDD over 25km 25 - 50km' window. It includes a 'Valid Date From' field. Below this is a 'Step 1' section with fields for 'Min Price', 'Price', 'Price Interval', 'Charge Interval', 'Max Value', 'Max Type', and 'In Cap'. The 'Min Price' field is set to '\$'. Below the 'Step 1' section is an 'Add Another Rate Step' button. At the bottom, there is a 'Note' section with a text area, and 'Cancel' and 'Save Rate For Tariff' buttons.

Figure 57. 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*. Options available are:

- pass-through
- markup %
- discount %
- flat charge
- rate per
- excess
- simple cap
- capped
- flagfall + markup %

See the Packages and Plans User Manual for information about rating methods.

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* 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 for Tariff** button to save the tariff rate. The *service subscription* page will appear, showing the tariff rate set in the *Custom Rate Override* section with any other rates set.

To View an Rate Override

1. In the *Custom Rate Override* section, in the list of rate overrides, click the **View** link in the *Options* column of the required tariff. The *Editing Rate For: <tariff>* window will appear showing the rate override set for the selected tariff.

The screenshot shows a window titled "Editing Rate For : Calls to 1800 Numbers". Inside, there's a "Step 1" section with a "Rate Per" dropdown menu. Below this, there are several input fields: "Flagfall" with a value of "\$ 0.0909091", "Min Price" with "\$ 0.0909091", "Price Per" with "\$ 0.0909091", "Price Interval" with "30", "Charge Interval" with "30", and "In Cap" with "Yes". At the bottom, there is a "Note:" label followed by a text area and a "Cancel" button.

Figure 58. The *Editing Rates For <tariff>* window

2. Click the **Cancel** button to dismiss the window and return to the *service subscription* page.

To Edit a Rate Override

1. In the *Custom Rate Override* section, in the list of rate overrides, click the **Edit** link in the *Options* column of the required tariff. The *Editing Rate For: <tariff>* window will appear showing the rate override set for the selected tariff.

Figure 59. 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 *service subscription* page will appear, showing the tariff rate set in the *Custom Rate Override* section with any other rates set.

To Delete a Rate Override

1. In the *Custom Rate Override* section, in the list of rate overrides, 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 override.

Figure 60. The *Delete Rate confirmation* message

2. Click the **Delete** button. A message will display at the top of the screen stating that the rate override was deleted.

To Cancel a Service

The *Cancel Service* section may allow you to cancel the service subscription, depending whether the service has been set as mandatory on the package plan set up. If the service is mandatory, a message will display advising that the service cannot be cancelled.

Custom Rate Override

Time Table: None Select Tariff: Select

Tariff Structure Hierarchy

Tariff ID	Tariff	Profile	How Tariff is Billed	Time Band	Tiered Rate	Tax	In Cap	Valid Date	Option
Nothing Found									

Cancel Service

This service is mandatory against the package and cannot be independently cancelled

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Figure 61. The *service subscription* page showing a service that cannot be cancelled

If the service is not mandatory, the Cancel Service section will display showing the options to cancel the service.

Cancel Service

* Cancel Reason: User Cancel

* Cancel Time Frame:

- ☐ Cancel Immediately
- ☐ Cancel End Of Today
- ☐ Cancel End Of Last Day in Period (31 Aug 2012)
- ☐ Cancel On End of Specific Date

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Figure 62. The *service subscription* page showing a service that can be cancelled

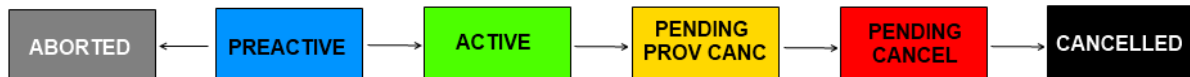
1. Select the *Cancel Reason* from the drop list.
2. Select when the service cancellation is to take place from the *Cancel Time Frame* option buttons. Options available are:
 - Cancel Immediately the cancellation will process immediately
 - Cancel End of Today the cancellation will process at midnight of the current day
 - Cancel End of Last Day in Period the cancellation will process at the end of the current billing period
 - Cancel on End of Specific Date the cancellation will process at midnight on the specified date.
3. If you selected the *Cancel on End of Specific Date* option, enter the cancellation date in the associated field. A calendar tool will appear to allow you to select the required date.
4. Click the **Confirm Service** button. The view *service subscription* page show a message at the top of the page stating that the service cancellation is set to occur per the option you selected.

Orders & Provisioning

To create a new service obtained by a customer, you create an Order in the system. Depending on the service type, the system integrates to the upstream supplier to provision the service automatically, or you may need to manually activate the service to indicate it has been provisioned if there is no system integration to your supplier. You choose the package to sell your customer for the required service(s).

Provisioning Process

Every Service Subscription in a Service Plan goes through the Provisioning Life Cycle.



By understanding this process, you will be able to understand when customers are billed and how services work.

- When a service is first ordered in the system, it will initially be created in a Pre-Active status.
- If the service type being used does not require provisioning, it will be automatically set to Active status.
- Once active, the *Package Period* the service is in will be started, and billing will commence.
- If the service type requires provisioning, the service will stay in Pre-Active status until notification is given that the service has been provisioned.

Provisioning types:

- Manual Provisioning – where you control provisioning of the customer's service
- Semi-Manual provisioning – where your supplier/wholesaler manages provisioning
- Fully Automated provisioning – where the provisioning system will automatically handle the order and receive updates directly from the carrier or service provider.
- When a service is cancelled, if there is provisioning involved the service subscription will go into Pending Prov Cancellation status (i.e. waiting for a provisioning action to complete)
- If no provisioning is required, or the provisioning step is complete, the status will be set to Pending Cancellation
- During this last stage, any credits that are required (sometimes due when a service subscription is cancelled mid-month) are generated by the system automatically
- Once credits have been calculated, the subscription status is changed to Cancelled
- If there are no other active Service Subscriptions within the Package Subscription, the Package Subscription is cancelled too.

Overall Order Process

The overall process for provisioning services is as follows:

1. Create Customer create the customer account record
2. Create Order order a service
3. Service Qualification (SQ) perform a SQ – depending on the service type
4. Select Order Type enter the request type i.e. a new service or churn an existing service from another service provider
5. Select Package Plan select the required package plan
6. Configure Service enter configuration details for the service
7. Customer Authorisation enter the customer authorisation details
8. Submit Order submit your order
9. Monitor Order monitor the submitted order for changes or errors until completion using the *Provisioning Log*.

To Create an Order

The first step of the provisioning process is to create a service order for an existing customer. You may also use the order process to check a particular service's availability without selecting a customer.

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will display showing a list of existing customers.
2. Locate the customer you wish to provision the service in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Order** tab. The *Create Order* page will display. Alternately, click the **Create Order** link beside the required customer in the *Customer List* page.

The screenshot shows the 'Customer List' page with search filters on the left and a table of customers. The 'Create Order' link is circled in red in the table's action column.

Account Number	Customer Name	Account Type	Account Profile	Status	Billing Contact	Phone	Email Address	Start Date	End Date	Invoice Period Start	Invoice Period End	Action
133449	Joe Bloggs	INDIVIDUAL	Emersion Default Account Profile	Active	Joe Bloggs	0439367205	test@test.com	Sep 28, 2010				Create Order Create Purchase Manage UserPortal

Figure 63. The *Customer List* showing the *Create Order* link

4. Tick the required service(s) check box(es). A list of package plans available for the services selected will display.

The screenshot shows the 'Create Order' page. Under 'Please choose the Service Types you would like in this order:', 'WBC - L3' is selected. Below, 'Possible Packages' are listed in a table.

Package ID	External Name	Internal Name
144526	WBC - L3 - OffNet	WBC - L3 - OffNet
144077	WBC - L3 - Sell Package Plan	WBC - L3 - Sell Package Plan
144263	Wholesale Broadband Connect	WBC - L3 - OnNet

Figure 64. The *Create Order* page showing examples of service packages

- Click **Submit**. Depending on the service type and configuration, the *Service Qualifications* page will display showing the SQ details and available order types.

For many service types, no order types will be available until a SQ has been performed that confirms that the service can be provisioned.

Order: i0782 (Customer: Jim)

Service Qualifications

SQ Type	SQ Created	Status	Result
WBC - L3	N/A	Initial	N/A

Available Order Types

WBC - L3

No Order Types to Choose From. (Perhaps you need to complete an SQ)

Please Select the order types you would like. Appropriate packages will be displayed depending on the service types, in the selected orders.

Note: you can only select 1 order type for each Service Qualification that you have performed.

Figure 65.The *Service Qualifications* page

Service Qualification (SQ)

The Service Qualification (SQ) function verifies that service can be provisioned with your upstream supplier. Depending on the service type, a service can be provisioned in 2 ways:

- create a new service for an customer that does not have an existing service (new)
- transfer an existing service from another provider (churn)/

Regardless of the provisioning type, a SQ must be performed as part of the Order process. However, you can perform a SQ to check availability before entering an order. A provisioning order will not be saved until a SQ is successfully completed that confirms that the service can be provisioned.

- On the SQ page, click the **Enter SQ Details** link. The *Service Qualification* page will display.

WBC - L3 Service Qualification

WBC - L3 Service Identifier

Enter a valid Full National Number

* Phone Number:

Please select one of the following service setup type :

☒ Create a brand new service (New)

☐ Transfer your existing service from another provider (Churn)

Proceed

Figure 66.The *Service Qualification* page

- Select the method to create the order from the option buttons, as follows:
 - for a new service select the *Create a brand new service (New)* option
 - for an existing service from another provider, select the *Transfer your existing service from another provider (Churn)* option.
- Enter the customer's phone number (or other identifier depending on the service typew) to provision the service on in the *Phone Number* field.
- Click the **Proceed** button.

- The *Order* page will display showing a system generated order number and show the *Status* of the SQ as well as the *Result*, which will correspond to the type of order selected in step 2.

When you submit a SQ, Emersion interacts with the service provider's provisioning system to confirm the provisioning order type and details entered. Until a response is received from the supplier's system, the SQ status will remain *Pending*.

