

# Oracle® Communications Billing and Revenue Management

## Billing Care Online Help



Release 15.0

F86202-03

September 2024

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

Copyright © 2018, 2024, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

## Preface

---

Audience	xiv
Documentation Accessibility	xiv
Diversity and Inclusion	xiv

## 1 Getting Started with Billing Care

---

About the Billing Care User Interface	1-1
About Authorization	1-1
About the User Menu	1-2
About the Account Bar	1-2
About the Actions Menu	1-2
About the Home Section	1-3
About the Bills Graph	1-4
Bill and Payment Indicators	1-4
Account Information Indicators	1-5
About the Bills Section	1-5
About Exporting Grid Contents	1-7
Using Keyboard Shortcuts	1-7
About Date and Time Formats (Release 15.0.1 or later)	1-8

## 2 Creating and Finding Accounts

---

Finding an Account	2-1
Search Dialog Box	2-1
Sorting Search Results	2-2
Creating an Account	2-2
Configuring SIM Cards	2-5
Working with Subscription Groups	2-6
Making Account Services Inactive or Terminating Them	2-6

## 3 Account Information

---

Viewing and Changing Account Information	3-1
--	-----

Changing Customer Security Hints and Answers	3-2
Changing the Account Status	3-3
Products and Account Status	3-3
Hierarchical Groups and Account Status	3-3
Working with Deferred Actions	3-3
Editing Deferred Actions	3-4
Executing Deferred Actions	3-5
Deleting Deferred Actions	3-5
Working with the Newsfeed	3-6
Displaying an Account's History	3-6
Finding Newsfeed Entries	3-6
Newsfeed	3-7
Working with Account-Level Notes	3-7
Creating an Account-Level Note	3-8
Adding Comments to a Note's Thread	3-8
Viewing Account-Level Notes	3-9
Notes Page	3-9
Working with Credit Limits, Credit Floors, and Thresholds	3-10
Setting up Credit Limit, Floor, and Thresholds	3-10
Credit Limit, Floor, and Thresholds Dialog Box	3-11
Finding a Bill	3-12
Finding a Specific Bill	3-12
Finding Bills by Date Range	3-13
Finding Last Generated Bills	3-13
Sorting Search Results	3-14
Viewing and Adding Subscriber Preferences	3-14
Filter Services Dialog Box	3-15
Viewing Bill Details	3-15
Viewing Refunded Bills	3-16
Viewing Account Balances	3-17
Viewing an Invoice	3-17
Working with Events	3-17
Working with an Account in Collections	3-18
Returning to the Landing Page	3-19

## 4 Purchases

---

Purchasing New Products and Services	4-1
Purchasing Add-On Products	4-2
Transitioning Bundles and Packages	4-3
Transitioning a Bundle for an Account	4-4
Transitioning and Configuring a Package for an Account	4-4

## 5 Assets

---

About Assets	5-1
Working with Service-Focused Asset Cards	5-1
Viewing Asset Card Details	5-2
Filtering the Services for an Account	5-2
Filter Services Dialog Box	5-3
Terminating Products and Discounts	5-3
Making Products or Discounts Inactive	5-4
Reactivating Products and Discounts	5-4
Terminating a Customer's Service	5-4
Inactivating a Customer's Service	5-5
Reactivating a Customer's Service	5-5
Customizing a Customer's Rates	5-6
Deferring Actions for a Service	5-6
Managing SIM Card Details	5-6
Working with Assets in a Product-Focused Table	5-7
Viewing an Account's Products in a Table	5-8
Filtering the Offers for an Account	5-8
Filter Offers Dialog Box	5-9
Customizing an Offer's Rate	5-9
Inactivating Offers	5-10
Reactivating Offers	5-10
Terminating Offers	5-11
Terminating Bundles	5-11
Working with Contracts (Release 15.0.1 or later)	5-12
Viewing a Contract's Terms	5-12
Modifying a Contract's Auto-Renewal Preferences	5-12
Viewing a Contract's Linked Assets	5-13
Canceling a Customer's Contract	5-13

## 6 Subscriptions (Release 15.0.0 only)

---

About Account Subscriptions	6-1
Viewing Subscriptions	6-1
Working with No-Contract Subscriptions	6-2
Working with Contracts	6-3
Viewing a Contract's Terms	6-3
Modifying a Contract's Auto-Renewal Preferences	6-4
Modifying a Bundle's Auto-Renewal Preferences	6-4

## 7 Billing

---

Creating a Bill on Demand	7-1
Generating Corrective Bills	7-1
Viewing Corrective Bills	7-2
Produce Corrective Bill Dialog Box	7-2
Corrective Bill Trail Dialog Box	7-3

## 8 Batch Payments, Refunds, and Reversals

---

Importing a Batch Payment File	8-1
About Batch Payment File Directories	8-2
About Batch Payment File Names	8-2
Configuring Auto Processing of Batch Payment Files	8-2
Processing Payments in Foreign Currencies	8-2
Uploading Batch Payment Files to the Billing Care Server	8-3
Importing Batch Payment Files Manually Using Billing Care	8-3
Viewing Imported File Status and Errors	8-4
About Batch Processing Errors	8-5
Reversing Failed Batch Payments	8-5
Viewing Batch Payment Processing History	8-5
Viewing Suspended Batch Payments	8-6
About Batch Payment Template Files	8-6
Creating, Editing, and Processing Payment, Refund, and Reversal Batches (Release 15.0.1 or later)	8-7
Creating and Processing a Batch	8-7
Creating a Record in a Batch	8-8
Searching for Records to Add to a Batch	8-8
Search for Records Through Accounts	8-8
Search for Records Through Bills	8-9
Search for Payments in a Reversal Batch	8-9
Modifying a Record in a Batch	8-10
Allocating Payments to Bills or Items	8-10
Suspending a Payment in a Batch	8-10
Removing Suspension from a Payment in a Batch	8-11
Importing and Editing Batches Manually Using Billing Care	8-11
Validating a Batch	8-13
Exporting a Batch to a File	8-13
Submitting a Batch	8-14
Working with Batch Templates (Release 15.0.1 or later)	8-14

Creating a Batch Template	8-14
Creating a Batch Template Based on an Existing Template	8-15
Editing a Batch Template	8-15
Viewing Existing Batch Templates	8-16
Create Batch Page (Release 15.0.1 or later)	8-16
Create or Edit Template Page (Release 15.0.1 or later)	8-17
Search Dialog Box (Release 15.0.1 or later)	8-17
Suspend Payment Dialog Box (Release 15.0.1 or later)	8-18

## 9 Payments

---

Initiating a Payment	9-1
Making a Payment	9-1
Make a Payment Dialog Box	9-2
Viewing Payment Details	9-3
Payment Details Dialog Box	9-3
All Payments Dialog Box	9-4
Items Affected Dialog Box	9-5
Allocating Payments	9-5
Allocating a Payment	9-6
Allocating a Payment to a Bill Unit or an Item	9-6
Allocate Payment Dialog Box	9-7
Reversing a Payment	9-7
Working with Suspended Payments	9-8
Finding a Suspended Payment	9-8
Payment Filter	9-9
Suspended Payment Details	9-10
Allocating a Suspended Payment	9-10
Allocating a Suspended Payment across Multiple Accounts	9-12
Adding Notes to a Suspended Payment	9-13
Assigning Suspended Payments to Billing Care Users	9-13
Reversing a Suspended Payment	9-13
Withdrawing a Posted Payment into Suspense	9-14
Manually Creating a Suspended Payment	9-14

## 10 Accounts Receivable

---

Working with Adjustments	10-1
Making Currency Adjustment	10-2
Account Adjustment Dialog Box	10-2
Account Adjustment Details Dialog Box	10-3
Allocating Currency Adjustments	10-3

Allocating an Adjustment to a Specific Bill Unit or Specific Items	10-4
Allocate Adjustment Dialog Box	10-4
Adjusting a Bill	10-5
Bill Adjustment Dialog Box	10-5
Allocate Adjustment Dialog Box	10-6
Adjusting an Item	10-6
Item Adjustment Dialog Box	10-6
Adjusting an Event	10-7
Event Adjustment Dialog Box	10-8
Adjusting Multiple Events for an Account	10-8
Making a Noncurrency Adjustment	10-9
Noncurrency Adjustment Dialog Box	10-10
Viewing Account Adjustment Details	10-10
Viewing Item Adjustment Details	10-11
Viewing Event Adjustment Details	10-11
Viewing Bill Adjustment Details	10-11
Working with Disputes	10-12
Disputing a Bill	10-12
Dispute Bill Dialog Box	10-13
Disputing an Item	10-13
Dispute Item Dialog Box	10-13
Viewing Item Dispute Details	10-14
Disputing an Event	10-14
Dispute Event Dialog Box	10-15
Viewing Event Dispute Details	10-15
Working with Settlements	10-16
Settling a Bill Dispute	10-16
Settle Bill Dispute Dialog Box	10-16
Settling an Item Dispute	10-17
Settle Item Dispute Dialog Box	10-18
Settling an Event Dispute	10-18
Settle Event Dispute Dialog Box	10-19
Viewing Settled Bill Dispute Details	10-19
Settled Bill Dispute Detail Dialog Box	10-20
Viewing Settled Item Dispute Details	10-20
Settled Item Dispute Dialog Box	10-21
Viewing Settled Event Dispute Details	10-21
Settled Event Dispute Dialog Box	10-22
Working with Refunds	10-22
Refunding an Account	10-23
Refunding a Bill	10-23
Refund Bill Dialog Box	10-24



Working with Write-Offs	10-24
Writing Off an Account	10-25
Write Off Account Dialog Box	10-26
Writing Off a Bill	10-26
Write Off Bill Dialog Box	10-26
Writing Off a Bill Item	10-27
Writing Off Bill Item Dialog Box	10-27
Viewing Write Off Details	10-28
Viewing Write Off Details from Newsfeed	10-28
Viewing Write Off from A/R Actions	10-28
Viewing Write Off from the Service Charges Area	10-28
Reversing a Write Off	10-29
Reverse Write Off Account Dialog Box	10-29
Transferring Negative Balances to Another Bill	10-30

## 11 Organization Hierarchies

---

About Organization Hierarchies	11-1
Creating an Organization Hierarchy	11-1
About Account Hierarchy Types	11-2
Assigning Hierarchy Types to Accounts	11-2
Adding Child Accounts to an Organization Hierarchy	11-2
Adding a Parent Account to an Organization Hierarchy	11-3
Modifying the Hierarchy Relationships of Child Accounts	11-3
Modifying the Hierarchy Relationships of Parent Accounts	11-4
Removing a Child Account from an Organization Hierarchy	11-4
Viewing an Account's Organization Hierarchy	11-5

## 12 Billing Hierarchies

---

About Billing Hierarchies	12-1
Creating a Billing Hierarchy	12-1
Adding Nonpaying Children to a Parent's Bill Unit	12-1
Removing Nonpaying Children from a Billing Hierarchy	12-2
Adding a Paying Parent for a Child's Bill Unit	12-3
Changing a Bill Unit's Parent Account	12-4
Returning a Bill Unit to an Account's Own Payment Method	12-4
Viewing Who Pays for a Bill	12-4

## 13 Financial Setup

---

Working with Payment Methods	13-1
Adding a Payment Method	13-1
Financial Setup New Payment Method Section	13-2
Editing a Payment Method	13-3
Financial Setup Bill Unit Section	13-3
Financial Setup Edit Payment Method Section	13-4
Deleting a Payment Method	13-4
Adding Bill Units to an Account	13-5
Editing a Bill Unit	13-5
Financial Setup Edit Bill Unit Section	13-6
Moving Services between Bill Units	13-7
Changing a Bill Unit's Invoice Template	13-7
Assigning a Bill Unit for Payment by Another Account	13-8
Adding and Changing Basic Tax Information	13-8
Adding Tax Exemptions	13-8
Financial Setup Tax Setup Section	13-9

## 14 Sharing Groups

---

Working with Resource Sharing Groups	14-1
About Charge Sharing	14-1
Creating a New Charge Sharing Group	14-2
Modifying a Charge Sharing Group	14-2
Deleting a Charge Sharing Group	14-2
Adding Members to the Charge Sharing Group	14-3
Selecting Specific Services for Charge Sharing	14-3
Removing a Member from the Charge Sharing Group	14-4
Modifying Priorities for Charge Sharing Group	14-4
Charge Sharing Group Dialog Box	14-4
About Discount Sharing	14-5
Creating a Discount Sharing Group	14-5
Modifying a Discount Sharing Group	14-6
Deleting a Discount Sharing Group	14-6
Adding Members to the Discount Sharing Group	14-7
Selecting Specific Services for Discount Sharing	14-7
Removing a Member from Discount Sharing Group	14-8
Modifying Priorities for Discount Sharing Group	14-8
Discount Sharing Group Dialog Box	14-9
About Profile Sharing	14-9
Creating a Profile Sharing Group	14-10

Modifying a Profile Sharing Group	14-10
Deleting a Profile Sharing Group	14-10
Adding Members to the Profile Sharing Group	14-11
Selecting Specific Services for Profile Sharing	14-11
Removing a member from a Profile Sharing Group	14-11
Profile Sharing Dialog Box	14-12

## 15 Collections

---

About Collections	15-1
Finding an Account in Collections	15-1
Filtering Collections Search Results	15-2
Sorting Collections Search Results	15-3
Viewing a Bill Unit in Collections	15-3
Collections Details Page	15-4
Removing a Bill Unit from Collections	15-5
Adding a Collections Action to a Bill Unit	15-5
Add Action Dialog Box	15-6
Changing the Status or Due Date of a Collections Action	15-6
Edit Action Dialog Box	15-7
Viewing Actions History for a Bill Unit in Collections	15-8
Replacing a Bill Unit's Collections Scenario	15-8
Replace Scenario Dialog Box	15-9
Making a Payment for a Bill Unit in Collections	15-9
Assigning a Collections Agent	15-10
Working with Exempted Bill Units	15-10
Exempting a Bill Unit from Collections	15-10
Exempt Bill Units Dialog Box	15-11
Viewing Bill Units Exempted from Collections	15-11
Removing a Bill Unit from Exemption	15-11
Exempted Bill Units Dialog Box	15-11
Working with Promise-to-Pay Agreements	15-12
Configuring System-Managed Promise-to-Pay Agreements	15-12
Manually Configuring a Promise-to-Pay Agreement	15-13
Canceling a Promise-to-Pay Agreement	15-15
Promise to Pay Installment Details Dialog Box	15-15
About Collections Sharing	15-16
Creating a Collections Sharing Group	15-17
Viewing a Collections Sharing Group	15-17
Modifying a Collections Sharing Group	15-17
Deleting a Collections Sharing Group	15-18
Adding Members to the Collections Sharing Group	15-18

Removing a Member from the Collections Sharing Group	15-18
Modifying Priorities for Collections Sharing Group	15-19
Collections Sharing Group Dialog Box	15-19

## 16 Deposits

---

Working with Deposit Configurations	16-1
Creating a Deposit Specification Profile	16-2
Creating a Deposit Specification	16-3
Finding Deposit Specification Profiles or Deposit Specifications	16-4
Editing a Deposit Specification Profile or Deposit Specification	16-5
Working with Deposits	16-5
Creating Deposits	16-6
Create Deposit Wizard Details Page Reference	16-7
Viewing Deposits	16-7
Reversing Deposits	16-8
Transferring Deposits	16-8
Updating Deposits	16-8
Update Dialog Box	16-8
Making Deposit Payments	16-9
Converting Deposits to Prepayments	16-10
Requesting Deposit Refunds	16-10
Approving Deposit Refund Requests	16-10

## 17 Installments

---

Working with Installment Specifications	17-1
Creating Installment Specifications	17-1
Finding Installment Specifications	17-2
Editing an Installment Specification	17-2
Working with Installment Schedules	17-3
Creating an Installment Schedule	17-3
Viewing Installment Schedules	17-4
Canceling an Installment Schedule	17-4

## 18 Notifications

---

About Notification Specifications	18-1
Creating a Notification Specification for Delivery Within A Day	18-2
Creating a Notification Specification for In-Advance Delivery	18-3
Creating a Notification Specification for Post-Event Delivery	18-4
Modifying a Notification Specification	18-6

Finding Notification Specifications	18-6
Create Notification Specification Wizard Reference	18-7
Trigger Criteria Screen	18-7
Delivery Details Screen	18-8
Review Screen	18-9

# Preface

Oracle Communications Billing Care Help is designed to assist you with performing tasks in the Billing Care user interface.

This guide has been updated to include changes and new feature content added for release 15.0.1.

## Audience

This guide is intended for all Billing Care users and system administrators.

See the documentation for those products for additional installation and configuration instructions.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### **Access to Oracle Support**

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

# 1

## Getting Started with Billing Care

You can use Oracle Communications Billing Care to manage billing, payments, and accounts receivable for customer accounts. Billing Care provides an account view that contains functionality for performing account transactions as well as an interface for viewing and allocating suspended payments.

For an introduction to Billing Care, see the following topics:

- [About the Billing Care User Interface](#)
- [About Authorization](#)
- [About the User Menu](#)
- [About the Account Bar](#)
- [About the Actions Menu](#)
- [About the Home Section](#)
- [About the Bills Graph](#)
- [About the Bills Section](#)
- [About Exporting Grid Contents](#)
- [Using Keyboard Shortcuts](#)
- [About Date and Time Formats \(Release 15.0.1 or later\)](#)

### About the Billing Care User Interface

The Billing Care user interface works in a web browser. When using Billing Care:

- Do not use browser commands, such as Back, Forward, and Refresh, to avoid losing data. If you accidentally use a browser command, navigate to the primary link and, if required, sign in to Billing Care again.
- Do not open multiple instances of Billing Care in different browser windows or tabs of the same browser.
- Ensure that cookies are enabled in your browser.

### About Authorization

Depending on your job and company policies, you might not be able to access all areas of Billing Care. For example:

- You might not be able to see all the menus and dialog screens described in the Help.
- You might be able to view the results of actions, such as adjustments, but not be able to perform them yourself.

Additionally, you might have limits on how much and how little you can write off, adjust, and so on.

## About the User Menu

The user menu located at the top right corner of the Billing Care user interface contains links to Billing Care Online Help, application version information, and sign-out functionality.

To access the user menu:

1. From the Billing Care user interface, click the list in the top right containing the signed-in user's name.
2. Do one of the following:
  - To view Billing Care Online Help, click **Help**.
  - To view release version and build version information, click **About**.
  - To sign out of Billing Care, click **Sign Out**.

## About the Account Bar

When you open a customer account, the account bar appears at the top of the page. This area displays the following account information:

- Contact information, such as name, address, and email address
- Account number
- Security hint and answer
- Account status if an account is closed or inactive
- The billing cycle for the account or, if the account has multiple bill units, for the selected bill unit
- If the account is in collections, the number of days past due, the minimum payment required, the last action performed, and the next action scheduled for the account
- If the account is a member of an organization hierarchy, the hierarchy type
- If the account is a wholesale parent or a wholesale child, the account details with their corresponding icons
- (Optional) The three-letter abbreviation of the currency used with the account or, if the account has multiple bill units, with the bill unit

## About the Actions Menu

The **Actions** menu lists the actions that can be performed on an account. Using this menu, you perform actions such as updating account information, creating payments, viewing accounts receivable, and setting up financial information such as taxation configuration.

Action	Description
<b>Account</b>	Click to update an account's profile or status. See " <a href="#">Account Information</a> ".
<b>Payments</b>	Click to make a new payment or allocate existing payments. See " <a href="#">Payments</a> ". <b>Note:</b> For wholesale child accounts, <b>Payments</b> is not shown.
<b>Accounts Receivables</b>	Click to perform currency adjustments, distribute existing adjustments, or write off an account. See " <a href="#">Accounts Receivable</a> ". <b>Note:</b> For wholesale child accounts, <b>Accounts Receivables</b> is not shown.



Action	Description
<b>Organizational Hierarchy</b>	Click to create or modify the relationship among accounts in the same company or organization. See " <a href="#">Organization Hierarchies</a> ".
<b>Financial Setup</b>	Click to create or update payment methods, configure bill units, or set up taxation. See " <a href="#">Financial Setup</a> ".
<b>Sharing Groups</b>	Click to create or modify sharing groups. See " <a href="#">Sharing Groups</a> ".
<b>Close</b>	Click to return to the landing page. See " <a href="#">Returning to the Landing Page</a> ".

## About the Home Section

The Home section provides a high-level overview of an account's subscriptions, account history, current balances, and account and status change activity. You initiate new payments from the Home section by using the **Make Payment** button.

Field	Description
<b>Subscriptions</b>	<p>Lists the services purchased for this account, including charge offers and discounts. Select this section to view the details of each service in the center of the account page. Services can also be made inactive or terminated on each subscription's card.</p> <p>See "<a href="#">About Account Subscriptions</a>".</p> <p>If the account has multiple bill units, a menu appears in the center of the account page:</p> <ul style="list-style-type: none"> <li>• Select <b>Bill Unit (All)</b> to view details of the subscriptions of all bill units.</li> <li>• Select the name of the bill unit whose subscription details you want to view.</li> </ul>
<b>Notes</b>	<p>Displays the number of notes that have been added to the account in the last 24 hours and in the last month. Select this section to view the notes.</p> <p>See "<a href="#">Working with Account-Level Notes</a>".</p>
<b>Account History, All Bill Units, Bill Unit</b>	<p>Displays service, payment, and billing information for an account or for a bill unit if the account has multiple bill units. The Account History area or an individual Bill Unit area must be selected to make the Bills Graph area, the Balance area, and <b>Balance</b> and <b>News Feed</b> links appear.</p> <p>Depending on the age of the account and payment history, information about past due amounts, current amounts, and the bill in progress is shown here:</p> <ul style="list-style-type: none"> <li>• <b>Past Due.</b> Click to view past due items.</li> <li>• <b>Unallocated A/R.</b> Click to allocate. See "<a href="#">Allocating Currency Adjustments</a>".</li> <li>• <b>Unallocated Payments.</b> Click to allocate. See "<a href="#">Allocating a Payment</a>".</li> </ul> <p><b>Note:</b> The bill in progress is not shown for wholesale parent accounts.</p>
<b>Make Payment</b>	<p>Click to make a payment on the account or bill unit. If the account has multiple bill units, select a bill unit to make this button appear. See "<a href="#">Making a Payment</a>".</p>
<b>Show Bill Units</b>	<p>Click to see information about each bill unit if the account has multiple bill units.</p> <p>If an account has multiple bill units, you must select a bill unit to see the billing cycle, the Bills graph, and the Balances section.</p>
<b>Balances</b>	<p>Click to see a graphic overview of the account or the bill unit information and balances. The Bills graph displays information about bills, purchases, payments, A/R transactions, and customer interactions. See "<a href="#">About the Bills Graph</a>" and "<a href="#">Viewing Account Balances</a>".</p>

Field	Description
<b>Newsfeed</b>	Click to see a history of activity for the account and its bill units. You can view a listing of all events or only A/R transactions, payments, charges, or account changes. See " <a href="#">Working with the Newsfeed</a> ".




## About the Bills Graph

The Bills graph is a visual overview of account activity, including billing and customer interactions.

- The horizontal axis shows information about the last 12 bills and the bill in progress.
- The vertical axis shows account information regarding customer communication and A/R.

## Bill and Payment Indicators

This table describes the indicators for bills and payments.

Indicator	Description
	Bill paid on time (including any overage from the last cycle).
	Bill paid after the due date.
	Bill in progress for the current billing cycle.
Horizontal line through indicators	Recurrent charge.

You can click an indicator to get more information about the bill it represents. The information can include the following, depending on the bill and bill history:

- Bill ID and Billing cycle dates
- My Charges
- Charges from Other Accounts

 **Note:**

Charges from wholesale child accounts are not shown for a wholesale parent account.

- A/R actions  
Click the link to view the A/R Actions dialog box.
- Payment applied
- Due for this period
- For overdue bills that have been paid, the number of days late for full payment
- Details  
Click the link to view the bill in the **Bills** section. See "[About the Bills Section](#)".

 **Tip:**

To close the details information, click inside the Bills graph.





## Account Information Indicators

The following table describes indicators for account information unrelated to bills. Account information indicators are for adjustments, disputes, and comments from CSRs. The indicators appear above the Bills graph. You can click an indicator to read further information about the interaction and to enter comments.

If multiple instances of the same type of interaction occur briefly, Billing Care displays a single indicator with the number of occurrences.

 **Tip:**

To close the details information, click inside the Bills graph.

Indicator	Description
	General customer inquiry.
	Payment, account adjustment, bill adjustment, item adjustment, event adjustment, open dispute, closed dispute, write-offs. For payments, disputes, and adjustments, you can drill down to see further details, such as effective dates, transaction IDs, payment methods, and comments, depending on the type of A/R.
	Unresolved status for inquiries and A/R changes. This indicator is shown in combination with customer inquiries and A/R changes.
	Award.

You can click an indicator to read more information about the transaction or interaction it represents. You can also enter a comment.

## About the Bills Section

The Bills section provides information about specific bills. The upper area is an overview of the selected bill unit. The initial view is of the bill in progress. If there are multiple bill units, the bill in progress for the default bill unit is shown.

For wholesale parent accounts, the Bills section displays the consolidated charges and A/R actions of all the child accounts. The A/R actions that are generated after the billing cycle and the consolidated amount of these A/R actions are shown in this section. However, the individual A/R actions of the wholesale child accounts are not shown in this section.

The information shown depends on the bill and bill history. The information may include:

- The payment method. If there is no payment method, the **Assign** link appears. Click to add a payment method. See "[Adding a Payment Method](#)" for more information.

- The account's service charges.
- The date when the bill unit's status was last modified.
- Charges from other accounts. If there are charges from other accounts, click the link to see the charge details.
- A/R actions. If there are A/R actions, click the link to see the adjustment or dispute details.
- Payment applied. If there is a payment, click the link to see the payment details.
- Total due for this period.

Charges and other billing-related items of the wholesale child accounts in the hierarchy are shown in the respective accounts until the billing is in progress. Once the billing cycle is completed, charges and other billing-related items of the wholesale child accounts in the hierarchy are rolled up to the wholesale parent account and the Total due for this period in the wholesale child accounts shows 0.

- Number of days overdue.

Field	Description
<b>Switch Bills</b>	<p>Click to access other bills. If there is more than one bill unit, select the one you want to work with. The list displayed includes the bill in progress and the bills for the 12 past billing cycles.</p> <p>For child accounts in a hierarchy, the list includes the bills that are generated before and after moving the account into the hierarchy.</p> <p>Click the <b>Bill Search</b> link to search for an older bill that may not be available in the list.</p> <p><b>Note:</b> The <b>Bill Search</b> link does not appear if the account contains less than 12 bills.</p>
<b>Actions</b>	<p>Use this menu for these bill-related activities:</p> <ul style="list-style-type: none"> <li>• <b>Make Payment</b></li> <li>• <b>Adjust Bill</b></li> <li>• <b>Dispute Bill</b></li> <li>• <b>Write Off Bill</b></li> <li>• <b>Refund Bill</b></li> <li>• <b>Produce Corrective Bill</b></li> <li>• <b>Transfer Negative Balance</b></li> </ul> <p>The <b>Actions</b> menu appears once a bill is selected.</p>
<b>Bill Details</b>	<p>Use this field to find specific charges. Enter all or part of the service type, service ID, or device ID.</p>
<b>My Charges</b>	<p>Shows the charges for the selected bill that are generated by the account. Click the charges in the following areas to view more information:</p> <ul style="list-style-type: none"> <li>• Account Charges</li> <li>• Account and Sharing Charges</li> <li>• Service Charges</li> </ul> <p>You can view an invoice from the details window.</p> <p><b>Note:</b> For wholesale parent accounts, the <b>Charge Sharing</b> link is shown under <b>My Charges</b>. Click the <b>Charge Sharing</b> link to view the consolidated amount due for the wholesale parent account.</p>

Field	Description
<b>Charges from Other Accounts</b>	<p>Shows the charges for the selected bill that are generated by other accounts. Click the charges in the following areas to view more information:</p> <ul style="list-style-type: none"> <li>• Account Charges</li> <li>• Account and Sharing Charges</li> <li>• Service Charges</li> </ul> <p>You can view an invoice from the details window.</p> <p><b>Note:</b> For wholesale parent accounts. The <b>Charges from Other Accounts</b> area is not displayed.</p>

## About Exporting Grid Contents

The following Billing Care account information grids contain data that can be exported to CSV files:

- All Unallocated Payments
- All Unallocated Adjustments
- Allocate Payments - Simple
- Allocate Payments - Advanced
- Allocate Adjustments - Simple
- Allocate Adjustments - Advanced
- Payment Details
- Adjustment Details
- Payment Details Item Affected
- Adjustment Details Item Affected
- AR Actions
- All Open Disputes
- Bill Adjustments Details
- Bill Adjustments Details Item Affected
- Payment Applied
- Past Due

To export grid data to CSV:

1. View the grid in Billing Care.
2. Click **Export**.
3. Save the file.

## Using Keyboard Shortcuts

You can use keyboard shortcuts for many actions in Billing Care.

Action	Shortcut
Move focus to the next field or element from top to bottom and left to right.	<b>Tab</b>
Move focus to the previous field or element, from bottom to top and right to left.	<b>Shift + Tab</b>
Click a link, a button, or a command on a menu.	<b>Enter</b> or <b>Spacebar</b>
In a table, move to the next row. In a drop-down list, move to the next item in the list.	<b>Down Arrow</b>
In a table, move to the previous row. In a drop-down list, move to the previous item in the list.	<b>Up Arrow</b>
Move from a menu item to its parent menu in the <b>Actions</b> menu, right to left.	<b>Left Arrow</b>
Open a submenu from a menu item in the <b>Actions</b> menu, left to right.	<b>Right Arrow</b>
Select the <b>Allocate</b> column in a table for allocating payments or adjustments.	<b>Ctrl + Enter</b>

## About Date and Time Formats (Release 15.0.1 or later)

Date and time formats are standardized across the Billing Care user interface. The format for dates matches the locale-specific standard. The time uses the 24-hour format, such as 13:00:00 for 1p.m.

[Table 1-1](#) lists the locale-specific standards for date and time formats.

**Table 1-1 Supported Date and Time Formats**

Locale	Supported Date and Time Formats
English (en-US)	<ul style="list-style-type: none"> <li>• MMM DD, YYYY HH:mm:SS</li> <li>• MMM DD, YYYY</li> <li>• MMM DD</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>

**Table 1-1 (Cont.) Supported Date and Time Formats**

Locale	Supported Date and Time Formats
Russian (ru)	<ul style="list-style-type: none"> <li>• DD MMM YYYY HH:mm:SS</li> <li>• DD MMM YYYY</li> <li>• DD MMM</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
French (fr)	<ul style="list-style-type: none"> <li>• DD MMM YYYY HH:mm:SS</li> <li>• DD MMM YYYY</li> <li>• DD MMM</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
Japanese (ja)	<ul style="list-style-type: none"> <li>• YYYY/MM/DD HH:mm:SS</li> <li>• YYYY/MM/DD</li> <li>• MM DD</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MM is months in digits.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
Italian (it)	<ul style="list-style-type: none"> <li>• DD MMM YYYY HH:mm:SS</li> <li>• DD MMM YYYY</li> <li>• DD MMM</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>

**Table 1-1 (Cont.) Supported Date and Time Formats**

Locale	Supported Date and Time Formats
Portuguese (pt-BR)	<ul style="list-style-type: none"> <li>• DD MMM YYYY HH:mm:SS</li> <li>• DD MMM YYYY</li> <li>• DD MMM</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
Korean (ko)	<ul style="list-style-type: none"> <li>• YYYY. MM. DD. HH:mm:SS</li> <li>• YYYY. MM. DD.</li> <li>• MM DD</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MM is months in digits.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
Chinese (zh-CN)	<ul style="list-style-type: none"> <li>• YYYY MM DD HH:mm:SS</li> <li>• YYYY MM DD</li> <li>• MM DD</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MM is months in digits.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>
Spanish (es-ES)	<ul style="list-style-type: none"> <li>• DD MMM YYYY HH:mm:SS</li> <li>• DD MMM YYYY</li> <li>• DD MMM</li> <li>• HH:mm:SS</li> </ul> <p>where:</p> <ul style="list-style-type: none"> <li>• MMM is the abbreviation for the month name.</li> <li>• DD is the day of the month.</li> <li>• YYYY is the 4-digit year.</li> <li>• HH is the hour of the day (0 – 23).</li> <li>• mm is the minute of the hour (0 – 59).</li> <li>• SS is the seconds (0 – 59).</li> </ul>



**Table 1-1 (Cont.) Supported Date and Time Formats**

Locale	Supported Date and Time Formats
Chinese Traditional (zh-TW)	<ul style="list-style-type: none"><li>• YYYY MM DD HH:mm:SS</li><li>• YYYY MM DD</li><li>• MM DD</li><li>• HH:mm:SS</li></ul> where: <ul style="list-style-type: none"><li>• MM is months in digits.</li><li>• DD is the day of the month.</li><li>• YYYY is the 4-digit year.</li><li>• HH is the hour of the day (0 – 23).</li><li>• mm is minute of the hour (0 – 59).</li><li>• SS is the seconds (0 – 59).</li></ul>

# 2

## Creating and Finding Accounts

You can find existing accounts in Oracle Communications Billing Care by using its search function, and you can create new customer accounts using its account function.

To create and find accounts, see the following topics:

- [Finding an Account](#)
- [Creating an Account](#)
- [Working with Subscription Groups](#)
- [Making Account Services Inactive or Terminating Them](#)

### Finding an Account

To find an account:

1. Click **Search**.

The Search dialog box appears. See "[Search Dialog Box](#)" for more information.

2. From the **Search** list, keep the default of **Accounts**.
3. Enter search criteria.



#### Tip:

Use an asterisk (\*) as a wildcard to match one or more characters at the start or end of words or numbers.

4. Click **Search**.

Billing Care displays search results on the right side of the Search dialog box. You can enter more criteria to refine the search if there are many results. You can also sort the search results. See "[Sorting Search Results](#)".

5. Select an account, and click **Open**.



#### Tip:

You can also open an account by double-clicking the account in the results list.

Billing Care displays the selected account.

### Search Dialog Box

Use the Search dialog box to search for accounts. Narrow your search results by using the filters provided under **Account Information**. You can also select the relevant schema to filter the account. By default, the primary schema is selected.

 **Note:**

For a multi-schema setup, the search criteria is used to search accounts in all schemas, and results are sorted according to the sort conditions for each schema.

The search is not case-sensitive.

 **Tip:**

- Use an asterisk (\*) as a wildcard to match any missing characters at the start, middle, or end of words or numbers.
- Scroll down to view recently accessed accounts.

Search list	Description
Account Information	Enter search criteria in one or more fields in the <b>Account Information</b> area.
Results	<p>Lists the items that meet your criteria.</p> <p>If an account has more than one match for a Service ID, &lt;multiple&gt; appears. You can see the service IDs and service types in the tooltip.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> <li>• Sort the results by a given column in either ascending or descending order. See "<a href="#">Sorting Search Results</a>".</li> <li>• Select a result and open it.</li> </ul> <p>When you search by a particular service ID, the subscription associated with that service ID is automatically displayed when you open the account from the search results.</p> <p>Search returns a maximum of 50 results. Refine your search criteria if the account you are searching for is not initially found.</p>

## Sorting Search Results

Initially, search results are sorted by last name. You can change how the results are sorted by clicking on a different column heading. Click the heading again to change from ascending to descending sort.

If you sort results by:	The second sort is:	And the third sort priority is:
Account Number	Last Name	First Name
Last Name	First Name	Account Number
First Name	Last Name	Account Number
Company Name	Last Name	First Name

## Creating an Account

To create a new account:

1. Click **New Account**.

The **Profile** screen appears.

- Enter the following information for the new account:

Field	Description
<b>Contacts</b>	Account contact information. Provide one or more contacts for the new account.
<b>Security</b>	Security question and response. Provide a secure question to verify the new account's owner during future interactions.
<b>Customer Type</b>	Select the customer type for the new account.
<b>Language</b>	Select the default language for the new account. Billing Care sets the default language based on your browser locale.
<b>Organization Hierarchy Type</b>	(Optional) Select the organization hierarchy type. See " <a href="#">About Account Hierarchy Types</a> " for more information.
<b>Monitor Group Balance</b>	Select the check box to make this account the owner of a payment responsible real-time credit enforcement (PR_RTCE) balance monitor group.  This allows the account to track the total rolled-up balance for all members in the PR_RTCE group in real-time. See "About Balance Monitoring Groups" in <i>BRM Managing Customers</i> for more information.

- Click **Select**.

The **Select** screen appears with the list of available packages. You can filter the list by service type, tag, and contract period.

- Select the package that your customer wants to purchase.
- Click **Configure**.

The **Configure** screen appears.

- Under **Service Configuration**, select a service.
- Do one of the following:
  - For non-telco services: Enter a service identifier in the **Service Identifier** field. The service identifier can be any text. It is a unique identifier that connects the customer to the service instance that the customer owns. For example, it could be an email address or a personal ID number. Customers use the service identifier as their login name for the service.
  - For telco services: The associated SIM card and number details are displayed. To search and associate a SIM card and primary number with a service, see "[Configuring SIM Cards](#)".
- To backdate account creation to a date earlier than the current date, select **Backdate account creation to** and click the calendar icon to set the date. By default, the current date is selected.

 **Note:**

Backdate account creation is hidden if the selected package has terms and deliverable-based revenue recognition is enabled.

9. Under **Configure Bundle**, click a bundle to configure the credit limit check. Select one of the following values:
  - **Override credit limit:** The credit limit will be overridden
  - **Prorate based on credit limit:** Prorated until the credit limit is reached
  - **Enforce credit limit:** The transaction will fail if the credit limit check fails

By default, **Enforce credit limit** is selected.

10. (Optional) Under **Configure Purchase**, click an offer to change the customer's purchase charges, such as by:
  - Changing the purchase activation or deactivation dates.
  - Decreasing the customer's monthly fee through discounts or overrides.
  - Changing the length of the grace period. Customers can reactivate and extend their expired product if they repurchase it within the grace period.
11. Select a reason for the purchase and enter notes if required.
12. Click **Terms**.

The **Terms** screen appears with details about the contract's commitment period, early termination policy, and renewal behavior.

 **Note:**

The **Terms** screen is disabled if a package or plan does not have subscription terms associated with it.

13. Review the terms associated with the selected package and then click **Pay**.

The **Pay** screen appears.
14. Select a payment type.

If the payment method is not defined, select **No Payment Method**.
15. Do one of the following:
  - For **New Credit Card** (credit card), enter card number, CVV2/CID details, card expiration details, name, address, and billing details.
  - For **New Direct Debit** (debit card), enter bank number, account number, account type, name, address, and billing details.
  - For **New Invoice**, enter the invoice payment method ID, delivery method, email, name, address, and billing details.
  - For **New SEPA**, enter SEPA-related information, such as the International Bank Account Number (IBAN), Bank Identifier Code (BIC), Unique Mandate Reference information, type of payment, date of signing, mandate signed place, creditor's ID and other details, debtor's ID and reference details, mandate contract description, address, and billing details.
16. To add one or more bill units, click **Manage how individual resources are paid**.

A bill unit is a group of one or more bills. Because each bill unit has its own payment settings and produces one invoice, your customers can control the number of invoices they receive and the payments they make for their account.

The screen displays the customer's bill units.

17. Click **Add Bill Unit** to add another bill unit.

The details of the default bill unit appear on the page. You can add new bill units from this page. The bill units that are added are available in the **Pay** screen.

This page also displays the services from the selected plan. The services are grouped by the balance group and are identified by the service type. You can drag and drop the balance groups from one bill unit to another.

See "[Moving Services between Bill Units](#)" for more information on how to move balance groups to the new bill unit.

See "[Financial Setup](#)" for more information on configuring payment methods and bill units.

18. Click **Finish** to create a new account.

Billing Care displays the newly created account. See "[Financial Setup](#)" for additional information on managing account financial information.

## Configuring SIM Cards

To find and associate a SIM card and primary number with a service, do this from the **Configure** screen of the Account Creation wizard:

1. To select a SIM card, click **Search**.

A search dialog box appears.

2. Do the following:

- a. (Optional) Enter a **Description**.

- b. (Optional) To search for a specific SIM card, enter a search criteria. You can search by SIM number, IMSI number, network element, or status.

- c. Click **Search**.

The search returns a maximum of 50 results by default. Refine your search criteria if the SIM Card you are searching for is not initially found.

- d. Select a SIM card and click **Associate**.

The selected SIM number is associated with the service.

3. To select and associate a number, click **Search**.

A search dialog box appears.

4. Do the following:

- a. (Optional) Select **Primary number** if the number to be associated is a primary number.

- b. (Optional) Enter a **Description**.

- c. (Optional) To search for a specific number, enter a search criteria. You can search by number, number category, network element, vanity, or status.

- d. Click **Search**.

The search returns a maximum of 50 results by default. Refine your search criteria if the number you are searching for is not initially found.

- e. Select a number and click **Associate**.

The selected number is associated with the service.

## Working with Subscription Groups

You can group services by subscription and allow sharing of resources among them. You can also perform collective administrative operations for the entire group, such as activating or canceling services or making them inactive.

Customers can have several subscriptions, such as a wireless phone and Internet access, or two wireless phones with different numbers. Grouping services by subscription allows you to rate and bill for services according to the customer's subscription rather than by account. For more information about subscription-level services, see "About Grouping Services by Subscription" in *BRM Managing Customers*.

To associate multiple services to a subscription group, you must create an account and associate the account with a plan that contains a group of subscriptions. See "[Creating an Account](#)" for more information on creating accounts.

Billing Care allows you to purchase services that are grouped in a plan. See "[Purchasing Add-On Products](#)" for more information about purchasing products and services.

### Related Tasks

[Creating an Account](#)

[Purchasing Add-On Products](#)

[Working with No-Contract Subscriptions](#)

## Making Account Services Inactive or Terminating Them

Use Billing Care's subscription management functionality to terminate or an account's services or make them inactive. See "[Working with No-Contract Subscriptions](#)" for more information on managing account subscriptions, including how to terminate, make inactive, or reactivate account services.

# 3

## Account Information

You can view and change your customers' account information by using Oracle Communications Billing Care.

To work with accounts and perform some basic tasks, see the following topics:

- [Viewing and Changing Account Information](#)
- [Changing the Account Status](#)
- [Working with Deferred Actions](#)
- [Working with the Newsfeed](#)
- [Working with Account-Level Notes](#)
- [Working with Credit Limits, Credit Floors, and Thresholds](#)
- [Finding a Bill](#)
- [Viewing and Adding Subscriber Preferences](#)
- [Viewing Bill Details](#)
- [Viewing Refunded Bills](#)
- [Viewing Account Balances](#)
- [Viewing an Invoice](#)
- [Working with Events](#)
- [Working with an Account in Collections](#)
- [Returning to the Landing Page](#)

## Viewing and Changing Account Information

An account can have multiple contacts, and each contact can have multiple phone numbers.

The first account contact appears in the account bar. You can see any additional contact information and add, change, or delete contact information on the Account Profile dialog box.



### Note:

The first contact cannot be deleted. The name and address in this contact are often also used for the account's billing information. If you change the contact information, you might also need to change the billing information. To do this, see "[Payments](#)".

To view or change account information, do any of the following:

1. From the **Actions** menu, select **Account**, and then select **Account Profile**.

The Account Profile dialog box appears.



2. To add a new contact, click **New Contact** and enter the customer information.

 **Note:**

Enter a pre-existing email address, not one associated with a service the customer is purchasing now.

3. To change existing contact information, update the information in any of the contact fields.

 **Note:**

If you enter a company name, that name is displayed.

If the company name is blank, the first and last names of the first contact in the account profile are displayed.

4. To change the phone number information, select the type and enter the new number.

 **Note:**

Each phone type can be used by only one phone number.

5. In **Security**, enter new text to change the hint or answer.  
For more information, see "[Changing Customer Security Hints and Answers](#)".
6. For **Customer Type**, select a new value.
7. For **Language**, select a new value.
8. For **Organization Hierarchy Type**, select a new value.
9. For **Monitor Group Balance**, select the check box to enable this account to be the owner of a payment responsible real-time credit enforcement (PR\_RTCE) balance monitoring group.
10. Click **Save**.

See "[Financial Setup](#)" for information on updating payment, bill unit, or tax information.

#### Related Tasks

[Working with Payment Methods](#)

## Changing Customer Security Hints and Answers

To change customer security hints and answers:

1. From the **Actions** menu, select **Accounts**, and then select **Account Profile**.  
The Account Profile dialog box appears.
2. In the Security section, enter new text to change the hint or answer.
3. To delete a hint and answer pair, click the minus icon.
4. Click **Save**.

## Changing the Account Status

If an account is inactive or closed, that information appears in the account bar.

Changing the status of an account affects services, products, and hierarchical groups. For more information, see:

- [Products and Account Status](#)
- [Hierarchical Groups and Account Status](#)

To change the account status:

1. From the **Actions** menu, click **Account status**.  
The Account Status dialog box appears.
2. From the **Status** list, select an account status.
3. Do one of the following:
  - Keep the default **Effective immediately**.
  - Select **Defer the action until**, and enter the date.
  - Select **Backdate the action to**, and enter the date.
4. From the **Account Status Change** list, select the reason.
5. (Optional) Enter a note.
6. Click **Save**.

## Products and Account Status

Making an account inactive makes all active products in the account inactive. Reactivating an inactive account reactivates all products that were active when the account was active. Products that were inactive when the account was active remain inactive.

Closing an account cancels all the account's products and services. Reactivating a closed account does not reinstate the canceled products. To regain the canceled products, the account must repurchase the deals that contain them.

Individual products and services can be made inactive or terminated without affecting an account's other products and services. See "[Working with No-Contract Subscriptions](#)" for more information about making products inactive or removing them from a customer's account.

## Hierarchical Groups and Account Status

By default, changing the status of the parent account's services in a hierarchical account group changes the status of all child accounts' services in the group, independent of their type of bill unit (paying or nonpaying).

See "[Organization Hierarchies](#)" for more information on managing organizational hierarchies.

## Working with Deferred Actions

The Deferred Actions list the account, service, and collections related scheduled actions. For example, activation or deactivation of a service or closure of an account at a later date. You can edit, execute, and delete the deferred actions.

To work with the deferred actions:

1. From the **Actions** menu, click **Deferred Actions**.

The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

- The **Deferred Actions** link in the Account banner tile.  
This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
  - The Subscriptions cards. See "[Deferring Actions for a Service](#)".
2. (Optional) From the **Type** list, select the type of deferred action you want to perform. By default, **All** is selected.
  3. (Optional) From the **Status** list, select one of the options. By default, **Pending** is selected.
  4. Select the deferred action to perform any of the following actions. These actions are available based on the user privileges:
    - **Edit**: Allows you to reschedule the deferred action.
    - **Execute**: Allows you to execute the action. When you execute, if the execution is successful, the status of the action changes to **Done**. If the execution fails, the status of the action changes to **Error**.
    - **Delete**: Allows you to remove the deferred action.

 **Note:**

For collections related deferred actions, you can only execute or delete an action.

## Editing Deferred Actions

To edit deferred actions:

 **Note:**

You can edit only the deferred actions that are in the **Pending** status.

1. From the **Actions** menu, click **Deferred Actions**.

The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

- The **Deferred Actions** link in the Account banner tile.  
This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
  - The subscriptions cards. See "[Deferring Actions for a Service](#)".
2. Select the account or service level deferred action.
  3. Click the pencil icon.

4. In the **Scheduled** field, enter a date or select a date from the calendar.
5. Click **Save**.

## Executing Deferred Actions

To execute deferred actions:

1. From the **Actions** menu, click **Deferred Actions**.

The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

- The **Deferred Actions** link in the Account banner tile.  
This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
- The Subscriptions cards. See "[Deferring Actions for a Service](#)".

2. Select the account or service level deferred action.
3. Click the execute icon.

### **Note:**

You can edit only the deferred actions that are in the **Pending** status.

After the execution, the Pending status changes to:

- **Done**, if the action successfully executes.
- **Error**, if the action does not execute successfully.

## Deleting Deferred Actions

To delete deferred actions:

1. From the **Actions** menu, click **Deferred Actions**.

The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

- The **Deferred Actions** link in the Account banner tile.  
This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
- The Subscriptions cards. See "[Deferring Actions for a Service](#)".

2. Select the account or service level deferred action.
3. Click the delete icon.

After the deletion is successful, the deleted action is removed and you cannot view the deleted action and its status. If you cannot delete the pending action, **Pending Undeletable** appears in the **Status** list.

## Working with the Newsfeed

The Newsfeed shows a chronological list of activity for an account, such as the purchases made, the payments submitted, and the disputes opened.

You can do the following with the newsfeed:

- View the history of all activity for an account and its bill units.
- Filter the list of newsfeed entries to show only accounts receivable (A/R) actions, payments, charges, or account-level changes.
- Search for newsfeed entries by bill number or payment ID.

You can select a newsfeed entry to open a dialog box or section with more details about the activity. Depending on the type of activity, you can add a comment or perform a related action.

## Displaying an Account's History

To display an account's history in the newsfeed:

1. On the account page, click the **Home** tab.
2. Select the **Account History** area and then click the **Newsfeed** link.

The Newsfeed appears on the right. All newsfeed entries for the account are listed by default.

## Finding Newsfeed Entries

To find entries in the newsfeed by bill number or payment ID:

1. On the account page, click the **Home** tab.
2. Select the **Account History** area and then click the **Newsfeed** link.

The Newsfeed appears on the right. The complete list of newsfeed entries are displayed by default.

3. To list only the entries for a specific category, click **A/R**, **Payments**, **Charges**, or **Account**.
4. Click the Search icon:



The Newsfeed Search appears.

5. In the **Find** list, do one of the following:
  - To search by bill number, select **Bill Number** and then enter a bill number.
  - To search by payment ID, select **Payment ID** and then enter a payment ID.
6. Click **Search**.


The Newsfeed displays the search results.

 **Tip:**

To clear the search criteria and see all search results again, click the Search icon and then click the **Reset** link.

## Newsfeed

The Newsfeed provides the history for an account and its bill units in list form.

Field	Description
Categories	<p>The top row lists the main categories. Click a category link to view entries for that category:</p> <ul style="list-style-type: none"> <li>• <b>All:</b> Includes all entries.</li> <li>• <b>A/R:</b> Includes currency adjustments, adjustment allocations, noncurrency adjustments, open disputes, closed disputes, refunds, write-offs, and collections.</li> <li>• <b>Payments:</b> Includes payments, payment allocations, payment method changes, payment reversals, when a payment for the account is moved to suspense, and when a suspended payment is allocated to the account.</li> <li>• <b>Charges:</b> Includes bill issued, bill became overdue, one-time charges, recurring charges, purchase, purchase canceled, corrective bill issued, and bill issued mid-cycle.</li> <li>• <b>Account:</b> Includes name or contact information changes, service status changes, and services attached (for example, a SIM card) or detached from the account. Also, bill unit created, bill unit deleted, billing frequency changed, billing day change, billing type change are included.</li> </ul> <p>When an account status change or service status change is scheduled in the future, it is listed as a deferred action.</p> <p>When a product, discount, or custom service status changes, the Newsfeed is also updated and reflects the changes.</p>
	Click this icon to search for Newsfeed entries by bill number or payment ID.
<b>Date</b>	The date the activity occurred.
<b>Icon</b>	Indicates the type of activity. For example, a shopping cart icon indicates a purchase, and a dollar sign indicates a payment.
<b>Type</b>	For the category, the particular types of entries. Click a link to access details about the entry and, depending on the type, comment or perform a related action.
<b>Amount</b>	If the type involves currency, the amount appears.
<b>Details</b>	Summary of the entry.
<b>Show More</b>	If there are more than 50 records, this link appears.

## Working with Account-Level Notes

Account-level notes consolidate all comments that CSRs have entered for an account, allowing you to easily track and view all interactions that have occurred with your customers.

Each note includes the name of the CSR that posted it, the date that it was entered, the note's comments, and any follow-up comments in the note's thread.

You can do the following with account-level notes:

- Add a note to an account
- Add follow-up comments to a note's thread
- View the notes and follow-up comments associated with an account

To maintain the integrity of account-level notes, you cannot modify or delete any note or follow-up comment. You also cannot post an empty note or follow-up comment. Billing Care generates an error message if you attempt to post one.

## Creating an Account-Level Note

To create an account-level note:

1. On the account page, click the **Home** tab.
2. Click the **Notes** area.

The **Notes** page appears on the right. See "[Notes Page](#)" for details.

3. In the Notes header bar, click the **Add Notes** icon:



4. Enter your comments.



### Note:

Ensure that your comments are correct before proceeding. You cannot edit or delete a note after it is posted.

5. Click **Post**.

Your note is added.

## Adding Comments to a Note's Thread

To add a comment to a note's thread:

1. On the account page, click the **Home** tab and then select the **Notes** area.  
The **Notes** page appears on the right. See "[Notes Page](#)" for details.
2. Select the note and then click **Comment**.
3. Enter your comments.



### Note:

Ensure that your comments are correct before proceeding. You cannot edit or delete a comment after it is posted.

4. Click **Post**.

Your comment is added to the note's thread.

## Viewing Account-Level Notes

The **Notes** page lists all notes that have been posted to an account, listed from the newest to the oldest.

The **Notes** page shows the following for each note:

- The name of the CSR who posted the note.
- The date the note was posted.
- The number of comments associated with the note. This number includes the original note plus any follow-up comments.

A number is displayed only when the note contains follow-up comments.

- The first three lines of the note's comments.

You can select a note to view its full contents.

To view the notes for an account:

1. On the account page, click the **Home** tab.



The **Notes** area displays the number of notes created in the past 24 hours and in the past two months. If the account does not have any notes, it displays **No recent notes**.

2. Select the **Notes** area.

The **Notes** page appears on the right. See "[Notes Page](#)" for details.

## Notes Page

The **Notes** page lists all notes that CSRs have entered for an account.

Field	Description
	Click this icon to add a note to an account.
Comment area	The note's comments.
<b>Post</b>	Click this to post your note or follow-up comment.
<b>Cancel</b>	Click this to cancel your note or follow-up comment.
<i>Name</i>	The name of the CSR who entered the note or follow-up comment.
<i>Date</i>	The date the note or a follow-up comment was posted.
	The number of comments associated with the note. This number includes the original note plus any follow-up comments. This icon appears only when a note contains a thread.
<b>Comment</b>	Click this to add a follow-up comment to a note's thread.



## Working with Credit Limits, Credit Floors, and Thresholds

The currency and noncurrency credit limits are displayed in the **Balances** section in the **Home** tab.

You set a credit limit to control the charges or noncurrency resources that a customer can accumulate. You can also configure a credit limit to be ignored.

After customers reach a noncurrency credit limit, the resource stops accumulating in the customer's account.

After customers reach a currency credit limit, they cannot use the service.

If you set a credit floor, a notification event is generated when the credit limit threshold is reached. If you do not set a credit floor, no notification event is generated. For currency resources, the credit floor is 0. The credit floor can be either static or dynamic (determined by the granted amounts from the sub-balances that are valid for the current cycle for the resource).

The thresholds represent a percentage of the credit limit amount or a percentage of the difference between the credit limit and the credit floor (if you selected a credit floor) amounts. Each selected threshold triggers an alert. You set the credit thresholds to notify customers when the resource usage reaches the specified amount or limit. You can specify the threshold either:

- As a fixed threshold value, such as \$100 or 30 minutes.
- As a percentage value of the credit limit, such as 90%. For example, if the credit limit is \$100 and the threshold is 90%, the threshold amount is reached when the customer has a balance of \$90; that is, when the customer has used 90% of the resource.

## Setting up Credit Limit, Floor, and Thresholds

To set credit limit, floor, and thresholds for currency or noncurrency resources:

1. On the account page, click the **Home** tab.
2. In the Account History Section, click **Balances**.

If the account or bill unit has multiple balances for multiple services, the **Balance** list appears; otherwise, the single balance appears.

3. Select the resource for which you want to set the credit limit, credit floor, and credit thresholds.
4. Enter or select the values for the following:
  - **Limit allowed.** (Optional) To set a credit limit, enter a value. To keep the credit limit as unlimited, leave it empty.
  - **Dynamic Floor.** (Optional) If selected, the credit floor will be determined dynamically, and the value for **Floor** cannot be set.
  - **Floor.** (Optional) Enter a lower credit limit amount for the balance. This value cannot be greater than the Fixed value. If you do not enter a value, the text box displays the value as Not Set.
  - **Fixed Thresholds.** (Optional) Enter the fixed threshold value at which to send the notification to customers. This value must be between the floor and the credit limit.

- **Thresholds.** (Optional) Select the desired percentage value. This value must be between the floor and the credit limit.
- **Outstanding amount due to insufficient credit.** Displays the amount the customer currently owes beyond the credit limit.
- **Credit limit check.** Select whether to enforce or override the credit limit.
- **Roll Up Credit Limit.** (Optional) Select this option to add this account's credit limit to the parent's bill unit in a payment responsible real-time credit enforcement balance monitor group.

 **Note:**

This field appears only when this bill unit is a child member of a payment responsible real-time credit enforcement balance monitor group.

 **Tip:**

You can change validity dates for noncurrency resources.

When spending reaches the selected percentage or the fixed threshold value, a notification event is generated.

5. Click **OK**.

## Credit Limit, Floor, and Thresholds Dialog Box

Use this dialog box to set the required values for credit limit, floor, and thresholds for currency or noncurrency resources.

Field	Description
<b>Limit allowed</b>	Enter the credit limit to control the charges or noncurrency resources a customer can accumulate. This value can be negative.
<b>Dynamic Floor</b>	Select this option to enable the dynamic credit floor. This determines the credit floor using the granted amounts from the sub-balances that are valid for the current cycle for the resource (for example, minutes).
<b>Floor</b>	Enter the lower credit limit amount for the balance. This value can be a negative value, but it cannot be greater than the fixed value.
<b>Fixed Thresholds</b>	Enter the value at which you want the notification event to be generated.
<b>Thresholds</b>	Select a percentage at which you want the notification event to be generated.
<b>Outstanding amount due to insufficient credit</b>	Displays the amount the customer currently owes beyond the credit limit. For example, if the customer's bill is \$500 and you set <b>Limit Allowed</b> to \$300, this field displays \$200.
<b>Credit limit check</b>	Select whether to enforce or override the credit limit. Values are: <ul style="list-style-type: none"> <li>• <b>Override credit limit:</b> The credit limit will be overridden</li> <li>• <b>Enforce credit limit:</b> The transaction will fail if the credit limit check fails</li> </ul> The default value is <b>Enforce credit limit</b> .

Field	Description
<b>Roll Up Credit Limit</b>	Select this option to add this account's credit limit to the parent's bill unit in a payment responsible real-time credit enforcement balance monitor group. <b>Note:</b> This field appears only when this bill unit is a child member of a payment responsible real-time credit enforcement balance monitor group.

## Finding a Bill

To find a bill (including refunded bills):

1. On the account page, click the **Bills** tab.

The bill in progress appears by default.

After the billing cycle completes, charges and other billing-related items of the wholesale child accounts in the hierarchy are rolled up to the wholesale parent account, and the total due for this period in the wholesale child accounts shows 0.

The **Bills** tab of the wholesale parent account shows the last generated bill. If it is the first billing cycle and wholesale child bills are in progress, the **No bills to display** message appears in the **Bills tab** of the wholesale parent account.

2. To select another bill by its date, click **Switch Bills**.

The bill in progress and up to 12 billing cycles are listed. You can view the bills that are generated before and after moving the account to the hierarchy.

3. If the account has multiple bill units, select the bill unit.

### Tip:

You can also find a bill by clicking its indicator in the **Bills** graph and clicking **Details** in the dialog box that appears.

### Related Tasks

[Making a Payment](#)

[Adjusting a Bill](#)

[Refunding a Bill](#)

## Finding a Specific Bill

To find a specific bill:

1. Click **Search**.

The Search dialog box appears.

2. From the **Search** list, select **Bills**.

Bill Information dialog box appears. See "[Search Dialog Box](#)" for more information.

3. Enter the bill number that you want to search.

 **Tip:**

Use an asterisk (\*) as a wildcard to match one or more characters at the start or end of words or numbers.

4. Click **Search**.
5. Billing Care displays search results on the right side of the Search dialog box.
6. Select a bill, and click **Open Bill**.

 **Tip:**

You can also open a bill by double clicking the bill in the results list.

Billing Care displays the selected bill.

## Finding Bills by Date Range

To find bills by date range:

1. Click **Search**.  
The Search dialog box appears.
2. From the **Search** list, select **Bills**.  
Bill Information dialog box appears.
3. In the date range, select the **From** and **To** date range in which you want to view bills.
  - a. Select the number of bills in a billing cycle.
  - b. Select the **From** and **To** date range in which to view bills.

 **Note:**

Select the **Bills with zero balance** option to view bills without any balance.

4. Click **Search**.

## Finding Last Generated Bills

To find the last generated bills:

1. Click **Search**.  
The Search dialog box appears.
2. From the **Search** list, select **Bills**.  
Bill Information dialog box appears. See "[Search Dialog Box](#)" for more information.
3. In the **Last** field, enter the number of last generated bills that you want to search. By default, 1 appears. You can search a maximum of 25 last generated bills.

 **Note:**

Select the **Bills with zero balance** option to view bills without any balance.

4. Click **Search**.

## Sorting Search Results

You can change how the results are sorted by clicking on a different column heading. Click the heading again to change from ascending to descending sort.

You can sort the following columns:

- Bill Number
- Cycle Start Date
- Days Overdue
- Billed Amount
- Balance Due

## Viewing and Adding Subscriber Preferences

 **Note:**

Whether subscriber preferences appear depends on your system configuration.

Subscriber preferences show how and when a customer wants to receive your company's messages. By default, Billing Care asks for your customer's preferred language and delivery method, but your company may have added custom fields for collecting additional information.

To view, add, or modify an account's subscriber preferences:

1. From the **Actions** menu, select **Account**, and then select **Subscriber Preferences**.

The Subscriber Preferences dialog box appears and displays the account preferences as well as all services associated with the account.

 **Tip:**

If more than 20 services are associated with the account, you can filter the list of services. To do so, click the **Filter** link. See "[Filter Services Dialog Box](#)" for details.

2. From the left side of the dialog box, select the level of preferences you want to see:
  - To view account preferences, click **Account**.
  - To view the preferences for a service, click the service's name.

The preferences for the account or service appears.

3. To add or change any preferences, click **Edit**.

4. In the **Language** list, select the language for any messages sent to the customer.
5. In the **Channel** field, select one or more delivery methods for sending messages to the customer: **Email**, **SMS**, or **IVR**.
6. In the **NotificationsOptOutList** list, select the notification message types the customer wants to unsubscribe from.
7. In the **NotificationsOptInList** list, select the notification message types the customer wants to subscribe to receive.
8. Enter your customer's preferences for any custom fields that your company has added.
9. Click **Apply** to save your changes.

## Filter Services Dialog Box

Use the Filter Services dialog box to narrow the list of services displayed in the Subscriber Preferences dialog box.

Field	Description
<b>Bill Unit</b>	Select the name of the bill unit to display.
<b>Service ID</b>	Enter a service ID to display.
<b>by Service Type</b>	Select a service type from the list of services in the account.
<b>Clear Filter</b>	Click <b>Clear Filter</b> to remove all criteria you entered into the dialog box.
<b>Update</b>	Click <b>Update</b> to view all services that meet your filter criteria.

## Viewing Bill Details

View detailed information for a selected bill using the **My Charges** area in the **Bills** tab. This area provides information about bill item account-level charges and service level charges, allows adjustment to individual bill items, and provides access to a bill's invoice.

After the billing cycle is completed, if you make any event adjustments in the wholesale child account, the adjusted amount is rolled up to the wholesale parent account. It shows the total adjusted amount, including the tax amount, in the wholesale parent account. For example, if you make an event adjustment of \$1.00, 10% is added as the tax amount, and \$1.10 is shown as the total A/R actions amount in the wholesale parent account.

### Note:

Charges in bills containing unsettled disputes are shown in the bill detail.

To view detailed account or service level charge information on a bill in My Charges:

1. Find the bill. See "[Finding a Bill](#)" for more information.
2. In the **My Charges** area, do one of the following:
  - To view account-level charges, click **Charges not related to services**.
  - To view service level charges, click the service listed under **Service Charges**.

 **Note:**

Once the bill is generated for a wholesale child account, you cannot perform the following actions:

- Bill adjustment
- Bill write-off
- Item adjustment
- Item dispute
- Item write-off

You cannot perform these actions for a wholesale child account, irrespective of billing:

- Account adjustment
- Account write-off
- Bill information write-off
- Payments
- Refunds

3. View events related to a charge by clicking on the charge amount link. Clicking a charge amount displays all the events included in the charge.
4. Click **Show Charge Changes** to view individual charge change details, such as one-time discounts.
5. To view a bill's invoice, click **View Invoice**.
6. (Optional) To adjust a bill item charge, click the charge's action menu and select **New Adjustment**.

**Related Tasks**

[Finding a Bill](#)

[Adjusting an Item](#)

[Refunding a Bill](#)

## Viewing Refunded Bills

To view previously refunded bills, use one of the following options:

- In the **Bills** tab, select the refunded bill.
- In the **A/R News Feed**, click the action with a type of **Refund**.
- In the **Home** tab, **Bills** chart, click the red dot for the refunded bill.

**Related Tasks**

[Refunding a Bill](#)

## Viewing Account Balances

The Balances area shows what the customer owes and what credits the customer has. There are two main types of balances:

- Currency balances, which are shown in green and have a currency symbol. The balance represents money owed for the services associated with the balance. If there is a credit limit for the amount owed, that is shown with the balance.
- Noncurrency balances, which are shown in blue and do not have a currency symbol. Noncurrency balances represent tokens, minutes, loyalty points, and so on that are associated with the service.

To view the balances for an account:

1. On the account page, click the **Home** tab, and then select the Account History section or the section for the bill unit whose balances you want to view.

If the account or bill unit has multiple balances, the **Balance** list appears; otherwise, a single balance appears.

2. In the **Balances** list, select the services whose balances you want to view.

The names of the services and the related balances appear below the list.

3. (Optional) Click a noncurrency balance to view further details.

### Related Tasks

[Making a Noncurrency Adjustment](#)

## Viewing an Invoice

To view an invoice:

1. Select a bill.

For more information, see "[Finding a Bill](#)".

2. In the Bills section with a bill open, do one of the following:

- From the **Actions** menu, select **View Invoice PDF**.
- Under My Charges or under Charges from Other Accounts, select the charges to view, and click **View Invoice**.

## Working with Events

You can view the charges for usage events included in the bill.

To view events:

1. On the account page, click the **Bills** tab.

2. Select the bill you want to work with.

To locate a bill, see "[Finding a Bill](#)".

3. In the Service Charges area of the **Bills** section, select a service.

The **Charges by service** page appears.



4. Select a charge by clicking on the amount.  
The **Events** screen appears, containing a list of events in the charge.
5. (Optional) Change the events shown by doing any of the following:
  - Sort by **Date**.
  - Sort by **Destination Network**.
  - Limit by date:
    - Click **Search**.
    - Enter dates for **From** and **To**.
    - Click **Search**.
  - Limit by phone number:
    - Click **Search**.
    - Enter a **Phone number**.
    - Click **Search**.
  - Limit the displayed:
    - Select the relevant events.
    - Change **Show all** to **Show Selected**.
  - Select the events to hide:
    - Select the non-relevant events.
    - Change **Show all** to **Show unselected**.
6. Do one of the following:
  - Select an event and click **Adjust selected**.
  - Click **Close**.

 **Tip:**

You can view event adjustment details by clicking its indicator in the **A/R actions** graph, and in the dialog box that appears, clicking **Details**.

**Related Tasks**

[Adjusting an Event](#)

## Working with an Account in Collections

If an account is in collections, collections information appears in the account bar. If the account has multiple bill units, the name of the bill unit in collections appears. You can:

- View the two next scheduled actions.
- View the number of days the account is past due and the amount that is owed.  
Click to see the details of all past due items.
- View the minimum payment required to stop the collections process.

Click to make a payment.

- View all collections actions and bill units in collections.

Click the **View in collections** link to view the bill units in collections.

If more than two actions are scheduled, the **All Collections Actions** link appears. Click this link to view each action's scheduled actions, notes, and history.

#### Related Tasks

[Making a Payment](#)

## Returning to the Landing Page

To close the account view and return to the landing page:

1. On the account page, select **Actions**.
2. Select **Close**.

The landing page is displayed.

# 4

## Purchases

You can purchase products and services using the **Purchase Catalogue** wizard in Oracle Communications Billing Care.

To purchase products, services, and add-on products, see the following topics:

- [Purchasing New Products and Services](#)
- [Purchasing Add-On Products](#)
- [Transitioning Bundles and Packages](#)

### Purchasing New Products and Services

To purchase new products and services for an account:

1. Open an account.
2. Click **Purchase** at the top left.  
The **Purchase Catalogue** wizard appears.
3. Click **New Service**.  
The list of available packages is displayed. You can filter the list by service type, tag, and contract period.
4. Select the package that your customer wants to purchase.
5. Click **Configure**.  
The **Configure** page appears.
6. Under **Service Configuration**, enter a service identifier for each service.
7. To schedule the package purchase to a date earlier than the current date, select **Backdate Package Purchase** and click the calendar icon to set the date. By default, the current date is selected.

#### Note:

- If you purchase a service, you cannot select the backdate if the chosen date is before the account's effective date and last status change
- If you purchase a bundle, you cannot select the backdate if the date selected is prior to the account's effective date, the account or service's status change, or the service's effective date.
- The backdate option is not visible when deliverable-based revenue recognition is enabled, and the package is associated with a subscription term.

8. Under **Configure Bundle**, click a bundle to configure the credit limit check. Select one of the following values:

- **Override credit limit:** the credit limit will be overridden
- **Prorate based on credit limit:** prorated until the credit limit is reached
- **Enforce credit limit:** the transaction will fail if the credit limit check fails

By default, **Enforce credit limit** is selected.

9. (Optional) Under **Configure Purchase**, click an offer to change the customer's purchase charges, such as by:
  - Changing the purchase activation or deactivation dates.
  - Decreasing the customer's monthly fee through discounts or overrides.
  - Changing the length of the grace period. Customers can reactivate and extend their expired product if they repurchase it within the grace period.
10. Click **Terms**.