Once the system has completed the SQ and received a response, the SQ *Status* will show 'Success', with the SQ *Result* corresponding to the type of order selected.

Order: 210186				
Service Qualifications				
SQ Type	SQ Created	Status	Result	
 AAPT Telephony	5 Jul 2012 13:04:56	Success	Phone Number 6139664444 Service is Available	
				Re-Submit

Figure 67. The *Service Qualification* page showing a completed SQ

- If you wish to perform another SQ, click the **Re-Submit** link. The system will return to the *Service Qualification* screen to allow you to perform another SQ as required.

Order Package Plan

Once the SQ has been completed successfully, you need to select the package plan to create the service against. The package selected will determine the charges and costs to on bill to your customer, as well as determine any other services that may be bundled together under the package to provide the customer.

- Once the SQ has completed successfully, a list of available packages for the service will be displayed.




Order: 21078				
Service Qualifications				
SQ Type	SQ Created	Status	Result	
 WBC - L3	16 Aug 2012 15:30:43	Success	Service 039867*** is available	
				Re-Submit
Available Order Types				
WBC - L3		Please Select the order types you would like. Appropriate packages will be displayed depending on the service types, in the selected orders. Note: you can only select 1 order type for each Service Qualification that you have performed.		
<input checked="" type="radio"/> Churn				
Available Packages				
*Filters have been applied to the list of available packages based on the service qualification result. Please expand the qualification result above for further detail.				
Package ID	External Name	Internal Name	Select	
 144077	WBC - L3 - Sell Package Plan	WBC - L3 - Sell Package Plan	<input type="radio"/>	
				Select

Figure 68. The *Order* page showing available packages

- Click the radio button beside the required package in the *Select* column. You can display a summary of the package details and charges by clicking the magnifying glass icon  beside the *Package ID*.

- Click the **Select** button. The *Configuring package* page will display, showing the previous SQ details, the package and the service details.

Order: 210710 (Customer: Test Service 1 Pty Ltd)

Service Qualifications

SO Type	SO Created	Status	Result
WBC - L3	8 Aug 2012 16:14:02	Success	Service 039527 is available

Configuring: WBC - L3 - Sell Package Plan

Service Type	Mandatory	Configure	Authorisation
WBC - L3	Yes	Configure	Authorise

Package Chain Details (Optional)

Package Chain Information:

Chain Started: 16 Aug 2012

Chain Ended:

Discount on Usage: \$

Discount on Each Service Access Fee: \$

Discount applied each Package Period (\$):

Save Chain Configuration

Upload Order Form

Upload Order Form: Browse...

Order Completion

Some aspects of your order require configuration.
Please complete this by either configuring or authorising your orders above.

Order Incomplete

- WBC - L3 (Configuration required)

Figure 69. The *Configuring package* page**Note:**

Emersion allows you to perform a SQ to confirm a service's availability without first creating a customer order. Select **Service > Order** from the menu. The system will prompt you to select the service and enter the SQ type as described previously. However, once the SQ has completed successfully, and you have selected the order type, the system will prompt you to select the customer to continue the order. If you have already selected a customer, skip the following steps and go to the *Configure Service* section on page 67.

Select Customer

If you performed a SQ without selecting a customer:

- After you have selected the package, the *Customer Choice* page will display a list of existing customers.

Customer Choice

Account Number:

Customer Name:

Service Identifier:

Account Status: Filter By Status

Billing Contact Name:

Date Filtering: Select

From:

To:

Search Clear

Add New Customer

Account Number	Customer Name	Account Type	Status	Billing Contact	Phone	Email Address	Start Date	End Date	Select
168453	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168454	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168455	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168456	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168457	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168458	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168459	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 02, 2011		Select
168653	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 03, 2011		Select
168753	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 03, 2011		Select
168755	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 03, 2011		Select
168862	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 03, 2011		Select
168865	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 03, 2011		Select
168953	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 10, 2011		Select
173053	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173153	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173253	Thompson, Susan	INDIVIDUAL	Cancelled	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173353	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173453	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173553	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select
173653	Thompson, Susan	INDIVIDUAL	Active	Thompson, Susan	0800 000 000	susan.thompson@emersion.co.nz	May 24, 2011		Select

1 2 3 4 5 ... 15

50 100 150 200

Figure 70. The *Customer Choice* page showing a list of customers

2. Locate the required customer to provision the service, and then click the **Select** link beside the customer record.
3. Alternately, you can create a new customer record if required. Click the **Add New Customer** button. The system will display the *Create New Account* wizard page. Enter the new customer's details using the wizard.



If you choose to create a new customer, you should note the *order number* from the top of the service qualification *Order* page to enable you to return to the order and continue the provisioning process.

4. Once a customer is selected, the *Configuring package* page will display.

Order: 210710 (Customer: Test Service 1 Pty Ltd)

Service Qualifications

SO Type	SO Created	Status	Result
WBC - L3	8 Aug 2012 16:14:02	Success	Service 039527... is available Finalised

Configuring: WBC - L3 - Sell Package Plan

Service Type	Mandatory	Configure	Authorisation
WBC - L3	Yes	Configure	Authorise

Package Chain Details (Optional)

Package Chain Information:

Chain Started: 16 Aug 2012

Chain Ended:

Discount on Usage: \$

Discount on Each Service Access Fee: \$

Discount applied each Package Period (\$):

Upload Order Form

Upload Order Form:

Order Completion

Some aspects of your order require configuration.
Please complete this by either configuring or authorising your orders above.

- WBC - L3 (Configuration required)

Figure 71. The *Configuring package* page

Configure Service

The *Service Configuration* page allows you to set up the specific service related features of the service. These vary depending on the service type. Refer to each service type's provisioning manual for specific details about each service's configuration requirements.

1. From the *Configuring package* page, click the **Configure** link. The *Service Configuration* page will appear showing the various fields related to the service type.

Figure 72. The *Service Configuration* page

2. Enter the required service confirmation information in the fields displayed.
3. Click the **Save** button. The *Order* page will display.

To return to the service configuration, click the *Configure* link to return to the *Service Configuration* page.

Customer Authorisation

The *Customer Authorisation* page allows you to enter the customer's authorisation information. To provision services, you must obtain a valid customer authorisation to verify that the customer wishes you to provide their service. For further details about customer authorisations, refer to your wholesale service provider.

1. On the *Order* page, click the **Authorise** link. The *Customer Authorisation* page will appear.

Figure 73. The *Customer Authorisation* page

2. Select the type of customer authorisation you have from the *Authorisation Method* drop list. Types available are 'Paper Form', 'Verbal Recording', and 'Other'.
3. Enter a *Reference Number* for the customer authorisation. For 'Verbal Recording' and 'Other' authorisation methods, this field is mandatory.
4. Select the *Authorisation Date* of the customer authorisation using the calendar tool.
5. Upload the relevant file (e.g. voice recording .wav file, or the electronic form etc). Click the **Browse** button. The *File Upload* window will appear. Navigate to and select the required file, and then click **Open**.
6. Click the **Save** button. The *Order* page will display.

Submit Order

Once all the service details have been completed, submit the order to provision the service.

You can optionally upload a copy of the customer's order (i.e. scanned paper form or electronic file) for easy future reference.

1. To apply a discount to the customer for the selected package:
 - a. Enter a discount to apply to the service usage in the *Discount Usage* field.
 - b. Select the discount type to apply to the service usage from the drop box. Options are \$ to apply a fixed dollar amount discount, or % to apply a percentage discount.
 - c. Enter a discount to apply to the service access fee in the *Discount on Each Service Account Fee* field.
 - d. Select the discount type to apply to the service access fee from the drop box. Options are \$ to apply a fixed dollar amount discount, or % to apply a percentage discount.
 - e. Enter a discount to apply to the service usage in the *Discount Usage* field.
 - f. Enter a discount amount to apply to the package access fee per period in the *Discount applied each Package Period (\$)* field.
2. To upload a copy of the customer's order, on the *Order* page, click the *Browse* button beside the *Upload Order Form* field. The *File Upload* window will appear. Navigate to and select the required file, and then click **Open**.
3. On the *Order* page, click the **Proceed** button. A message will display prompting you to confirm you wish to submit the order.

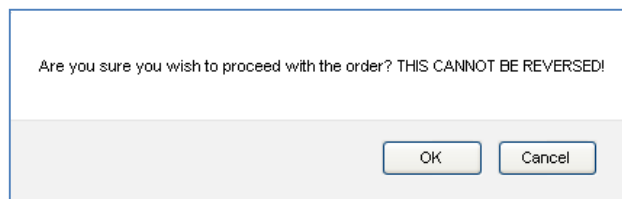


Figure 74.The *Order Confirmation* message

4. Click the **Yes** button to confirm the order. The *Order* page will appear showing that the order is complete. A message at the top of the screen will display, showing, "Provisioning request has been submitted".
 The system will automatically send the provisioning request to your upstream service provider. Emersion polls the service supplier for the provisioning request response and updates the *Provisioning Log* with any response received.
5. Use the *Provisioning Log* to monitor and update the status of the service order.

Purchases

The system allows you to record purchases made by customers. Purchases can be created either as an *Outright Purchase*, or under an *Installment Plan* that can be invoiced to the customer immediately or at the end of the billing period. Purchases are created against an existing customer from the *Customers* menu. You can also see the customer's purchase history from the customer account's page.

Outright Purchase

An Outright purchase is simply a regular sale where the goods are provided to the customer, and the customer is either invoiced immediately, or at the end of their next billing period. Payment may be taken immediately, or at a later date.

Installment Plan

An Installment Plan purchase allows products to be sold to a customer and then paid for over a period of time in smaller payment amounts. A variety of methods are available to calculate the installment plan final figure and payment period, as well as the repayment amounts. The system automatically creates cardlines on the relevant customer's invoices for the required installment payment amount, per the installment plan's configuration. Customers may also make additional payments on their installment plans, or finalise or break out of the installment plan.


To Create a Product Purchase

There are two ways to navigate to the *Purchase* function:

1. Select **Customers** > **Customer List** > from the Menu. The *Customer List* page will appear showing a list of existing customers. Locate the required customer and then click the **Create Purchase** link on the right side of the customer record

or

Select **Customers** > **Customer List** > from the Menu. The *Customer List* page will appear showing a list of existing customers. Select the required customer to display the customer details page. Select the **Purchase** tab. The *Purchase Management* page will appear showing a list of the customer's previous purchases. Click the **Add New Purchase** button. The *Purchase Type* page will display.



The screenshot shows a web form titled "Purchase Type". Below the title is a label "* Select Purchase Type" followed by two radio button options: "Outright Purchase" and "Installment Plan". The "Outright Purchase" option is selected.

Figure 76. The *Purchase Type* page

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

To Create an Outright Purchase

1. From the *Purchase Type* page, select the *Outright Purchase* option. The *Outright Purchase* section will appear showing additional fields and information.

The screenshot shows a web form titled 'Purchase Type'. At the top, there are two radio buttons: 'Outright Purchase' (selected) and 'Installment Plan'. Below this is a section titled 'Outright Purchase : Product Selection'. It contains several fields: 'Product Category' (a dropdown menu), 'Product Sub Category' (a dropdown menu), 'Product' (a dropdown menu), a checked checkbox for 'Use Product Ledger Code', a 'Custom Ledger Code' dropdown menu, 'Qty Required' (a text input field with '1' entered), and 'Unit Price (Inc Tax)' (a text input field with '0.00' entered). An 'Add to Cart' button is located to the right of these fields. Below the 'Add to Cart' button is a section titled 'Cart Details' which says 'No items in the cart.'. At the bottom is a section titled 'Complete Purchase' with two radio buttons: 'Complete Purchase via Service Information Record' (selected) and 'Complete Purchase by Creating a Cardline'. Below these are two dropdown menus: 'Invoicing Method' (set to 'Create Invoice') and 'Payment Method' (set to 'Take Payment Now'). A 'Proceed to Confirmation' button is at the bottom right.

Figure 77. The *Outright Purchase* section

2. Select the required *Product Category* from the drop list.
3. Select the required *Product Sub Category* from the drop list. The list will contain all sub categories associated with the product category selected.
4. Select the required *Product* from the drop list. The list will contain all products associated with the product category and sub category selected.

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

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

5. Tick the *Use Product Ledger Code* tick box to assign the sale cardline transaction to the product ledger code set up in the product details.
6. If you wish to assign the sale to another ledger code, un-tick the *Use Product Ledger Code* check box. The *Custom Ledger Code* drop list will be enabled. Select the required ledger code from the drop list.
7. Enter the number of items purchased in the *Qty Required* field.
8. If the product is serialised, enter the product's serial number in the *Serial Number* field. The system will verify the serial number entered is held in the product inventory.

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

9. If you entered a quantity greater than 1, the *Create single cardline for all items* check box will appear.
 - a. Tick the *Create single cardline for all items* check box to allow the system to create a single consolidated cardline entry on the customer account's invoice for the total value of the items.
 - b. Leave the *Create single cardline for all items* check box blank to allow the system to create a separate cardline on the customer account's invoice for each instance of the product (e.g. if there are 5 products purchased, the system will create 5 cardlines, one for each item).
10. If required, overwrite the product's unit price by entering the required price in the *Unit Price (inc Tax)* field.
11. Click the **Add to Cart** button. The *Cart Details* section will be updated to show the product and purchase information entered. The system will look up the product and examine the price point information to determine the applicable product price based on the current date, quantity and the customer's account profile.

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

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

Purchase Type

* Select Purchase Type: ☒ Outright Purchase
☐ Installment Plan

Outright Purchase : Product Selection

* Product Category:

Product Sub Category:

* Product:

☒ Use Product Ledger Code

Custom Ledger Code:

* Qty Required:

* Unit Price (Inc Tax):

Cart Details

ID	Product Name	Qty	Unit Price(Ex Tax)	Unit Tax	Tax Type	Sub Total(Ex Tax)	Sub Total(Inc Tax)	Action
1704201	Modem	4	318.18	31.82	Australian GST	1,272.73	1,400.00	Serial Numbers Delete
Total:						1,272.73	1,400.00	

Complete Purchase

☒ Complete Purchase via Service Information Record
☐ Complete Purchase by Creating a Cardline

Invoicing Method:

Payment Method:

Figure 78.The *Outright Purchase* section showing the *Cart Details*

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

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

Figure 79. The *Serial Numbers* window

- b. Enter the serial numbers of the individual products in the *Serial Number 1*, *Serial Number 2* etc fields.
- Note that you can paste multiple serial numbers into the *Serial Number* fields (i.e. from a spreadsheet). In the spreadsheet, select all required serial numbers and click *Copy*. In the *Serial Numbers* window, click in the first *Serial Number* field and click *Paste*. All selected serial numbers from the spreadsheet will be pasted into each *Serial Number* field.
- c. Click the **Save Serial Numbers** button. The system will validate all the serial numbers entered are held in the product inventory. Once complete, a message will display at the top of the window showing that the serial numbers have been saved.

Figure 80. The *Serial Numbers* window

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

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

Purchase Confirmation

Invoice Method: Invoice immediately

Payment Method: Pay Later

Back

Cancel

Confirm The Purchase

Cart Details

ID	Product Name	Product Note	Qty	Unit Price(Ex GST)	Tax	Tax Amount	Sub Total(line GST)	
1704085	Nokia C5000		1	236.32	Australian GST	23.63	259.95	Delete
Total:						23.63	259.95	

Figure 81.The *Purchase Confirmation* page

19. Review the purchase details.
20. Click the **Confirm The Purchase** button to confirm the product purchase transaction and save the details.
- If you elected to create an invoice immediately, the system will create a pending invoice containing cardlines for each item in the product purchase. You can view the invoice by clicking the *Invoices* tab on the *View Customer* page.
- If you elected to invoice the customer at the end of the billing period, the system will create pending cardlines for each item in the product purchase. If you elected to *Create single cardline for all items* for a product with a quantity greater than 1, the system to create a single consolidated pending cardline for the total value of the product. These pending cardlines will be picked up and processed on to the customer's next invoice during the next bill run, or you can manually create an invoice if there are no existing pending invoices. You can view the cardlines by clicking the *Pending Ledger Cardlines* tab from the *View Customer* page.

21. If you elected to *Take Payment Now* in the *Payment Method* option, the *Take Payment* page will be displayed for you to enter the payment details and the process the payment through the Electronic Payment System.

Take Payment

Customer Name: Matt Test Account Balance: 0.00
 * Total: Unallocated Funds: 0.00

☒ Auto Allocate

Stored Payment Method:

Payment Note:

☐ Use One Time Credit Card

Name On Card:

Card Type:

Credit Card No.:

Expiry Month:

Expiry Year:

CVV:

☐ Use One Time Direct Debit

Bank:

BSB:

Account Name:

Account Number:

Invoice ID	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Amount
Nothing Found							
1							

Figure 82.The *Take Payment* page

22. If you elected to *Receive Payment Now* in the *Payment Method* option, the *Receive Payment* page will be displayed for you to enter the manual payment details.

Receive Payment

Customer Name: Matt Test Account Balance: 0.00
 Total: Unallocated Funds: 0.00

☒ Auto Allocate

Payment Reference:

Payment Method:

Payment Date: 16 Dec 2011 15:05:10

Payment Note:

Invoice ID	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Amount
Nothing Found							
1							

Figure 83.The *Receive Payment* page

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

To Create an Installment Plan

1. From the *Purchase Type* page, select the *Installment Plan* option. The *Installment Plan* area will appear showing additional fields and information.

The screenshot displays the 'Purchase Type' form with the 'Installment Plan' option selected. The form is divided into several sections:

- Purchase Type:** Includes radio buttons for 'Outright Purchase' and 'Installment Plan' (selected).
- Installment Plan - Product Selection:**
 - Product:** A dropdown menu showing 'Monthly Repayment Option'.
 - * Product:** A text field with the placeholder 'Select a Product Category'.
 - * Base Price:** A text field displaying '0.00'.
 - Use Product Ledger Code:** A checked checkbox.
 - Custom Ledger Code:** A dropdown menu with the placeholder 'Select Ledger Code'.
- Installment Plan Configuration:**
 - Installment Cycle Payment Handling:** A dropdown menu showing 'Auto Prorate'.
 - Invoicing Method:** A dropdown menu showing 'Create Invoice'.
 - Product supplied, payment to begin immediately:** An unchecked checkbox.
 - Serial / Product Instance Code:** A text field.
 - Product Instance Description:** A large text area.
 - First Installment Date:** A text field.
- Installment Pricing Method:** Four radio buttons for different pricing methods:
 - Specify markup percentage, total amount of installments, and the installment period length.
 - Specify markup percentage, amount per installment, and the installment period length.
 - Specify total cost, total amount of installments, and the installment period length.
 - Specify total cost, amount per installment, and the installment period length.
- Installment Details:**
 - Base Price:** 0.00
 - Markup:** 0.00 %
 - Total Installments:** (empty text field)
 - Charge per Installment:** 0.00
 - Final Cost for Installment Plan:** 0.00
 - Installment Period Length:** 1 month

A 'Continue' button is located at the bottom right of the form.

Figure 84. The *Installment Plan* area

2. Select the required *Product Category* from the drop list.
3. Select the required *Product* from the drop list. The product price will display in the *Base Price* field.
4. Tick the *Use Product Ledger Code* tick box to assign the sale to the product ledger code set up in the product details.
5. If you wish to assign the sale to another ledger code, un-tick the *Use Product Ledger Code* check box. The *Custom Ledger Code* drop list will be enabled. Select the required ledger code from the drop list.

6. In the *Installment Plan Configuration* section, select the *Installment Offcycle Payment Handling* method required in the drop list. This option controls how the system processes customer payments that are made outside of the regular billing cycle.