The **Terms** screen details about the contract's commitment period, early termination policy, and renewal behavior.

 **Note:**

The **Terms** screen is disabled if no subscription terms are associated with the package.

11. Click **Pay**.

The **Pay** screen appears.

12. Click **Add Bill Unit** to add Bill Units.

The details of the existing bill units appear on the page. You can add new bill units from this page. The added bill units are available in the **Pay** screen.

This page also displays the services from the selected plan. The services are grouped by the balance group and are identified by the service type.

The newly selected services can be added to the bill unit that has a balance group for the account. You can drag and drop the balance groups, purchased for a new service, from one bill unit to another. For more information, see "[Creating an Account](#)".

During account creation, you can add new bill units and configure payment methods. However, you can only configure the existing bill units or payment methods during purchasing new products and services.

13. Click **Finish**.

## Purchasing Add-On Products

To purchase additional products for an account:

1. Find the account. See "[Finding an Account](#)" for more information.
2. Click **Purchase**.

The **Purchase Catalogue** wizard appears.
3. Click **Add to a service**.

The list of available packages is displayed. You can filter the list by tag or service type.

4. Select a bundle and then click **Configure**.

The **Configure** screen appears.

 **Note:**

If you add a telco service, see "[Configuring SIM Cards](#)".

5. To schedule the package purchase to a date earlier than the current date, select **Backdate package purchase to** and click the calendar icon to set the date. By default, the current date is selected.

 **Note:**

- You cannot select the backdate if the date selected is prior to the account's effective date, the last status change date of the account or service, or the service's effective date.
- The backdate option is disabled for systems configured for deliverable-based revenue recognition.
- The backdate option is not visible when deliverable-based revenue recognition is enabled, and the package is associated with a subscription term.

6. (Optional) Under **Configure Purchase**, click an offer to change the customer's purchase charges, such as by decreasing the customer's monthly fee, customizing the purchase options including activation, recurring fees, and usage dates.

7. Click **Terms**.

The **Terms** screen details the bundle's commitment period, early termination policy, and renewal behavior.

 **Note:**

The **Terms** screen is disabled if no subscription terms are associated with the package.

8. Click **Finish**.

## Transitioning Bundles and Packages

 **Note:**

You cannot transition bundles or packages that are associated with subscription terms.

Transitions enable you to limit the packages customers can switch to while remaining fully provisioned. When transitioning to a designated package, your customers can retain their devices, such as phone numbers.

Only a few transition types, such as **Upgrade** and **Downgrade**, appear by default. There could be more based on your system configuration.

- **Upgrade** to a package that is typically more expensive and has more features. For example, a customer might transition from a package that provides Internet and cable TV services to one that includes Internet, cable TV, and VOIP services. In this case, the transition adds a service and a bundle, and changes the bundles for the existing services.
- **Downgrade** to a package that is typically less expensive and has fewer features.

You can perform the following tasks:

- [Transitioning a Bundle for an Account](#)
- [Transitioning and Configuring a Package for an Account](#)
- [Mapping Services for an Account](#)

## Transitioning a Bundle for an Account

To transition a bundle for an account:

1. Select an account. See "[Finding an Account](#)" for more information.
2. Click **Purchase**.  
The **Purchase Catalogue** screen appears.
3. Click **Transitions**.
4. Click the **Bundle** option on the top left.
5. From the **From Bundle** list, select the bundle you want to transition from.
6. From the **Transition Type** list, select a type of transition, such as **Upgrade** or **Downgrade**.
7. Select a **Deal** to transition to.
8. Select a reason for purchase.
9. (Optional) Enter a note.
10. Click **Finish**.

## Transitioning and Configuring a Package for an Account

To transition and configure a package for an account:

1. Find the account. See "[Finding an Account](#)" for more information.
2. Click **Purchase**.  
The **Purchase Catalogue** screen appears.
3. Click **Transitions**.
4. Click **Package**.
5. Select a package from the **From Package** list.
6. Select a type of transition from the **Transition Type** list.
7. Select a package to transition to.

The information about the package and any available options appears.

8. Click **Continue**.

Based on the selected package, **The Map Services** page of the **Purchase Catalogue** page appears. To map existing services to new services, see "[Mapping Services for an Account](#)".

9. To configure a service, in the **Purchase Catalogue** screen, click **Configure**.

The **Service Configuration** page of the Purchase Catalogue appears.

10. Configure the required fields in the **Bundle**, **Purchase**, **Recurring (cycle)**, and **Usage** sections.

11. Select a reason for purchase.

12. (Optional) Enter a note.


13. Click **Finish**.

## Mapping Services for an Account

The **Map Services** page displays existing bundles and services in the selected package. You can map existing services in a package to new services. All existing services appear in one column, and the new services appear in another column.

To map the existing services of an account to new services, do the following:

1. In the **Map Services** page of the **Purchase Catalogue** page, select **Map Services**.
2. The first column lists all the existing services. Select a service.
3. The second column lists new services. Select a service to which the existing service needs to be mapped.
4. Select a reason for purchase.
5. (Optional) Enter a note.
6. Click **Finish**.

 **Note:**

If the mapping service is a new service, the service must be purchased before mapping and must have a service identifier (ID).

# 5

## Assets

You can manage an account's assets, such as the services and charge offers owned, by using the **Assets** area of Oracle Communications Billing Care.

To work with account assets, see the following topics:

- [About Assets](#)
- [Working with Service-Focused Asset Cards](#)
- [Working with Assets in a Product-Focused Table](#)
- [Working with Contracts \(Release 15.0.1 or later\)](#)

### About Assets

The **Assets** page shows the services and related offers a customer owns. You can display the assets in a services-focused, product-focused, or contracts view.

- In the services-focused view, Billing Care displays each service the customer owns in an asset card. By default, the cards are organized by purchase date with the most recently purchased service on top, but you can change the organization. You can expand the cards to show more details and use the menu to perform actions, such as terminating services or making them inactive. See "[Working with Service-Focused Asset Cards](#)".
- In the product-focused view, Billing Care displays each product the customer owns in a table. You can change the amount of detail shown by adding or removing columns in the table. You can also sort the contents by column and perform actions, such as making offers inactive or reactivating them. See "[Working with Assets in a Product-Focused Table](#)".
- In the contracts view, Billing Care displays each contract's subscription terms in an asset card. The terms define the commitment periods and options for canceling and renewing the subscription. A contract's terms apply to all required bundles in the contract. Any added optional bundles have their own independent terms. See "[Working with Contracts \(Release 15.0.1 or later\)](#)".

You can toggle between the views by selecting **Services**, **Offers**, or **Contracts** at the top right of the **Assets** page.

### Working with Service-Focused Asset Cards

To work with assets in service-focused asset cards, see the following topics:

- [Viewing Asset Card Details](#)
- [Filtering the Services for an Account](#)
- [Terminating Products and Discounts](#)
- [Making Products or Discounts Inactive](#)
- [Reactivating Products and Discounts](#)
- [Terminating a Customer's Service](#)



- [Inactivating a Customer's Service](#)
- [Reactivating a Customer's Service](#)
- [Customizing a Customer's Rates](#)
- [Deferring Actions for a Service](#)
- [Managing SIM Card Details](#)

## Viewing Asset Card Details


Billing Care displays details about the products and subscriptions a customer owns in asset cards. Each asset card contains information about one product or subscription. The top of the card shows overview information, such as:

- The name of the package that the customer purchased
- The number of deferred actions, if any
- The date when the customer purchased the package
- The date when the service takes effect

The asset card displays a **View Contract** button if the service is associated with a subscription term.

For Telco services, it also displays details about the SIM card and phone number. If a service is active, its status is not displayed on the asset card. All other standard or custom service statuses are displayed under the service ID.

To view asset card details:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. On the top right next to **Show**, click **Services**.
3. Click the  menu icon at the top right of the asset card and then select **Show Asset Details**.

The asset details are displayed.

### **Note:**

In the detail view, customized charge offers are displayed with an asterisk.

4. To view the deals included with an asset, click the menu icon and then select **Show Deals**.  
The asset card displays the deals in the plan.

## Filtering the Services for an Account

You can narrow the list of services displayed by using the filter.

To filter the services displayed in the service-focused asset cards:

1. On the account page, click the **Home** tab, and then select the **Assets** area.  
Asset cards appear on the right.
2. Next to **Show** on the top right, click **Services**.

A group of service-focused assets appears on the right.

3. Click **Filter** above the table.

The Filter Services dialog box appears. See "[Filter Services Dialog Box](#)".

4. Select the criteria by which to filter assets, such as by service type, service status, or service ID.
5. Click **Update**.

Billing Care displays the filtered results.

## Filter Services Dialog Box

Use the Filter Services dialog box to narrow the list of services displayed in the service-focused asset cards.


Field Name	Description
<b>Bill Unit</b>	Select the name of the bill unit to display. Select <b>All</b> to display all bill units. <b>Note:</b> The <b>Bill Unit</b> drop-down list is visible only when an account has multiple bill units.
<b>Service Type</b>	Select the type of service to display, such as IP or GPRS.
<b>Service Status</b>	Select one or more service statuses to display: <b>Active</b> , <b>Inactive</b> , or <b>Closed</b> .
<b>Include Sub-Services</b>	Select this check box to view the selected service and its sub-services.
<b>Service ID</b>	Enter the service ID to display.
<b>Clear Filter</b>	Click to remove all criteria you entered into the dialog box.
<b>Update</b>	Click to display all assets that meet your filter criteria.
<b>Cancel</b>	Click to exit the dialog box without applying your changes.

## Terminating Products and Discounts

### **Note:**

A product or discount cannot be terminated if it is associated with a subscription term.


To terminate the products and discounts associated with a customer's service:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Terminate Products/Discounts**.  
Billing Care displays a list of services that contain offers that can be individually selected for termination.
4. Select one or more services. Billing Care terminates the offers associated with the services you select.

5. (Optional) To set the termination in the past, select the **Backdate** link and then enter or select a date.
6. Click **Terminate**.


## Making Products or Discounts Inactive

To make a product or discount inactive:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Inactivate Products/Discounts**.  
Billing Care displays a list of services that contain offers that can be chosen individually and made inactive.
4. Select one or more services. Billing Care makes the offers associated with the services you select inactive.
5. (Optional) To make the services inactive in the past, select the **Backdate** link and then enter or select a date.
6. Click **Inactivate**.

## Reactivating Products and Discounts

To reactivate the products and discounts associated with a customer's service:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Reactivate Products/Discounts**.  
Billing Care displays a list of services that contain offers that can be individually selected for reactivation.
4. Select one or more services. Billing Care reactivates the offers associated with the services you select.
5. (Optional) To set the reactivation in the past, select the **Backdate** link and then enter or select a date.
6. Click **Reactivate**.

## Terminating a Customer's Service

When you terminate a service, Billing Care terminates all offers associated with the service. It also applies any applicable early termination fees to the customer.


If the service is a parent service, Billing Care also terminates child services in the hierarchy.



**Note:**

A service cannot be terminated if it is associated with a subscription term.

To terminate a customer's service:


1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Terminate Service**.  
Billing Care displays a list of services that can be terminated.
4. (Optional) To set the termination in the past, select the **Termination Date** link and then enter or select a date.
5. Click **Terminate Service**.

## Inactivating a Customer's Service

You can temporarily disable a service for a customer by making it inactive. The customer will not be able to use the service, but it can be reactivated if the customer wants to use it again.

If the service is for a parent, Billing Care also inactivates any child services in the hierarchy.


To make a customer's service inactive:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Inactivate Service**.  
Billing Care displays a list of services that can be made inactive.
4. (Optional) To set the services to be inactive in the past, select the **Inactivation Date** link and then enter or select a date.
5. Click **Inactivate Service**.

## Reactivating a Customer's Service

You can reactivate a customer's service. If the service is for a parent, Billing Care also reactivates any child services in the hierarchy.

To reactivate a customer's service:


1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Reactivate Service**.  
Billing Care displays a list of services that can be reactivated.

4. (Optional) To set the reactivation in the past, select the **Reactivation Date** link and then enter or select a date.
5. Click **Reactivate Service**.

## Customizing a Customer's Rates

You can modify product- and discount-related information after creating an account or purchasing a service.

To customize a customer's rates:

1. On the account page, click the **Home** tab and then click the **Assets** area.  
Asset cards appear on the right.
2. Click the  menu icon at the top right of the card.
3. From the menu, select **Rate Customizations**.  
Billing Care displays the fees and discounts.
4. Click **Edit**.
5. Modify the fees, discounts, or grace period for the service.
6. Click **Save and Close**.

## Deferring Actions for a Service

You can schedule a service-specific action to occur in the future. For example, you can schedule a subscriber's service termination in one week.

To defer a service-specific action:

1. On the account page, click the **Home** tab, and then select the **Assets** area.  
A list of asset cards appears. If deferred actions are associated with services, they appear as a **Deferred Actions** link.
2. Click the **Deferred Actions** link.  
A deferred action specific to the service appears. For example, a deferred action for Telco/GPRS.
3. Select any of the following:
  - **Edit**: Allows you to modify the deferred action. See "[Editing Deferred Actions](#)" for more information.
  - **Execute**: Allows you to run the action. After you run it, the status of the action changes to **Done**. See "[Executing Deferred Actions](#)" for more information.
  - **Delete**: Allows you to remove the deferred action. "[Deleting Deferred Actions](#)" for more information.

## Managing SIM Card Details

If your customer purchased a Telco service plan, the Asset card will include details about its associated SIM card and telephone number.

To change the SIM card and number:

1. In an expanded Asset card, click the  menu icon at the top right and then select **Show Asset Details**. See "[Viewing Asset Card Details](#)".

The card displays the SIM card and phone number associated with the service.

2. Click **Edit**.
3. To assign a new SIM card to the service, do this:
  - a. In the SIM card section, click the Search icon:



A search pop-up appears.

- b. Select a status from the drop-down list: **New** or **Released**.
- c. Click **Search**.

The search returns a maximum of 50 results by default.

- d. Select a SIM card and then click **Associate**.

The selected SIM card is associated with the service.

4. To assign a new phone number to the service, do this:
  - a. In the Number section, click the Search icon:



A search pop-up appears.

- b. Select **Primary number** if it will be a primary number.
- c. Select a status from the drop-down list: **New** or **Unassigned**.
- d. Click **Search**.

The search returns a maximum of 50 results by default.

- e. Select a number and then click **Associate**.

The selected phone number is associated with the service.

5. Click **Save and Close** to apply your changes.

## Working with Assets in a Product-Focused Table

To work with assets in a product-focused table, see the following topics:

- [Viewing an Account's Products in a Table](#)
- [Filtering the Offers for an Account](#)
- [Customizing an Offer's Rate](#)
- [Inactivating Offers](#)
- [Reactivating Offers](#)
- [Terminating Offers](#)
- [Terminating Bundles](#)

## Viewing an Account's Products in a Table

You can view details about the products an account owns in tabular format. The table includes information such as:

- The name of the plan and deal the customer purchased
- The name of the service associated with the plan
- The name of the product or discount the customer purchased
- The name of the bill unit associated with the plan (displayed only if the customer has multiple bill units)
- The date when the customer purchased the plan
- The status of the product or discount
- The quantity of the product or discount owned

You can add or remove the columns displayed in the table.

A row includes the **View Contract** task if the product is associated with a subscription term.

By default, Billing Care displays products according to their expiration date, from those expiring first to those expiring last, but you can change how the rows are sorted.


To view an account's offers in a table:

1. On the account page, click the **Home** tab.
2. Click the **Assets** area.

Asset cards appear on the right.

3. Next to **Show** on the top right, click **Offers**.

The list of offers owned by the account appears in a table on the right. You can sort the offers using the up or down arrows next to the column names.

4. To add or remove columns from the table, do the following:
  - a. On the top right of the table, click the  menu.  
The Columns dialog box appears.
  - b. Select the check box next to each column to display.
  - c. Click **Update**.

The table lists the offers with the columns you selected.

## Filtering the Offers for an Account

You can narrow the list of offers owned by an account by using the filter.

To filter the offers displayed in the product-focused table:

1. On the account page, click the **Home** tab, and then select the **Assets** area.  
Asset cards appear on the right.
2. Next to **Show** on the top right, click **Offers**.  
A list of product-focused assets appears in a table on the right.
3. Click **Filter** above the table.

The Filter Offers dialog box appears. See "[Filter Offers Dialog Box](#)".

4. Select the criteria by which to filter assets, such as by date, service type, or service status.
5. Click **Update**.

The product-focused table displays the filtered results.

## Filter Offers Dialog Box

Use the Filter Offers dialog box to narrow the list of offers displayed in the table.

Field Name	Description
<b>Bill Unit</b>	Select the name of the bill unit to display. Select <b>All</b> to display all bill units. <b>Note:</b> The <b>Bill Unit</b> drop-down list is visible only when an account has multiple bill units.
<b>Service ID</b>	Select the service ID to display.
<b>Service Type</b>	Select the type of service to display, such as GSM or GPRS.
<b>Service Status</b>	Select one or more service statuses to display: <b>Active</b> , <b>Inactive</b> , or <b>Closed</b> .
<b>Offer Name</b>	Select the name of the offer to display.
<b>Offer Status</b>	Select one or more offer statuses to display: <b>Active</b> , <b>Inactive</b> , or <b>Closed</b> .
<b>Include Sub-Services</b>	Select this check box to list services and all of their sub-services.
<b>Offer Purchase Date</b>	Select the qualifier for the purchase date: <b>On</b> , <b>Before</b> , <b>After</b> , or <b>Between</b> . In the <b>Date</b> field, select or enter the date. For example, to show assets created prior to June 15, you would select <b>Before</b> and then select June 15 from the <b>Date</b> calendar.
<b>Update</b>	Click to display all assets that meet your filter criteria.
<b>Cancel</b>	Click to exit the Filter Offers dialog box without applying your changes.

## Customizing an Offer's Rate

You can customize an offer your customer owns in the following ways:

- Modify the discount amount or percentage
- Override the amount of the purchase or recurring fee
- Change the length of the grace period

To customize an offer's rate:

1. View a product-based list of assets owned by the account. See "[Viewing an Account's Products in a Table](#)".
2. Select the row of the asset you want to customize.
3. Click the following menu icon at the end of the row:



4. From the menu, select **Review Customized Rates**.



The row expands to show the customization details. You can review the current fees, dates, and discounts.

5. Click **Edit**.

The Customize Rates for *OfferName* area appears.

6. Modify the offer's fees, discounts, or grace period.
7. Click **Save and Close**.

## Inactivating Offers

You can make an offer temporarily unavailable to a customer by making it inactive. The customer will not be able to use the offer, but it can be reactivated if the customer wants to use it again.

To make a customer's offer inactive:

1. View a product-based list of assets owned by the account. See "[Viewing an Account's Products in a Table](#)".
2. Select the row of the asset you want to make inactive.
3. Click the following menu icon at the end of the row:



4. From the menu, select **Inactivate Offer**.  
The row expands to include the action's details.
5. (Optional) To inactivate the offer in the past, select the **Backdate Inactivation** link and enter or select a date.
6. Click **Inactivate**.

## Reactivating Offers

You can reactivate a customer's offer.

To reactivate a customer's offer:

1. View a product-based list of assets owned by the account. See "[Viewing an Account's Products in a Table](#)".
2. Select the row of the asset you want to reactivate.
3. Click the following menu icon at the end of the row:



4. From the menu, select **Reactivate Offer**.  
The row expands to include the action's details.
5. (Optional) To set the offer reactivation in the past, select the **Backdate Reactivation** link and then enter or select a date.  
By default, the reactivation date is set to today.
6. Click **Reactivate**.

## Terminating Offers

You can terminate a customer's offer immediately or backdate it to an earlier date.

### Note:

- After an offer is terminated, it cannot be reactivated. The customer must repurchase the offer to use it again.
- You cannot terminate a product if it is associated with a subscription term.

To terminate a customer's offer:

1. View a product-based list of assets owned by the account. See "[Viewing an Account's Products in a Table](#)".
2. Select the row of the asset you want to terminate.
3. Click the following menu icon at the end of the row:



4. From the menu, select **Terminate Offer**.  
The row expands to include the action's details.
5. (Optional) To set the offer termination in the past, select the **Backdate Termination** link and then enter or select a date.  
By default, the termination date is set to today.
6. Click **Terminate**.

## Terminating Bundles

When you terminate a bundle, Billing Care also terminates all associated offers. You can terminate a customer's bundle immediately or backdate it to an earlier date.

### Note:

After a bundle is terminated, it cannot be reactivated. The customer must repurchase the bundle to use it again.

To terminate a customer's bundle:

1. View a product-based list of assets owned by the account. See "[Viewing an Account's Products in a Table](#)".
2. Select the row of the asset you want to terminate.
3. Click the following menu icon at the end of the row:



4. From the menu, select **Terminate Bundle**.  
The row expands to include the action's details.
5. (Optional) To set the bundle termination in the past, select the **Backdate Termination** link and then enter or select a date.  
By default, the termination date is set to today.
6. Click **Terminate**.

## Working with Contracts (Release 15.0.1 or later)

To work with contracts after customers have purchased them, see the following topics:

- [Viewing a Contract's Terms](#)
- [Modifying a Contract's Auto-Renewal Preferences](#)
- [Viewing a Contract's Linked Assets](#)
- [Canceling a Customer's Contract](#)

### Viewing a Contract's Terms

You can view details about the subscription terms associated with a customer's contract in several ways.

To do so, click the **Bills** tab, click **Assets**, and then do one of the following from the **Assets** page:

- Click **Contracts** on the top right.
- Click **Services** on the top right and then click **View Contract** on the appropriate asset card.
- Click **Offers** on the top right and then select the offer that you want to view the contract details for. Click the following menu icon at the end of the row:



Select **View Contract** from the menu list. After the row expands, click **Show Details**.

An asset card displays the term's details, such as the commitment period, the minimum contract length, the penalty fees for early termination, and the auto-renewal options.



By default, Billing Cares sorts the contracts using these rules in order:

1. By the contract's status, with the terminated contracts displayed last.
2. By the contract's end date in ascending order.
3. By the contract's start date in ascending order.
4. In alphabetical order of the term's name.

### Modifying a Contract's Auto-Renewal Preferences


To modify the auto-renewal preferences for a customer's contract:

1. View the appropriate contract's terms. See "[Viewing a Contract's Terms](#)".
2. Select the appropriate asset card.

3. To automatically renew the contract at the end of its commitment period, do this:
  - a. Click the  menu icon at the top right of the card. Then, select **Enable Auto-renew**.  
A renewal options window shows when the terms will renew and end.
  - b. If the renewal terms are correct, click **Enable Auto-review**.
4. To prevent the contract from automatically renewing at the end of its commitment period, do this:
  - a. Click the  menu icon at the top right of the card. Then, select **Disable Auto-renew**.  
A disable options window appears.
  - b. Click **Disable Auto-renew**.

## Viewing a Contract's Linked Assets


To view all offers or services associated with a customer's contract:

1. Open the appropriate contract's subscription terms. See "[Viewing a Contract's Terms](#)".
2. From the appropriate asset card, click the  menu icon at the top right of the card and then select **Linked Assets**.  
The asset card expands to show a **Linked Assets** area.
3. To view all services associated with the contract, click **View Services**.  
A services-focused asset card displays. See "[Working with Service-Focused Asset Cards](#)".
4. Click **View Offers** to view all charge offers and discount offers associated with the contract. See "[Working with Assets in a Product-Focused Table](#)".

## Canceling a Customer's Contract

Your customers can cancel their contract early if it is allowed by the contract's terms. When contracts are canceled, BRM cancels all bundles, offers, and services in the contract and applies any early termination fees.

To cancel a customer's contract:

1. Open the appropriate contract's subscription terms. See "[Viewing a Contract's Terms](#)".
2. From the appropriate asset card, click the  menu icon at the top right of the card and then select **Terminate Contract**.  
The asset card expands to show a **Terminate Contract** area.
3. To backdate the cancellation, click **Backdate** and select or enter the appropriate date.
4. Click **Terminate**.

The asset card displays **Terminated** along with the cancellation date. Any early termination fees are automatically applied to the customer's current bill.

# 6

## Subscriptions (Release 15.0.0 only)

You can manage the no-contract subscriptions and contracts owned by your customers by using the **Subscriptions** area of Oracle Communications Billing Care.

### **Note:**

Billing Care displays the **Subscriptions** area only if you are using the 15.0.0 release and have enabled deliverable-based revenue recognition. See "Enabling Deliverable-Based Revenue Recognition" in *BRM Collecting General Ledger Data*. In release 15.0.1 or later, the **Subscriptions** area does not exist.

To manage your customers' subscriptions, see the following topics:

- [About Account Subscriptions](#)
- [Viewing Subscriptions](#)
- [Working with No-Contract Subscriptions](#)
- [Working with Contracts](#)

## About Account Subscriptions

Your customers can purchase two different types of subscriptions:

- **Contracts:** A contract is a subscription with terms that your customers agree to when they purchase it. The terms define the commitment periods and options for canceling and renewing the subscription. A contract's terms apply to all required bundles in the contract. Any optional bundles that are added have their own, independent terms.
- **No-contract subscriptions:** A no-contract subscription does not include terms. Your customers can use a no-contract subscription until they wish to cancel, without requiring them to renew or to incur early termination fees.

Each subscription that your customer owns is displayed in a subscription card, which displays details such as the purchase date and the services owned.

## Viewing Subscriptions

Billing Care displays details about the subscriptions that a customer owns in the Subscriptions area. Each subscription has its own subscription card. The top of the card contains overview information, such as:

- The name of the package that the customer purchased
- The number of deferred actions, if any
- The date the package was purchased

The lower section contains information about the bundles, services, charge offers, and discount offers owned by the customer. For contracts, it also includes details about the terms, such as the end date and renewal settings.

You can select a card to expand it and show more details.

In case of service groups, the subscription cards for all the member services in the group are displayed under the parent service irrespective of their status. You can use the parent service to sort the services in the group. You cannot sort the services in the group individually.



**Note:**

In the detail view, customized charge offers are displayed with an asterisk.

To view a subscription:

1. On the account page, click the **Home** tab.
2. Select the **Subscriptions** area.

Subscription cards appear on the page to the right. The cards are organized by purchase date with the most recent on top.

3. Select the subscription card that you want to work with.

## Working with No-Contract Subscriptions

To perform an action on a no-contract subscription, such as inactivating, reactivating, or terminating a service:

1. View your customer's subscriptions. See "[Viewing Subscriptions](#)".
2. In a subscription card, select the row of the bundle that you want to change.  
A bundle window appears.
3. In the bundle row, click the **Actions** menu and then select one of the following:



**Note:**

For account subscriptions, the Actions menu service options are not applicable.

Action	Description
<b>Cancel Products/ Discounts</b>	Displays a list of service charge offers and discounts which can be individually selected for termination.
<b>Inactivate Products/ Discounts</b>	Displays a list of service charge offers and discounts which can be individually selected for inactivation.
<b>Reactivate Products/ Discounts</b>	Displays a list of inactivated charge offers and discounts which can be individually selected for reactivation.
<b>Cancel Service</b>	Terminates a service and applies any early termination fees if applicable. Terminating a parent service also terminates any child services.

Action	Description
<b>Inactivate Service</b>	Temporarily inactivates a service. Inactivating a parent service also inactivates any child services.
<b>Reactivate Service</b>	Reactivates a previously inactivated service. Reactivating a parent service also reactivates any child services.
<i>Custom Service Life Cycle State</i>	Transitions the service to the selected custom service life cycle state. Custom service life cycle states are available on the action menu only if Service Lifecycle Management (SLM) is enabled in your BRM system and a custom service life cycle is configured for the service type. When those conditions are met, the action menu does not display the Terminate Service, Inactivate Service, and Reactivate Service options. Instead, it lists all the states in the specified service's custom life cycle to which the service can transition from its current state. For more information, see the discussion about SLM in <i>BRM Managing Customers</i> .
<b>Rate Customizations</b>	You can modify product and discount related information after creating an account or purchasing a service. Click <b>Edit</b> in the Rate Customizations dialog box to modify the information. The expired products or services appear in the Cancelled or Expired section of a subscription card.
<b>Show Subscription Details</b>	Displays additional details about a subscription including information on recurring monthly charges, rate customizations, and expired promotions. Click <b>Edit</b> to make changes to the subscription.

4. (Optional) Do one of the following:
- Click **Backdate** to set a past date for the Terminate Products and Discounts and Inactivate Products and Discounts actions.

 **Note:**

You cannot backdate a custom life cycle state transition.

- To set the termination date, click **Terminate Service** and **Termination Date**.
- To set the inactivation date, click **Inactivate Service** and **Inactivation Date**.

## Working with Contracts

After your customers have purchased a contract, they can:

- View the subscription terms associated with their contract
- Modify the contract's auto-renewal options
- Purchase any optional bundles that are associated with their contract
- Cancel optional bundles in their contract, incurring any early termination fees for doing so
- Cancel their contract before the end of the commitment period, if allowed by the contract's terms, incurring any early termination fees for doing so



## Viewing a Contract's Terms

To view the terms of a customer's contract:

1. On the account page, click the **Home** tab and then select the **Subscriptions** section.  
Subscription cards appear. Each card contains information about the subscription, including the services and related charge offers and discount offers owned by the customer.  
If the subscription card is for a contract, the **Terms** row includes the contract's end date and renewal settings. If it is for a no-contract subscription, the **Terms** row says **No subscription terms**.
2. In the contract's subscription card, select the **Terms** row.  
The **Subscription Terms** screen appears and lists the commitment period, what happens if the customer cancels early, and what happens when the commitment period ends.

## Modifying a Contract's Auto-Renewal Preferences

To modify the auto-renewal preferences for a customer's contract:

1. On the account page, click the **Home** tab and then select the **Subscriptions** section.  
Subscription cards appear. Each card contains information about the subscription, including the services, related charge offers, and discount offers owned by the customer.  
If the subscription card is for a contract, the **Terms** row includes the contract's end date and renewal settings. If it is for a no-contract subscription, the **Terms** row says **No subscription terms**.
2. Select the contract that you want to change.
3. To automatically renew the contract at the end of its commitment period, do this:
  - a. Click the  menu icon at the top right of the card. Then, select **Enable auto-renew**.  
A renewal options window shows when the terms will renew and end.
  - b. If the renewal terms are correct, click **Renew**.
4. To prevent the contract from renewing at the end of its commitment period, do this:
  - a. Click the  menu icon at the top right of the card. Then, select **Cancel Subscription**.  
A cancel options window shows options for canceling now or when the commitment period ends.
  - b. Click **Cancel on Date**, where *Date* lists the day the contract's commitment period ends.

## Modifying a Bundle's Auto-Renewal Preferences

You can modify the auto-renewal preferences for only optional bundles in a contract. Required bundles are governed by the contract's terms, so you cannot cancel a required bundle and still keep the contract. If you cancel a required bundle, the entire subscription is canceled.

To modify the auto-renewal preferences for an optional bundle:

1. On the account page, click the **Home** tab and then select the **Subscriptions** section.  
Subscription cards appear. Each card contains information about the subscription, including the services and related charge offers and discount offers owned by the customer.




If the subscription card is for a contract, the **Terms** row includes the contract's end date and renewal settings. If it is for a no-contract subscription, the **Terms** row says **No subscription terms**.

2. Select the appropriate contract.
3. In the contract's card, select the row of the optional bundle that you want to change.  
A bundle window appears. The bundle's terms indicate whether it is an optional or required bundle.
4. To automatically renew the bundle's terms at the end of its commitment period, do this:
  - a. In the bundle window, click the **Actions** menu and then select **Enable auto-renew**.  
A renew options window appears and shows when the terms will renew and end.
  - b. If the renewal terms are correct, click **Renew**.
5. To prevent the bundle from renewing at the end of its commitment period, do this:
  - a. In the bundle window, click the **Actions** menu and then select **Cancel Bundle**.  
A cancel options window appears and shows options for canceling now or when the commitment period ends.
  - b. Click **Cancel on Date**, where *Date* lists the day the bundle's commitment period ends.

## Canceling a Customer's Contract

Your customers can cancel their contract early, if it is allowed by the contract's terms, or at the end of the commitment period. When contracts are canceled, BRM cancels all bundles, offers, and services in the contract.

1. On the account page, click the **Home** tab and then select the **Subscriptions** section.  
Subscription cards appear. Each card contains information about the subscription, including the services and related charge offers and discount offers owned by the customer.  
If the subscription card is for a contract, the **Terms** row includes the contract's end date and renewal settings. If it is for a no-contract subscription, the **Terms** row says **No subscription terms**.
2. Select the contract that you want to cancel.
3. Click the  menu icon at the top right of the card and then select **Cancel Subscription**.  
A cancel options window appears and shows options for canceling now or when the commitment period ends.
4. To cancel the contract immediately, click **Cancel Now**.  
BRM automatically applies any early termination fees.
5. To cancel the contract at the end of the commitment period, click **Cancel on Date** where *Date* lists the day the contract's commitment period ends.

# 7

## Billing

You can use Oracle Communications Billing Care to create bills on demand and corrective bills for your customers.

To work with billing, see the following topics:

- [Creating a Bill on Demand](#)
- [Generating Corrective Bills](#)

### Creating a Bill on Demand

Use Bill Now to create a bill on demand for a customer's unbilled items.

To create a bill using Bill Now:

1. On the account page, click the **Bills** section.
2. Click **Bill Now**.
3. Click **OK**.

### Generating Corrective Bills

You generate corrective bills when you need to make corrections to a bill or a billing address. For more information about corrective billing and enabling corrective billing in BRM, see "About Corrective Bills" in *BRM Configuring and Running Billing*.

You can generate and view corrective bills for a selected bill from the Bills section.

To generate a corrective bill:

1. On the account page, click the **Bills** tab.

The Bill in progress appears by default.

 **Note:**

An invoice must be generated for the bill before modifying the bill. A corrective bill can only be generated if an invoice for the bill has been generated.

2. (Optional) To select another bill, click **Switch Bills**.

The bill in progress and any other bills, up to 12 billing cycles, are listed.

3. Select the required bill.
4. From the **Actions** menu in the Bills section, select **Produce Corrective Bill**.

The Produce Corrective Bill dialog box appears. See "[Produce Corrective Bill Dialog Box](#)" for details.

5. From the **Invoice Format** list, select an invoice format. By default, the **Detail** format is selected.
6. From the **Invoice Type** list, select an invoice type. By default, the **Invoice Correction Letter** type is selected.
7. From the reason list, select a reason.
8. (Optional) Enter a note.
9. Click **OK**.

The information in the **Bills** tab is refreshed with the modified data and shows the new corrective bill.

 **Note:**

Once a corrective bill is generated, the News Feed displays the **Corrective Bill Issued**.

## Viewing Corrective Bills

To view corrective bills:

1. On the account page, click the **Bills** tab.  
The Bill in progress appears by default.
2. (Optional) To select another bill, click **Switch Bills**.  
The bill in progress and any other bills, up to 12 billing cycles, are listed.
3. Select the required corrected bill.
4. Click **Corrective Bill Trail**.

 **Tip:**

You can also view the corrective bills from the Bills chart in the Home tab or from the A/R News Feed.

The Corrective Bill Trail dialog box appears. See "[Corrective Bill Trail Dialog Box](#)" for details.

This dialog box displays a series of corrective bills for the selected bill with the details, such as my charges, A/R actions (Billed and Unbilled), payment applied, and total due. The notes panel displays all the notes that are entered for the bill.

5. (Optional) To view the invoice for the bill, click **View Invoice**.
6. (Optional) Click comment and enter a comment.

## Produce Corrective Bill Dialog Box

Use the Produce Corrective Bill dialog box to produce corrective bills.

Field	Description
<b>Invoice Format</b>	Select one of the following invoice formats: <ul style="list-style-type: none"> <li>• <b>Detail.</b> The Detail format for a corrective invoice includes all the detail on the adjustment for the corrected item along with all the events.</li> <li>• <b>Summary.</b> The Summary format for a corrective invoice includes all the detail on the adjustment for the corrected item.</li> </ul>
<b>Invoice Type</b>	Select one of the following invoice types: <ul style="list-style-type: none"> <li>• <b>Invoice Correction Letter.</b> An Invoice Correction Letter contains only the changes from the original bill, that is, the corrected items and corrected events. Select <b>Invoice Correction Letter</b> when you wish to create a Credit Note.</li> <li>• <b>Replacement Invoice.</b> A Replacement Invoice includes all the items or events from the original bill along with the corrected amounts. Select <b>Replacement Invoice</b> when you wish to create a duplicate invoice or regenerate an invoice.</li> </ul>
<b>Select a reason</b>	Select a reason.
<b>Notes</b>	(Optional) Enter notes.
<b>Comment</b>	(Optional) Click and enter a comment.

## Corrective Bill Trail Dialog Box

Use the Corrective Bill Trail dialog box for viewing the corrective bill trail details.

Field	Description
<b>My charges</b>	The charges for the bill.
<b>A/R actions</b>	The A/R actions (including Billed and Unbilled) for the bill.
<b>Payment applied</b>	The payment applied for a specific bill.
<b>Total Due</b>	The amount that is due for the bill.
<b>Comment</b>	(Optional) Click and enter a comment.

# 8

## Batch Payments, Refunds, and Reversals

You can process customer payments collected by banks and payment processors by providing batch payment files to Billing Care for allocation to customer accounts. Batch payment files are text files containing payment information, such as account number, payment amount, and payment date, in delimiter-separated rows.

Starting in Release 15.0.1, you can also create and process batches for payments, refunds, and reversals in Billing Care. Using this method, you can also import files and manually edit and process them. You can create and edit templates for processing batches as well.

For more information, see the following topics:

- [Importing a Batch Payment File](#)
- [About Batch Payment Template Files](#)
- [Creating, Editing, and Processing Payment, Refund, and Reversal Batches \(Release 15.0.1 or later\)](#)
- [Working with Batch Templates \(Release 15.0.1 or later\)](#)
- [Create Batch Page \(Release 15.0.1 or later\)](#)
- [Create or Edit Template Page \(Release 15.0.1 or later\)](#)
- [Search Dialog Box \(Release 15.0.1 or later\)](#)
- [Suspend Payment Dialog Box \(Release 15.0.1 or later\)](#)

### Importing a Batch Payment File

You can upload payment files created externally either by placing them in the appropriate directory or by uploading them manually

The following sections contain information about methods of creating or importing a batch payment file:

- [About Batch Payment File Directories](#)
- [About Batch Payment File Names](#)
- [Configuring Auto Processing of Batch Payment Files](#)
- [Processing Payments in Foreign Currencies](#)
- [Uploading Batch Payment Files to the Billing Care Server](#)
- [Importing Batch Payment Files Manually Using Billing Care](#)
- [Viewing Imported File Status and Errors](#)
- [Reversing Failed Batch Payments](#)
- [Viewing Batch Payment Processing History](#)
- [Viewing Suspended Batch Payments](#)

## About Batch Payment File Directories

Billing Care stores uploaded and imported batch payment files in the following directories on the Billing Care server:

- `Middleware_home/BatchPaymentFiles/unprocessed` contains unprocessed files
- `Middleware_home/BatchPaymentFiles/processed` contains processed files
- `Middleware_home/BatchPaymentFiles/processing` contains processing files
- `Middleware_home/BatchPaymentFiles/error` contains files with processing failures

where `Middleware_home` is the home directory of the Oracle WebLogic Server installation where Billing Care is installed.

## About Batch Payment File Names

Each batch payment file that you upload and import into Billing Care must have a unique file name. Otherwise, the batch payment file fails.

Sometimes, you may need to re-import the same batch payment file into Billing Care, such as after you correct errors in its content. To maintain auditing data, rename the batch payment file before you import it into Billing Care again.

## Configuring Auto Processing of Batch Payment Files

Configure Billing Care to either automatically process transferred batch payment files or require manual processing in the Batch Payment interface. This setting applies to batch files uploaded to the Billing Care server or imported in the Batch Payment interface.



### Note:

When auto processing is enabled, Billing Care continues to automatically process files uploaded or imported even when Batch Payment interface browser sessions are closed.

To configure Billing Care auto processing behavior:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **Auto Process** to enable or disable auto processing of batch files immediate after upload.

## Processing Payments in Foreign Currencies

Billing Care can process batch payment files in a currency different from an account's primary currency if the connected BRM system has been configured with currency conversion rates. An error is displayed if a batch payment file contains payments for accounts in a currency different from the accounts' profile currency.

See "Changing Currency Conversion Rates" in *BRM Managing Customers* for more information about configuring currency conversion rates.

## Uploading Batch Payment Files to the Billing Care Server

Upload batch payment files in supported formats to the following directory on your Billing Care server:

*Middleware\_home*/**BatchPaymentFiles/unprocessed**

where *Middleware\_home* is the home directory of the Oracle WebLogic Server installation where Billing Care is installed. This is the default location for unprocessed batch payment files. The Billing Care installation allows specifying an alternative location. Confirm with your administrator to determine where your unprocessed folder is located.

Batch payment files placed into the unprocessed folder are uploaded into Billing Care and viewable in the Batch Payment interface.

To view uploaded files:

1. Log into Billing Care
2. Click **Batch Payment**.

 **Note:**

If Auto Process is enabled, uploaded batch payment files are automatically processed by Billing Care.

## Importing Batch Payment Files Manually Using Billing Care

To manually import and process batch payment files:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **Import** to upload a batch payment file.
4. Select the batch payment file.

 **Note:**

If your batch file includes any non-standard data in the header area, it will be ignored. Standard header data which must be named which must have the exact name listed below:

- Locale
- Batch Date
- Batch Total
- Currency ID
- Channel
- Batch Size
- Batch Name
- Lockbox ID
- Lockbox Date

5. Click **Open**.

The payment file is imported and listed as **Unprocessed**.

6. (Optional) Click **File Details** to view general information about the payment file.

7. Click **View File** to confirm the contents of your payment file.

The payment file is rendered in a separate tab or window.

8. Click **Process** to process the batch payment.

Billing Care processes the batch payment file.

## Viewing Imported File Status and Errors

Uploaded and imported batch payment files are displayed as summary cards, each containing a status, in the **Active** tab of the Batch Payment interface. The displayed status indicates which Billing Care server batch payment folder a file is currently located in. See "[About Batch Payment File Directories](#)" for more information of file locations.

Billing Care displays each payment batch in either the Unprocessed or Processed areas of the Batch Payment interface.

The Unprocessed area includes:

- Files that have been transferred but not manually processed
- Files currently being processed by Billing Care
- Files placed into error status

The Processed area includes all successfully processed batch payment files from the past 24 hours. Select the **Stay on This Page if Suspended Payments Remain** check box to retain processed payments containing outstanding suspended payments until all suspended payments in the batch have been resolved. See "[Viewing Suspended Batch Payments](#)" for more information on suspended batch payments.



## About Batch Processing Errors

Unprocessed failed batch payment files result from one of the following errors.

Error	Description
Older Version Found	An older version of the same batch payment file has been previously loaded and not processed. When prompted, do one of the following: <ul style="list-style-type: none"> <li>Click <b>Continue</b> to have Billing Care overwrite the older file version with the newly imported version. In this case, you will lose the previous file data and auditing will not be possible.</li> <li>Click <b>Cancel</b> to leave the file unprocessed. To maintain auditing data, rename the batch payment file and then upload or import the file again.</li> </ul>
Processing Error	A Billing Care system error or connection failure occurred. Clear the error and retry processing. Contact your administrator if the problem persists.
Threshold Exceeded	The number of suspended payments in a batch has exceeded a preconfigured threshold. Successful allocations in the payment batch are rolled back. Check the batch payment file for errors before reattempting processing.
Unknown Bank	The batch payment file is readable but cannot be processed due to an unknown/unidentifiable bank. This error occurs when a valid template for the batch payment file cannot be determined. A list of valid templates is shown. If the file complies with an existing template, select the template and click <b>Retry</b> .
Unrecognizable File Type	The file uploaded or imported is not a recognizable batch payment file.

## Reversing Failed Batch Payments

Use Billing Care's batch payment functionality to reverse multiple failed payments within a batch processing file. Failed batch processing files contain a list of payments and amounts by payment ID instead of account number.

To reverse a batch of failed payments, upload a batch processing file that complies with the Failed payment template and follow the same procedures for either "[Importing Batch Payment Files Manually Using Billing Care](#)" or "[Configuring Auto Processing of Batch Payment Files](#)" for uploading reversal batch payment files. Billing Care identifies the payment IDs listed in the batch processing file and reverses the listed amount.

Individual payments can be reversed when viewing an account. See "[Reversing a Payment](#)" for more information on reversing payments when viewing an account.

## Viewing Batch Payment Processing History

The batch payments **History** tab includes information on:

- Currency totals
- Number of records
- Process completion date
- Processing duration
- Queue duration

- Source

To view batch payments history:

1. Click **Batch Payment**.
2. Select **History**.
3. Sort batch payment processing history using the **Sort** list.

## Viewing Suspended Batch Payments

Payments within a batch that Billing Care cannot apply to a customer account are automatically placed into suspense. Payments can be suspended due to improper information, such as account number, in the batch payment file.

To view suspended payments in a processed payment batch:

1. Navigate to the Processed section in the Batch Payment interface.
2. In the payment's card summary, click **Suspended**.

The Payment Suspense interface with the suspended payments from the processed batch is displayed.

### Note:

The Suspended link is also available in the History tab of the Batch Payment interface for payment batches containing suspended payments.

See "[Working with Suspended Payments](#)" for more information on managing suspended payments.

## About Batch Payment Template Files

Batch files must conform to one of the following supported template formats:

- Cash payment
- Check payment
- Failed payment
- Interbank pay order
- Postal order
- Wire-transfer payment
- Custom payment (configured with the Billing Care SDK)

Batch payment templates are installed during Billing Care installation. See your administrator for more information on ensuring your batch payment files are formatted according to a supported template or creating a custom template to support custom payment types. Billing Care will not process batch files that are not properly formatted.

See "Enabling Custom Payment Types in Batch Processing" in *Billing Care SDK Guide* for more information on batch payment templates.

# Creating, Editing, and Processing Payment, Refund, and Reversal Batches (Release 15.0.1 or later)

Starting with Billing Care 15.0.1, you can edit the contents of batch files, whether you have imported them or created them in the Billing Care GUI. With this new mechanism, you can also provide refunds and reversals in batches in addition to payments.

You can work with batches in the following ways:

- [Creating and Processing a Batch](#)
- [Creating a Record in a Batch](#)
- [Searching for Records to Add to a Batch](#)
- [Modifying a Record in a Batch](#)
- [Allocating Payments to Bills or Items](#)
- [Suspending a Payment in a Batch](#)
- [Removing Suspension from a Payment in a Batch](#)
- [Importing and Editing Batches Manually Using Billing Care](#)
- [Validating a Batch](#)
- [Exporting a Batch to a File](#)
- [Submitting a Batch](#)

## Creating and Processing a Batch

You can create a batch in Billing Care.

To create a batch:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Payment**.
3. Click **More Actions** and click **Create Batch**.

The Create Batch dialog box appears.

4. Click **Continue** to continue without uploading a file to create a new batch.
5. Enter details for the batch such as **Number of Records**, **Projected Total Amount** in the Create Batch page. See [Create Batch Page \(Release 15.0.1 or later\)](#) for more details about the Create Batch page.

### Note:

Type, Payment Method, Currency, Effective Date and Number of Records are populated by default but you can change them if required. The Batch ID field is read-only. It is automatically populated when the batch is submitted.

6. Add records to the batch. See "[Creating a Record in a Batch](#)" for more information.
7. You can search for records to add to the batch. See "[Searching for Records to Add to a Batch](#)" for more information.

8. You can modify a record in a batch. See "[Modifying a Record in a Batch](#)" for more information.
9. You can allocate payments to bills or items in a batch. See "[Allocating Payments to Bills or Items](#)" for more information.
10. You can manually suspend records in a batch. See "[Suspending a Payment in a Batch](#)" for more information.
11. You can remove suspension from manually suspended records in a batch. See "[Removing Suspension from a Payment in a Batch](#)" for more information.
12. Validate the batch, see "[Validating a Batch](#)" for more information.
13. You can export the batch, see "[Exporting a Batch to a File](#)" for more information.
14. Submit the batch. See "[Submitting a Batch](#)" for more information.

## Creating a Record in a Batch

You can create a record in a batch in Billing Care.

To create a record in a batch:

1. Create a batch. See "[Creating and Processing a Batch](#)" for more information.
2. In the Records in Batch table, click **Add Record** and add records to the table by filling details like **Payment Amount, Account Number**. See [Create Batch Page \(Release 15.0.1 or later\)](#) to learn about the fields in the table.

## Searching for Records to Add to a Batch

You can search for a record in a batch through **Account** or **Bill** details while adding an existing record to a batch.

You can search for records or payments to add them to batch in the following ways:

- [Search for Records Through Accounts](#)
- [Search for Records Through Bills](#)
- [Search for Payments in a Reversal Batch](#)

## Search for Records Through Accounts

To search for a record by providing **Accounts** details:

1. In the Create Batch page, select a row to activate the **Search** button at the top.
2. Click the **Search** button to open the Search dialog box.
3. In the Search dialog box, keep the default of **Accounts** in the list. Optionally, you can enter any of the details as search criteria.

All fields are optional. If no criteria are entered, all accounts are fetched.

4. Click the **Search** button to find all the matching accounts.
5. You can clear existing search results and criteria by clicking the **Reset** button.
6. When the results are fetched, select one of the accounts and press **Enter**.
7. Click **Add To Batch**.

 **Note:**

You can also double-click the desired record to add it to the batch.

## Search for Records Through Bills

To search for a record by providing **Bills** details:

1. In the Create Batch page, select a row to activate the **Search** button at the top.
2. Click **Search** to open the Search dialog box.
3. In the Search dialog box, choose **Bills** from the list. Optionally, you can enter any of the details as search criteria.

All fields are optional. If no criteria are entered, all bills are fetched.

4. Click **Search** to find all the matching bills.
5. You can clear existing search results and criteria by clicking the **Reset** button.
6. When the results are fetched, select one of the Bills and press **Enter**.
7. Click **Add To Batch**.

 **Note:**

You can also double-click the desired record to add it to batch.

## Search for Payments in a Reversal Batch

In a reversal batch, you search only for payments which are not suspended or already reversed.

 **Note:**

The type of reversal batch determines the payment being searched. For example, in a "**Check Reversal Batch**" only check payments can be searched.

To search for **Payments** in a **Reversal** type batch:

1. In the Create Batch page, change the batch **Type** to **Reversal**.
2. Select a row on the table to activate the **Search** button at the top.
3. Click the **Search** button to open the Search dialog box.
4. In the Search dialog box, you can search for any **Payment**. Optionally, you can enter any of the details as search criteria.

All fields are optional. If no criteria are entered, all payments are fetched.

5. Click **Search** button to find all the matching payments.
6. Click **Add to Batch** to add the desired record to batch.


 **Note:**

You can also double-click the record to add it to batch.

## Modifying a Record in a Batch

To modify a record in a batch:

1. Access a batch. For more information, see "[Creating and Processing a Batch](#)" and "[Importing and Editing Batches Manually Using Billing Care](#)".

2. In the table, click the **Edit**  button to modify a record in a batch.

 **Note:**

You can also edit a record by double-clicking the required row.

3. Click **Save**.

## Allocating Payments to Bills or Items

You can allocate payments in Billing Care. If the payment is already allocated, you can change the allocation using this method.

To allocate payments to bills or items:

1. Access a batch. For more information, see "[Creating and Processing a Batch](#)" and "[Importing and Editing Batches Manually Using Billing Care](#)".
2. In the table, identify the row corresponding to the record you wish to allocate and click **Allocation**.

The Allocate Payment dialog box appears with the details for the row, such as bill unit, bill ID, due date, and balance.

3. In the Allocate Payment dialog box, you can switch between **Simple View** for bill-level allocation and **Advanced View** for item-level allocation.
4. Enter the allocation amount which should be lesser than the unallocated amount and click **Allocate**.
5. Click **Save** or **Cancel** the changes you have made in any view.

You can also **Reset** the changes in both the views.

## Suspending a Payment in a Batch

You can manually suspend a payment in Billing Care.

To manually suspend a payment:

1. Access a batch file. For more information, see "[Creating and Processing a Batch](#)" and "[Importing and Editing Batches Manually Using Billing Care](#)".
2. (Optional) Click the **Validate** button to validate the records.

3. Click **More Actions** (three dots).
4. You will get two options, **Suspend Payment**, and **Delete Record**. If the status is already Suspended or the records are not validated, the **Suspend Payment** button is disabled.
5. If you select **Suspend Payment**, select a Reason and add Comments in the Suspend Payment dialog box.
6. Click **Suspend**.

## Removing Suspension from a Payment in a Batch

You can remove suspension of a manually suspended payment in Billing Care.

To remove manual suspension of a payment:

1. Access a batch. For more information, see "[Creating and Processing a Batch](#)" and "[Importing and Editing Batches Manually Using Billing Care](#)".
2. Click **More Actions** from the **Action Column** in the end of each row.
3. From the list, select **Remove Suspension**.

## Importing and Editing Batches Manually Using Billing Care

You can edit imported batches in the same way as created batches using the following mechanism.

To manually import and edit batches:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **More Actions** and select **Create Batch**.
4. In the Create Batch dialog box, click **Upload File**.
5. Browse to and select the batch file and click **Continue**. Make sure that the batch name in your imported batch **.pmt** file is the same as the template name.

 **Note:**

If your batch file includes any non-standard data in the header area, it will be ignored. Standard header data which must be named which must have the exact name listed below:

- Locale
- Batch Date
- Batch Total
- Currency ID
- Channel
- Batch Size
- Batch Name
- Lockbox ID
- Lockbox Date

If the system can find a template that matches your batch file, the **Matching template ready for processing** option will be selected by default, and the **Select template** field will contain the name of the matching template. If not, the **Create Template** option will be selected by default.

6. Do one of the following:
  - a. To process the payment file with an existing template, click **Matching template ready for processing** and select a template from the **Select Template** list to use as the template you will use to process the file. If the system selected a template by default, you can select a different template if you want. Click **Continue**.
  - b. To process the payment file with a template that you create from scratch, click **Create template**, click **Continue**, and create a template to process the file. See [“Creating a Batch Template”](#) for more information. When you are finished, click **Save**.
  - c. To process the payment file with an existing template and edit the template before processing, click **Edit and use existing template**.
    - i. Select a template from the **Select template** list to edit and use.
    - ii. Click **Continue**.
    - iii. In the Edit Batch Template page, set the options to process your batch file. See [“Create or Edit Template Page \(Release 15.0.1 or later\)”](#) for more information.
    - iv. When you are finished, click **Save**.
  - d. To process the payment file using a new template that is based on an existing template, click **Duplicate and use an existing template**.
    - i. Select a template from the **Select template** list to use as the basis for the template you will use to process the file.
    - ii. Click **Continue**.
    - iii. In the Create template page, set the options to process your batch file. See [“Create or Edit Template Page \(Release 15.0.1 or later\)”](#) for more information.
    - iv. When you are finished, click **Save**.



The Create Batch page appears where you can edit your batch file.

7. Make changes in the batch file as appropriate, validate, and submit the file. See "[Creating and Processing a Batch](#)" for more information.

## Validating a Batch

You can validate the records in a batch in Billing Care.

To validate a batch:

1. Access a batch. For more information, see "[Creating and Processing a Batch](#)" and "[Importing and Editing Batches Manually Using Billing Care](#)" for more information.

### Note:

The Validate button is enabled only after you provide the account number, bill number and payment amount of the respective records.

2. Click the **Validate** button to validate the records.

The status of the validated records will show as validated and you can see a summary table with the validated records. Records that have not been validated successfully will be marked for suspension if you are using Payment Suspense Manager. See "Managing Suspended Payments" in *Configuring and Collecting Payments* for more information about Payment Suspense Manager.

### Note:

A payment can fail validation if it is less or more than the amount for a specific bill. If you have the correct permission in Billing Care (noManualAllocationMandatory), you can select to ignore this error and allocate the payment at the account level rather than the bill level by selecting the **Deferred Allocation** check box.

## Exporting a Batch to a File

You can export a batch to a file in Billing Care.

To export a batch to a file:

1. Create a batch. See "[Creating and Processing a Batch](#)" for more information on how to create a batch.
2. When you have finished creating and editing the records in your new batch, or at any time during the creation process, click **More Actions** and select **Save this payment batch**. The Export File dialog box appears.
3. Choose one of the two formats - **Grid view** to export in default grid format or the uploaded file template format, for example, **Cash Refund Batch Template**.
4. If the batch has a different locale than the locale for your browser, choose a locale to export between **Original File Locale** or **Current Locale**.
5. Click **Export**.

The data from the table will be saved as **Export\_BatchName\_Date\_Time\_Locale.pmt** where *BatchName* is the name of the batch template, *Date* and *Time* are the date and time of the export, and *Locale* is the locale of the payments in the file.

## Submitting a Batch

You can submit a batch after exporting in Billing Care.

To submit a batch:

1. Create a batch. See "[Creating and Processing a Batch](#)" for more information on how to create a batch.
2. Validate all the records in a batch. See "[Validating a Batch](#)" to learn how to validate records.

### Note:

The **Submit** button will be enabled only after all the records are either validated, suspended or manually suspended.

3. Click **Submit**.  
A dialog box will be displayed indicating whether the batch submission was successful. If the batch submission is not successful, the number of records which couldn't be processed will also be displayed.
4. Click **OK**.  
You are returned to the Create Batch page, with all buttons disabled except **Close** and **Save this payment batch**. If any of the records were not successful, there will also be a link at the top to **Edit failed records**.
5. If you want to export the final version of this batch, click **Save this payment batch**.
6. If there were failed records and you want to correct them, click **Edit failed records**. This will create a new batch with only the failed records that you can update just like any batch. See "[Create Batch Page \(Release 15.0.1 or later\)](#)"
7. Click **Close**.

## Working with Batch Templates (Release 15.0.1 or later)

The following sections contain information about batch templates:

- [Creating a Batch Template](#)
- [Creating a Batch Template Based on an Existing Template](#)
- [Editing a Batch Template](#)
- [Viewing Existing Batch Templates](#)

## Creating a Batch Template

If the batch file you upload doesn't match any existing templates, an error message will appear. The Create Batch dialog box will pop up where you can either choose an existing batch or proceed without uploading a file to create a new batch. You can create, edit, and duplicate existing templates here.

To create a new batch template:

1. Log into Billing Care and click **Batch Payment**.
2. Click **More Actions** and select **Batch Templates** from the list.  
The Batch Templates page will appear with a list of templates.
3. Click **Create Template** to create a new template.  
The Create Batch Template page will appear.
4. Enter details for the new template like **Name, Number of Fields** according to your needs. See [Create or Edit Template Page \(Release 15.0.1 or later\)](#) for information about the fields in this page.

 **Note:**

If you have an existing **.pit** file, you can enter the data from your file to the Create Template page.

5. Click **Create**.  
The Create Batch Template dialog box will appear indicating that the template was created successfully.
6. Click **OK**.

## Creating a Batch Template Based on an Existing Template

You can create a batch template based on an existing template in Billing Care.

To create a batch template based on an existing template:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Templates**.
3. On the Batch Payments page, click **More Actions** (three dots) on the corresponding row for the template you want to edit.
4. Select **Duplicate** from the list.  
The Edit Batch Template page appears.  
  
The new template is created with the name *BaseTemplate\_copy* and values that match the ones in the source template where *BaseTemplate* is the name of the source template.
5. Edit the template according to your needs. See [Create or Edit Template Page \(Release 15.0.1 or later\)](#) for information about the fields in this page.

## Editing a Batch Template

You can edit a batch template in Billing Care.

To edit a batch template:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Templates**.
3. On the Batch Payments page, click **More Actions** (three dots) on the corresponding row for the template you want to edit.

4. Edit the template according to your needs. See [Create or Edit Template Page \(Release 15.0.1 or later\)](#) for information about the fields in this page.

## Viewing Existing Batch Templates

You can view an existing batch template in the Billing Care UI.

To view an existing standard template:

1. Log into Billing Care and click **Batch Payments**.
2. On the Batch Payments page, click **More Actions**.
3. Select **Batch Templates** from the list.  
A list of standard batch templates will be displayed.

To search for a specific template in the list of standard preinstalled batch templates:

1. Use the **Browse batch templates by name** search bar to search for a specific template name.
2. (Optional) Click **More Filters** to refine your search by selecting a **Type** and **Payment Method**.
3. Click **Update** to apply the selected search filters.

## Create Batch Page (Release 15.0.1 or later)

Use the Create Batch page to create and make batch payments.

Field	Description
<b>Type</b>	Select the type of payment for the batch ( <b>Payment</b> , <b>Refund</b> , or <b>Reversal</b> ).
<b>Payment Method</b>	States the method of payment of the source template, such as <b>Cash</b> or <b>Check</b> .
<b>Number of Records</b>	Enter the number of records or transactions to include in the batch.
<b>Batch ID</b>	A unique identifier for the batch which is populated by Billing Care automatically.
<b>Effective Date</b>	Select the date of the batch from which it is effective.
<b>Currency</b>	Select the currency for the batch (for example <b>USD</b> for US Dollars or <b>EUR</b> for Euros).
<b>Payment Channel</b>	The delivery method by which customer payments are sent to a financial institution.
<b>Projected Total Amount</b>	The projected total amount for the batch.
<b>Add Record</b>	Click to add a new payment to the batch.
<b>Search</b>	Click to search for a record in a batch.
<b>Validate</b>	Click to validate the batch.
<b>More Actions</b>	Use this menu to access additional commands, like <b>Save this payment batch</b> or <b>Clear Data</b> .
<b>Records in Batch</b>	This table displays the details of the payment, refund, or reversal records, for example, <b>Account Number</b> and <b>Amount</b> . You can edit, allocate, suspend, and delete records in this table.

## Create or Edit Template Page (Release 15.0.1 or later)

The Create Template page and the Edit Template page have the same fields. Use these pages to create or edit a batch template.

Field	Description
<b>Name</b>	Enter batch template file name.
<b>Type</b>	States the type of batch: <b>Payment</b> , <b>Refund</b> , or <b>Reversal</b> . This field is disabled if you are editing the template after it is created.
<b>Payment Method</b>	States the method of payment, such as <b>Cash</b> or <b>Check</b> . This field is disabled if you are editing the template after it is created.
<b>Delimiter</b>	Select a column delimiter like comma or tab or enter a different delimiter.
<b>Ignore delimiters within specific characters</b>	Select this option to ignore column delimiters within strings, and then select the appropriate string delimiter character in the field below.
<b>Treat consecutive delimiters as one</b>	Select this option to ignore duplicate delimiter characters.
<b>File includes a batch header</b> <b>File includes a batch footer</b>	Select whether the file includes a batch header and footer and enter start and end line numbers for any headers or footers.
<b>Sample File Contents</b>	Enter some sample payment records from a <b>.pmt</b> file. The data will be displayed in the <b>Field Mapping</b> table.
<b>Records Start Line</b>	Choose the line number in the file of the first record. Ensure that this does not conflict with the lines containing any header rows.
<b>Number of Fields</b>	Choose the number of fields in your template.
<b>Field Mapping</b>	The data entered in <b>Sample File Contents</b> will be displayed here. You can map each column by selecting the fields from the lists as per the data.

## Search Dialog Box (Release 15.0.1 or later)

Use the Search dialog box to search for accounts, bills and, payments through account, bill, and payment information.

The default of **Accounts** is selected. You can use the fields in the following table to search for accounts to add them to batch.

Field	Description
<b>Account Information</b>	Enter account information details like Account Number or Company Name in the search filters.
<b>Results</b>	Search results will show in a table with columns like Account Number, First and Last Name, and, Company Name.
<b>Add to Batch</b>	Select the appropriate rows in the table and click to add them to the batch You can also double-click any record to add it to batch.

When you select **Bills** in the list, you can use the fields in the following table to search for bills to add them to batch.

Field	Description
<b>Bill Information</b>	Enter bill information details like Account details and Bill number in the search filters.
<b>Results</b>	Search results will show in a table consisting of columns like Account Number, Bill Number, Cycle Start Date, Days Overdue, Billed Amount, Balance Due.
<b>Add to Batch</b>	Select the appropriate rows in the table and click to add them to the batch. You can also double-click any record to add it to batch.

When you search for **Payment** in a Reversal type batch, you can use the fields in the following table to search for payments to add them to batch.

Field	Description
<b>Payment Information</b>	Enter payment information details such as account number, check number, bank code, date in the search filters.
<b>Results</b>	Search results will be displayed in a table consisting of columns like Account Number, Payment ID, Effective Date, Amount, Check Number, Bank Code, Bank Account Number.
<b>Add to Batch</b>	Select the appropriate rows in the table and click to add them to the batch. You can also double-click any payment record to add it to batch.

## Suspend Payment Dialog Box (Release 15.0.1 or later)

Use the Suspend Payment dialog box to manually suspend payments.

Field	Description
<b>Reason</b>	Enter the reason that you want to suspend the payment. You can select any reason from the list, or you can enter a reason manually.
<b>Comments</b>	Enter comments about the suspension if needed.

# 9

## Payments

You can manage your customers' payments by using Oracle Communications Billing Care.

To work with payments, see the following topics:

- [Initiating a Payment](#)
- [Making a Payment](#)
- [Viewing Payment Details](#)
- [Allocating Payments](#)
- [Allocating a Payment](#)
- [Reversing a Payment](#)
- [Working with Suspended Payments](#)
- [Batch Payments, Refunds, and Reversals](#)

### Initiating a Payment

You can initiate a payment from any of the following locations in Billing Care:

- From the **Actions** menu above the account bar, select **Payments** and then select **Make a Payment**.
- From the **Home** section, click **Make Payment** under the **Account History** area.
- From the **Bills** section, select the **Actions** menu and then select **Make Payment**.
- From the **Account details** page of the account for which you want to make the payment.

For information about applying a payment to a customer's account, see "[Making a Payment](#)".

### Making a Payment

Billing Care supports the following payment methods:

- Credit Card
- Debit Card
- Cash
- Check
- Wire-Transfer
- Inter Bank Payment Order
- Postal Order

 **Note:**

- A payment amount does not need to match a bill amount. You determine where to apply a payment when allocating the payment.
- You cannot make payments to wholesale child accounts.

To make a payment:

1. From the **Actions** menu, select **Payments** and then select **Make a Payment**.

The Make a Payment dialog box appears. See "[Make a Payment Dialog Box](#)" for details.

 **Tip:**

For alternative ways to open the **Make a Payment** dialog box, see "[Initiating a Payment](#)".

2. Enter the amount.
3. (Optional) To use a payment method other than the one displayed, select **Use a different payment method** and select a method from the **Payment Method** list.
  - a. Enter the account information for the new payment method.
  - b. Select **Use name and billing address from primary contact**, or enter the name and address for the card holder.
  - c. (Optional) Select **Save to Payment Methods on file** for credit card and debit payment methods.
 

If you are making a payment for an account, the payment method applies to the account. If you are making a payment for a bill unit, the payment method applies to the bill unit.
4. For **Select a reason**, select the reason that matches the situation.
5. (Optional) Enter notes.
6. Do one of the following:
  - Click **Continue to manually allocate** to make the payment and to allocate the payment.
  - Click **Save** to make the payment without allocating.

See "[Allocating Payments](#)" for information about allocating payments.

## Make a Payment Dialog Box

Use the Make a Payment dialog box to enter a customer's payment and to add new payment methods.

Field	Description
<b>Bill Unit</b>	For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the term does not appear.



Field	Description
<b>Use a different payment method</b>	Select if you want to change the payment method.
<b>Payment method</b>	If multiple payment methods are available, select a payment method. If you selected <b>Use a different payment method</b> , select a new payment method option. For a new payment method, new fields appear for you to enter the details.
<b>Amount</b>	Enter the payment amount.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>Continue to manually allocate</b>	Click to save and allocate the payment.
<b>Save</b>	Click to make the payment without allocating the payment. You can allocate the payment later.

## Viewing Payment Details

You can view details of a payment, including an audit trail of related payment actions, and enter notes from several places in Billing Care.

To view payment details:

1. Click the **Bills** tab and select a bill that has a payment.
2. Click **Payment Applied**.

One of the following happens:

- If only one payment has been made, the Payment Details dialog box appears. See "[Payment Details Dialog Box](#)" for details.
- If more than one payment has been made, the All Payments dialog box appears first. See "[All Payments Dialog Box](#)" for details. Click **Payment Details** to go to the Payment Details dialog box.


3. View payment allocations in the **Allocation** tab.
4. View the payment's audit trail in the **Audit Trail** tab.
5. (Optional) If all or part of the payment has been allocated, to see details about the allocated items, do any of the following:
  - Under **Original payment**, click the **Show all items affected** link.
  - In the **Allocation** tab, click the link in the **Items Affected** column.

The Items Affected dialog box appears. You can view details about the adjusted items. See "[Items Affected Dialog Box](#)".

6. (Optional) Click **Export** to save the account adjustment details to a CSV file.
7. Click **Close**.

## Payment Details Dialog Box

Use the Payment Details dialog box to identify payments.


Field	Description
<b>Effective</b>	The payment's effective date.
<b>Receipt Date</b>	The payment receipt date.
<b>Receipt No.</b>	An automatically generated ID for a receipt.
<b>Transaction ID</b>	Similar to a payment ID, a transaction ID is automatically generated for each payment, payment reversal, and refund. Additionally, the transaction ID identifies transactions involving third parties, such as transactions with credit card processing companies.
<b>Original Payment</b>	The original payment amount and method.
<b>Show all items affected</b>	If any part of the payment has been allocated, click for details on the items.
<b>Effective (reversal)</b>	The payment reversal date (if a payment has been reversed).
<b>Move to Suspended Payments</b>	Click to move payment into suspense.
<b>Reverse Payment</b>	The payment reversal amount and method.
<b>Audit Trail</b>	The audit trail information for any payment reversal or suspense actions.
<b>Payment Details</b>	The amount (with payment method), time, reason, and notes (if notes are available) for the payment. Billing Care also lists any reversed payment amounts or amounts that have been moved into suspense.
<b>Comment</b>	Click to add a note to the payment.
<b>Export</b>	Click to export the payment details to a CSV file. The Export button is enabled for the <b>Allocation</b> tab and disabled for the <b>Audit Trail</b> tab.
<b>Allocation</b>	<ul style="list-style-type: none"> <li>• <b>Account</b> - This is only displayed when the customer has multiple accounts.</li> <li>• <b>Bill Unit</b> - A bill unit is a group of one or more bills consisting of its own payment settings and invoices. This is only visible when the customer has multiple bill units.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p> <b>Note:</b> Bill Unit will not appear if there is only one bill unit.</p> </div> <ul style="list-style-type: none"> <li>• <b>Payment ID</b> - An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.</li> <li>• <b>Bill ID</b> - Displays the ID number of the bill.</li> <li>• <b>Items Affected</b> - If any part of the payment has been allocated, click the links under Items Affected for details on the items.</li> <li>• <b>Amount</b> - Displays the payment amount.</li> <li>• <b>Date</b> - Displays the date of the payment.</li> </ul>

## All Payments Dialog Box

Use the All Payments dialog box to view detailed payments information for a bill's payments.