The options include:

- | | | |
|---|----------------------------------|---|
| ➤ | Auto Prorata | the payment amount is automatically pro-rated resulting in the installment payment amounts being reduced. |
| ➤ | Reduce Payments | the number of payments may be reduced but the installment payment amount will remain the same. |
| ➤ | No Off Cycle Payments | off cycle payments are not permitted. |
| ➤ | Off Cycle payment acts as credit | off cycle payments are treated as payment in advance and appear as a credit on the customer's account. |

7. Select the *Invoicing Method* required for the first installment from the drop list.

The options include:

- | | | |
|---|----------------|---|
| ➤ | Create Invoice | a pending invoice will be created containing the first installment once the installment plan purchase is confirmed. |
| ➤ | Next Invoice | a pending cardline will be created for the first installment to be processed at the next bill run. |

8. If the product has been provided to the customer:

- Tick the *Product supplied, payment to begin immediately* check box. The *Serial / Product Instance Code*, *Product Instance Description* and *First Installment Date* fields will be enabled for entry.
- Enter the product's serial number or other unique ID (e.g. IMIE etc) in the *Serial / Product Instance Code* field.
- Enter the description in the *Product Instance Description* field.
- Enter the date the first instalment of the plan is due in the *First Installment Date* field. A calendar tool will appear to allow you to select the required date.



The installment plan processing will not commence until the product has been provided to the customer. You can use the *View / Manage Installment Plan* function to update the details after the instalment plan has been saved.

9. Select a pricing method to apply to the product from the *Installment Pricing Method* option radio buttons.

The system provides a variety of methods to calculate the final product total and installment payment amounts based on a several attributes as follows:

- Specify markup percentage, total amount of installments, and the installment period length
- Specify markup percentage, amount per installment, and the installment period length
- Specify total cost, total amount of installments, and the installment period length
- Specify total cost, amount per installment, and the installment period length.

10. Depending on the *Installment Pricing Method* option selected, the system will enable or disable the *Installment Details* fields. The product *Base Price* will display showing the original base price, which cannot be modified.
- For the *Specify markup percentage, total amount of installments, and the installment period length* and *Specify markup percentage, amount per installment and the installment period length* pricing methods, enter the markup percentage in the *Markup* field. For no markup, you can leave the value as zero (0).
 - For the *Specify markup percentage, total amount of installments, and the installment period length* and the *Specify total cost, total amount of installments, and the installment period length* pricing methods, enter the number of installments for the plan in the *Total Installments* field. The system will automatically create the specified number of payment installments on the subsequent customer's invoices until the installment plan is complete.
 - For the *Specify markup percentage, amount per installment and the installment period length* and the *Specify total cost, amount per installment, and the installment period length* pricing methods, enter the amount of each installment payment in the *Charge per Installment* field. The system will automatically create the payment installments of the entered amount on the subsequent customer's invoices.
 - For the *Specify total cost, total amount of installments, and the installment period length* and the *Specify total cost, amount per installment, and the installment period length* pricing methods, enter the total cost for the product including any additional fees or charges in the *Final Cost for Installment Plan* field. The system will use this figure to calculate each payment installment amount.
11. Select the frequency of the installment payments from the *Installment Period Length* drop list. Options include 1, 3, 6, 9, 12, 18, 24 and 36 months.
12. Click the **Continue** button. The *Purchase* page will display showing all details of the installment plan entered.

The screenshot shows the 'Purchase Type' page with the following details:

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

Figure 85. The *Purchase* page showing the confirmation details

13. Review the information to confirm it is correct.
14. Click the **Create Installment Purchase** button. A message will display at the top of the screen showing, "Installment Plan created".
- To return to the Installment Plan page to make changes, click the **Modify** button.

Purchase Management

Purchases made by customers, both outright purchases and installment plans, are stored with the customer's details. You can view past purchase details, as well as view the invoices the purchases appeared on.

To View a Customer's Purchase History

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will display showing a list of existing customers.
2. Locate the customer required in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display listing all the customer's purchases.

ID	Name	Product Category	Product Type	Purchase Type	Supplier	Purchase Date	Purchase Status
1779836	Nokia C5000	Phones	Physical Product	Installments	B...	2011-12-16 15:39:20	Incomplete
1779835	Nokia C5000	Phones	Physical Product	Installments	B...	2011-12-16 15:19:57	InProgress
1779834	Nokia C5000	Phones	Physical Product	Outright	B...	2011-12-16 15:07:00	Complete
1779833	Nokia C5000	Phones	Physical Product	Outright	B...	2011-12-16 15:05:09	Complete
1779826	BKB Netstick E160e	Hardware	Physical Product	Outright	B...	2011-12-15 13:24:36	Complete
1770232	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-11-01 15:15:29	Complete
1755947	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-11-01 13:07:20	Complete
1664300	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-10-02 03:22:03	Complete
1632468	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-10-01 17:24:30	Complete
1586541	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-09-01 14:25:12	Complete
1533590	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-09-01 12:58:03	Complete
1480622	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-08-01 19:08:43	Complete
1452057	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-08-01 16:58:28	Complete
1354031	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-07-01 20:00:08	Complete
1346096	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-07-01 18:25:54	Complete
1214115	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-06-01 21:58:24	Complete
1199045	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-06-01 21:07:00	Complete
1109780	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-05-02 01:11:49	Complete
1096385	Package Plan Access	Access Fee	Service Charge	Outright	B...	2011-05-01 23:55:15	Complete
1010353	Service Plan Access	Access Fee	Service Charge	Outright	B...	2011-04-01 22:41:04	Complete

Figure 86. The *Purchase Management* page

Search

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

- Purchase Status All, Complete, Incomplete and In Progress
- Purchase Type All, Outright, or Installment plans
- Product Type All, Service Charges, Billable items, or Physical Products

To View an Outright Purchase

1. Locate the required purchase that has a *Purchase Type* of 'Outright' on the *Purchase Management* page.
2. Click the purchase number link in the *ID* column of the list. The *Product Purchase Information* page will display.

The screenshot displays the 'Outright Purchase' page. It features a 'Product Purchase Information' section with the following details: Purchase ID: 1779834, Product Purchased: Nokia C5000, Purchased Qty: 1, Product Type: Physical products; stock may or may not have to be tracked, Product Category: Phones, Purchase Type: Outright, and Purchase Date: 16 Dec 2011. Below this is a 'Transactions' table with one row of data.

ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice
1805929	16 Dec 2011	Point of Sale	236.32	23.63	N/A	282615

Figure 87. The *Installment Purchase* page showing an Outright Purchase

3. To view the invoice that the purchase appeared on, click the invoice number in the *Invoice* column of the Transactions list. The invoice details will appear.
4. Click the *View Invoice* button to view the invoice .pdf.

To View an Installment Plan

1. Locate the required installment plan that has a *Purchase Type* of 'Installments' on the *Purchase Management* page.
2. Click the installment plan number link in the *ID* column of the list. The *Installment Purchase* page will display.
 - The *Product Purchase Information* section shows the basic product purchase information.
 - The *Installment Information* section shows the installment payment particulars, including the payment amount, next installment date, total outstanding etc.
 - The *Product Information* shows the product instance details.
 - The *Transactions* section shows all payments created to date for the installment plan, as well as whether each payment has been included on a customer invoice, or is still pending.

Installment Purchase															
Product Purchase Information Purchase ID: 1779835 Product Purchased: Nokia C5000 Purchased Qty: 1 Product Type: Physical products, stock may or may not have to be tracked Product Category: Phones Purchase Type: Installments Purchase Date: 16 Dec 2011	Installment Information Installment Amount: 26.00 Next Installment: 16 Dec 2011 Original Total Amount: 259.95 Total Amount Remaining: 259.95 Installments Remaining: 10 Custom Next Installment: 0.00 Installment Period Length: 1 month(s) Base Amount (prior to 259.95 markup): Charge Invoicing Method: Create Invoice Ad Hoc Payment Method: Auto Prorata <i>Note: All figures shown above are EX TAX</i>														
Product Information Product Instance ID: 14570 Product Serial Number: 234453 Instance Created: 16 Dec 2011 Product Supplied Product Instance Description: 423524354															
Transactions <table border="1"> <thead> <tr> <th>ID</th> <th>Date</th> <th>Purchase Text</th> <th>Amount</th> <th>Tax</th> <th>Service Subscription Id</th> <th>Invoice</th> </tr> </thead> <tbody> <tr> <td colspan="7"> Ad Hoc Payment: Amount to Charge including Tax: 0.00 Charge Invoice Method: Create Invoice <div> <input type="button" value="Create AdHoc Payment"/> <input type="button" value="Finalise all Payments (Break out)"/> </div> </td> </tr> </tbody> </table>		ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice	Ad Hoc Payment: Amount to Charge including Tax: 0.00 Charge Invoice Method: Create Invoice <div> <input type="button" value="Create AdHoc Payment"/> <input type="button" value="Finalise all Payments (Break out)"/> </div>						
ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice									
Ad Hoc Payment: Amount to Charge including Tax: 0.00 Charge Invoice Method: Create Invoice <div> <input type="button" value="Create AdHoc Payment"/> <input type="button" value="Finalise all Payments (Break out)"/> </div>															

Figure 88. The *Installment Purchase* page showing an Installment Plan

3. Depending on the installment plan's status, you may perform various actions:
 - Incomplete update the product supplied information
 - In Progress create an ad hoc payment against the instalment plan, or finalise the installment plan (i.e. break out and complete the plan)
 - Complete view the invoice(s) that the installment payments appeared on, if processed.

To Update the Product Supplied Information

If an installment plan was created but the product was not supplied to the customer at the time the purchase was saved, you can update the installment plan once the product has been supplied. The system will not create installment plan payment cardlines for invoicing until the product has been updated as provided to the customer.