Field	Description
<b>Effective Date</b>	The effective date of the applied payment.
<b>ID</b>	An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.
<b>Payment Amount</b>	The payment amount.
<b>Payment Actions</b>	A description of reversed and suspended payment amounts.
<b>Payment Details</b>	The amount (with payment method), time, reason, and notes (if notes are available) for the payment. Billing Care also lists any reversed payment amounts or amounts that have been moved into suspense.
<b>Export</b>	Click to export the payment details to a CSV file. The Export button is enabled for the <b>Allocation</b> tab and disabled for the <b>Audit Trail</b> tab.

## Items Affected Dialog Box

Field	Description
<b>Payment ID</b>	An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.
<b>Bill Unit</b>	A bill unit is a group of one or more bills consisting of its own payment settings and invoices. This is only visible when the customer has multiple bill units.  <div style="border-left: 2px solid #0070C0; padding-left: 10px; margin-left: 20px;"> <p> <b>Note:</b> Bill Unit will not appear if there is only one bill unit.</p> </div>
<b>Bill ID</b>	Displays the ID number of the bill.
<b>Item</b>	Details of the adjusted item.
<b>Amount</b>	Displays the payment amount.
<b>Export</b>	Click to export the payment details to a CSV file. The Export button is enabled for the <b>Allocation</b> tab and disabled for the <b>Audit Trail</b> tab.

## Allocating Payments

You allocate payments to distribute the payments among the bills of an account. If the account has multiple bill units, you can allocate payments to specific bill units. You can also allocate payments to specific items.

Customers are credited for all payments. The company needs payments to be allocated for accounting purposes.

You can allocate to bills or to specific items or bill units. For information, see:

- [Allocating a Payment](#)

- [Allocating a Payment to a Bill Unit or an Item](#)

## Allocating a Payment

To allocate a payment:

1. From the **Actions** menu, select **Payments**, and then select **Allocate**.

If there is only one unallocated payment, the Allocate Payment dialog box appears, and you can skip the next step. If there is more than one unallocated payment, the All Unallocated Payments dialog box appears.

2. In the All Unallocated Payments dialog box, select the payment you want to work with, and click **Next**.

The Allocate Payment dialog box appears.

### **Note:**

To see more details about a bill or to allocate to a specific bill unit, or item, click the Advanced View icon. See "[Allocating a Payment to a Bill Unit or an Item](#)".

3. Click a bill.

You can search for a bill by entering the Bill ID or balance amount.

The amount available for allocation is automatically applied to the balance.

### **Tip:**

Press Shift+select to contiguously select Allocate cells.

4. (Optional) Select an allocation cell and enter a specific amount to allocate.
5. (Optional) Continue allocating funds to other bills.
6. (Optional) Click **Payment Details** for more information about a payment.
7. Click **Save** to complete allocating the payment, or **Save, select another payment** to allocate more payments.
8. (Optional) Click **Export** to save the allocated payment details to a CSV file. Customize the exported data by choosing specific columns from the optional columns available in the drop-down list.

## Allocating a Payment to a Bill Unit or an Item

You allocate payments to distribute the payment amount among multiple bills or bill units of an account. If the account has multiple bill units, you can allocate payments to specific bill units. You can also allocate to specific items.

To allocate a payment to specific bill units or items:

1. From the **Actions** menu, select **Payments**, and then select **Allocate**.

You can also allocate a payment while making the payment.

2. In the Allocate Payment dialog box, click the Advanced View icon.

3. (Optional) In **Search**, enter text to find bills, bill units, services, or items.
4. Click the bill, bill unit, or item that you want to allocate a payment to.  
The amount available for allocation is automatically applied to the balances.

**Tip:**

Press Shift+click to contiguously select and enter amounts in Allocate cells.

5. (Optional) Click an allocation cell and enter a specific amount to allocate.
6. (Optional) Continue allocating funds to other bills.
7. (Optional) Click **Payment Details** for more information about a payment.
8. Click **Save**.

## Allocate Payment Dialog Box

Use the Allocate Payment dialog box to allocate a payment to one or more bills. There are two views for allocating payments:

View	Description
<b>Simple view</b>	Includes the headings Bill ID, Due Date, Balance, and Allocate. In this view, you can sort the columns.
<b>Advanced view</b>	Includes the above headings and Name, Bill Unit, Service, and Item. In this view, you can: <ul style="list-style-type: none"> <li>• Filter the list of bills using any value that appears in the table.</li> <li>• Allocate payments to specific items.</li> </ul>

## Reversing a Payment

Payment reversals are necessary when a payment is recorded in Billing Care, but the payment is not deposited. For example, you could record a check payment for a check that does not clear. To reopen the bill so the payment can be made again, you reverse the payment. Reversing the payment enables Billing Care to treat the payment as if it never happened.

To permanently reverse a previously applied payment:

**Note:**

You can also reverse payments from the Payments Details dialog box (see "[Payment Details Dialog Box](#)" for more information) or from the Suspended Payments Details dialog box (see "[Suspended Payment Details](#)" for more information).

1. Click the **Bills** tab.
2. Click **Switch Bills** and select the bill containing the payment to reverse.
3. Click **Actions**, and then select **Reverse Payment**.  
The Reverse Payment dialog box appears.

4. Set the effective date for the payment reversal. The effective date cannot be set in the future.
5. Select a reason for the payment reversal.
6. (Optional) Enter notes for the payment reversal.
7. Click **Reverse Payment**.

## Working with Suspended Payments

Oracle Communications Billing and Revenue Management (BRM) automatically suspends payments that cannot be posted immediately to customer accounts due to insufficient information, account closure, or other criteria.

You manage suspended payments in Billing Care by viewing and allocating suspended payments to customer accounts when the payment error is resolved. You also use Billing Care to identify any incorrectly posted payments and move them into suspense for future resolution.

### Finding a Suspended Payment

To find a suspended payment:

1. From the landing page, click **Payment Suspense**.

The Payment filter appears along with a list of suspended payments that meet the filter criteria. The Payment filter assists you in narrowing the suspended payments shown and helps you find a suspended payment for allocation. Billing Care sets a default 30-day search criteria for suspended payments. See "[Payment Filter](#)" for more information on using filters to set search criteria.

2. Click **Add Filter** to add additional filters to the suspended payments shown.
3. To enable or disable a filter, click the filter button.
4. Click **Update**.

The filtered suspended payments are shown.

 **Tip:**

In the Payment filter, click **X** to remove a filter or click **Reset** to return to the default filter of less than 30 days.

5. Select a suspended payment to view it.

Billing Care displays the selected suspended payment details. See "[Suspended Payment Details](#)" for more information.

 **Tip:**

Click **Close** to return to the Billing Care home page.

## Payment Filter

Narrow your suspended payment search results by using the filters provided under **Payment**, **Suspense**, and **Account**.

### Tips:

- You can sort filtered results by date, amount, reason, and currency code using the **Sort** menu.
- Scroll down to view additional suspended payments.
- Search for payments using the information from the original suspended payment entry. Search criteria will not filter payments with changes made after the original payment.

Payment Filter	Description
<b>Payment</b>	<p>Contains the following payment attributes used for filtering suspended payments:</p> <ul style="list-style-type: none"> <li>• Amount: The amount of the suspended payment</li> <li>• Date: The date the payment was made</li> <li>• Method: The payment method (Cash, Check, Wire-Transfer, Inter Bank Payment Order, Postal Order, or Failed)</li> <li>• Currency: The payment currency</li> <li>• Channel: The payment channel</li> </ul>
<b>Suspense</b>	<p>Contains the following suspense attributes for filtering the suspended payments:</p> <p>Schema: For multi-schema, you can select the secondary schema for which you want to see the suspended payments. By default, the primary schema is selected.</p> <p>Reason:</p> <ul style="list-style-type: none"> <li>• Unclassified</li> </ul> <p>Detailed Reasons:</p> <ul style="list-style-type: none"> <li>• Account No not found</li> <li>• Account status is closed</li> <li>• Bill not found</li> <li>• Invalid Transaction Id</li> <li>• Missing Transaction Id</li> <li>• Multiple Account Distribution</li> <li>• Payment due to recycling</li> <li>• MBI Distributed Payment</li> <li>• MBI Distribution Required</li> <li>• Default Reason Id</li> </ul> <p>Handler (see "<a href="#">Assigning Suspended Payments to Billing Care Users</a>" for more information):</p> <ul style="list-style-type: none"> <li>• Assigned to me</li> <li>• Unassigned</li> </ul>

Payment Filter	Description
<b>Account</b>	Contains the following filters for account information: <ul style="list-style-type: none"> <li>• Account Number</li> <li>• Bill Number</li> <li>• Payment Transaction ID</li> </ul>

## Suspended Payment Details

The suspended payment detail includes the following information:

Field	Description
<b>Payment ID</b>	Contains the following suspended payment information: <ul style="list-style-type: none"> <li>• Payment ID</li> <li>• Suspense reason</li> <li>• Suspense Date</li> <li>• Payment amount, currency, and method</li> <li>• Allocated and Unallocated payment amounts</li> </ul>
<b>Account Distribution</b>	Contains the eligible accounts for which a suspended payment can be allocated. See <a href="#">"Allocating a Suspended Payment"</a> for more information.
<b>Details</b>	Contains the following suspended payment information (if available): <ul style="list-style-type: none"> <li>• Bank Code</li> <li>• Bank Account Number</li> <li>• Effective Date</li> <li>• Bill Number</li> <li>• Check Number</li> <li>• Pay Order Id</li> <li>• Postal Order Id</li> <li>• Transfer ID</li> </ul>
<b>Notes</b>	Contains a text field for adding notes to the suspended payment. See <a href="#">"Adding Notes to a Suspended Payment"</a> for more information.
<b>Audit Trail</b>	Contains the audit trail for the suspended payment. The audit trail records the following activities: <ul style="list-style-type: none"> <li>• Payment Made</li> <li>• Allocation</li> <li>• Moved Into Suspense</li> </ul>

## Allocating a Suspended Payment

Billing and Revenue Management stores suspended payments in a system account until allocation to a customer account's open balances and billable items. Use Billing Care to allocate suspended payments to one or more customer accounts after resolving the issues that caused the initial payment suspension.

To allocate a suspended payment to an account:

1. Find the suspended payment to allocate. See ["Finding a Suspended Payment"](#) for more information.



2. Click on the suspended payment to allocate to view the payment details. A list of accounts eligible to receive the suspended payment allocation is shown in Account Distribution. Each account contains associated allocation details including the account owner's name.
3. If no distribution accounts are configured for the suspended payment, click **Add Account** in Account Distribution to add one or more accounts.
4. Use the search dialog box to add an account for allocating a suspended payment to. The search dialog box supports the following search parameters:
  - Account number
  - First name
  - Last name
  - Company

Billing Care searches for the account and adds the account to Account Distribution. Billing Care supports allocating a suspended payment to multiple accounts. However, you must complete the initial distribution account's allocation before adding another distribution account.

 **Note:**

To remove an account from the distribution accounts list, click the account's menu icon, and then click **Remove Account**. Remove any accounts not receiving a payment distribution before performing allocation.

5. Enter an amount in **Add Allocation** to allocate to each distribution account. This amount must be less than or equal to the suspended payment amount. Multiple separate allocations to the same distribution account can be made if the payment still contains funds awaiting allocation. Billing Care groups and displays such allocations by account in Account Distribution.
6. Select a required reason from the list.  
The **Auto Allocate** and **Allocate** buttons are enabled.
7. Do one of the following:
  - Click **Auto Allocate** for Billing Care to automatically select the account's bill items to which to allocate a suspended payment. If an allocation amount is greater than all the account's bills, or if allocation amounts are made to accounts with no balance due, the remaining balance is assigned a status of Awaiting Allocation and available when a future payment is due.
  - Click **Allocate** to perform manual allocation.
  - Click **Cancel** to reset the allocation amount to zero, remove the reason code, and disable the allocation buttons.



 **Note:**

If a selected distribution account contains no open balance or billable items, you must either:

- Click **Continue** to apply the suspended payment to the distribution account as unallocated.
- Click **Cancel** to reset the allocation amount to zero.

The Allocate Payment dialog box is displayed. See "[Allocate Payment Dialog Box](#)" for details.

8. Do one of the following:

- To allocate a payment to one or more Bill IDs, click the simple view button (  ) and enter the amount to allocate for each Bill ID row.
- To allocate a payment to one or more Bill Units, click the advanced view button (  ) and enter in the amount to allocate for each Bill Unit row.

9. Click **Save**.

If a suspended payment has been fully allocated, the payment suspense search screen is shown.

 **Note:**

Fully allocated suspended payments no longer appear in payment suspense search results. Additionally, if more than one payment has been applied to a bill, including any payments allocated from suspended payments, the total payment applied for the bill will include all payments applied.

## Allocating a Suspended Payment across Multiple Accounts

A suspended payment can be allocated across multiple accounts. For example, a customer may make one large payment that they want allocated to multiple accounts.

To allocate a payment across multiple accounts:

1. Make a new payment in Billing Care. See "[Manually Creating a Suspended Payment](#)" for more information.
2. Under Account Distribution, click **Add Account**.
3. Search for and add an account to allocate the payment to.
4. Repeat the search to add additional accounts to the payment.
5. (Optional) Select a new payment administrator from the **Assigned to** list.
6. (Optional) Enter notes and click **Post** for the payment.
7. Do one of the following:
  - a. Manually enter the amounts to allocate for each account and click **Allocate**.

- b. Click **Auto Allocate** for Billing Care to automatically allocate payment amounts to the selected accounts until the full payment amount is allocated.

 **Note:**

Unallocated payments are placed into a suspense. You can use the payments search filter to find unallocated payments ready for multiple account distribution. Select the suspense reason as **Unable to Process**, and the detailed reason as **Multiple Account Distribution** to filter for unallocated payments.

## Adding Notes to a Suspended Payment

To add a note to a suspended payment:

1. Open the suspended payment details. See "[Finding a Suspended Payment](#)" for more information.
2. Enter your notes in **Notes**.
3. Click **Post**.

 **Note:**

You can make additional comments to existing notes in a suspended payment. To add a comment to an existing notes thread, click **Comment**.

## Assigning Suspended Payments to Billing Care Users

Production Billing Care installations configured securely with Oracle Identity and Access Management (IAM) allow suspended payments to be assigned to users with a suspense payment management role and permissions. See *Billing Care Installation Guide* for more information on production installations and securing Billing Care with IAM.

By default, suspended payments are not assigned to any Billing Care user. Users with access to suspended payments functionality can assign an authorized handler to manage the payment.

To assign a suspended payment to an authorized user:

1. Find the suspended payment. See "[Finding a Suspended Payment](#)" for more information.
2. From the search results, select and open the suspended payment.
3. In the **Assigned to** list, select a Billing Care user with permissions to manage suspended payments.

## Reversing a Suspended Payment

Suspended payments that cannot be allocated can be reversed for accounting purposes. See "[Reversing a Payment](#)" for more information on reversing a suspended payment.

## Withdrawing a Posted Payment into Suspense

Posted payments may contain errors requiring manual resolution. You can withdraw incorrectly posted payments into suspense for resolving errors and correcting payment allocations using Billing Care.

### Note:

You can also withdraw posted payments from the Payments Details dialog box (see "[Payment Details Dialog Box](#)" for more information) or from the Suspended Payments Details dialog box (See "[Suspended Payment Details](#)" for more information).

To withdraw a posted payment into suspense from the **Bills** tab:

1. Open the account containing the payment to suspend.
2. In the **Bills** tab, select the bill with the posted payment to suspend using the **Switch Bills** menu. See "[Viewing Payment Details](#)" for more information.

### Note:

If a bill contains more than one applied payment, click **Payments applied** to view the **All Payments** dialog box to select the payment to move into suspense.

3. Confirm that the correct amount is shown in **Payment applied**.
4. Click **Actions**, and then select **Move Payment to Suspense**.  
The Move to Suspended Payments dialog box is displayed.
5. In the **Effective** field, enter a date.
6. Select a reason for suspending the payment.
7. Do one of the following:
  - Click **Move** to move the payment into suspense.
  - Click **Move and view into Payment Suspense** to move the payment into suspense and return to the suspended payments detail screen.

Payments withdrawn into suspense remain viewable in the customer's account.

## Manually Creating a Suspended Payment

To manually create a suspended payment in the Payment Suspense interface for allocation:

1. From the landing page, click **Payment Suspense**.
2. In the filters section, click **Make Payment**.  
The **Make Payment** screen appears.
3. Select a payment method from the list.
4. Enter a payment amount and select a currency.

5. Enter the additional payment detail required for the selected payment method.
6. Select a reason for the payment from the list.
7. (Optional) Enter notes.
8. Click **Continue**.

The **Payment Allocation** screen is displayed. Use this screen to allocate the new payment to one or more accounts. See "[Allocating a Suspended Payment](#)" for more information.

# 10

## Accounts Receivable

You can manage accounts receivable in Oracle Communications Billing Care. Accounts receivable (or A/R) tracks the money that customers owe to your company for services performed or merchandise sold.

To work with accounts receivable information, see the following topics:

- [Working with Adjustments](#)
- [Working with Disputes](#)
- [Working with Settlements](#)
- [Working with Refunds](#)
- [Working with Write-Offs](#)
- [Transferring Negative Balances to Another Bill](#)

### Working with Adjustments

An adjustment is a transaction that credits or debits a customer's account by changing:

- The amount due for a bill, which is currency.
- The minutes, tokens, loyalty points, and so on, which are noncurrency.

If you want to work with multiple customer bills or items, you may want to make adjustments on the account level.



**Note:**

You cannot perform account adjustments to wholesale child accounts.

For more information on Adjustments, see:

- [Making Currency Adjustment](#)
- [Allocating Currency Adjustments](#)
- [Allocating an Adjustment to a Specific Bill Unit or Specific Items](#)
- [Adjusting a Bill](#)
- [Adjusting an Item](#)
- [Adjusting an Event](#)
- [Adjusting Multiple Events for an Account](#)
- [Making a Noncurrency Adjustment](#)
- [Viewing Account Adjustment Details](#)
- [Viewing Item Adjustment Details](#)

- [Viewing Event Adjustment Details](#)

To review and manage A/R information in Billing Care, you need the appropriate permissions.

## Making Currency Adjustment



### Note:

You cannot adjust loan sub-balances in a currency balance.

To make a currency adjustment:

1. From the **Actions** menu above the account bar, select **Account Receivables**, and then select **Adjust Currency Balance**.

The Account Adjustment dialog box appears. See "[Account Adjustment Dialog Box](#)" for details.

2. Enter the amount or percentage you want to adjust.  
To increase the amount due, enter a negative number.
3. For **Effective**, select a date.
4. (Optional) Select **Exclude taxes from the adjustment**.
5. From the list, select a reason.
6. (Optional) Enter a note.
7. Do one of the following:
  - Click **Continue to manually allocate** to make the adjustment and to allocate the adjustment.
  - Click **Save** to make the adjustment without allocating.

See "[Allocating Currency Adjustments](#)" for information about allocating adjustments.

## Account Adjustment Dialog Box

Use the Account Adjustment dialog box to make an adjustment on the account level.

Field	Description
<b>Bill Unit</b>	For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the selection does not appear.
<b>Adjustment</b>	Enter an amount or a percentage.
<b>Effective</b>	Select a date.
<b>Exclude taxes from the adjustment</b>	(Optional) Select if appropriate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>Continue to manually allocate</b>	Click to save and continue allocating the adjustment.
<b>Save</b>	Click to save the information you entered without allocating the adjustment. You can allocate the adjustment later.

## Account Adjustment Details Dialog Box

Use the Account Adjustment dialog box to view or comment on an account adjustment.

Field	Description
<b>Unallocated</b>	If listed, click the link to allocate the amount.
<b>Comment</b>	(Optional) Enter notes.
<b>Allocated to</b>	Lists information about allocated amounts. For more information, click <b>Show all items affected</b> or the individual items.

## Allocating Currency Adjustments

To allocate currency adjustments:

1. From the **Actions** menu above the account bar, select **Account Receivables**, and then select **Allocate Currency Adjustments**.

You can also allocate an adjustment while making the adjustment.

If more than one unallocated adjustment exists, the All Unallocated Adjustments dialog box appears first. Otherwise, the Allocate Adjustment dialog box appears.

2. In the All Unallocated Adjustments dialog box, select the adjustments you want to work with.
3. Click **Next**.

The Allocate Adjustment dialog box appears.

### Tip:

To see more details about the bill or to allocate to a specific bill unit, item, or service, click the Advanced View icon. See "[Allocating an Adjustment to a Specific Bill Unit or Specific Items](#)".

4. Select a bill.

The amount available for allocation is automatically applied to the balance.

### Tip:

Press Shift+select to contiguously select Allocate cells.

5. (Optional) Select an allocation cell and enter a specific amount to allocate.
6. (Optional) Continue allocating funds to other bills.
7. Enter the amount to allocate for each bill.

To increase the unallocated amount in a bill, enter a negative number preceded by a minus symbol (-).

8. (Optional) Click **Adjustment Details** for more information about an adjustment.



9. Click **Save** to complete the adjustment allocation, or click **Save, select another adjustment** to allocate more unallocated adjustments.
10. (Optional) Click **Export** to save the allocated currency details to a CSV file. Customize the exported data by choosing specific columns from the optional columns available in the drop-down list.

## Allocating an Adjustment to a Specific Bill Unit or Specific Items

You allocate adjustments to distribute the adjustment amount among multiple bills or bill units of an account. If the account has multiple bill units, you can allocate adjustments to specific items.

To allocate an adjustment to a specific bill units or items:

1. From the **Actions** menu above the account bar, select **Account Receivables**, and select **Allocate Currency Adjustments**.

If there is only one unallocated adjustment, the Allocate Adjustment dialog box appears, and you can skip the next step. If there is more than one unallocated adjustment, the All Unallocated Adjustments dialog box appears.

2. In the All Unallocated Adjustments dialog box, select the adjustment you want to work with, and click **Next**.

The Allocate Adjustment dialog box appears. See "[Allocate Adjustment Dialog Box](#)" for details.

3. In the Allocate Adjustment dialog box, click the Advanced View icon.
4. (Optional) In Search, enter text to view the items of interest.
5. Click the item row that you want to allocate the adjustment to.

Click in the allocation cell to automatically apply the available amount to the balance.



### Tip:

Press Shift+click to contiguously select Allocate cells.

6. (Optional) Click an allocation cell, and enter a specific amount to allocate.
7. (Optional) Click **Adjustment Details** for more information about an adjustment.
8. Click **Save** to complete the adjustment allocation, or click **Save, select another adjustment** to allocate more unallocated adjustments.

## Allocate Adjustment Dialog Box

Use the Allocate Adjustment dialog box to allocate an adjustment to one or more bills. There are two views for allocating adjustments:

View	Description
<b>Simple view</b>	Includes the headings Bill ID, Due Date, Balance, and Allocate. In this view, you can sort the columns.

View	Description
<b>Advanced view</b>	Includes the above headings and additionally, Name, Bill Unit, Service, and Item. In this view, you can: <ul style="list-style-type: none"> <li>Filter the list of bills using any value that appears in the table.</li> <li>Allocate payments to specific items.</li> </ul>
<b>Export</b>	Click to export allocated adjustment details to a CSV file. You can customize the exported data by choosing specific columns from the optional columns available in the drop-down list.

## Adjusting a Bill

From the Bills section, you can adjust and allocate the bill you are working with.



### Note:

The **Actions** menu is disabled for written off bills. No adjustments can be made to written off bills.

To adjust a bill from the Bills tab:

- On the account page, click the **Bills** section.  
In the Bills section, select the bill you want to work with.
- From the **Actions** menu in the Bills section, select **Adjust Bill**.  
Bill Adjustment dialog box appears. See "[Bill Adjustment Dialog Box](#)" for details.
- For **Adjustment**, enter the amount or percentage you want to adjust.  
To increase the amount due, enter a negative number.
- For **Effective**, select a date.
- (Optional) Select **Exclude taxes from the adjustment**.
- From the list, select a reason.
- (Optional) Enter a note.
- Do one of the following:
  - To have the allocation distributed automatically, click **Auto Allocate**.
  - To specify allocation amounts, click **Continue to manually allocate**, and enter the amounts to allocate in the Allocate Adjustment dialog box.

## Bill Adjustment Dialog Box

Use the Bill Adjustment dialog box to adjust a bill.

Field	Description
<b>Adjustment</b>	Enter an amount or a percentage.
<b>Effective</b>	Select a date.

Field	Description
<b>Exclude taxes from the adjustment</b>	(Optional) Select if appropriate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>Continue to manually allocate</b>	Click to specifically allocate items.
<b>Auto Allocate</b>	Click to save adjustment and to allocate the adjustment evenly to all items.

## Allocate Adjustment Dialog Box

Use the Allocate Adjustment dialog box to allocate an adjustment to specific items in a bill. Information about the adjustment includes: Name, Bill Unit, Bill ID, Due Date, Service, Item, and Balance. You can filter the list of adjustments using any value that appears in the table.

### Related Tasks

[Adjusting a Bill](#)

## Adjusting an Item

You can adjust account or bill unit charges on the item level. You can adjust service charges on the item level or on the event level.

To adjust an item:

1. On the account page, click the **Bills** tab.
2. In the Bills section, select the bill you want to work with.
3. Select the charge.  
The Charges dialog box appears.
4. Click a charge description.  
A dialog box opens.
5. Click **New Adjustment**.  
The Item Adjustment dialog box opens. See "[Item Adjustment Dialog Box](#)" for details.
6. For **Adjustment**, enter the amount or percent to adjust.
7. For **Effective**, select a date.
8. (Optional) Select **Exclude taxes from the adjustment**.
9. Select a reason.
10. (Optional) Enter notes.
11. Click **OK**.

## Item Adjustment Dialog Box

Use the Item Adjustment dialog box to adjust an item.

Field	Description
<b>Adjustment</b>	Enter an amount or a percentage.
<b>Effective</b>	Select a date.
<b>Exclude taxes from the adjustment</b>	(Optional) Select if appropriate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>OK</b>	Click to save and close.

## Adjusting an Event

To adjust an event:

1. Open a bill.
2. In the **My Charges** area, select a service charge.  
The Charges by Service dialog box appears.
3. In the charge, select an amount.  
For example, in this figure, you would select **20.00** or **50.00**.

Charge description	Amount	
Cycle forward	20.00	☰
Usage	50.00	☰
<b>Total:</b>	<b>70.00</b>	

4. In the Events dialog box, select the event you want to adjust and then click **Adjust Selected**.  
The Event Adjustment dialog box appears. See "[Event Adjustment Dialog Box](#)" for details.
5. From the **What to Adjust** list, select one of the following:
  - **Amount and tax**
  - **Amount only**
  - **Tax only**
6. In the **Adjustment** field, enter the adjustment amount or percentage.  
To reduce the balance, enter a positive number. To increase the balance, enter a negative number such as -10.
7. In the **Effective** field, select or enter a date.
8. From the list, select a reason.

9. (Optional) Enter a note.
10. Click **OK**.

## Event Adjustment Dialog Box

Use the Event Adjustment dialog box to adjust the amount to charge a customer for an event. You can adjust the amount and tax.

Field	Description
<b>Events</b>	Click to return to the Events dialog box.
<b>What to Adjust</b>	Select one of the following: <ul style="list-style-type: none"> <li>• <b>Amount and tax:</b> Adjusts the amount for the events and the tax levied on the amount.</li> <li>• <b>Amount only:</b> Adjusts the amount on the events.</li> <li>• <b>Tax only:</b> Limits the adjustment to the tax levied on the events.</li> </ul>
<b>How to Apply Adjustment Amount</b>	Select one of the following: <ul style="list-style-type: none"> <li>• <b>Apply amount equally per event:</b> The adjustment amount is applied to each event equally. For example, if the adjustment amount is \$5, \$5 is applied to the first event, \$5 to the second event, \$5 to the third event, and so on.</li> <li>• <b>Apply to events in order until amount is used up:</b> The total adjustment amount is applied to the first event and each subsequent event until the adjustment amount runs out. For example, assume Event A is for \$6, Event B is for \$8, and Event C is for \$10. If the adjustment amount is \$10, \$6 is applied to Event A, \$4 is applied to Event B, and \$0 is applied to Event C.</li> </ul> <p><b>Note:</b> This field appears only if you have selected multiple events to adjust.</p>
<b>Adjustment</b>	Enter an adjustment amount or a percentage.
<b>Effective</b>	Select or enter a date, when the adjustment takes effect. See " <a href="#">About Date and Time Formats (Release 15.0.1 or later)</a> " for more information on the format for entering the date and time. You can backdate the adjustment.
<b>Number of selected events</b>	Displays the number of events that can be adjusted. <b>Note:</b> This field appears only if you have selected multiple events to adjust.
<b>Available to adjust</b>	Displays the sum of all events that can be adjusted.
<b>Adjustment (for <i>N</i> events)</b>	Displays the sum of all event adjustments that will be applied.
<b>Due after adjustment</b>	Displays the net amount due after adjustments are applied. Due after adjustment = Available to adjust – Adjustment (for <i>N</i> events)
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>OK or Cancel</b>	Click <b>OK</b> to save your changes or click <b>Cancel</b> to close the dialog box without saving your changes.

## Adjusting Multiple Events for an Account

When you adjust multiple events for an account at the same time, you can specify how to apply the adjustment to each event. You can specify to apply:

- The same adjustment amount, such as \$20, to each event that you have selected. For example, if you have selected four events, Billing Care would apply a \$20 adjustment to each of the four events.
- The total adjustment amount to the events you have selected, in order, until it runs out. For example, assume you want to apply a \$70 adjustment to these events: Event A (\$50), Event B (\$30), and Event C (\$40). In this case, Billing Care would apply an adjustment of \$50 to Event A, \$20 to Event B, and \$0 to Event C.

 **Note:**

If you specify to increase the balance by applying a negative adjustment, such as -\$50, Billing Care applies the adjustment, in order, up to the credit limit amount.

To adjust multiple events in an account at the same time:

1. Open a bill.
2. In the **My Charges** area, select a service charge.  
The Charges by Service dialog box appears.
3. In the charge, select an amount.
4. In the Events dialog box, select multiple events to adjust and then click **Adjust Selected**.  
The Event Adjustment dialog box appears. See "[Event Adjustment Dialog Box](#)" for details.
5. From the **What to Adjust** list, select one of the following:
  - **Amount and tax**
  - **Amount only**
  - **Tax only**
6. From the **How to Apply Adjustment Amount** list, select one of the following:
  - **Apply amount equally per event**
  - **Apply to events in order until amount is used up**
7. In the **Adjustment** field, enter the adjustment amount or percentage.  
To reduce the balance, enter a positive number. To increase the balance, enter a negative number such as -10.
8. In the **Effective** field, select or enter a date.
9. From the list, select a reason.
10. (Optional) Enter a note.
11. Click **OK**.

## Making a Noncurrency Adjustment

To make a noncurrency adjustment:

1. On the account page, click the **Home** tab, and then select the Account History section or the section for a bill unit.  
By default, in the Balances section, the balances for all services appear.

2. In the **Balances** list, select the service that has the noncurrency balance you want to adjust.  
The name of the services and the related balances appear below the menu.
3. Click the noncurrency balance.  
The details for the noncurrency balance appear.
4. Click **New Adjustment**.  
The Noncurrency Adjustment dialog box appears. See "[Noncurrency Adjustment Dialog Box](#)" for details.
5. For **Adjustment**, enter the amount to adjust.
6. (Optional) For **Valid from**, enter a date.
7. (Optional) For **Valid to**, enter a date or leave as **never ends**.
8. Select a reason.
9. (Optional) Enter notes.
10. Click **OK**.

## Noncurrency Adjustment Dialog Box

Use the Noncurrency Adjustment dialog box to make a noncurrency adjustment.

Field	Description
<b>Adjustment</b>	Enter an amount.
<b>Valid from</b>	Enter a date.
<b>Valid to</b>	Enter a date.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.
<b>OK</b>	Click to save and close.

## Viewing Account Adjustment Details

To view account adjustment details:

1. In the account page, click **Unallocated A/R** in the Home section.  
The Allocate Adjustment dialog box appears.
2. Click **Adjustment Details**.  
The Account Adjustment Details dialog box appears.
3. (Optional) Click **Comment**, add a comment, and then click **Post**.
4. (Optional) To see all items affected by an adjustment, do one of the following:
  - Click the **Show all items affected** link.
  - In the **Allocated to** table, click the link in the **Items Affected** column.

The Items Affected dialog box appears where you can view details about the adjusted items. See
5. (Optional) Click **Export** to save the account adjustment details to a CSV file.

6. Click **Close**.

## Viewing Item Adjustment Details

To view item adjustment details:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with.
3. In the Service Charges area, select a service for the selected bill.  
The **Charges by service** page appears.
4. Select **Show Charge Changes**. This option appears only if an item or event has been changed.  
A dialog box pops up.
5. Click **Item adjustment**. This link appears only if an item has been adjusted.  
The Item Adjustment Details page appears, which shows the adjustment date and amount.

## Viewing Event Adjustment Details

To view event adjustment details:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with.
3. In the Service Charges area, select a service for the selected bill.  
The **Charges by service** page appears.
4. Select **Show Charge Changes**. This option appears only if an item or event has been changed.  
A dialog box pops up.
5. Click **Event adjustment**. This link appears only if an event has been adjusted.  
The Event Adjustment Details page appears, which shows the adjustment date and amount.

## Viewing Bill Adjustment Details

To view bill adjustment details:

1. On the Account page, click the **Bills** tab.
2. Select the bill you want to work with.
3. Click the **A/R actions** link.  
The A/R Actions dialog box appears. This displays all A/R actions the bill has undergone.
4. Select the row with the bill adjustment and then click **A/R Action Details**.  
The Bill Adjustment Details dialog box appears.
5. (Optional) You can add a comment by clicking on the **Comment** link.
6. In the **Allocated to** table, click the link in the **Items Affected** column to see all items affected by an adjustment.  
The Items Affected dialog box appears where you can view details about the adjusted items like **Item** and **Amount**.



7. (Optional) Click **Export** to save the bill adjustment details to a CSV file.

## Working with Disputes

You create a dispute when a customer disagrees with the amount they are asked to pay. These issues require investigation before they can be resolved. Until the dispute is resolved by a settlement, the disputed amount is removed from the balance of the customer's bill.



### Note:

You can open and resolve disputes for bills, items, and events.

For disputes, see:

- [Disputing a Bill](#)
- [Disputing an Item](#)
- [Viewing Item Dispute Details](#)
- [Disputing an Event](#)
- [Viewing Event Dispute Details](#)

## Disputing a Bill

From the Bills section, you can open a dispute on the bill you are working with.



### Note:

You can open disputes only on bills that have money due and that do not already have another open dispute.

You cannot open or settle a dispute on a child account.

To dispute a bill:

1. On the account page, click the **Bills** tab.  
In the Bills section, select the bill you want to work with.
2. From the **Actions** menu in the Bills section, select **Dispute Bill**.  
The Dispute Bill dialog box appears. See "[Dispute Bill Dialog Box](#)" for details.
3. In the **Dispute** field, enter the amount you want to dispute.  
The due amount, the disputed amount, and the amount available for disputing are calculated and displayed on the page.
4. For **Effective**, select a date.
5. (Optional) Select **Exclude taxes from the dispute**.
6. Select a reason for disputing from the list.
7. (Optional) Enter a note.

- Click **OK**.

## Dispute Bill Dialog Box

Use the Dispute Bill dialog box to dispute at the bill level.

Field	Description
<b>Dispute</b>	Enter an amount.
<b>Due</b>	Amount that is due for the bill.
<b>Effective</b>	Select a date.
<b>Exclude taxes from the dispute</b>	(Optional) Select if appropriate.
<b>Select a reason</b>	Select a reason.
<b>Notes</b>	(Optional) Enter notes.

## Disputing an Item

To dispute an item:

- On the account page, click the **Bills** tab.
- Click **Switch Bills** and select the bill you want to work with.
- In the Service Charges area of the Bills section, select a service for the selected item.  
The **Charges by service** page appears for the selected service.
- Click the charge's action menu and select **Open Item Dispute**.  
The Dispute Item dialog box appears. See "[Dispute Item Dialog Box](#)" for details.
- Enter the amount to be disputed in the **Dispute** field.
- For **Effective**, select a date. By default, the current date is selected.
- (Optional) Select **Exclude taxes from the dispute**.
- Select a reason for the dispute.
- (Optional) Enter any notes about the dispute.
- Click **OK**.

## Dispute Item Dialog Box

Use the Dispute Item dialog box to dispute items. You can dispute the amount and tax.

Field	Description
<b>Dispute</b>	Enter an amount.
<b>Due</b>	Amount that is due for the bill.
<b>Effective</b>	Select a date.
<b>Exclude taxes from the dispute</b>	(Optional) Select if appropriate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.

## Viewing Item Dispute Details

To view item dispute details:

1. On the account page, click the **Bills** tab.

 **Tip:**

You can access settled or unsettled item dispute details through **News Feed** in the Home section, **Notes** pop up on top of the chart, **A/R Actions** in the Bills section, or from within the graph.

2. Select the bill you want to work with.
3. In the Service Charges area of the **Bills** section, select a service for the selected bill.  
The **Charges by service** page appears.
4. Click **Show Charge Changes**. This option appears only if there are any open settled or unsettled item disputes.  
The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Do one of the following:
  - a. To view a settled item dispute, click the appropriate settled item dispute.  
The Settle Item Dispute dialog box appears and displays the item dispute that is settled. See "[Settle Item Dispute Dialog Box](#)" for details.
  - b. To view an unsettled item dispute, click the appropriate unsettled item dispute.  
The Settle Item Dispute dialog box appears and displays the item dispute that is not settled. See "[Settle Item Dispute Dialog Box](#)" for details.

## Disputing an Event

To dispute an event:

1. On the account page, click the **Bills** tab.
2. In the Bills section, select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected item.  
The **Charges by service** page appears for the selected service.
4. Select a charge by clicking on the amount.  
The **Events** page appears.
5. Select the required event(s) and click **Dispute Selected**.  
The Dispute Event dialog box appears. See "[Dispute Event Dialog Box](#)" for details.

 **Note:**

You cannot open multiple disputes on the same event.

6. Select one of the following:
  - **Adjust amount and tax**
  - **Adjust amount only**
  - **Adjust tax only**
7. For **Dispute**, enter the amount or percentage.
8. For **Effective**, select a date. By default, this is set to the current date.  
The Dispute Event dialog box appears. See "[Dispute Event Dialog Box](#)" for details.
9. Select a reason for the dispute.
10. Enter any notes about the dispute.
11. Click **OK**.

## Dispute Event Dialog Box

Use the Dispute Event dialog box to dispute events. You can dispute the amount and tax.

Field	Description
<b>Dispute</b>	Enter an amount or percentage.
<b>Due</b>	Amount that is due for the bill.
<b>Adjust amount and tax</b>	Select to adjust both the amount for the events and the tax levied on the amount.
<b>Adjust amount only</b>	Select to adjust the amount on the events.
<b>Adjust tax only</b>	Select to limit the adjustment to the tax levied on the events.
<b>Effective</b>	Select a date.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.

## Viewing Event Dispute Details

You can view event dispute details from the **Bills** section, through News Feed in the Home section, **Notes** pop up on top of the chart, A/R Actions in the Bills section, or from within the graph.

To view event dispute details through the Bills tab:

1. On the account page, click the **Bills** tab.
2. Select a bill you want to work with.
3. In the Service Charges area of the **Bills** section, select a service for the selected bill.

The **Charges by service** page appears.

4. Select a charge amount.

The Events dialog box appears. This displays the event disputes and any unsettled event disputes.

You can also select the unsettled event disputes and settle them. For more information, see "[Settling an Event Dispute](#)".

## Working with Settlements

You work with settlements when a dispute has to be resolved by the customer, after investigation. You can view settlements made to resolve your disputes using the Billing Care interface. These are generally divided into three levels:

- Item Dispute Level
- Bill Dispute Level
- Event Dispute Level

For settlements, see:

- [Settling a Bill Dispute](#)
- [Settling an Item Dispute](#)
- [Settling an Event Dispute](#)
- [Viewing Settled Bill Dispute Details](#)
- [Viewing Settled Item Dispute Details](#)
- [Viewing Settled Event Dispute Details](#)

## Settling a Bill Dispute

You can settle disputes on bills that have an open dispute.

To settle a dispute on a bill:

1. On the account page, click the **Bills** tab.  
In the Bills section of the account page, select the bill you want to work with.
2. From the **Actions** menu in the Bills section, select **Settle Bill Dispute**.  
The Settle Bill Dispute dialog box appears. See "[Settle Bill Dispute Dialog Box](#)" for details.
3. Select one of the following:
  - **Grant in full**
  - **Grant partial amount**
  - **Deny**
4. If you select **Grant partial amount**, enter the amount.
5. For **Effective**, select a date.
6. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
7. (Optional) Click **Comment** and enter a comment.
8. Click **OK**.

## Settle Bill Dispute Dialog Box

Use the Settle Bill Dispute dialog box to settle a dispute at the bill level.

Field	Description
Grant in full	Select to allow full amount of dispute.

Field	Description
<b>Grant partial amount</b>	Select to allow a partial amount. Enter the amount.
<b>Deny</b>	Do not allow dispute. Return disputed amount to bill.
<b>Effective</b>	Select a date.
<b>Other open disputes</b>	The total amount of all other disputes. (Optional) Click to view other open disputes. Your company may have policies regarding how many disputes can be granted.
<b>Comment</b>	(Optional) Click and enter a comment.
<b>Due</b>	Amount that is due for the bill.
<b>This dispute</b>	The current dispute amount.
<b>Item</b>	The name of the disputed item at the bill level.
<b>Settled Tax Amount</b>	Total tax amount paid as part of any AR action/payment.
<b>Settled Taxed Amount</b>	Total charge amount settled (taxed) paid as part of AR/payment.
<b>Settled Non-Taxed Amount</b>	Total charge amount (non-taxed) as part of AR/payment.

## Settling an Item Dispute

You can settle disputes on items that have an open dispute.

To settle an item dispute:

1. On the account page, click the **Bills** tab.

### Tip:

You can also access the settled item dispute details through **News Feed** in the Home Section or **A/R Actions** in the Bills section.

2. In the Bills section of the account page, select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected bill.  
The **Charges by service** page appears.
4. Click **Show Charge Changes**. This option appears if there are any open settled or unsettled item disputes.  
The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Click **Unsettled Item Dispute**.  
The Settle Item Dispute dialog box appears. See "[Settle Item Dispute Dialog Box](#)" for details.
6. Select one of the following:
  - **Grant in full**
  - **Grant partial amount**
  - **Deny**

7. If you select **Grant partial amount**, enter the amount.
8. For **Effective**, select a date.
9. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
10. (Optional) Click **Comment** and enter a comment.
11. Click **OK**.

## Settle Item Dispute Dialog Box

Use the Settle Item dialog box to settle item disputes.

Field	Description
<b>Grant in full</b>	Select to allow full amount of dispute.
<b>Deny</b>	Select to deny the dispute. The disputed amount is returned to the bill.
<b>Effective</b>	Select a date.
<b>Due</b>	Amount that is due for the bill.
<b>This dispute</b>	The current dispute amount.
<b>Other open disputes</b>	(Optional) Click to view other open disputes.
<b>Comment</b>	(Optional) Click and enter a comment.
<b>Item</b>	The name of the disputed item.
<b>Settled Tax Amount</b>	Total tax amount paid as part of any AR action/payment.
<b>Settled Taxed Amount</b>	Total charge amount settled (taxed) paid as part of AR/payment.
<b>Settled Non-Taxed Amount</b>	Total charge amount (non-taxed) as part of AR/payment.

## Settling an Event Dispute

You can settle disputes on events that have an open dispute.

To settle an event dispute:

1. On the account page, click the **Bills** tab.

### Tip:

You can access settled or unsettled item dispute details through **News Feed** in the Home section, **Notes** pop up on top of the chart, **A/R Actions** in the Bills section, or from within the graph.

2. In the Bills section of the account page, select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected bill.  
The **Charges by service** page appears.
4. Click **Show Charge Changes**. This option appears if there are any open settled or unsettled event disputes.  
The Cycle forward dialog box appears and displays any open settled or unsettled event disputes.

5. Click an **Unsettled Event Dispute**.  
The Settle Event Dispute dialog box appears. See "[Settle Event Dispute Dialog Box](#)" for details.
6. Select one of the following:
  - **Grant in full**
  - **Grant partial amount**
  - **Deny**
7. If you select **Grant partial amount**, enter the amount.
8. For **Effective**, select a date.
9. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
10. (Optional) Click **Comment** and enter a comment.
11. Click **OK**.

## Settle Event Dispute Dialog Box

Use the Settle Event dialog box to settle event disputes.

Field	Description
<b>Grant in full</b>	Select to allow full amount of dispute.
<b>Grant partial amount</b>	Select to allow a partial amount. Enter the amount.
<b>Deny</b>	Do not allow dispute. Return disputed amount to bill.
<b>Effective</b>	Select a date.
<b>Due</b>	Amount that is due for the bill.
<b>Dispute</b>	The current dispute amount.
<b>Other open disputes</b>	The total amount of all other disputes. (Optional) Click to view other open disputes.
<b>Due after dispute</b>	Amount that is due after the event is settled.
<b>Comment</b>	(Optional) Click and enter a comment.
<b>Item</b>	The name of the disputed item at the event level.
<b>Settled Tax Amount</b>	Total tax amount paid as part of any AR action/payment.
<b>Settled Taxed Amount</b>	Total charge amount settled (taxed) paid as part of AR/payment.
<b>Settled Non-Taxed Amount</b>	Total charge amount (non-taxed) as part of AR/payment.

## Viewing Settled Bill Dispute Details

To view settled bill dispute details:

1. On the account page, click the **Bills** tab.



 **Tip:**

You can access settled or unsettled item dispute details through **News Feed** in the Home section, **Notes** pop up on top of the chart, **A/R Actions** in the Bills section, or from within the graph.

2. Select the bill you want to work with.
3. In the Service Charges area of the **Bills** section, select a service for the selected bill. The **Charges by service** page appears.
4. Click **Show Charge Changes**. This option appears only if there are any open settled or unsettled item disputes.

The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.

5. Click the appropriate settled bill dispute. The Settled Bill Dispute dialog box appears and displays the bill dispute that is settled. See "[Settled Bill Dispute Detail Dialog Box](#)" for details.

## Settled Bill Dispute Detail Dialog Box

Use the Settled Bill dialog box to view settled bill disputes.

**Table 10-1 Settled Bill Dispute Dialog Box**

Field	Description
Opened	The date the dispute was raised.
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.
Settlement ID	The settlement ID.
Settled amount	The settled amount.
Comment	(Optional) Click and enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed bill's taxes. The table includes the following columns: <ul style="list-style-type: none"> <li>• <b>Item:</b> The name of the disputed bill.</li> <li>• <b>Settled Tax Amount:</b> The tax amount settled by this adjustment.</li> <li>• <b>Settled Taxed Amount:</b> The amount of the adjustment that is taxable.</li> <li>• <b>Settled Non-Taxed Amount:</b> The amount of the adjustment that is not taxable.</li> </ul>

## Viewing Settled Item Dispute Details

To view settled item dispute details:

1. On the account page, click the **Bills** tab.

 **Tip:**

You can access settled or unsettled item dispute details through **News Feed** in the Home section, **Notes** pop up on top of the chart, **A/R Actions** in the Bills section, or from within the graph.

2. Select the bill you want to work with.
3. In the Service Charges area of the **Bills** section, select a service for the selected bill. The **Charges by service** page appears.
4. Click **Show Charge Changes**. This option appears only if there are any open settled or unsettled item disputes. The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Click the appropriate settled item dispute. The Settled Item Dispute dialog box appears and displays the item dispute that is settled. See "[Settled Item Dispute Dialog Box](#)" for details.

## Settled Item Dispute Dialog Box

Use the Settled Item dialog box to view settled item disputes.

**Table 10-2 Settled Item Dispute Dialog Box**

Field	Description
Opened	The date the dispute was raised.
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.
Settlement ID	The settlement ID.
Settled amount	The settled amount.
Comment	(Optional) Click and enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed item's taxes. The table includes the following columns: <ul style="list-style-type: none"> <li>• <b>Item:</b> The name of the disputed item.</li> <li>• <b>Settled Tax Amount:</b> The tax amount settled by this adjustment.</li> <li>• <b>Settled Taxed Amount:</b> The amount of the adjustment that is taxable.</li> <li>• <b>Settled Non-Taxed Amount:</b> The amount of the adjustment that is not taxable.</li> </ul>

## Viewing Settled Event Dispute Details

To view settled event dispute details:

1. On the account page, click the **Bills** tab.

 **Tip:**

You can access settled or unsettled item dispute details through **News Feed** in the Home section, **Notes** pop up on top of the chart, **A/R Actions** in the Bills section, or from within the graph.

2. Select a bill you want to work with.
3. In the Service Charges area of the **Bills** section, select a service for the selected bill. The **Charges by service** page appears.
4. Select a charge amount. The Settled Event Dispute dialog box appears. See "[Settled Event Dispute Dialog Box](#)" for details.

## Settled Event Dispute Dialog Box

Use the Settled Event dialog box to view settled event disputes.

**Table 10-3 Settled Event Dispute Dialog Box**

Field	Description
Opened	The date the dispute was raised.
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.
Settlement ID	The settlement ID.
Settled amount	The settled amount.
Comment	(Optional) Click and enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed event's taxes. The table includes the following columns: <ul style="list-style-type: none"> <li>• <b>Item:</b> The name of the disputed event.</li> <li>• <b>Settled Tax Amount:</b> The tax amount settled by this adjustment.</li> <li>• <b>Settled Taxed Amount:</b> The amount of the adjustment that is taxable.</li> <li>• <b>Settled Non-Taxed Amount:</b> The amount of the adjustment that is not taxable.</li> </ul>

## Working with Refunds

You can initiate a refund to a customer whose account or bill has a credit balance.

 **Note:**

You cannot refund to wholesale child accounts.

Depending on the payment method selected, the customer receives the refund amount later by check or as a credit to the customer's credit card account, the direct debit account, or the SEPA account.

For more information about refunds in BRM, see "About Refunds" in *BRM Managing Accounts Receivable*.

 **Caution:**

Refunds cannot be reversed. You should give a refund only in strict compliance with your company's guidelines. If you refund a customer account by mistake, you can adjust the account balance for the refunded amount.

For refunds, see:

- [Refunding an Account](#)
- [Refunding a Bill](#)
- [Refund Bill Dialog Box](#)

## Refunding an Account

To refund an account:

1. From the **Actions** menu, select **Accounts Receivables**, and then select **Refunds**.

The Credit Balances Available for Refund dialog box appears and lists all the items that are eligible for refunds.

2. Do one of the following:

To refund all items:

- a. Select **Refund all**.

All the items that are eligible for refund are selected.

- b. Click **Refund** or **Next**.

The Refund Multiple Items dialog box appears.

To refund selected items:

- a. Select **Refund selected bills**.

- b. Select the items to refund.

- c. Click **Refund** or **Next**.

The Refund Bill or Refund Multiple Items dialog box appears depending on your selection.

3. Enter the required information. See "[Refund Bill Dialog Box](#)" for more information.
4. Click **OK**.

## Refunding a Bill

To create a bill level refund:

1. On the account page, click the **Bills** section.
2. Select the bill you want to refund from **Bills**.
3. From the **Actions** menu, select **Refund Bill**.

The Refund Bill dialog box appears. See "[Refund Bill Dialog Box](#)" for details.

4. Enter the required information.
5. Click **Save**.

 **Note:**

Billing Care only allows refunding of bills when the total amount due for the period is negative. The option is not displayed for bills with positive balances.

## Refund Bill Dialog Box

Use the Refund Bill dialog box to enter and view bill refund information.

Field	Description
<b>Refund Amount</b>	The amount to be refunded.
<b>Refund Type</b>	The type of refund. By default, the following refund types are supported: <ul style="list-style-type: none"> <li>• Cash</li> <li>• Check</li> <li>• Inter Bank Payment Order</li> <li>• Postal Order</li> <li>• Wire-Transfer</li> </ul> After selecting a refund type, provide the required information in the displayed fields. For example, if you select Check, provide the date, number, bank code, and bank account number.
<b>Receipt Date</b>	(Optional) The receipt date.
<b>Receipt No</b>	(Optional) The receipt number.
<b>My charges</b>	The current bill's charges (credit).
<b>A/R actions</b>	The amount of any accounts receivable actions taken on the current bill.
<b>Payment applied</b>	The amount of any payments previously applied to the current bill.
<b>Total due for this period</b>	The total amount due in the current bill.
<b>Reason</b>	Select a reason.
<b>Notes</b>	(Optional) Enter any notes.

## Working with Write-Offs

When your company determines that it will not receive payment from a customer, you may be asked to write off the amount the customer owes. You can perform a write-off for an account, a bill, or an item charge. The write-off can be performed as one event that includes both the net and tax amounts, or as two events, one for the net amount and one for the tax amount.

 **Caution:**

A write-off can be reversed. However, you should perform a write-off only in strict compliance with your company's guidelines.

To write-off a bad debt and reverse a write-off, see:

- [Writing Off an Account](#)
- [Writing Off a Bill](#)
- [Writing Off a Bill Item](#)
- [Viewing Write Off Details](#)
- [Reversing a Write Off](#)

## Writing Off an Account

 **Caution:**

You can reverse a write-off only if the write-off reversal feature is enabled in your BRM database. You should perform a write-off only in strict compliance with your company's guidelines.

To write off an account:

1. From the **Actions** menu, select **Account Receivables**. Select **Write-Off Account**.  
The Write Off Account dialog box appears. See "[Write Off Account Dialog Box](#)" for details.
2. For **Effective**, select a date.

 **Note:**

Selecting a future date is not supported. However, backdating is supported.

3. (Optional) Select **Inactivate account**.
4. (Optional) Select **Separate the tax portion from the write-off**.
5. Select a reason.
6. (Optional) Enter appropriate notes.
7. Click **OK**.

## Write Off Account Dialog Box

### **Caution:**

You should perform a write-off only in strict compliance with your company's guidelines. To reverse a write-off of an account, the account status must be inactive before you write off the account.

Use the Write Off Account dialog box to write off an account.

Field	Description
<b>Amount</b>	The amount to write off, that is, the amount owed on the account.
<b>Effective</b>	Select a date.
<b>Inactivate account</b>	Select to make the account inactive.
<b>Separate the tax portion from the write-off</b>	(Optional) Select to keep the tax amount separate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.

## Writing Off a Bill

To write off a bill:

1. On the account page, click the **Bills** section.  
The existing bill details are displayed.
2. Use **Switch Bills** and select the bill you want to write off.
3. From the **Actions** menu, select **Account Receivables**. Select **Write Off Bill**.  
The Write Off Bill dialog box appears. See "[Write Off Bill Dialog Box](#)" for details.
4. For **Effective**, select a date.
5. (Optional) Select **Separate the tax portion from the write off**.
6. Select a reason.
7. (Optional) Enter any notes.
8. Click **OK**.

### **Note:**

The write off action is permanent and cannot be reversed.

## Write Off Bill Dialog Box

Use the Write Off Bill dialog box to write off a bill.

Field	Description
<b>Effective</b>	Select a date.
<b>Separate the tax portion from the write off</b>	(Optional) Select to keep the tax amount separate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.

## Writing Off a Bill Item

To write off a bill item:

1. On the account page, click the **Bills** tab.  
The existing bill details are displayed.
2. Use **Switch Bills** and select the bill you want to work with.
3. In the section, select a service for the selected bill.  
The **Charges by service** page appears.
4. Select a charge, click the **Actions** menu, and select **Write Off Item**.  
The Writing Off Bill Item dialog box appears. See "[Writing Off Bill Item Dialog Box](#)" for details.
5. (Optional) Select **Separate the tax portion from the write off**.
6. Select a reason.
7. (Optional) Enter notes.
8. Click **OK**.

### Note:

The write off action is permanent and cannot be reversed.

## Writing Off Bill Item Dialog Box

Use the Write Off Bill dialog box to write off an item.

Field	Description
<b>Effective</b>	Select a date.
<b>Separate the tax portion from the write off</b>	(Optional) Select to keep the tax amount separate.
<b>Select a reason</b>	Select the reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.



## Viewing Write Off Details

You can view write off details from News Feed in the Home section, A/R Actions in the Bills section, or from the Service Charges Area in the Bill section. See the following topics for more information.

- [Viewing Write Off Details from Newsfeed](#)
- [Viewing Write Off from A/R Actions](#)
- [Viewing Write Off from the Service Charges Area](#)

## Viewing Write Off Details from Newsfeed

To view write off details from the news feed:

1. On the account page, click the **Home** tab.
2. Click **News Feed** in the Account History section.

The **Newsfeed** page appears and displays details about A/R actions, payments, charges, and accounts. See "[Newsfeed](#)" for details.

3. To view a write off, click **Write off**.

Based on the selected write off type, the appropriate write off dialog box appears. The Details column specifies the write off type.

- If the selected write off is for an account, the Write Off Account dialog box appears and displays details about the account.
  - If the selected write off is for a bill, the Write Off Bill dialog box appears and displays details about the bill.
  - If the selected write off is for an item, the Write Off Item dialog box appears and displays details about the item.
4. (Optional) Click **Comment** and enter a comment.
  5. Click **Post**.

## Viewing Write Off from A/R Actions

To view the write off details from the A/R actions:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with.
3. Click **A/R actions** in the Bills section.

The A/R Actions dialog box appears. This displays all the A/R actions for the bill.

4. Select the required type of Write off A/R action and click **A/R Action Details**.  
The appropriate type of Write Off dialog box appears.
5. (Optional) Click **Comment** and enter a comment.
6. Click **Post**.

## Viewing Write Off from the Service Charges Area

To view the write off from the Services Charges Area:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with.
3. In the Service Charges area, select a service for the selected bill.  
The **Charges by service** page appears.
4. Click **Show Charge Changes**.  
The related dialog box appears with the actions that affected the item.
5. Do one of the following:
  - a. To view an account write off, click **Account Write-off**.  
The Write Off Account dialog box appears and displays the details about the account. See "[Write Off Account Dialog Box](#)" for details.

 **Note:**

You cannot perform account write-off to wholesale child accounts.

- b. To view a bill write off, click **Bill Write-off**.  
The Write Off Bill dialog box appears and displays the details about the bill. See "[Write Off Bill Dialog Box](#)" for details.
  - c. To view an item write off, click **Item Write-off**.  
The Write Off Item dialog box appears and displays the details about the item.
6. (Optional) Click **Comment** and enter a comment.
7. Click **Post**.

## Reversing a Write Off

You can reverse a write-off on an account. However, to reverse the write off on an account, the account status must be **Inactive** before you reverse the account write off.

To reverse the account write off:

1. From the **Actions** menu, select **Account Receivables**.
2. Select **Reverse Account Write Off**.  
The Reverse Write-Off Account dialog box appears with the selected account name. See "[Reverse Write Off Account Dialog Box](#)" for details.
3. For **Effective**, select a date.
4. Select a reason.
5. (Optional) Enter appropriate notes.
6. Click **Reverse Write-Off**.

## Reverse Write Off Account Dialog Box

Use the Reverse Write Off Account dialog box to reverse write off an account.

Field	Description
<b>Effective</b>	The current date.
<b>Reason</b>	Select a reason that most closely matches the situation.
<b>Notes</b>	(Optional) Enter notes.

## Transferring Negative Balances to Another Bill

Your customers' bills could have a negative balance (credit) when they return a product, overpay a bill, or so on. Your customers can apply this negative balance to another bill that they owe money on. For example, if a customer's mobile phone bill has a balance of -\$10, that balance could be transferred to a \$50 Internet bill. In this case, the balance would become \$0 for the mobile phone bill and \$40 for the Internet bill.

To transfer a negative balance from one bill to another bill:

1. On the account page, click the **Bills** tab.
2. Select the bill that you want to work with.
3. Click **Actions**, and then select **Transfer Negative Balance**.

### **Note:**

The **Transfer Negative Balance** option is enabled only when there is a negative balance.

The Transfer Negative Balance dialog box appears and shows the amount owed for each bill unit in the account. The table is blank if none of the bill units have a positive balance.

4. Type an amount to allocate to each bill unit in the **Allocate** column.

### **Tip:**

To remove all amounts from the **Allocate** column, click **Clear**.

5. Optionally, click **Export** to save the information to a CSV file.
6. Click **Save**.

If necessary, Billing Care automatically recalculates the remaining amount to be allocated.

# 11

## Organization Hierarchies

You can manage your customers' organization hierarchies by using Oracle Communications Billing Care.

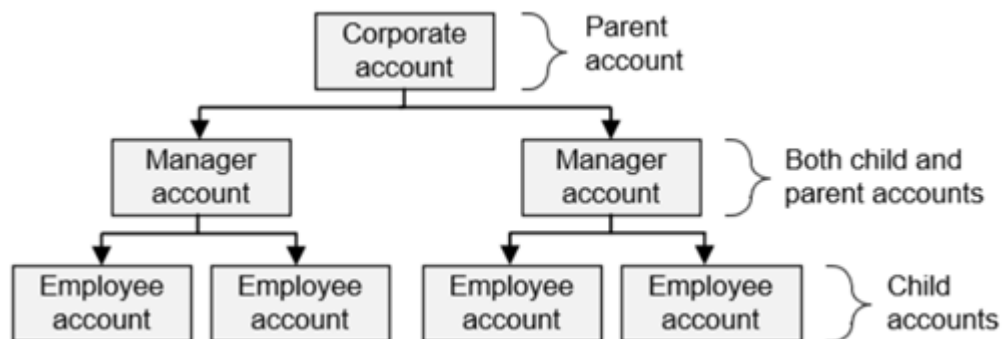
To work with organization hierarchies, see the following topics:

- [About Organization Hierarchies](#)
- [Creating an Organization Hierarchy](#)
- [About Account Hierarchy Types](#)
- [Assigning Hierarchy Types to Accounts](#)
- [Adding Child Accounts to an Organization Hierarchy](#)
- [Adding a Parent Account to an Organization Hierarchy](#)
- [Modifying the Hierarchy Relationships of Child Accounts](#)
- [Modifying the Hierarchy Relationships of Parent Accounts](#)
- [Removing a Child Account from an Organization Hierarchy](#)
- [Viewing an Account's Organization Hierarchy](#)

### About Organization Hierarchies

You use organization hierarchies to connect accounts in an organization and display their relationship graphically. Billing Care shows the parent account at the top and child accounts beneath it.

Child accounts can also be parent accounts themselves, as shown below.



You can assign hierarchy types and classify multiple accounts by functional roles, which allows you to manage and group accounts within your organization's structure in Billing Care.

### Creating an Organization Hierarchy

Creating an organization hierarchy involves these general steps:

1. Create the account that will be the parent in the hierarchy. For example, create one account to represent a corporate account.
2. Create the accounts that will be the children in the hierarchy. For example, create accounts to represent employees and departments within a company.
3. Associate the child account with the appropriate parent. For example, associate an employee account with the corporate account.

You don't explicitly identify an account as a parent or child. Instead, they become parent or child accounts when you associate them.

## About Account Hierarchy Types

Accounts in an organization hierarchy can have one of these hierarchy types:

Hierarchy Type	Description
<b>Not Set</b>	The account does not have a hierarchy type.
<b>Site</b>	A nonservice-owning account used for physical or logical sites in an organization. Classify other account types under a common site when defining an organization's hierarchy in Billing Care.
<b>Legal Entity</b>	A nonservice-owning account type used for legal entities in an organization with accounts in Billing Care.
<b>Billing Account</b>	An account type used for configuring billing hierarchies representing a parent billing account with financial responsibility for child account bill units. See " <a href="#">Billing Hierarchies</a> ".
<b>Service Account</b>	An account type used for accounts with active, billable services.

## Assigning Hierarchy Types to Accounts

Assign a hierarchy type to an account in one of these ways:

- During account creation, select a value from the **Organization Hierarchy Type** list.
- For existing accounts, assign a hierarchy type by editing the account's profile:
  1. From the **Actions** menu, select **Account** and then select **Account Profile**.  
The account profile appears.
  2. Select a value from the **Organization Hierarchy Type** list. See "[About Account Hierarchy Types](#)".
  3. Click **Save**.

After assigning an organization hierarchy type, add the account to an organization hierarchy. See "[Adding Child Accounts to an Organization Hierarchy](#)" and "[Adding a Parent Account to an Organization Hierarchy](#)".



## Adding Child Accounts to an Organization Hierarchy

You add a child account to an organization hierarchy by associating it with its parent account.

To add a child account to an organization hierarchy:

1. Open the account that is the parent in the organization hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.


The organization hierarchy for the account appears. Billing Care highlights the active account and displays any connected accounts in the organization.

3. Click the  menu icon at the top right and then click **Add Children**.  
The **Add to Hierarchy** page appears.
4. Next to **Find account**, click the search icon.  
The Search dialog box appears. See "[Search Dialog Box](#)" for more information.
5. Enter your search criteria, such as the account's company name, and then click **Search**.  
Billing Care lists the accounts that meet your criteria.
6. Click the  icon next to each account that you want to add as a child.  
The account is moved to the **This 1 account will be added to hierarchy** column on the right.
7. Click **Add to Hierarchy**.  
The account is added as a child in the organization hierarchy.

## Adding a Parent Account to an Organization Hierarchy

You add a parent account to an organization hierarchy by associating it with a child account.

To add a parent account to an organization hierarchy:

1. Open the account that is a child in the organization hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The organization hierarchy for the account appears. Billing Care highlights the active account and displays any connected accounts in the organization.
3. Click the  menu icon at the top right and then click **Move to a new parent**.  
The **Hierarchy Move** page appears.
4. Next to **Find account**, click the search icon.  
The Search dialog box appears. See "[Search Dialog Box](#)" for more information.
5. Enter your search criteria, such as the account's company name, and then click **Search**.  
Billing Care lists the accounts that meet your criteria.
6. Select the account that you want to be the parent and then click **Move Account**.  
The account is added as a parent in the organization hierarchy.

## Modifying the Hierarchy Relationships of Child Accounts

You can modify a child account's relationship to other accounts in an organization hierarchy in these ways:

- Move it underneath a different parent account.  
For example, move child account 1 from parent account A to parent account B.
- Remove it from the organization hierarchy.
- Add one or more children underneath it.

## Modifying the Hierarchy Relationships of Parent Accounts

You can modify a parent account's relationship to other accounts in an organization hierarchy in these ways:

- Add more children underneath it.
- Move it underneath a parent account and move all its children to a different parent account.  
For example, if parent account A has child accounts 1 and 2, you could add account A as a child of parent account B and then move child accounts 1 and 2 to parent account C.
- Move it and all its children underneath a parent account.  
For example, if parent account A has child accounts 1 and 2, you could move account A to account B. Child accounts 1 and 2 would stay underneath account A.
- Move all its children underneath a different parent account.  
For example, if parent account A has child accounts 1 and 2, you could move child accounts 1 and 2 to parent account B.
- Remove it from the organization hierarchy and move all its children underneath an upstream parent account.  
For example, assume a hierarchy has account A at the top, account B underneath account A, and accounts 1 and 2 underneath account B. This option would remove account B from the hierarchy and move accounts 1 and 2 to account A.

 **Note:**

This option is available only if the parent account is a child underneath another parent account.

- Remove it and all its children from the organization hierarchy.

 **Note:**

This option is available only if the parent account is a child underneath another parent account.


- Remove all its children from the organization hierarchy.

## Removing a Child Account from an Organization Hierarchy

To remove a child account from an organization hierarchy:

1. Open the child account that you want to remove.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**. Alternatively, click the **Organizational child** link from the account banner.

The organization hierarchy for the account appears. Billing Care highlights the active account and displays connected accounts in the organization.

3. In the account you want to remove, click the  menu icon at the top right and then select **Remove from hierarchy**.

 **Note:**

If this account also has child accounts, its children are moved to the upstream parent account.

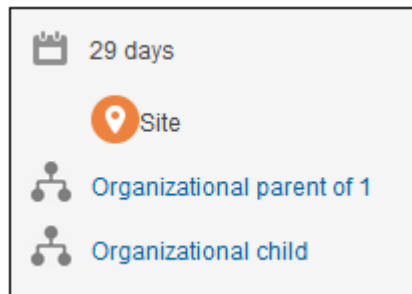
Billing Care displays a removal confirmation message.

4. To approve the account's removal from the organization hierarchy, click **Remove**.

## Viewing an Account's Organization Hierarchy

View an account's position in an organization hierarchy in one of these ways:

- From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The organization hierarchy for the account appears. Billing Care highlights the active account and displays connected accounts in the organization. Each account displays its type using a type icon. No accounts are displayed if no organization hierarchy relationships exist.
- Look at the Billing Care account banner, which displays organization hierarchy information for the account. For example, this shows an account that has one child account underneath it and a parent account on top of it:



If you click the **Organizational child** or **Organizational parent** link, Billing Care displays the entire organization hierarchy that is associated with the account.



# 12

## Billing Hierarchies

You can manage your customers' billing hierarchies by using Oracle Communications Billing Care.

To work with billing hierarchies, see the following topics:

- [About Billing Hierarchies](#)
- [Creating a Billing Hierarchy](#)
- [Adding Nonpaying Children to a Parent's Bill Unit](#)
- [Removing Nonpaying Children from a Billing Hierarchy](#)
- [Adding a Paying Parent for a Child's Bill Unit](#)
- [Changing a Bill Unit's Parent Account](#)
- [Returning a Bill Unit to an Account's Own Payment Method](#)
- [Viewing Who Pays for a Bill](#)

### About Billing Hierarchies

Billing hierarchies allow one account to be financially responsible for another account's bills, such as when a parent pays for a child's bill or a company pays for its employees' bills. You create a billing hierarchy by associating bill units in a parent-child relationship.