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with a *Purchase Status* of 'Incomplete' on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

Installment Purchase

Product Purchase Information

Purchase ID: 1779836
 Product Purchased: Nokia C5000
 Purchased Qty: 1
 Product Type: Physical products, stock may or may not have to be tracked
 Product Category: Phones
 Purchase Type: Installments
 Purchase Date: 16 Dec 2011

Installment Information

Installment Amount: 21.67
 Next Installment:
 Original Total Amount: 259.95
 Total Amount Remaining: 259.95
 Installments Remaining: 12
 Custom Next Installment: 0.00
 Installment Period Length: 1 months(s)
 Base Amount (prior to 259.95 markup):
 Charge Invoicing Method: Create Invoice
 Ad Hoc Payment Method: Auto Prorate
 Note: All figures shown above are EX TAX

Product Information

Product information required to start installments

Product Instance ID:
 Product Serial Number:
 * Instance Created:

* Product Instance Description:

Save Product Information

Transactions

ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice
----	------	---------------	--------	-----	-------------------------	---------

Figure 89. The *Installment Purchase* page showing an *Incomplete* Installment Plan

5. In the *Product Information* section, enter the serial number, or other unique information (e.g. IMIE etc) in the *Product Serial Number* field.
6. Enter the description in the *Product Instance Description* field.
7. Enter the date the product was supplied in the *Instance Created* field. A calendar tool will appear to allow you to select the required date.
8. Click the **Save Product Information** button. A message will display at the top of the screen showing, "Product Instance created, installments will now proceed".

To Create an Ad Hoc Payment on an Installment Plan

Once an installment plan is *In Progress* (i.e. the product has been supplied to the customer), the system will automatically create cardline entries for the instalment payments that will appear on the customers' invoices. Customers may wish to make an Ad Hoc, or unscheduled, payment against the installment plan between invoices e.g. to reduce the amount owing etc.

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with a *Purchase Status* of '*In Progress*' on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

Installment Purchase

Product Purchase Information		Installment Information	
Purchase ID: 1779835	Product Purchased: Nokia C5000	Installment Amount: 26.00	Custom Next Installment: 0.00
Purchased Qty: 1	Product Type: Physical products, stock may or may not have to be tracked	Next Installment: 16 Dec 2011	Installment Period Length: 1 months(s)
Product Category: Phones	Purchase Type: Installments	Original Total Amount: 259.95	Base Amount (prior to 259.95 markup):
Purchase Date: 16 Dec 2011		Total Amount Remaining: 259.95	Charge Invoicing Method: Create Invoice
		Installments Remaining: 10	Ad Hoc Payment Method: Auto Prorata
Note: All figures shown above are EX TAX			

Product Information

Product Information	
Product Instance ID: 14570	Product Supplied
Product Serial Number: 234453	Product Instance Description: 423524354
Instance Created: 16 Dec 2011	

Transactions

ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice
Ad Hoc Payment						
Amount to Charge including Tax:		0.00				
Charge Invoice Method:		Create Invoice				

Buttons: Create AdHoc Payment, Finalise all Payments (Break out)

Figure 90. The *Installment Purchase* page showing an *In Progress* Installment Plan

5. In the *Ad Hoc Payment* section, enter the payment amount in the *Amount to Charge including Tax* field.
6. Select the invoicing method required for the payment from the *Charge Invoice Method* drop list. Options include:
 - Create Invoice a pending invoice will be created for the payment once the payment is confirmed
 - Next Invoice a pending cardline will be created for the payment to be included on the customer's invoice at the next bill run
7. Click the **Create AdHoc Payment** button. A message will display at the top of the screen showing, "Once off payment has been accepted..." The payment will appear in the *Transactions* list.

To Finalise an Installment Plan

An installment plan may be finalised, or broken out at any time i.e. if a customer wishes to pay out the amount outstanding before the scheduled completion date. This effectively stops the payment plan processing in the system and creates a corresponding invoice for the balance remaining.

1. Select **Customers > Customer List >** from the **Menu**. The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with a *Purchase Status* of 'In Progress' on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

The screenshot displays the 'Installment Purchase' page with the following sections:

- Product Purchase Information:**
 - Purchase ID: 1779835
 - Product Purchased: Nokia C5000
 - Purchased Qty: 1
 - Product Type: Physical products, stock may or may not have to be tracked
 - Product Category: Phones
 - Purchase Type: Installments
 - Purchase Date: 16 Dec 2011
- Installment Information:**
 - Installment Amount: 26.00
 - Next Installment: 16 Dec 2011
 - Original Total Amount: 259.95
 - Total Amount Remaining: 259.95
 - Installments Remaining: 10
 - Custom Next Installment: 0.00
 - Installment Period Length: 1 month(s)
 - Base Amount (prior to 259.95 markup):
 - Charge Invoicing Method: Create Invoice
 - Ad Hoc Payment Method: Auto Prorate
- Note:** All figures shown above are EX TAX
- Product Information:**
 - Product Instance ID: 14570
 - Product Serial Number: 234453
 - Instance Created: 16 Dec 2011
 - Product Supplied
 - Product Instance Description: 423524354
- Transactions:**

ID	Date	Purchase Text	Amount	Tax	Service Subscription Id	Invoice
Ad Hoc Payment:						
Amount to Charge including Tax:		0.00				
Charge Invoice Method:		Create Invoice				
- Buttons:** Create AdHoc Payment, Finalise all Payments (Break out)

Figure 91. The *Installment Purchase* page showing an *In Progress* Installment Plan

5. Click the **Finalised all Payments (Break out)** button. A message will display showing the breakout details, and prompt you to confirm the installment breakout.

The screenshot shows a confirmation dialog box titled 'Installment Breakout' with the following content:

Are you sure you want to Finalise all Payments (Break out) ?
Amount required:\$95.45 EXT 9.545 tax

Buttons: Yes, No

Figure 92. The *Installment Breakout* confirmation message

6. Click the **Yes** button to confirm. A message will display at the top of the screen showing, "Finalising..."
The system will process the installment plan finalisation and create a pending cardline will be created for the final payment amount to be included on the customer's invoice at the next bill run. The installment plan status will be updated to 'Complete'.
7. Click the **No** button to cancel. The system will not process the installment plan breakout and will display the *Installment Purchase* page as before.

Account and Invoice Management

The system provides a number of functions to allow you to manage your customers' invoices and account activities, such as processing payments and viewing transactions. You can access these functions from the customer's account page. You can also use the Accounts Receivable menu to manage your accounts (see the Billing and Accounts Management User Manual).

To manage a customer's account, you first need to navigate to the correct tab page of the account to access the required account function. The following account management functions are available from the customer's account page:

- **Invoices** displays all the customer's invoices, which can be downloaded and managed
- **Pending Ledger Cardlines** shows all unallocated ledger cardlines held against the customer account and allows you to create new cardlines.
- **Transactions** lists all financial transactions held against the customer account (e.g. payments, invoices, debits, credits, refunds etc)
- **Receive Payment** allows you to record a manual payment from the customer
- **Take Payment** allows you to process a payment from the customer via the automated EPS gateway

Invoices

To Display an Account's Invoices

The customer account *Invoices* page displays a list of all invoices generated by the system for the selected customer account. Invoices may be managed or downloaded.

1. From the customer account's *Summary* page, click the **Invoice** tab. The *Invoice* page will appear showing all invoices for the customer.

Customer: matthew daly (Account ID: 105652) [Has 3 overdue Invoice] Oldest Amount: 45 Age: 289 days

Summary Details Contacts Package Subscriptions Service Subscriptions Pending Ledger Cardlines **Invoices** Transactions Profile Order Purchase Payment Plan Payment Methods Receive Payment Take Payment Portal Notes

Invoice

Invoice ID:

Search Clear

Invoice ID	Current Charges (ExTax)	Current Charges (Tax)	Current Charges (Total)	Outstanding	Disputed	Balance at Generation	Start Date	End Date	Issue Date	Due Date	Approval Status	Action	PDF
306561	27.28	2.72	30.00	30.00	0.00	150.00	1 Feb 2012	1 Mar 2012	4 Apr 2012	10 Mar 2012	Pending	Manage	Download
300083	63.64	6.36	70.00	0.00	0.00	615.00	1 Jan 2012	1 Feb 2012	5 Feb 2012	10 Feb 2012	Approved	Manage	Download
292584	63.64	6.36	70.00	0.00	0.00	545.00	1 Dec 2011	1 Jan 2012	13 Jan 2012	10 Jan 2012	Approved	Manage	Download
283908	63.64	6.36	70.00	0.00	0.00	475.00	1 Nov 2011	1 Dec 2011	5 Dec 2011	10 Dec 2011	Approved	Manage	Download
277794	63.64	6.36	70.00	0.00	0.00	405.00	1 Oct 2011	1 Nov 2011	7 Nov 2011	10 Nov 2011	Approved	Manage	Download
270812	0.00	0.00	0.00	0.00	0.00	335.00	1 Sep 2011	1 Oct 2011	4 Oct 2011	10 Oct 2011	Approved	Manage	Download
261019	63.64	6.36	70.00	5.00	0.00	335.00	1 Aug 2011	1 Sep 2011	9 Sep 2011	10 Sep 2011	Approved	Manage	Download
247759	63.64	6.36	70.00	70.00	0.00	265.00	1 Jul 2011	1 Aug 2011	5 Aug 2011	10 Aug 2011	Approved	Manage	Download
236814	63.64	6.36	70.00	45.00	0.00	195.00	1 Jun 2011	1 Jul 2011	4 Jul 2011	10 Jul 2011	Approved	Manage	Download
228350	63.64	6.36	70.00	0.00	0.00	125.00	1 May 2011	1 Jun 2011	14 Jun 2011	10 Jun 2011	Approved	Manage	Download
217964	50.00	5.00	55.00	0.00	0.00	55.00	1 Apr 2011	1 May 2011	4 May 2011	10 May 2011	Approved	Manage	Download

1

50 100 150 200

Figure 93. The account *Invoice* tab page

Search

You can locate an invoice in the *Invoice List* by using the *Search* function. The *Invoice ID* field can be used to search for invoices:

To Download an Invoice

1. Locate the invoice required in the *Invoice list*.
2. Click the **Download** link in the *PDF* column of the required invoice. The *Opening...* download window will display.

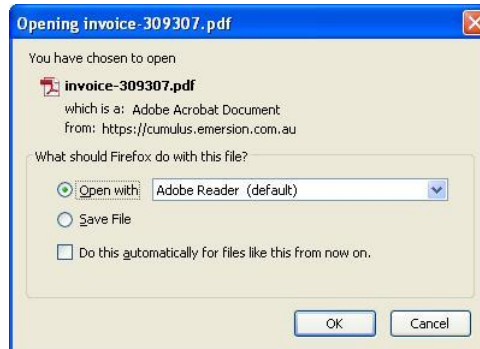


Figure 94. The *Opening invoice ...* download window

3. Select the *Open with* option to open the invoice with Adobe Reader. You may select another application to open the file with by selecting an application from the drop list, if required.
4. Select the *Save File* option to save the invoice file to your system.
5. Tick the *Do this automatically for files like this from now on* checkbox to perform the option selected automatically every time you download PDFs.
6. Click the **OK** button. The invoice .PDF file will open in Adobe or download to your system, depending on the option you selected.

To Manage an Invoice

1. Locate the invoice required in the *invoice list*.
2. Click the **Manage** link in the *Action* column of the required invoice. The *Manage Invoice* page will display.

Manage Invoice

Invoice ID: 309307
 Account Number: 1011...
 Customer Name: Cumulus Ltd
 Billing Cycle: Monthly
 Date From: 01 Jun 2012 21:21:41
 Added By: Admin
 Status: Pending

☐ Recall Issue Date to Today and Due Date as per terms when approved

Set Invoice Dates

Due Date: 24 Jun 2012
 Issue Date: 2 Jun 2012

Allocated Cardlines

ID	Date	Description	Amount	Tax	Ledger Code	Created From	Created To	Valid From	Valid To	Valid From	Valid To
309307	25 May 2012	Package Plan Access (21-05-2012 - 02-06-2012)	0.00	00	PACKAGE_PLAN_ACCESS_FEE_ADV (No mapped code)	01 May 2012	01 Jun 2012	01 May 2012	02 Jun 2012	01 May 2012	02 Jun 2012
309307	25 May 2012	Package Plan Access (02-06-2012 - 03-07-2012)	0.00	00	PACKAGE_PLAN_ACCESS_FEE_ADV (No mapped code)	01 May 2012	01 Jun 2012	02 Jun 2012	03 Jul 2012	02 Jun 2012	03 Jul 2012
309307	25 May 2012	Package Plan Access (03-07-2012 - 04-08-2012)	0.00	00	PACKAGE_PLAN_ACCESS_FEE_ADV (No mapped code)	01 May 2012	01 Jun 2012	03 Jul 2012	04 Aug 2012	03 Jul 2012	04 Aug 2012
309307	25 May 2012	Package Plan Access (04-08-2012 - 05-09-2012)	0.00	00	PACKAGE_PLAN_ACCESS_FEE_ADV (No mapped code)	01 May 2012	01 Jun 2012	04 Aug 2012	05 Sep 2012	04 Aug 2012	05 Sep 2012

Please Note:
 Amount on each Cardline is exclusive of Tax.

Add new Cardline to Invoice

Transaction Date: 01 Jun 2012
 Tax Type: Australian GST
 * Actual Value (incl Tax):
 * Tax Amount:
 * Description:
 * Ledger Code: (Select Ledger Code)
 * Ledger Code is an alpha numeric code to represent the transaction. It is used for reporting. (A-Z, 0-9 and _ permitted only)

Pending Ledger Cardlines

1 Results Found:

Transaction Date	Description	Amount	Tax	Code	Excl	Incl	Total
01 Jun 2012	Package Plan Access (02-06-2012 - 03-07-2012)	0.00	00	PACKAGE_PLAN_ACCESS_FEE_ADV	0.00	0.00	0.00

Adding Cardlines

Figure 95. The *Manage Invoice* page

See the Billing and Accounts Management User Manual for detailed information about the process of managing invoices.

Pending Ledger Cardlines

Pending ledger cardlines show charges generated for the customer that have not yet appeared on an invoice. You can create manual pending cardlines for charges or credits against the account e.g. for service fees or other charges or credits. Unallocated, pending ledger cardlines can be created at any time during the billing period independently to the regular billing cycle.

The pending cardline amount will not be reflected in the account's balance until it is allocated to an invoice, and the invoice then approved. The manually created cardline will appear in the *Miscellaneous Charges* section of the invoice. If the cardline is a credit (i.e. a negative cardline amount) the amount will appear in the *Adjustments* section of the invoice, and the amount will be deducted from the invoice total.



Cardlines entered for a negative amount will appear as a credit against the account.

Once an unallocated, pending ledger cardline has been created against an account, you can perform a number of actions:

- add the pending cardline to an existing pending invoice, via the *Manage Invoice* function
- if there is no current pending invoice for the account, you can create an *immediate* invoice that will automatically allocate the pending cardline created, as well as any other pending cardlines stored against the account, to the new invoice created (see *Immediate Invoices* below)
- leave the pending cardline to be processed with all other charges and cardlines during the next bill run. It will then be automatically picked up by the billing process, and appear on the account's next invoice.

To View Unallocated Pending Ledger Cardlines

1. From the customer account's *Summary* page, click the **Pending Ledger Cardlines** tab. The *Pending Ledger Cardlines* page will appear showing any unallocated pending ledger cardlines held against the account.

Due to this account having a Pending Invoice, the 'Create Immediate Invoice' button has been disabled

Customer: My Org Pty Ltd (Account ID: 154253)

[Summary](#) | [Details](#) | [Organisation](#) | [Contacts](#) | [Package Subscriptions](#) | [Service Subscriptions](#) | [Pending Ledger Cardlines](#) | [Invoices](#) | [Transactions](#) | [Profile](#) | [Order](#) | [Purchase](#) | [Payment Methods](#) | [Receive Payment](#) | [Take Payment](#) | [Portal](#) | [Notes](#)

Pending Ledger Cardlines

[Create New Unallocated Cardline](#)

Please approve the Pending Invoice for this customer before attempting to create another invoice

7 Results Found

Edit	ID	Transaction Date	Description	Acct Name	Package	Service	Billing Type	Code	Status	ExGST	GST	Total	Actions
	2079181	1 Aug 2012	Package Plan Access [01-08-2012 - 31-08-2012]	My Org	Soul ADSL2 - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
	2079153	1 Aug 2012	Package Plan Access [01-08-2012 - 31-08-2012]	My Org	Emersion Email Mailbox - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
	1969157	1 Jul 2012	Package Plan Access [01-07-2012 - 31-07-2012]	My Org	Soul ADSL2 - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
	1968507	1 Jul 2012	Package Plan Access [01-07-2012 - 31-07-2012]	My Org	Emersion Email Mailbox - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
	1964195	22 Jun 2012	Package Plan Setup [Soul Inbound - Sell Package Plan]	My Org			Advance	PACKAGE_PLAN_SETUP_FEE	PreAllocated	70.00	7.00	77.00	Delete <input checked="" type="checkbox"/>
	1953723	1 Jun 2012	Package Plan Access [01-06-2012 - 30-06-2012]	My Org	Emersion Email Mailbox - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
	1953454	1 Jun 2012	Package Plan Access [01-06-2012 - 30-06-2012]	My Org	Soul ADSL2 - Sell Package Plan		Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	30.00	3.00	33.00	Delete <input checked="" type="checkbox"/>
										Sum:280	Sum:25	Sum:275	

1

| | |

Figure 96. The account *Pending Ledger Cardlines* tab page

To Create a Pending Ledger Cardline

1. From the account's *Pending Ledger Cardlines* tab page, click the **Create New Unallocated Cardline** button. The *New Unallocated Cardline* page will appear.

The screenshot shows the 'New Unallocated Cardline' form with the following fields and values:

- Transaction Date: 7 May 2012
- Total (inc. Tax):
- Tax Type: Australian GST
- * Actual Value (ex. Tax):
- * Tax Amount: ☐ Manually enter tax:
- * Description:
- * Ledger Code:
- Select Ledger Code: (A-Z, 0-9 and _ permitted only)
- Buttons: Save, Cancel

Figure 97. The *New Unallocated Cardline* page

2. Enter the date for the cardline in the *Transaction Date* field. A calendar tool will appear to allow you to select the required date. This date will appear on the Invoice as the date the cardline charge was incurred.
3. Enter the amount including tax in the *Total (inc. Tax)* field. The system will automatically calculate the *Actual Value (ex. Tax)* and the *Tax Amount* and display in the corresponding fields.
Alternately, enter the cardline amount in the *Actual Value (ex. Tax)* field. The system will automatically calculate the *Total (inc. Tax)* and the *Tax Amount*.
4. Select the *Tax Type* applicable to the cardline in the drop list. By default, this is set to 'Australian GST'.
5. If you need to enter a manual tax amount, tick the *Manually enter tax* check box. The *Tax Amount* field will re-display enabled for editing. Enter the tax amount required.
6. Enter the description to show on the invoice for the cardline in the *Description* field.
7. Select the *Ledger Code* in the drop list. The cardline will be recorded against the selected ledger in the system for accounting purposes.
8. Click the **Save** button. The account's *Pending Ledger Cardline* page will display with a message will display at the top of the page stating that the cardline was saved successfully.
9. Click the **Cancel** button to cancel the cardline creation.

Immediate Invoice

The system allows you to create an ad-hoc or *immediate* invoice to create an invoice outside the regular bill run for any new charges or pending cardlines. For example, if you sell a piece of hardware to the customer, you can create an immediate invoice to update the account balance and bill the customer immediately outside the invoice cycle without waiting for the bill run. You can then manage the invoice and receive payment against that invoice in the same way as other invoice functions.

When you create an immediate invoice, the system will automatically allocate any pending cardlines held against the account to the new invoice, which may include cardlines created by the Billing and Rating engine for charges associated with services, product purchases, and ad hoc charges created manually.



You cannot create an immediate invoice if the account already has an existing pending invoice. Use the *Manage Invoice* function to add pending cardlines to the invoice.

To Create an Immediate Invoice

- From the customer account's *Summary* page, click the **Pending Ledger Cardlines** tab. The *Pending Ledger Cardlines* page will appear

If the account already has an existing pending invoice, the *Create Immediate Invoice* button will not appear. A message will appear at the top of the page stating that "Due to this account having a Pending Invoice, the 'Create Immediate Invoice' button has been disabled".

- Click the **Create Immediate Invoice** button. The *Pending Ledger Cardlines Create Immediate Invoice* page will appear showing all cardlines that will be allocated to the customer's new invoice.