For more information, see "Managing Account and Bill Unit Hierarchies" in *BRM Managing Customers*.

### Creating a Billing Hierarchy

Creating a billing hierarchy involves these general steps:


1. Create the account that will be the parent in the hierarchy and the bill unit that will be responsible for paying the group's bills. For example, create one account and bill unit for a corporate account.
2. Create an account and bill units for each child in the hierarchy. For example, create an account and a bill unit for each employee within a company.
3. Associate each child's bill unit with the parent's bill unit. For example, associate an employee's bill unit with the corporate bill unit.

You don't explicitly identify a bill unit as a parent or child. Instead, they become parent or child bill units when you associate them.

### Adding Nonpaying Children to a Parent's Bill Unit

You add a child's bill unit to a billing hierarchy by associating the bill unit with the hierarchy's parent.

To add nonpaying children to a parent's bill unit:

1. Open the parent account that will be financially responsible for all child bill units in the billing hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Add children**.  
The **Add to Billing Hierarchy** page appears.
5. Next to **Find account**, click the search icon.  
The Search dialog box appears. See "[Search Dialog Box](#)" for more information.
6. Enter your search criteria, such as the account's company name, and then click **Search**.  
Billing Care lists the accounts that meet your criteria.
7. Click the  icon next to each account that you want to add as nonpaying children.  
Each account that you select and its bill units are moved to the **Add these selected bill units to the hierarchy** column on the right.
8. In the **Add these selected bill units to the hierarchy** column, select the bill units that the parent account will pay for.  
Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.
9. Select **Roll Up Credit Limit** to add the child bill unit's credit limit to the parent's bill unit.

 **Note:**


This option appears only when the parent account owns a payment responsible real-time credit exposure (PR\_RTCE) balance monitoring group. See "About Balance Monitoring Groups" in *BRM Managing Customers* for more information.

10. Click **Add to Hierarchy** at the top right.  
The selected child bill units are added to the billing hierarchy. The parent account will be financially responsible for all child bill units in the billing hierarchy going forward.
11. Click **Close**.

## Removing Nonpaying Children from a Billing Hierarchy

To remove nonpaying child accounts from a billing hierarchy:

1. Open the parent account in the billing hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Remove children**.

5. Under the list of **Nonpaying children**, click the  icon next to a bill unit that you want to remove from the billing hierarchy.  
Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.  
The Remove from hierarchy dialog box appears.
6. In the **Select the new payment method for this bill unit** list, select a payment method on file for the child account or create a new payment method.
7. Click **Remove**.  
You are returned to the **Hierarchy** page.
8. After you have deleted all children that you want to remove from the billing hierarchy, click **Done** at the top right.
9. Click **Close**.

## Adding a Paying Parent for a Child's Bill Unit

To specify that a customer's bill is paid by another account, you associate the customer's bill unit with a paying parent.

To add a paying parent for a child's bill unit:

1. Open the child account.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Associate with Parent**.  
The **Select Parent** page appears.
5. Next to **Find account**, click the search icon.  
The Search dialog box appears. See "[Search Dialog Box](#)" for more information.
6. Enter your search criteria, such as the account's company name, and then click **Search**.  
Billing Care lists the accounts that meet your criteria.
7. Select the account that will be the parent and then select the bill unit that will be responsible for payment.
8. Select **Roll up credit limit to this parent** to add the child bill unit's credit limit to this parent's bill unit.

### **Note:**

This option appears only when the parent account owns a payment responsible real-time credit exposure (PR\_RTCE) balance monitoring group. See "About Balance Monitoring Groups" in *BRM Managing Customers* for more information.

9. Click **Select Parent** at the top right.  
The parent account is now financially responsible for the child account's bill.

10. Click **Close**.

## Changing a Bill Unit's Parent Account

To change the parent account responsible for a child account's bill unit:

1. Open the child account.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Change Parent** on the top right.
5. Next to **Find account**, click the search icon.  
The Search dialog box appears. See "[Search Dialog Box](#)" for more information.
6. Enter your search criteria, such as the account's company name, and then click **Search**.  
Billing Care lists the accounts that meet your criteria.
7. Select the new paying parent account and then click **Select Parent**.  
The child account is moved to the new paying parent's billing hierarchy.
8. Click **Close**.

## Returning a Bill Unit to an Account's Own Payment Method

You make an account responsible for its own bills again by removing its bill unit from a billing hierarchy.

To return a bill unit to an account's own payment method:

1. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.  
The **Hierarchy** page appears.
2. Click the **Bill Units** tab.  
The **Bill Units** tab displays the bill unit's location in the billing hierarchy and the paying parent is shown on the right.
3. Click **Change to Standalone**.  
Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.  
The Remove from hierarchy dialog box appears.
4. In the **Select the new payment method for this bill unit** list, select a payment method on file for the child account or create a new payment method.
5. Click **Remove**.  
The account is responsible for paying its own bill going forward.
6. Click **Close**.

## Viewing Who Pays for a Bill

You can view who is responsible for paying a bill in one of these ways:

- Click the **Bills** tab for an account.

If it is a parent account, the **Bills** tab displays the parent icon and lists the bills that it is responsible for paying. The bill total is broken down into the amount generated by the parent and the amount generated by all children in the billing hierarchy.

If it is a child account, the **Bills** tab displays the child icon and the account number that is responsible for paying the bill.

#### Child Bill



#### Parent Bill



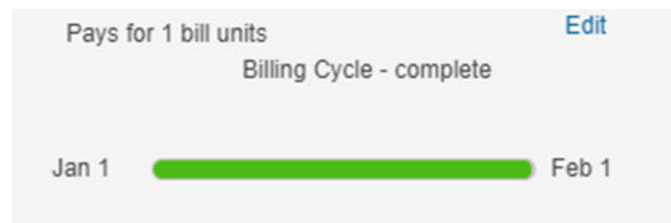
- From the **Actions** menu, select **Hierarchy**, select **Hierarchy**, and then click the **Bill Units** tab.

Billing Care shows a graphical display of the account's position in the billing hierarchy. For parent accounts, it lists all child bills that they are responsible for paying. For child accounts, it lists the paying parent account.

For example, this shows a parent account that is financially responsible for one child bill.



- Look at an account's Billing Care banner, which displays whether the account is responsible for paying any child bills. For example, this shows an account that is financially responsible for one child bill:



If you click the **Edit** link, Billing Care displays the entire billing hierarchy that is associated with the account.

# 13

## Financial Setup

You can set up and modify an account's financial details, such as the payment method and tax settings, by using Oracle Communications Billing Care.

To work with an account's financial setup, perform the following tasks:

- [Working with Payment Methods](#)
- [Adding a Payment Method](#)
- [Editing a Payment Method](#)
- [Deleting a Payment Method](#)
- [Adding Bill Units to an Account](#)
- [Editing a Bill Unit](#)
- [Moving Services between Bill Units](#)
- [Changing a Bill Unit's Invoice Template](#)
- [Assigning a Bill Unit for Payment by Another Account](#)
- [Adding and Changing Basic Tax Information](#)
- [Adding Tax Exemptions](#)

### Working with Payment Methods

Payment methods are assigned to bill units. Only one payment method can be assigned to a bill unit at any particular time. Assigned payment methods are listed before unassigned payment methods, and the last assigned appears first.

### Adding a Payment Method

To add a payment method to an account or bill unit:

1. From the **Actions** menu, select **Financial Setup**, and then **Payment Methods**.  
The Financial Setup dialog box appears.
2. Click **New**, next to **Payment Methods**.  
The New Payment Method section appears. See "[Financial Setup New Payment Method Section](#)".
3. Select a **Payment type**.
4. Do one of the following:
  - For **Credit Card** and **Direct Debit**, enter the card, bank, and account information.
  - For **Invoice**, enter the invoice ID and delivery method.
  - For **SEPA**, enter SEPA-related information such as the International Bank Account Number (IBAN), Bank Identifier Code (BIC), date of signing, creditor's information,

debtor's information, unique mandate reference information, type of payment, and address details.

 **Note:**

For SEPA, you cannot manually enter the creditor's information. Based on the creditor's ID, the system displays the required information.

5. Enter the contact information:

- For **Credit Card** or **Direct Debit** payment types, provide the address details or select **Use name and billing address from primary contact**.
- For **Invoice**, provide the invoice payment method, select the delivery method, email, and address details.

 **Note:**

Provide an email address to which the invoices have to be delivered.

- For **SEPA**, provide the type of payment and address details.
6. (Optional) For **Bill unit assignment**, select one or more bill units to assign the new payment method to.
7. Click **Apply**.

**Related Tasks**

[Making a Payment](#)

## Financial Setup New Payment Method Section

Use the New Payment Method section of Financial Setup to add a new payment method to an account.

Field	Description
<b>Payment type</b>	<p>Select the payment type. The payment type determines the other fields that display.</p> <p>Enter the details according to the selected payment type.</p> <p>For Direct Debit, enter the Bank number, Account number, and select appropriate account type details.</p> <p>For Credit Card, enter the card number, CVV2/CID, and card expiration details.</p> <p>For Invoice, enter the Invoice payment method ID and Delivery method.</p> <p>For SEPA, enter the IBAN, BIC, date of signing, creditor's and debtor's information, unique mandate reference information, type of payment, and address details.</p> <p><b>Note:</b> For SEPA, you cannot manually enter creditor related information. Based on the creditor ID, the creditor's information is displayed by the system.</p> <p><b>Note:</b> SEPA only supports <b>EURO</b> accounts.</p>

Field	Description
<b>Contact Details</b>	Enter the contact information or select <b>Use name and billing address from primary contact</b> . For email delivery method, provide the email address.
<b>Bill unit assignment</b>	Select to assign this payment method to one or more bill units. If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.

## Editing a Payment Method



### Note:

To change credit card numbers, you need to add a new payment method.

To change a payment method:

1. From the **Actions** menu, select **Financial Setup**, and then **Payment Methods**.  
The Financial Setup dialog appears with the existing payment methods.
2. For the payment method that you want to work with, click the edit icon.  
The Edit Payment Method section appears. The contents of the section depend on the payment type. See "[Financial Setup Edit Payment Method Section](#)".
3. (Optional) You can change the following:
  - For credit cards, change the expiration date.
  - For direct debit, change the bank number, account number, and account type.
  - For invoices, change the invoice ID and the contact method.  
For invoice payments that use email for delivery, the email address is required.
  - For SEPA, change the IBAN, BIC, and the Unique Mandate Reference number as required.
4. (Optional) Change the contact information.
5. (Optional) Select **Bill unit assignment**, to assign the payment method to a bill unit.  
If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.
6. Click **Apply**.

## Financial Setup Bill Unit Section

Use the Bill Unit section to find a bill unit.



Field	Description
<b>General area</b>	<p>Describes the account's bill units or the selected bill unit if there several bill units. The information includes:</p> <ul style="list-style-type: none"> <li>• Payment method</li> <li>• Account that pays for the bill unit</li> <li>• Start and end dates for the current billing cycle</li> <li>• Date when the bill unit was last modified</li> <li>• The services included in the bill unit</li> </ul> <p><b>Note:</b> If you are viewing a wholesale parent account, the services of wholesale child accounts are not displayed.</p> <p>Click the edit icon to change.</p>
<b>Summary area</b>	<p>If there are several bill units associated with the account, the unselected bill units are listed in a summary area on the right. The services associated with a bill unit are listed.</p> <p>Click <b>hide</b> to close a list of services.</p>

## Financial Setup Edit Payment Method Section

Use the Edit Payment Method section to change an existing payment method.

Field	Description
<b>Payment Area</b>	<p>The payment type determines the fields that display. Enter the changed values for the payment type.</p> <p>For credit card payments: if you need to change more than the expiration date, you must add a payment method. See "<a href="#">Adding a Payment Method</a>".</p>
<b>Contact Area</b>	<p>Enter the contact information or select <b>Use name and billing address from primary contact</b>.</p> <p>For invoice payments that use email for delivery, the street address information is also required.</p>
<b>Bill unit assignment</b>	<p>Select to assign or unassign the payment method to one or more bill units.</p> <p>If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.</p>

## Deleting a Payment Method

### Note:

You cannot delete a payment method:

- If it is the only payment method for the account.
- If it is assigned to one or more bill units.

To delete a payment method:

1. From the **Actions** menu, select **Financial Setup**, and then **Payment Methods**.  
The Financial Setup dialog appears.
2. On the payment method that you want to delete, click the delete icon.

3. Click **Delete**.

## Adding Bill Units to an Account

A bill unit defines when and how often to generate a bill and invoice as well as the customer's preferred method for paying for the bill. Every account contains one bill unit, but you can add bill units to an account. For example, you might add a bill unit if the customer wants to:

- Receive a separate invoice for each service
- Use a different payment method for each service
- Pay for other accounts' bills in a billing hierarchy
- Have a parent in a billing hierarchy be financially responsible for the bill

For more information, see "[Billing Hierarchies](#)" or "[Adding a Payment Method](#)".

To add a bill unit to an account:

1. On the account page, select **Actions, Financial Setup**, and then **Bill Unit Setup**.

The **Financial Setup** screen appears.

2. Click **New** next to Bill Units.

The **New Bill Unit** screen appears.

3. Enter the Bill Unit name.

4. Select the Payment method, Accounting type, Billing frequency, Billing day of month, and Re-rated invoice options from the lists for the new bill unit.

If the payment method is not available, you can select **No Payment Method**.

5. Click **Apply**.

### **Tip:**

You can move services between bill units. See "[Moving Services between Bill Units](#)" for information on how to move services between bill units.

The new bill unit is created and displays the date when the bill unit was last modified.

## Editing a Bill Unit

### **Note:**

You can change a non-paying bill unit; for example, a child bill unit into a paying bill unit. However, you cannot change a paying bill unit into a non-paying bill unit.

To edit a bill unit:

1. On the account page, select **Actions, Financial Setup**, and then **Bill Unit Setup**.

The **Bill Unit(s)** screen appears. It displays all existing bill units.

2. In the bill unit that you want to modify, click the **Edit** icon:



The **Edit Bill Unit** screen appears. See "[Financial Setup Edit Bill Unit Section](#)" for details.

3. (Optional) Enter a new name or edit the **Bill Unit name**.
4. (Optional) Select or edit a new value for **Payment method or Paying Account**.

If you selected a payment method that is new to the account, perform the following steps:

If the payment method is not available, you can select **No Payment Method** and proceed to step 6.

- a. Do one of the following:

For **Credit Card** and **Direct Debit**, enter the card details, account, and billing information.

For **Invoice**, enter the invoice payment method ID, Email, Address, and Billing details.

For **SEPA**, enter the International Bank Account Number (IBAN), Bank Identifier Code (BIC), Unique Mandate Reference information, Type of Payment, Date of Signing, Mandate Signed Place, Creditor's or Debtor's details such as Creditor's or Debtor's ID, Address, and Billing details.

- b. Enter the contact information:

For **Credit Card** and **Direct Debit**, enter the delivery address, or select **Use name and billing address from primary contact**.

For **Invoice**, select the delivery method, and enter the address (email or postal). For the street address, you can select **Use name and billing address from primary contact**.

 **Note:**

For email delivery of the invoices, the email or postal address is required.

For **SEPA**, enter the Address. You can select **Use name and billing address from primary contact**.

5. (Optional) For **Accounting type**, select a new value.
6. (Optional) To change the **Billing frequency**, select a new value.
7. (Optional) To change the **Billing day of month**, select a new day.
8. (Optional) In the Business Profile list, if the selected business profile contains the Wholesale Billing key and the value of this key is set to **Yes**, the selected account is considered as a wholesale parent. For more information on creating wholesale accounts and bill unit hierarchies, see *Converting Existing Bill Unit Hierarchies to Wholesale Billing in BRM Configuring and Running Billing*.
9. (Optional) To change the **Re-rated invoice option**, select a value.
10. Click **Apply**.

## Financial Setup Edit Bill Unit Section

Use the Edit Bill Unit section to change a bill unit.

Field	Description
<b>Bill Unit name</b>	Enter a new name.
<b>Payment Method Area</b>	Select an existing payment method or select one of the options to create a new method. For a new payment method, enter the account details and contact information. See " <a href="#">Adding a Payment Method</a> ". If the payment method is not available, you can select <b>No Payment Method</b> .
<b>Accounting type</b>	Select either <b>Balance forward</b> or <b>Open Item</b> . You cannot change the accounting type of a child bill unit.
<b>Billing frequency</b>	(Optional) Select a new interval.
<b>Billing day of month</b>	(Optional) Enter a new day of the month.
<b>Currency</b>	Select the currency. For SEPA payment, select the currency type as <b>EUR</b> .

## Moving Services between Bill Units

To move a service or balance group from one bill unit to another:

1. On the account page, select **Actions, Financial Setup** and then **Bill Unit Setup**.  
The **Financial Setup** screen appears.
2. Click **Move services between Bill Units**.  
The **Financial Setup** screen displays the bill units.
3. Select the required bill unit from the list.
4. Select a balance group.
5. Drag and drop the selected balance group to the other bill unit.  
All the services that are part of the balance group are moved at once.
6. Click **Apply**.

## Changing a Bill Unit's Invoice Template

Assign an alternative invoice template for a bill unit that determines which template Billing Care selects when creating a new or re-rated invoice. Templates can be customized in Oracle Analytics Publisher.

To assign an alternative invoice template to a bill unit in an account:

1. Edit an existing account bill unit. See "[Editing a Bill Unit](#)" for more information on how to edit a bill unit.
2. In the **Invoice template** list, select a template for regular invoicing.
3. In the **Re-rated invoice option** list, select a template for re-rated invoices.
4. Click **Apply**.

## Assigning a Bill Unit for Payment by Another Account

You can assign a bill unit for payment by another account when editing or creating a new bill unit. See "[Adding a Paying Parent for a Child's Bill Unit](#)" for more information on assigning an account's bill unit for payment by a separate account.

## Adding and Changing Basic Tax Information

Whether an account is a business account or subject to city taxes can affect taxation.

To add or change basic tax information for an account:

1. On the account page, select **Actions, Financial Setup** and then **Tax Setup**.  
The Tax Setup section of the Financial Setup dialog appears. See "[Financial Setup Tax Setup Section](#)" for details.
2. If the account is a business account, select **This is a business account**.
3. If the account address is inside the incorporated area of a city, select **Inside incorporated area of a city**.
4. (Optional) Enter any notes that are required for the account's taxation setup. Select a **Reason** when entering notes.
5. Click **Apply** or continue with adding exemptions.  
See "[Adding Tax Exemptions](#)".

## Adding Tax Exemptions

To add tax exemptions:



1. From the **Actions** menu, select **Financial Setup**, and then **Tax Setup**.  
The Tax Setup section of the Financial Setup dialog appears. See "[Financial Setup Tax Setup Section](#)" for details.
2. Do one of the following:
  - If this is the first tax exemption, under **No tax exempt information**, click **Add**.
  - If this is not the first tax exemption, click the plus icon to add a new exemption.
3. For each exemption:
  - a. For **Tax type**, select the type.
  - b. For **Certificate number**, enter the number.
  - c. For **Percent exempt**, enter the amount.
  - d. For **From**, select the date the exemption starts.  
You can backdate an exemption.
  - e. For **To**, select the end date, or leave as **never ends**.
4. To add a new exemption, click the plus icon.

 **Tip:**

You can edit an existing exemption. To delete an exemption, click the minus icon.

## Financial Setup Tax Setup Section

Use the Tax Setup section to configure tax information for an account.

Field	Description
<b>This is a business account</b>	Select for business accounts.
<b>Inside incorporated area of a city</b>	Select for customers whose billing address is inside the incorporated area of a city.
<b>Add</b>	Click to add first tax exemption.
<b>Tax type</b>	Select the type of tax exemption.
<b>Certificate number</b>	Enter the certificate number that authorizes the exemption.
<b>Percent exempt</b>	Enter the percentage of the bill that is exempt from taxation.
<b>From</b>	Select the date the exemption starts. The start date can be backdated.
<b>To</b>	Select the date the exemption ends, or select <b>never ends</b> .
	Click the plus icon to add a new exemption.
	Click the minus to delete an exception.

# 14

## Sharing Groups

You use sharing groups in Oracle Communications Billing Care to create and maintain resource sharing groups.

To work with sharing groups, see the following topics:

- [Working with Resource Sharing Groups](#)
- [About Charge Sharing](#)
- [About Discount Sharing](#)
- [About Profile Sharing](#)

### Working with Resource Sharing Groups

A resource sharing group consists of an owner and one or more members who share resources. A resource sharing group can be one of the following types:

- Charge Sharing. See "[About Charge Sharing](#)".
- Discount Sharing. See "[About Discount Sharing](#)".
- Profile Sharing. See "[About Profile Sharing](#)".
- Collections Sharing. See "[About Collections Sharing](#)".

You create resource sharing groups by selecting members and the services that the owner wants to include. For example, the charges and discounts for IP services could be shared. A member account can participate in multiple sharing groups. And, if multiple group owners invite a member to share charges or discounts for the same service, the member can join any or all sharing groups for that service.

### About Charge Sharing

Charge sharing enables a customer to sponsor the charges of other accounts or services in the system. For example, it enables a company to pay for all of its employees' GSM telephony services, or a parent to pay for the child's SMS and email services.

When a member incurs charges sponsored by the owner, the charges are applied to the owner's balance group first. Any charges that remain afterward impact the member's balance group.

Use Charge Sharing in the Sharing Groups menu to add, view, modify, or delete charge sharing groups and to add or delete members from a charge sharing group. For more information, see the following topics:

- [Creating a New Charge Sharing Group](#)
- [Modifying a Charge Sharing Group](#)
- [Deleting a Charge Sharing Group](#)
- [Adding Members to the Charge Sharing Group](#)

- [Selecting Specific Services for Charge Sharing](#)
- [Removing a Member from the Charge Sharing Group](#)
- [Modifying Priorities for Charge Sharing Group](#)
- [Charge Sharing Group Dialog Box](#)

## Creating a New Charge Sharing Group

To create a new charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.  
The **Sharing Groups** page appears.
2. Click **New**, next to **Charge Sharing**.  
The New Charge Sharing Group dialog box appears.
3. In the **Name** field, enter a name for the charge sharing group.
4. From the **Services** list, select the required service.

 **Note:**

Select **Account** for non-services.

A list of charges appears in the **Charges Shared** table. This table displays the name, description, events, and the validity period of the charge.

5. Select the charges for sharing.
6. Click **Apply**.

## Modifying a Charge Sharing Group

To modify a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.  
The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.
2. In the Charge Sharing Ownership dialog box, click on the edit icon for the group that you want to modify.  
The Edit Charge Sharing Group dialog box appears.
3. (Optional) To change the name of the charge sharing group, enter a new name in the **Name** field.
4. (Optional) To add or remove charges from the group, select or deselect the charges in the **Charges Shared** table.
5. Click **Apply**.

## Deleting a Charge Sharing Group

To delete a charge sharing group:



1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.  
The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.
2. In the Charge Sharing Ownership dialog box, click the delete icon for the group that you want to delete.  
A warning message appears.
3. Click **Delete**.

## Adding Members to the Charge Sharing Group

To add members to a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.  
The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.
2. Click **Add Members**.  
The *GroupName: Members* section appears.
3. Click **Add account**.  
The account search dialog box appears.
4. Enter the account search criteria and click **Search**.  
The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.
5. Select an account and click **Add Account**.
6. Click **Close**.  
After you add the account, you can select specific services for charge sharing. See "[Selecting Specific Services for Charge Sharing](#)".

## Selecting Specific Services for Charge Sharing

You can configure charge sharing based on specific services when the group owner wants to limit sharing to a small subset of the services within a type. For example, if a member has work email (smith@internetprovider.com) and home email (john@internetprovider.com). Both are specific services of the email service type. If the group owner wants to share charges only for the work email, you can select only the work email service for the group owner to assume the charges.

The charges for each of the specific services you select are assumed by the group owner.

To select specific services for charge sharing:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.  
The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.
2. In the Charge Sharing Ownership dialog box, click the number of members for the group that you want to edit.  
The *GroupName: Members* section appears.
3. Click the edit icon for the member for which you want to select the services for charge sharing.

The **Specific Services to Charge Share** page appears with a list of services eligible for charge sharing. In this list, the services for which the charges are currently assumed by the group owner are selected by default.

4. Select or deselect the services as required.
5. Click **Apply**.

## Removing a Member from the Charge Sharing Group

To remove a member from the charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Ownership dialog box, click the link showing the number of members.

The *GroupName*: **Members** section appears.

3. Click the delete icon for the member you want to remove from the group.

### **Caution:**

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

## Modifying Priorities for Charge Sharing Group

You can increase or decrease priorities for charge sharing groups. To modify priorities of the charge sharing groups:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

The **Sharing Groups** page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority.

The Modify Priorities dialog box appears with a list of group names and existing priority settings.

3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.
4. Click **Apply**.

## Charge Sharing Group Dialog Box

Use the Charge Sharing dialog box to:

- Create and modify charge sharing groups
- Add or remove members from charge sharing groups

- Select specific services for charge sharing groups

Field	Description
<b>Name</b>	Name the charge sharing group. The name you enter must be unique. You cannot use this name for any other discount or charge sharing group owned by the account.
<b>Services</b>	Select a service.
<b>Charges Shared</b>	This table lists the charges that the group owner will assume for the group members. Each row displays the charge name, description, event type included in the charge, and validity period of the charge.
<b>Add Members</b>	Adds members to a charge sharing group. You can specify the search criteria for the accounts you want to add as members. You can use wildcard, First Name, Last Name, or Company name for the search criteria. You use the search results to select accounts for membership.

## About Discount Sharing

Discount sharing is based on discounts purchased by the owner as part of a product rate plan. Shared discounts impact the member's balance groups by either increasing noncurrency resources or reducing the currency impact of an event.

For discount sharing groups, the noncurrency resources that were offered as part of the discount have been depleted in the owner account; for example, a monthly discount of free minutes that has already been consumed by the owner or other members. In this case, the member still benefits from currency-type shared discounts such as a 10% reduction on bills for email usage or a \$15 discount on overseas calls.

Use Discount Sharing in the Sharing Groups menu to add, modify, or delete discount sharing groups and to add or delete members from a discount sharing group. For more information, see the following topics:

- [Creating a Discount Sharing Group](#)
- [Modifying a Discount Sharing Group](#)
- [Deleting a Discount Sharing Group](#)
- [Adding Members to the Discount Sharing Group](#)
- [Selecting Specific Services for Discount Sharing](#)
- [Removing a Member from Discount Sharing Group](#)
- [Modifying Priorities for Discount Sharing Group](#)
- [Discount Sharing Group Dialog Box](#)

## Creating a Discount Sharing Group

To create a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.  
The **Sharing Groups** page appears.
2. Click **New** next to **Discount Sharing**.

The New Discount Sharing Group dialog box appears.

3. In the **Name** field, enter a name for the discount sharing group.
4. From the **Services** list, select a required service.

 **Note:**

Select **Account** for non-services.

A list of discounts appears in the **Discounts to apply** table. For more information, see "[Discount Sharing Group Dialog Box](#)".

5. Select the discounts for sharing.
6. Click **Apply**.

## Modifying a Discount Sharing Group

 **Note:**

You cannot use Billing Care to modify automated discount sharing groups.

To modify a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the edit icon for the group that you want to modify.

The Edit Discount Sharing Group dialog box appears.

3. (Optional) To change the name of the discount sharing group, in the **Name** field, enter a new name.
4. (Optional) To add or remove discounts from the group, in the **Discounts to Apply** table, select or deselect the discounts.
5. Click **Apply**.

## Deleting a Discount Sharing Group

 **Note:**

You cannot delete automated discount sharing groups.

To delete a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the delete icon for the group that you want to delete.  
A warning message appears.
3. Click **Delete**.

## Adding Members to the Discount Sharing Group



### Note:

You cannot use Billing Care to add members to automated discount sharing groups.

To add members to a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.  
The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.
2. Click **Add Members**.  
The *GroupName:* **Members** section appears.
3. Click **Add account**.  
The account search dialog box appears.
4. Enter the account search criteria and then click **Search**.  
The search results appear. The search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.
5. Select an account and then click **Add Account**.
6. Click **Close**.  
After you add the account, you can select specific services for discount sharing. See "[Selecting Specific Services for Discount Sharing](#)".

## Selecting Specific Services for Discount Sharing

You can configure discount sharing based on specific services when the group owner wants to limit sharing to a small subset of the services within a type.

To select specific services for discount sharing:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.  
The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.
2. In the Discount Sharing Ownership dialog box, click the number of members for the group that you want to edit.  
The *GroupName:* **Members** section appears.
3. Click the edit icon for the member for which you want to select the services for discount sharing.

The Specific Services to Discount Share dialog box appears with a list of services eligible for discount sharing. In that list, the services for which the discounts are currently assumed by the group owner are selected by default.

4. Select or deselect the services as required.
5. Click **Apply**.

## Removing a Member from Discount Sharing Group



### Note:

You cannot remove members from automated discount sharing groups.

To remove a member from the discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the link showing the number of members.

The *GroupName*: **Members** section appears.

3. Click the delete icon for the member you want to remove from the group.



### Caution:

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

## Modifying Priorities for Discount Sharing Group

You can increase or decrease priorities for discount sharing groups. To modify priorities of the discount sharing groups:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

The **Sharing Groups** page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority.

The Modify Priorities dialog box appears with a list of group names and existing priority settings.

3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.
4. Click **Apply**.

## Discount Sharing Group Dialog Box

Use the Discount Sharing dialog box to:

- Create and modify discount sharing groups
- Add or remove members from discount sharing groups
- Select specific services for discount sharing groups

Field	Description
<b>Name</b>	Name the discount sharing group. The name you enter must be unique. You cannot use this name for any other discount or charge sharing group owned by the account.
<b>Services</b>	Select a service.
<b>Discounts to Apply</b>	This table lists the discounts that the group owner will share with the group members. Each row displays the discount name, description, quantity, event type included in the discount, and validity period of the discount.
<b>Add Members</b>	Adds members to a discount sharing group. You can specify the search criteria for the accounts you want to add as members. You can use wildcard, First Name, Last Name, or Company name for the search criteria. You use the search results to select accounts for membership.

## About Profile Sharing

A profile sharing group enables an account or an account's service to share a profile with other accounts or services. A profile stores ERAs or other types of information about an account.

The group owner can be an account or a service. If an account is the owner, profiles from all the services owned by the account are available for sharing. If a specific service is the owner, only profiles of that service are available for sharing. For example, a friends and family list can be set up for a GSM service owned by one account and then shared so that a GSM service belonging to other accounts can use the same list.

### Note:

Only service-level profiles can be shared. Account-level profiles cannot be shared, even if the profile sharing group is owned by an account.

Use Profile Sharing in the Sharing Groups menu to add, modify, or delete profile sharing groups and to add or delete members from a profile sharing group. For more information, see the following topics:

- [Creating a Profile Sharing Group](#)
- [Modifying a Profile Sharing Group](#)
- [Deleting a Profile Sharing Group](#)
- [Adding Members to the Profile Sharing Group](#)

- [Selecting Specific Services for Profile Sharing](#)
- [Removing a member from a Profile Sharing Group](#)
- [Profile Sharing Dialog Box](#)

## Creating a Profile Sharing Group

To create a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears.
2. Click **New**, next to **Profile Sharing**.  
The New Profile Sharing Group dialog box appears.
3. In the **Name** field, enter a name for the profile sharing group.
4. From the **Group Owners** list, select the group owner.  
A list of profiles that are available for sharing, appear in the **Profile Shared** table. This table displays the type, label and the account/service of the accounts.
5. Select the accounts for profile sharing.
6. Click **Apply**.

## Modifying a Profile Sharing Group

To modify a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.
2. In the Profile Sharing Ownership dialog box, click on the edit icon for the group that you want to modify.  
The Edit Profile Sharing Group dialog box appears.
3. (Optional) To change the name of the profile sharing group, in the **Name** field, enter a new name for the group.
4. To add or remove profiles shared from the group, in the **Profiles Shared** table, select or deselect the profiles in the group.
5. Click **Apply**.

## Deleting a Profile Sharing Group

To delete a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.
2. In the Profile Sharing Ownership dialog box, click the delete icon for the group that you want to delete.  
A warning message appears.
3. Click **Delete**.



## Adding Members to the Profile Sharing Group

To add members to a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.
2. Click **Add Members**.  
The *GroupName: **Members*** section appears.
3. Click **Add account** if there are one or more members in the group.  
The account search dialog box appears by default, if the group is empty.
4. Enter the account search criteria and click **Search**.  
The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.
5. Select an account and click **Add Account**.
6. Click **Close**.

## Selecting Specific Services for Profile Sharing

You can configure profile sharing based on specific services when the group owner wants to limit sharing to a small subset of the profiles within a type.

To select specific profiles for discount sharing:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.
2. In the Profile Sharing Ownership dialog box, click the number of members for the group that you want to edit.  
The *GroupName: **Members*** section appears.
3. Click the edit icon for the member for which you want to select the services for profile sharing.  
The Specific Services to Profile Share dialog box appears with a list of services eligible for profile sharing. In that list, the services for which the profiles are currently assumed by the group owner are selected by default.
4. Select or deselect the services as required.
5. Click **Apply**.

## Removing a member from a Profile Sharing Group

To remove a member from a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.  
The **Sharing Groups** page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. In the Profile Sharing Ownership dialog box, click the link showing the number of members.  
The *GroupName: **Members*** section appears.
3. Click the delete icon for the member you want to remove from the group.

 **Caution:**

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

## Profile Sharing Dialog Box

Use the New Profile Sharing dialog box to:

- Create and modify profile sharing groups
- Add or remove members from profile sharing groups

Field	Description
<b>Name</b>	Name the profile sharing group. The name you enter must be unique. You cannot use this name for any other profile sharing group owned by the account.
<b>Group owner</b>	Select a group owner.

# 15

## Collections

You can manage your customers' bill units that are in collections by using Oracle Communications Billing Care.

To work with collections, see the following topics:

- [About Collections](#)
- [Finding an Account in Collections](#)
- [Viewing a Bill Unit in Collections](#)
- [Removing a Bill Unit from Collections](#)
- [Adding a Collections Action to a Bill Unit](#)
- [Changing the Status or Due Date of a Collections Action](#)
- [Viewing Actions History for a Bill Unit in Collections](#)
- [Replacing a Bill Unit's Collections Scenario](#)
- [Making a Payment for a Bill Unit in Collections](#)
- [Assigning a Collections Agent](#)
- [Working with Exempted Bill Units](#)
- [Working with Promise-to-Pay Agreements](#)
- [About Collections Sharing](#)

### About Collections

*Collections*, or debt management, is a proactive process used by businesses to collect overdue payments from their customers. Collections includes identifying accounts that have overdue balances, determining whether those accounts meet predefined criteria, and then taking collections actions.

When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, see "[About Collections Sharing](#)".

### Finding an Account in Collections

To find an account in collections:

1. On the landing page, click **Collections**.

 **Note:**

The **Collections** button appears on the landing page only if you have installed Collections Manager. For information, see "Understanding Collections Manager" in *BRM Collections Manager*.

The **Collections Search** page appears with the details about all accounts and bill units in collections.