Pending Ledger Cardlines : Create Immediate Invoice

Please confirm that you want to create an invoice based on the following cardlines.

* Issue Date:

* Due Date:

☐ Auto Approve

Please Note: If you create an immediate invoice on a cardline that is preallocated, it will be assigned to this invoice only.

11 Results Found

Transaction Date	Description	Acct Name	Billing Type	Code	Status	ExGST	GST	Total
24 Feb 2012	Peak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/01/2012 - 31/01/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
24 Feb 2012	OffPeak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/01/2012 - 31/01/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
24 Feb 2012	Package Plan Access [01-01-2012 - 31-01-2012]	Matthew F. [Advance]	Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	63.64	6.36	70.00
24 Feb 2012	Package Plan Access [01-02-2012 - 29-02-2012]	Matthew F. [Advance]	Advance	PACKAGE_PLAN_ACCESS_FEE_ADV	PreAllocated	63.64	6.36	70.00
6 Mar 2012	Peak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/02/2012 - 29/02/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
6 Mar 2012	OffPeak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/02/2012 - 29/02/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
14 Mar 2012	Package Plan Setup [1300 Test Package - SP SELL]	Matthew F. [Advance]	Advance	PACKAGE_PLAN_SETUP_FEE	PreAllocated	98.90	9.89	108.79
27 Apr 2012	Peak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/03/2012 - 31/03/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
27 Apr 2012	OffPeak Service Usage [Shaped 25GB] for Service #266948 [03:00:00-08] (0Mb Up/0Mb Down) for period 01/03/2012 - 31/03/2012	Matthew F. [Arrears]	Arrears	SOU_ADSL2_USAGE	PreAllocated	0.00	0.00	0.00
1 May 2012	Package Plan Setup [1300 Test Package - SP SELL]	Matthew F. [Advance]	Advance	PACKAGE_PLAN_SETUP_FEE	PreAllocated	98.90	9.89	108.79
7 May 2012	Overdue fees	Matthew F. [Advance]	Advance	MISC	PreAllocated	22.73	2.27	25.00

1

50 100 150 200

Figure 98. The *Pending Ledger Cardlines Create Immediate Invoice* page

- Enter an updated *Issue Date* if required. A calendar tool will appear to allow you to select the required invoice issue date. This date will appear on the Invoice as the *Date of Issue*.
- Enter an updated *Due Date* if required. A calendar tool will appear to allow you to select the required invoice due date. This date will appear on the Invoice as the *Payment Due Date*.
- Tick the *Auto Approve* check box if you want the invoice to be automatically approved, instead of being created in a Pending state to be managed manually.
- Click the **Confirm & Create Invoice** button. A message will appear at the top of the page stating that the invoice was created.
- Click the **Cancel** button to cancel the invoice creation.

Receive Payment

The Receive Payment function allows you to record a payment from the customer that was received manually. The actual payment must be processed outside of the system.

1. From the customer account's *Summary* page, click the **Receive Payment** tab. The *Receive Payment* tab page will appear, showing a list of all the customer's outstanding invoices, with the oldest invoice shown first. Invoices that have been paid in full will not appear.

Customer: My Org Pty Ltd (Account ID: 154253)

Summary | Detail | Organisation | Contacts | Package Subscriptions | Service Subscriptions | Pending Ledger Carlines | Invoices | Transactions | Profile | Order | Purchase | Payment Methods | **Receive Payment** | Take Payment | Portal | Notes

Receive Payment

Customer Name: My Org

Total: 0.00

Finance Charges(%):

Finance Charges(\$): 0.00

Account Balance: 264.00

Unallocated Funds: 0.00

☒ Auto Allocate

☐ Create Surcharge

Payment Reference:

Payment Method: Please Select A Method

Payment Date: 29 Aug 2012 13:50:06

Payment Note:

Submit

Cancel

Use this option to create a payment surcharge.

3 Results Found

Invoice ID	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Amount
236818	Feb	21 Feb 2012	28 Feb 2012	33.00	33.00	0.00	
252106	Feb	21 Feb 2012	28 Feb 2012	33.00	33.00	0.00	
303109	Feb	21 Feb 2012	28 Feb 2012	198.00	198.00	0.00	
Sum:				264	264	0.00	

50 100 150 200

Figure 99. The account *Receive Payment* tab page

2. Enter the total amount of the payment in the *Total* field.
3. Tick the *Auto Allocate* check box to prompt the system to automatically allocate the payment against outstanding invoices. Funds can be allocated across multiple invoices. The system will allocate the payment against the oldest outstanding invoice.
If the total payment amount is greater than the oldest outstanding invoice, the system will allocate payment against the next oldest outstanding invoice, and so on, until the payment total amount is fully allocated. If the total payment amount is greater than the total of all outstanding invoices, the system will record the balance as an unallocated payment and show the amount as a credit on the account balance.
4. Alternately, clear the *Auto Allocate* check box to manually assign the payment against the required invoice(s). Enter the amount(s) in the *Allocated Amount* field beside each outstanding invoice as required.
If you do not allocate the payment against any invoice, the system will record the payment as an unallocated payment.
5. Enter the *Payment Reference*, if applicable.
6. Select the *Payment Method* from the drop list. Options available include: Direct Debit, EFT or Direct Deposit, EFTPOS, Cash, Cheque, Money Order, Bpay, Pay By Phone, Australia Post Bill Pay, Credit Card, Agent Collected, and PayPal.
7. Depending on the payment method selected, the system will display the *Card Type* field. Select the credit card type from the *Card Type* drop list. Options available include: American Express, Diners, MasterCard and Visa.
8. Enter the *Payment Date*. A Calendar tool will appear to allow you to select the required date.
9. Enter any notes or other details in the *Payment Note* field.
10. The system will show the default *Finance Charge (%)* and *Finance Charge (\$)* in the corresponding fields as read only by default.
11. Click the *Create Surcharge* check box to override the default payment surcharge details. The fields will be enabled for editing.
12. Enter the *Finance Charge (%)* or *Finance Charge (\$)* in the corresponding fields as required.

13. Click the **Submit** button. A window will appear showing the payment details entered, along with any surcharges, to confirm the payment.



Figure 100. The *Confirm Payment* window

14. Click the **Yes** button to confirm the payment. A *Payment receipt* page will appear showing the payment details, with a message at the top of the page stating the payment has been allocated to the account.

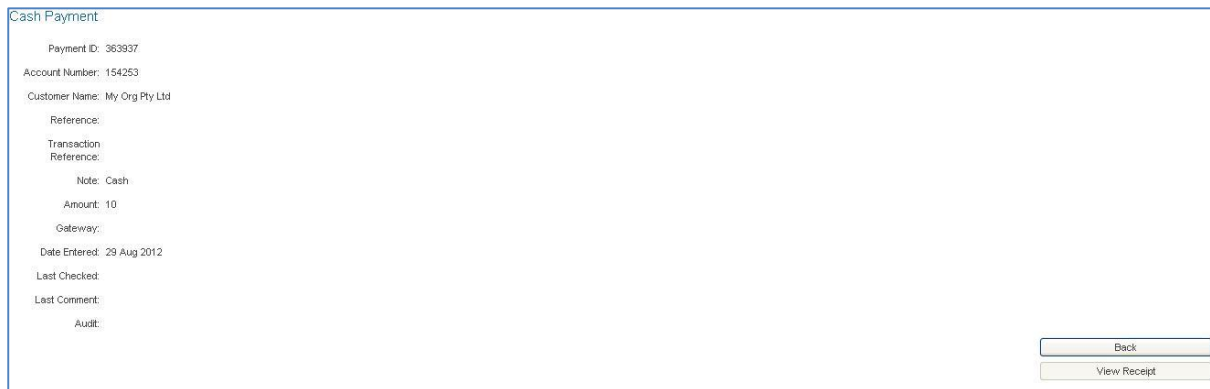


Figure 101. The *Payment* receipt window

The system will record the payment against the customer account, update the account balance, and create a transaction in the ledger. If a payment surcharge was applied, the system will create an unallocated cardline for the surcharge amount.

15. Click the **No** button to cancel the payment and return to the *Receive Payment* page to make any changes as required.

Take Payment

The Take Payment function allows you to process a payment from the customer through the automated Emersion Electronic Payment System (EPS). You must have the EPS module configured to use this function, and charges may apply. For further information, please contact the Emersion Sales or Support teams.

1. From the customer account's *Summary* page, click the **Take Payment** tab. The *Take Payment* tab page will appear, showing a list of all outstanding invoices for the customer, with the oldest invoice shown first. Invoices that have been paid in full will not appear.

Customer: My Org Pty Ltd (Account ID : 194253)

Take Payment

Customer Name: My Org Pty Ltd

* Total:

☒ Auto Allocate

Payment Method: ☐ Credit Card

Finance Charges(%):

Finance Charges(\$):

☐ Override Payment Surcharge

Account Balance: 254.00

Unallocated Funds: 0.00

Submit

Cancel

Notes

We are unable to take a 'Direct Debit' live payment as you do not have a Direct Debit merchant configured with Emersion. If you feel that this is incorrect, please contact our support team. If you would like assistance in arranging a payment Merchant, please contact our sales team.

3 Results Found

Invoice ID	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Amount
236818	Feb	21 Feb 2012	28 Feb 2012	33.00	23.00	0.00	
252108	Feb	21 Feb 2012	28 Feb 2012	33.00	33.00	0.00	
303109	Feb	21 Feb 2012	28 Feb 2012	198.00	198.00	0.00	

1

50 100 150 200

Figure 102. The account *Take Payment* tab page

2. Enter the total amount of the payment in the *Total* field.
3. Funds can be allocated across multiple invoices. Tick the *Auto Allocate* check box to prompt the system to automatically allocate the payment against outstanding invoices. The system will allocate the payment against the oldest outstanding invoice.

If the total payment amount is greater than the oldest outstanding invoice, the system will allocate payment against the next oldest outstanding invoice, and so on, until the payment total amount is fully allocated. If the total payment amount is greater than the total of all outstanding invoices, the system will record the balance as an unallocated payment and show the amount as a credit on the account balance.

Alternately, clear the *Auto Allocate* check box to manually assign the payment against the required invoice(s). Enter the amount(s) in the *Allocated Amount* field beside each outstanding invoice as required. If you do not allocate the payment against any invoice, the system will record the payment as an unallocated payment.

4. Select the method to process the payment from the *Payment Method* option boxes, as follows:
 - a. To process the payment using the customer's existing payment details (i.e. if the customer has existing payment details recorded in the system), select *Customer's Stored Payment Method* in the *Payment Method* options. The stored payment details will appear. If the customer has stored credit card details, the card number will appear masked.

Take Payment

Customer Name: Leticia M. Rodriguez

* Total:

☒ Auto Allocate

Payment Method: ☒ Customer's Stored Payment Method

☐ Credit Card

☐ Direct Debit

Stored Payment Method: ☒ VISA XXXXXXXXXXXX4242 (2/2014)

Figure 103. The *Take Payment* page showing the stored payment method fields

If there is more than one payment method recorded for the customer, select the required *Stored Payment Method* to use for this payment using the option boxes displayed beside each payment method.

- b. To process a credit card payment, select *Credit Card* in the *Payment Method* options. The credit card fields will appear:

The screenshot shows the 'Take Payment' form with the following fields and options:

- Customer Name: [Text Field]
- * Total: [Text Field]
- ☒ Auto Allocate
- Payment Method:
 - ☐ Customer's Stored Payment Method
 - ☒ Credit Card
 - ☐ Direct Debit
- Payment Note: [Text Field]
- Name On Card: [Text Field]
- Card Type: [Select Card Type]
- Credit Card No.: [Text Field]
- Expiry Month: [Select Expiry Month]
- Expiry Year: [Select Expiry Year]
- CVV: [Text Field]

Figure 104. The *Take Payment* page showing the credit card fields

- Enter notes about the payment in the *Payment Note* field that can be used for reference.
 - Enter the *Name on Card* of the credit card.
 - Select the *Card Type* from the drop list. Options available include: American Express, Diners, MasterCard and Visa.
 - Enter the card number in the *Credit Card No.* field.
 - Select the card expiry date from the *Expiry Month* and *Expiry Year* drop lists.
 - Enter the credit card verification number in the *CCV* field.
- c. To process a direct debit account payment, select *Direct Debit* in the *Payment Method* options. The debit account fields will appear:

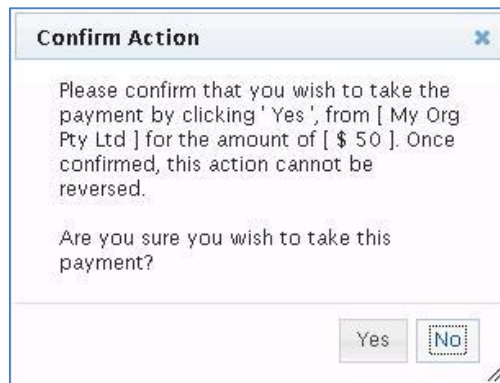
The screenshot shows the 'Take Payment' form with the following fields and options:

- Customer Name: [Text Field]
- * Total: [Text Field]
- ☒ Auto Allocate
- Payment Method:
 - ☐ Customer's Stored Payment Method
 - ☐ Credit Card
 - ☒ Direct Debit
- Bank: [Select Bank]
- BSB: [Text Field]
- Account Name: [Text Field]
- Account Number: [Text Field]

Figure 105. The *Take Payment* page showing the direct debit fields

- Select the Bank from the drop list. The list will contain all Australian banks. If the bank you require is not in this list, please contact the Emersion Support team.
- Enter the customer's bank account's BSB number in the *BSB* field.
- Enter the customer's bank account name in the *Account Name* field.
- Enter the customer's bank account number in the *Account Number* field.

5. The system will show the default *Finance Charge (%)* and *Finance Charge (\$)* in the corresponding fields read only by default.
6. Click the *Create Surcharge* check box to override the default payment surcharge details. The fields will be enabled for editing.
7. Enter the *Finance Charge (%)* or *Finance Charge (\$)* in the corresponding fields as required.
8. Click the **Submit** button. A window will appear showing the payment details entered, along with any surcharges, to confirm the payment.



9. Click the **Yes** button to confirm the payment.

The system will validate the credit card or direct debit details entered before sending the payment through the EPS gateway for processing. If any payment details are invalid (e.g. credit card number, expiry date etc), the system will return to the Take Payment page showing a red error message beside the invalid fields. You must correct the information before the payment will be processed.

Once the payment has been successfully processed, the *Payment receipt* page will appear with an information box showing the payment has been allocated to the account.

The system will record the payment against the customer account, update the account balance, and create a transaction in the ledger. If a payment surcharge was applied, the system will create an unallocated cardline for the surcharge amount.
10. Click the **No** button to cancel the payment and return to the *Take Payment* page to make any changes as required.

Transactions

The Transactions function displays a list of all financial transactions recorded against the customer account including payments, invoices, debits, credits, and refunds.

1. From the customer account's *Summary* page, click the **Transactions** tab. The *Transaction tab* page will appear showing all transactions for the customer.

Customer: My Org Pty Ltd (Account ID : 154253)

Summary Detail Organisation Contacts Package Subscriptions Service Subscriptions Pending Ledger Cardlines Invoices **Transactions** Profile Order Purchase Payment Methods Receive Payment Take Payment Portal Notes

Transactions

From: Transaction Type: All Types: Invoice Allocate Unallocated Payment

To:

Batch ID:

Journal ID:

Search Clear

6 Results Found

Batch ID	Journal ID	Created By	Customer Name	Transaction Type	Reference	Date	Debit	Credit
744312	794657	Emersion Support	My Org	payment		29 Aug 2012	0.00	10.00
741410	791362	Emersion Support	My Org	securityRefund		15 Aug 2012	100.00	0.00
741409	791361	Emersion Support	My Org	securityPayment		15 Aug 2012	0.00	500.00
730900	778683	Emersion Support	My Org	invoice	Invoice 303109	24 May 2012	198.00	0.00
668509	711723	Emersion Support	My Org	refund		27 Oct 2011	10.00	0.00
668507	711722	Emersion Support	My Org	unallocatedPayment		27 Oct 2011	0.00	10.00

1

50 100 150 200

Figure 106. The account *Transaction tab* page

Search

You can locate a transaction in the *Transaction* list by using the *Search* function. The following fields can be used to search for transactions:

- From allows date selection via a Calendar tool
- To allows date selection via a Calendar tool
- Batch ID
- Journal ID
- Transaction Type All, Invoice, Allocate Unallocated Payment, Debit, Debit Write Off, Security Payment, Security Refund, Unallocated payment, Payment, Credit, and Refund

Account Profiles

Account Profiles are a simple grouping of customer accounts. This can help you identify customers based on their profile. For example, you may set up an account profile for business customers, and another for residential customers. Different system and event actions can be performed against each profile e.g. invoice templates, invoice processing options, usage threshold alerts etc (refer the Events User Manual for more details).

You can create one or many account profiles as required. However, each customer account can only be mapped to a single account profile, or left blank (i.e. not linked to any profile).

To Create an Account Profile

1. Select **Admin > Settings >** from the **Menu**.
2. Select the **Account Profiles** tab. A list of existing account profiles will be shown.

Name	Description
System Event Profile	System Event Profile
Residential Customers	This group is for Residential customers.
Residential Customers	Residential Customers
SOHO	This is for SOHO Customers

Figure 107. The Account Profile list page

3. Click the **Create New** button. The *New Account Profile* page will appear.

New Account Profile

Name:

Description:

Save

Back to Profile List

Figure 108. The New Account Profile page

4. Enter the *Name* of the new account profile.
5. Enter a *Description* of the new account profile.
6. Click the **Save** button.
7. To cancel without saving, click the **Back to Profile List** button.

To Edit an Account Profile

1. Select **Admin > Settings >** from the **Menu**.
2. Select the **Account Profiles** tab. A list of existing account profiles will be shown.
3. Click the account profile *Name* or *Description* in the list. The selected account profile will be displayed showing a list of accounts and the current profile the account is linked to.
4. Edit the *Name* and *Description* of the account profile.
5. Click the **Save Profile Details** button to save the changes.
6. Click the **Back to Profile List** button to exit.

To Link a Customer Account to an Account Profile

From the *Edit Account Profile* page:

Account Number	Account Name	Current Profile	Add to This Profile
123340	Joe Emersion		<input type="checkbox"/>
123341	Brian Waters		<input type="checkbox"/>
123343	Frank Emersion		<input type="checkbox"/>
123344	Matthew Johns		<input type="checkbox"/>
123345	Mary Emersion		<input type="checkbox"/>
123346	David Corr	SOHO Profile	<input type="checkbox"/>
123347	Sarah Test	SOHO Profile	<input type="checkbox"/>
123348	Heath Cliff	SOHO Profile	<input type="checkbox"/>
123349	Michael Jackson	SOHO Profile	<input type="checkbox"/>
123350	James Bond	SOHO Profile	<input type="checkbox"/>
123351	Steve Apple	SOHO Profile	<input checked="" type="checkbox"/>

Figure 109. The Edit Account Profile page

1. In the list of accounts, navigate to the customer accounts you wish to link to the current account profile.
2. If the account is not linked to an account profile (i.e. the *Current Profile* column is empty), click the check box beside the account in the **Add to This Profile** column.
If the account is already linked to an account profile, you cannot link it to another account profile. However, you can change the account profile an account is linked to from the *Customers* menu (see below).
3. Click the **Save Profile Details** button.

To Delete an Account Profile

Only account profiles that have no accounts linked to them may be deleted.

1. Select **Admin > Settings >** from the **Menu**.
2. Select the **Account Profiles** tab. A list of existing account profiles will be shown.
3. Click the account profile *Name* or *Description* in the list. The selected account profile will be displayed. If there are no accounts linked to the profile, the *Delete Profile* button will be visible. If there are any accounts linked to the account profile, the *Delete Profile* button will not be shown.
4. Click the **Delete Profile** button to delete the profile.
5. The *Account Profile* list page will be displayed.

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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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 minimum 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 GB =10⁹ 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 an 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 provided 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. re-seller 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.