2. In the filter section on the left, select a field to filter the search. See "[Filtering Collections Search Results](#)".

If there are many results, you can refine the search by adding more filters or sorting the search results. See "[Sorting Collections Search Results](#)".

3. From the search results list, select an account.

The account's collections details appear. See "[Viewing a Bill Unit in Collections](#)" for more information.

 **Tip:**

To return to the landing page, click the **Close** link.

## Filtering Collections Search Results

Narrow your collections search results by using the filters provided under **Bill Unit**, **Collections**, and **Account**. You can modify the search criteria in a filter by clicking **Update**. You can also add new filters to narrow the search by clicking the **Add Filter** link.

 **Tip:**

Click the **Reset** link to return to the default filter page.

To filter your search based on billing details, use these fields under **Bill Unit**:

Fields	Description
<b>Bill Unit Name</b>	Filter the results using the name of the bill unit.
<b>Bill Unit Status</b>	Filter the results using the status of the bill unit.
<b>Billing Day</b>	Filter the results using the billing day of the month (DOM).

To filter your search based on collections details, use these fields under **Collections**:

Fields	Description
<b>Assigned</b>	Filter the results using the CSR assigned. Click <b>Assigned to me</b> to see bill units assigned to you.
<b>Amount Due</b>	Filter the results using the amount due to be collected.

Fields	Description
<b>Days Overdue</b>	Filter the results using the days overdue.
<b>Scenario</b>	Filter the results using the scenario information.
<b>Profile</b>	Filter the results using the collections profile information.

To filter your search based on account details, use these fields under **Account**:

Fields	Description
<b>Account Number</b>	Filter the results using the account number for the bill unit.
<b>Name</b>	Filter the results using the customer name.
<b>Company</b>	Filter the results using the company name.
<b>Schema</b>	Filter the results using the schema number. By default, the primary schema is selected.

## Sorting Collections Search Results

By default, the search results are sorted in ascending order of days overdue. You can change how the results are sorted to one of the following:

- Descending order of days overdue
- Ascending order of collections amount due
- Descending order of collections amount due

Click **Show More** to see the next set of records.

## Viewing a Bill Unit in Collections

You can view the following information about a bill unit that is in collections:

- Collections details, such as when the bill unit entered collections, the past due amount, and the date of the last collections payment.
- The collections agent assigned to the bill unit.
- An ordered list of collections actions that are scheduled for the bill unit, along with their current status.

You can click a collections action to view more details.

- The collections agent notes associated with each collections operation.

To view details about a bill unit that is in collections:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is in collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.



**Tip:**

Click the **Search Results** link to return to the **Collections Search Results** page.

## Collections Details Page

Use the Collections Details page to view information about all bill units that an account has in collections. The top of the page shows the following:

- *Account Name*: Displays the name of the account. Click this link to open the account in a new tab.
- *Account Number*: Displays the account number. Click this link to open the account in a new tab.

The Collections Details page also includes these sections:

- [Bill Unit Section](#)
- [Collections Scenario Table](#)
- [Notes Section](#)



### Bill Unit Section

Use the Bill Unit section to view details about the selected bill unit.

Fields	Description
<b>Past due</b>	Displays the total collections amount that is past due.
<b>Overdue for <i>N</i> days</b>	Displays the number of days the bill is past due.
<b>Entry date</b>	Displays the date that the bill unit entered into collections.
<b>In collections <i>N</i> time</b>	Displays the number of times the bill unit has been in collections.
<b>Minimum payment</b>	Displays the minimum amount that the customer must pay to exit collections.
<b>Promise to pay status</b>	<p>Displays the current status of the customer's promise-to-pay agreement, if applicable:</p> <ul style="list-style-type: none"> <li>• <b>Pending</b>: The bill unit has entered into a promise-to-pay agreement.</li> <li>• <b>Canceled</b>: The customer has canceled the promise-to-pay agreement.</li> <li>• <b>Completed</b>: The customer has paid off the full amount owed in the promise-to-pay agreement.</li> <li>• <b>Kept</b>: All promise-to-pay installments to date have been paid by the customer. The customer still has installment payments scheduled for the future.</li> <li>• <b>Broken</b>: The customer missed an installment payment, breaking the promise-to-pay agreement.</li> </ul> <p><b>Note:</b> This field is displayed only if the bill unit has entered into a promise-to-pay agreement.</p>
<b>Assigned to</b>	<p>Displays the agent to whom the collections action is assigned, or displays <b>Unassigned</b> if the bill unit is not assigned to an agent. You can use the drop-down list to assign an agent.</p>

### Collections Scenario Table

The Collections Scenario table displays the order of collections actions that can be performed against the bill unit, along with their schedule and current status. You can also add or edit a collections action:

- To add a collections action, click the  icon. See "[Adding a Collections Action to a Bill Unit](#)" for more information.
- To edit an existing collections action, click the  icon. See "[Changing the Status or Due Date of a Collections Action](#)" for more information.

The Collection Scenario table includes the following columns:

Column	Description
<b>Action</b>	Displays the name of a collections action.
<b>Scheduled</b>	Displays the date when the collection action is due.
<b>Completed</b>	Displays the collections action's current status or the date when the action was completed.


### Notes Section

The Notes section displays consolidated notes for each bill unit. It includes all comments that have been added for various collections operations on that bill unit.

You can also enter notes for the bill unit, if required.

## Removing a Bill Unit from Collections


To remove a bill unit from collections:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that you want to remove from collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Select the bill unit's  menu and then select **Exit Collections**.  
The Exit Collections dialog box appears.
5. (Optional) Enter a note.
6. Click **Exit**.

## Adding a Collections Action to a Bill Unit

To add a collections action to a bill unit in collections:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.

2. Select the bill unit that is in collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Click the  icon that appears above the Collections Scenario table.  
The Add Action dialog box appears. See "[Add Action Dialog Box](#)" for details.
5. From the **Action** list, select the collections action to add.
6. If you selected **Collect Payment**, do the following:
  - In the **Amount** field, enter the payment amount to collect.
  - In the **Payment Method** list, select a payment method.
7. In the **Scheduled** field, select or enter a due date for the collections action.
8. From the **Follow on actions** list, select one of the following:
  - **No schedule change** to keep the due date of all remaining collections actions.
  - **Days to slip schedule** to move out the due date of all remaining collections actions by the specified number of days.
  - **Cancel all** to cancel all remaining collections actions.
9. From the reasons list, select a reason.
10. (Optional) Enter a note.
11. Click **Save**.

## Add Action Dialog Box

Use the Add Action dialog box to add a collections action to a bill unit.

Field	Description
<b>Action</b>	Select the collections action to add.
<b>Amount</b>	Enter the payment amount to collect.
<b>Payment Method</b>	Select a payment method.
<b>Scheduled</b>	Select or enter the date for the collections action.
<b>Follow on actions</b>	Select how to handle the scheduling of the remaining collections actions.
<b>Reason</b>	Select a reason for the action.
<b>Notes</b>	(Optional) Enter the notes for future reference.

## Changing the Status or Due Date of a Collections Action

You can change the scheduled date or the status of a bill unit's collections action.

To edit an existing collections action for a bill unit:


1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is in collections.



The account bar at the top of the page displays the **In Collections** tile.

3. From the **In Collections** tile, click the **View in Collections** link.

The **Collections Details** page appears. See "[Collections Details Page](#)" for details.

4. Click the  icon that appears above the Collections Scenario table.

The Edit Action dialog box appears. See "[Edit Action Dialog Box](#)" for details.

 **Note:**

You cannot edit a promise-to-pay collections action.

5. From the **Status** list, select a new status.
6. If you selected a **Pending** status, do the following:
  - a. Select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions.
  - b. In the **Change the schedule to** field, enter a date or select a date from the calendar.
  - c. From the **Follow on actions** list, select an action.
7. If you selected a **Canceled** status, select one of the following options:
  - **Only this task** (and select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions).
  - **All following tasks** to cancel all remaining collections actions.
8. From the reasons list, select a reason.
9. (Optional) Enter a note.
10. Click **Save**.

## Edit Action Dialog Box

Use the Edit Action dialog box to change the scheduled date or status for a collections action.

Field	Description
<b>Action</b>	Displays the name of the collections action.
<b>Status</b>	Select a new status, if applicable.
<b>Change schedule to</b>	Select or enter a new date. For a <b>Pending</b> status, also select one of the following: <ul style="list-style-type: none"> <li>• <b>Do not reschedule outstanding actions</b>: Does not reschedule any outstanding collections actions.</li> <li>• <b>Change the schedule to</b>: Specifies a new due date for the collection actions.</li> </ul>
<b>Follow on actions</b>	Select how to schedule any follow-on collections actions: <ul style="list-style-type: none"> <li>• <b>No schedule change</b>: Does not reschedule any remaining collections actions.</li> <li>• <b>Days to slip schedule</b>: Specifies to move out all remaining collections actions by the specified number of days.</li> <li>• <b>Cancel all</b>: Cancels all remaining collections actions.</li> </ul>

Field	Description
Reason	Select a reason for the change.
Notes	(Optional) Enter notes for future reference.

## Viewing Actions History for a Bill Unit in Collections

The actions history for a bill unit in collections displays all the actions assigned to the bill unit.


To view the action history for a bill unit in collections:

1. Find the bill unit, see "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit.
3. In the **Actions** table, click an action.

The Actions History dialog box appears with the details of the past actions.

## Replacing a Bill Unit's Collections Scenario

To replace a bill unit's collection scenario:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is in collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Select the bill unit's  icon and then select **Replace Scenario**.  
The Replace Scenario dialog box appears. See "[Replace Scenario Dialog Box](#)" for details.
5. Under **Replace with**, do one of the following:
  - To specify a new collections scenario to assign to the bill unit, click **New Scenario** and then select the new collections scenario from the list that appears.
  - To automatically assign a collections scenario based on the amount owed, the number of days the bill unit has been in collections, and any custom criteria, click **Auto Assigned by collections criteria**.
6. From the **Scheduled** list, select when the bill unit starts using the new collections scenario:
  - To start the new collections scenario on the bill unit's next payment due date, select **Bill due date**.
  - To start the new scenario on a specific date, select **On** and then enter or select a date from the calendar.

 **Note:**

The date specified must occur on or after the next bill due date.

7. If you want the new scenario's entry days to be considered for scheduling the collections actions, select **Collections entry**.
8. (Optional) Enter a note.
9. Click **Save**.


## Replace Scenario Dialog Box

Use the Replace Scenario dialog box to replace a bill unit's collections scenario.

Field	Description
<b>Scenario</b>	Displays the bill unit's current collections scenario.
<b>Replace with</b>	Select a new scenario or automatically assign a collections scenario based on the amount owed.
<b>Scheduled</b>	Select when the bill unit starts using the new collections scenario: <ul style="list-style-type: none"> <li>• <b>Bill due date:</b> The new collections scenario starts on the bill unit's next payment due date.</li> <li>• <b>On:</b> The new collections scenario starts on the date you enter or select in the calendar.</li> </ul>
<b>Collections entry</b>	Select this option to consider the new scenario's entry days for scheduling its collections actions.
<b>Notes</b>	(Optional) Enter a note if required.

## Making a Payment for a Bill Unit in Collections

To make a payment for a bill unit under collections:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is making the payment.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Select the bill unit's  menu and then select **Make Payment**.  
The Make a Payment dialog box appears. See "[Make a Payment Dialog Box](#)" for details.
5. Enter the payment amount.
6. (Optional) To use a payment method other than the one displayed, select **Use a different payment method** and then select a method from the **Payment Method** list.
  - a. Enter the account information for the new payment method.
  - b. Select **Use name and billing address from primary contact**, or enter the name and address for the card holder.
  - c. (Optional) Select **Save to Payment Methods on file** for credit card and debit payment methods.

If you are making a payment for an account, the payment method applies to the account. If you are making a payment for a bill unit, the payment method applies to the bill unit.

7. For **Select a reason**, select the reason that matches the situation.
8. (Optional) Enter notes.
9. Do one of the following:
  - Click **Continue to manually allocate** to make the payment and to allocate the payment.
  - Click **Save** to make the payment without allocating.

## Assigning a Collections Agent

By default, bill units in collections are not assigned to any collections agent. When you assign a bill unit to a collections agent, the agent becomes responsible for completing all of the manual tasks for that bill unit.



### Note:

You must have permission to assign collections agents to collections accounts.

To assign a collections agent:

1. Find and open the account. See "[Finding an Account in Collections](#)" for more information.
2. From the list of search results, select an account.

The collection details for the account appears.
3. Select the bill unit to assign the collections agent.
4. From the **Assigned to** list, select an agent.

## Working with Exempted Bill Units


You exempt a bill unit from collections to prevent it from ever entering collections. Exemption also removes the bill unit from any existing collections scenarios and cancels any pending collections actions against it.

To work with exempted bill units, see the following topics:

- [Exempting a Bill Unit from Collections](#)
- [Viewing Bill Units Exempted from Collections](#)
- [Removing a Bill Unit from Exemption](#)

## Exempting a Bill Unit from Collections

To exempt a bill unit from collections:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit's  menu and then select **Exempt Bill Unit**.

The Exempt Bill Units dialog box appears. See "[Exempt Bill Units Dialog Box](#)" for details.
3. Select a reason for the exemption from the list.

4. (Optional) Enter a note.
5. Click **Save**.

## Exempt Bill Units Dialog Box

Use the Exempt Bill Units dialog box to prevent a bill unit from ever entering collections.

Field	Description
<b>Reason</b>	Select a reason for the exemption.
<b>Exemption Notes</b>	(Optional) Enter notes for future reference.

## Viewing Bill Units Exempted from Collections

To view bill units exempted from collections:

1. On the landing page, click **Collections**.  
The **Collections Search** page appears with details about all accounts and bill units in collections.
2. Click **Exempted Bill Units** at the top left.  
The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections. See "[Exempted Bill Units Dialog Box](#)" for details.
3. Click **Close**.

## Removing a Bill Unit from Exemption

To remove a bill unit from exemption:

1. On the landing page, click **Collections**.  
The **Collections Search** page appears containing details of all the bill units in collections.
2. Click **Exempted Bill Units** at the top left.  
The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections. See "[Exempted Bill Units Dialog Box](#)" for details.
3. (Optional) Enter any comments in the notes section.
4. Select an exempted bill unit and then click **Remove Exemption**.
5. Click **Close**.

## Exempted Bill Units Dialog Box

Use the Exempted Bill Units dialog box to view the bill units exempted from collections. Select a bill unit to view its details or to remove it from exemption.

Field	Description
<b>Remove exemption</b>	Click to remove the bill unit from collections exemption.
<b>Notes</b>	Displays the bill unit details.
<b>Comment</b>	Click and enter a comment.

## Working with Promise-to-Pay Agreements

When a bill unit is in collections, you can offer customers the option of a promise-to-pay agreement. This agreement defers all collections actions for a bill unit, allowing the customer to pay the due amount at a date beyond the original payment due date. Customers can choose to pay off the agreement amount using one or more installments.

The installments in a promise-to-pay agreement can be one of the following:

- **System-configured:** Collections Manager calculates the installment schedule and installment amount for you.
- **Manually configured:** Allows you to create installments with varying amounts owed and varying intervals between due dates.



### Note:


After a promise-to-payment agreement has been created, it cannot be modified.

To work with promise-to-pay agreements, see the following topics:

- [Configuring System-Managed Promise-to-Pay Agreements](#)
- [Manually Configuring a Promise-to-Pay Agreement](#)
- [Canceling a Promise-to-Pay Agreement](#)
- [Promise to Pay Installment Details Dialog Box](#)

## Configuring System-Managed Promise-to-Pay Agreements

To create a promise-to-pay agreement with system-configured details:

1. Find and open the customer's account in collections. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is in collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Select the bill unit's  icon and then select **Promise to Pay**.  
The Promise to Pay Installment Details dialog box appears. See "[Promise to Pay Installment Details Dialog Box](#)" for details.
5. In the **Amount promised** field, enter the total amount that the customer agrees to pay.  
By default, Billing Care displays the full overdue amount. It also lists the minimum amount that the customer must pay to exit collections.
6. From the **Payment method** list, select a payment method.
7. In the **First installment due** field, enter or select the due date for the first installment payment.
8. Disable the **Manual installment configuration** option.

 **Note:**

This option is displayed only if your system contains promise-to-pay specifications.

9. From the **Payment options** field, specify how to calculate the number of installment payments and the amount owed for each installment:
  - To specify the number of installment payments, select **Make a specific number of payments** and then enter the number of payments.  
To calculate the amount of each installment payment, the amount promised is divided by the number of installment payments.
  - To specify the amount owed for each installment, select **Pay a specific amount each time** and then enter the installment amount.  
To calculate the number of installment payments, the amount promised is divided by the installment amount.
10. From the **Time options** field, specify how to calculate the installment payment schedule:
  - To specify the interval between payments, select **Specify number of days between payments** and then enter the number of days between each payment.  
To calculate the end date of the promise-to-pay agreement, the number of installment payments is multiplied by the interval amount.
  - To specify the date when the full amount will be paid off, select **Complete payments by a specified date** and then select a date.  
To calculate the installment schedule, the total number of days between the first installment date and end date is divided by the number of installment payments.
11. Select a reason for entering a promise-to-pay agreement and optionally enter a note.
12. Click **Save**.



## Manually Configuring a Promise-to-Pay Agreement

 **Note:**




You can create manually configured promise-to-pay agreements only if your system contains promise-to-pay specifications. See "Creating Promise-to-Pay Specifications" in *BRM Collections Manager*.

To create a promise-to-pay agreement with a manually configured installment schedule and payment amounts:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is in collections.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.

4. Select the bill unit's  icon and then select **Promise to Pay**.  
The Promise to Pay Installment Details dialog box appears. See "[Promise to Pay Installment Details Dialog Box](#)" for details.
5. In the **Amount promised** field, enter the total amount that the customer agrees to pay. By default, it is set to the total amount past due.  
Underneath this field, Billing Care displays the minimum amount that the customer must pay to exit collections.
6. From the **Payment method** list, select a payment method.
7. In the **First installment due** field, enter or select the due date for the first installment payment.
8. Enable the **Manual installment configuration** option.  
The Promise to pay specification section appears. See "[Enabled Manual Installment Configuration Option](#)" for details.
9. From the **Select specification** list, select the promise-to-pay specification to apply.  
On the bottom right, Billing Care displays the terms associated with the specification.
10. Select one of the following:
  - **Amount** to specify an absolute amount to pay for each installment.
  - **Percentage** to specify a percentage of the total promised amount to pay for each installment.
11. In the **Amount** or **Percentage** field, enter what the customer agrees to pay for the first installment.  
The **Interval** field is set to **0**, because the date of the first installment has already been set.
12. If the customer wants to pay in multiple installments, click the  for each additional installment.  
Billing Care displays an **Amount/Percentage** and **Interval** field for each installment.
13. In each subsequent installment row, enter the amount or percentage the customer agrees to pay as well as the interval, in days, from the previous installment when the payment is due.  
For example, this creates two installments. On the first installment date, the customer owes 45% of the total amount promised. Five days later, the customer owes 55% of the total amount promised.

Amount     Percentage

Percentage 45	Interval 0	
Percentage 55	Interval 5	 

14. Ensure that the sum of all amount fields equals the amount promised, or that the sum of all percentage fields equal 100% of the amount promised.




Billing Care displays an error message if the total installment amount does not equal the promised amount.

15. Select a reason for entering a promise-to-pay agreement and optionally enter a note.
16. Click **Save**.

## Canceling a Promise-to-Pay Agreement

To cancel a customer's promise-to-pay agreement:

1. Find and open the customer's account. See "[Finding an Account in Collections](#)" for more information.
2. Select the bill unit that is canceling its promise-to-pay agreement.  
The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.  
The **Collections Details** page appears. See "[Collections Details Page](#)" for details.
4. Select the bill unit's  menu and then select **Cancel Promise To Pay**.

### Note:

You can cancel a promise-to-pay agreement only if there is an active promise-to-pay agreement for the selected bill unit.

5. Click **Yes**.

## Promise to Pay Installment Details Dialog Box

Use the Promise to Pay Installment Details dialog box to enter a bill unit into a promise-to-pay agreement.

**Table 15-1 General Information**

Field	Description
<b>Past due</b>	Displays the total amount due that is in collections.
<b>Amount promised</b>	Enter the total amount that the customer agrees to pay. The amount must be greater than the minimum payment amount. By default, this field displays the total due in collections and the minimum payment amount for exiting collections.
<b>Payment method</b>	Select a payment method, such as credit card.
<b>First installment due</b>	Enter or select the due date for the first installment. By default, it displays the existing due date.
<b>Manual installment configuration</b>	Do one of the following: <ul style="list-style-type: none"> <li>• Enable this option to manually configure the promise-to-pay details. See "<a href="#">Enabled Manual Installment Configuration Option</a>".</li> <li>• Disable this option to create a system-configured promise-to-pay agreement. See "<a href="#">Disabled Manual Installment Configuration Option</a>".</li> </ul> <p><b>Note:</b> This option is displayed only if your system contains promise-to-pay specifications.</p>

### Enabled Manual Installment Configuration Option

When you enable the **Manual Installment Configuration** option, the fields in the following table appear. Use these fields to create installments with varying amounts due and varying intervals between due dates.

Field	Description
<b>Select specification</b>	Select the promise-to-pay specification to apply.
<b>Amount</b>	Select <b>Amount</b> to set this installment to an absolute value, such \$50.
<b>Percentage</b>	Select <b>Percentage</b> to set this installment to a percentage of the total amount due, such as 25%.
<b>Interval</b>	For each installment, select or enter the interval, in days, from the previous installment.
<b>Specification details</b>	Displays the limits in the specified promise-to-pay specification.

### Disabled Manual Installment Configuration Option

When you disable the **Manual Installment Configuration** option, the fields in the following table appear.

Field	Description
<b>Payment options</b>	Select one of these payment options: <ul style="list-style-type: none"> <li>• <b>Make a specific number of payments:</b> Enter the total number of installments that will be made.</li> <li>• <b>Pay a specific amount each time:</b> Enter the amount to be paid for each installment.</li> </ul>
<b>Time options</b>	Select the time milestone for installments: <ul style="list-style-type: none"> <li>• <b>Specific number of days between payments:</b> To add the number of days between each installment, select or enter the number of days between payments.</li> <li>• <b>Complete payments by a specific date:</b> To add the date by which all payments will be made, select or enter a date.</li> </ul>
<b>Promise To Pay</b>	Select a reason why the bill unit entered a promise-to-pay agreement and optionally add notes.

## About Collections Sharing

When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, which consists of a group owner and one or more members.

A bill unit can belong to only one collections sharing group, and the group owner cannot be a member of the same collections sharing group. You can change a collections sharing group's owner and add or remove members' bill units at any time.

Use Collections Sharing in the Sharing Groups menu to add, view, modify, or delete collections sharing groups and to add or delete members from a collections sharing group. For more information, see the following topics:

- [Creating a Collections Sharing Group](#)
- [Viewing a Collections Sharing Group](#)

- [Modifying a Collections Sharing Group](#)
- [Deleting a Collections Sharing Group](#)
- [Adding Members to the Collections Sharing Group](#)
- [Removing a Member from the Collections Sharing Group](#)
- [Modifying Priorities for Collections Sharing Group](#)

## Creating a Collections Sharing Group

To create a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears.
2. Click **New**, next to **Collections Sharing**.  
The New Collections Sharing Group dialog box appears.
3. In the **Name** field, enter a name for the collections sharing group.
4. Select a **Group Owner** from the list.
5. Add members to the collections group, see "[Adding Members to the Collections Sharing Group](#)" for more information.
6. Click **Apply**.

## Viewing a Collections Sharing Group

To view a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.
2. Select **Collections Group**.  
The Collections Sharing Ownership and Collections Sharing Membership dialog box appears.  
The Collections Sharing Ownership dialog box displays all the collections groups owned by the account.  
The Collections Sharing Membership dialog box displays the collections groups in which the account has been associated as a member.
3. Click **Close**.

## Modifying a Collections Sharing Group

To modify a collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.
2. Click on the edit icon for the collections group that you want to modify.  
The Edit Collections Sharing Group dialog box appears.
3. (Optional) To change the name of the collection sharing group, enter a new name in the **Name** field.

4. (Optional) To add or remove collections from the group, select or deselect the collections in the **Collections Shared** table.
5. Click **Apply**.

## Deleting a Collections Sharing Group

To delete a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.
2. In the Collections Sharing Ownership dialog box, click the delete icon for the group that you want to delete.  
A warning message appears.
3. Click **Delete**.

## Adding Members to the Collections Sharing Group

To add members to the collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.
2. Click **Add members**.  
The *GroupName*: Members section appears.
3. Click **Add account**.  
The account search dialog box appears.
4. Enter the account search criteria and click **Search**.  
The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.
5. Select an account and click **Add Account**.
6. Click **Close**.

## Removing a Member from the Collections Sharing Group

To remove a member from the collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.
2. In the Collections Sharing Ownership dialog box, click the link showing the number of members.  
The *GroupName*: **Members** section appears.
3. Click the delete icon for the member you want to remove from the group.

**▲ Caution:**

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

## Modifying Priorities for Collections Sharing Group

You can increase or decrease priorities for collections sharing groups.

To modify priorities of the collections sharing groups:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.  
The **Sharing Groups** page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.
2. In the Collections Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority.  
The Modify Priorities dialog box appears with a list of group names and existing priority settings.
3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.
4. Click **Apply**.

## Collections Sharing Group Dialog Box

Use the Collections Sharing Group dialog box to:

- Create and modify collections sharing groups
- Add or remove members from collections sharing groups

Field	Description
<b>Name</b>	Name the collections sharing group. The name you enter must be unique. You cannot use this name for any other sharing group owned by the account.
<b>Group Owner</b>	Displays the group owner of the collections sharing group.
<b>Add Members</b>	Adds members to a collections sharing group. You can specify the search criteria for the accounts you want to add as members. You can use wildcard, First Name, Last Name, or Company name for the search criteria. You use the search results to select accounts for membership.

# 16

## Deposits

You can set up and collect customer deposits in Oracle Communications Billing Care for devices, services, packages, or accounts. To use this feature, you create deposit specification profiles and deposit specifications and use them to create deposits for individual customers.

To work with deposits, see the following topics:

- [Working with Deposit Configurations](#)
- [Working with Deposits](#)

### Working with Deposit Configurations

Deposit configurations determine the rules used to create individual deposits for customers. A configuration includes:

- **Deposit specification profile:** Contains the business rules for associated deposit specifications and deposits. It defines the deposit validity period and release type, and rules governing whether deposits can be refunded, transferred, exempted, overridden, or accrue interest.
- **Deposit specification:** Defines the behavior of associated deposits. It specifies the permitted type (account, device, package, or service), charge offer, validity period, and the billing preference for deposits, and includes an associated deposit specification profile.

Deposits require charge offers that have a specific deposit event mapped to the charge. Include such a charge offer in the package, bundle, or device that customers purchase.

Deposit specification profiles and deposit specifications can have these status types:

- **Draft** (deposit specifications only)
- **Active**
- **Expired**



#### Note:

Expired status means that the validity period has expired.

To work with deposit configurations, see the following topics:

- [Creating a Deposit Specification Profile](#)
- [Creating a Deposit Specification](#)
- [Finding Deposit Specification Profiles or Deposit Specifications](#)
- [Editing a Deposit Specification Profile or Deposit Specification](#)

## Creating a Deposit Specification Profile

To create a deposit specification profile:

1. On the Billing Care landing page, click **Deposit Configuration**.  
A page listing existing deposit specifications appears.
2. From the **View** list at the top of the page, select **Deposit Specification Profiles**.  
The page now lists existing deposit specification profile names.
3. Click **Create**.  
The **Create Deposit Specification Profile** page appears.
4. Select one of the following options:
  - **Copy Existing:** Select to use data from an existing profile as a starting point for the new profile. If you select this option, click **Search** and select a profile.
  - **Create New:** Select to start with no data defined.
5. Enter a unique name and a description.
6. Enter the following:

Field	Description
<b>End Date</b>	Specify the end date of the profile's validity period. <b>Note:</b> <ul style="list-style-type: none"> <li>• If you don't specify an end date, the deposit specification profile never expires.</li> <li>• If the end date is less than or equal to the current date, the deposit specification profile is considered to be expired.</li> </ul>
<b>Deposit Validity Value</b>	Enter a number and select <b>Days, Weeks, Months, or Years</b> from the <b>Unit</b> list to specify how long a deposit associated with this specification profile is valid. <b>Note:</b> After the validity period ends, the deposit can be released as a prepayment or refund.
<b>Deposit Release Type</b>	Select one of the following as the default release type for this profile: <ul style="list-style-type: none"> <li>• <b>Prepayment:</b> Customers use the deposit to pay other billed charges.</li> <li>• <b>Refund:</b> Customers get a refund of the deposit.</li> </ul>
<b>Refund Approval is needed</b>	(Optional) If you selected <b>Refund</b> for <b>Deposit Release Type</b> , select to require approval for refunding deposits using this profile specification.
<b>Refund handling fee is needed</b>	(Optional) If you selected <b>Refund</b> for <b>Deposit Release Type</b> , select to require a handling fee when refunding deposits using this profile specification.
<b>Refund Handling Fee Value</b>	If you selected <b>Refund handling fee is needed</b> , enter a value for the fee and select <b>Percentage</b> or <b>Amount (in Account currency)</b> for the type of value.
<b>GLID for the Refund Handling Fee</b>	(Optional) If you selected <b>Refund handling fee is needed</b> , select a deposit refund G/L ID.

7. (Optional) Select one or more of the following options in the **Configure Business Attributes** section:

Option	Description
<b>Deposit will be transferable</b>	Select if deposits can be transferred to another account or service.
<b>Deposit can be overridden</b>	Select if CSRs can override the deposit amount.
<b>Deposit will be exemptible</b>	Select if CSRs can waive the deposit for a customer.
<b>Deposit attracts interest</b>	Select if you want deposits to accrue interest. <b>Note:</b> If selected, the system calculates interest using the type and rate you specify.
<b>Interest Type</b>	If you selected <b>Deposit attracts interest</b> , select the interest type: <ul style="list-style-type: none"> <li>• <b>Simple</b></li> <li>• <b>Compound</b></li> <li>• <b>Absolute</b></li> </ul>
<b>Rate of Interest</b>	If you selected <b>Deposit attracts interest</b> , enter the rate. For simple or compound interest, enter a percentage. For absolute interest, enter an amount.
<b>Interest Frequency Value</b>	If you selected <b>Deposit attracts interest</b> , specify the time interval for calculating interest. Enter a number and select <b>Days</b> , <b>Weeks</b> , <b>Months</b> , or <b>Years</b> from the <b>Unit</b> list.
<b>Start Interest Calculation On</b>	If you selected <b>Deposit attracts interest</b> , select the basis for calculating interest for the deposit, <b>Partial payment</b> or <b>Full payment</b> .
<b>GLID for interest</b>	(Optional) If you selected <b>Deposit attracts interest</b> , select a deposit interest G/L ID.

8. Click **Finish**.

## Creating a Deposit Specification

To create a deposit specification:

1. On the Billing Care landing page, click **Deposit Configuration**.

A page listing existing deposit specifications appears.

2. Make sure **Deposit Specifications** is selected in the **View** list.
3. Click **Create**.

The **Create Deposit Specification** wizard appears, on the **Select Profile** page.

4. Select one of the following options to specify a profile for the design specification:
  - **Use existing Deposit Specification Profile:** Select an existing profile from the list. Billing Care displays details of the selected profile on the right side of the page.
  - **Create new Deposit Specification Profile:** If you select this, profile creation fields appear. See "[Creating a Deposit Specification Profile](#)" for more information.

 **Note:**

Billing Care displays profile details on the **Configure Details** page.

5. Click **Configure Details** or **Continue**.  
The **Configure Details** page appears.
6. Enter a unique name and a description.



7. Enter the following:

Field	Description
<b>Permitted</b>	Select the permitted category value for the deposit: <ul style="list-style-type: none"> <li>• <b>Account</b></li> <li>• <b>Service.</b> If you select this, select a service from the <b>Category</b> list.</li> <li>• <b>Package.</b> If you select this, select a package from the <b>Category</b> list.</li> <li>• <b>Device.</b> If you select this, enter a category.</li> </ul>
<b>Charge Offer Name</b>	Select a charge offer that determines the deposit charge. <b>Note:</b> The list displays charge offers with purchase deposit events.
<b>End Date</b>	Specify the end date of the specification's validity period. <b>Note:</b> <ul style="list-style-type: none"> <li>• If you don't specify an end date, the deposit specification never expires.</li> <li>• If the end date is less than or equal to the current date, the deposit specification profile is considered to be expired.</li> </ul>
<b>Billing Preference</b>	Select one of the following: <ul style="list-style-type: none"> <li>• <b>Bill Immediately:</b> Select to bill the deposit amount immediately.</li> <li>• <b>Bill with next billing cycle:</b> Select to include the deposit amount in the next bill.</li> </ul>
<b>Increase credit limit based on deposit</b>	Select to enable increasing the credit limit by the deposit amount. For example, a subscriber purchases any available international roaming plan and pays the deposit amount for that. While on international roaming, the subscriber's usage is more, and it requires more credit limit. Selecting this option enables the service provider to bump up the credit limit by the deposit amount. <b>Note:</b> Don't select this if the credit limit won't need to be increased. For example, the credit limit on the deposit for a device such as a phone need not be increased.

8. If you want to make more changes to the specification later, click **Save as Draft**. You do need to enter something for each required field before doing this.

 **Note:**

Use this option to save, revisit, and change any deposit specification details later.

9. Click **Finish** to complete the specification.

## Finding Deposit Specification Profiles or Deposit Specifications

You can search existing deposit specification profiles or deposit specifications by wildcard (\*), or by their name, or by the permitted category, or by their status.

To find deposit specifications or deposit specification profiles:

1. On the **Deposit Specifications** page, select either **Deposit Specifications** or **Deposit Specification Profiles** from the **View** list.

The page lists existing deposit specifications or deposit specification profiles.

2. Click **Search**.

The Search dialog box appears.

3. Enter search criteria.

For deposit specifications, you can search for any combination of:

- Deposit specification name
- Deposit specification profile name
- Permitted category: **Account**, **Service**, **Package**, or **Device**
- Status: **Draft**, **Active**, or **Expired**

If you search for a deposit specification profile name, you'll get results for deposit specifications associated with that profile.

For deposit specification profiles, you can search for any combination of:

- Deposit specification profile name
- Status: **Active** or **Expired**

 **Note:**

Use an asterisk (\*) as a wildcard to match one or more characters at the start or end of names.

4. Click **Search**.

Billing Care displays the search results.

## Editing a Deposit Specification Profile or Deposit Specification

You can change the end date of a deposit specification in Draft state or a deposit specification profile.

To edit a deposit specification profile or deposit specification:

1. Click the name of a deposit specification or deposit specification profile.  
The **Edit Deposit Specification** or **Edit Deposit Specification Profile** page appears.
2. Add or change the end date.
3. Click **Finish**.

## Working with Deposits

You can create and manage customer deposits for accounts, packages, devices, or services in Billing Care.

To work with deposits, see the following topics:

- [Creating Deposits](#)
- [Viewing Deposits](#)
- [Reversing Deposits](#)
- [Transferring Deposits](#)
- [Updating Deposits](#)

- [Making Deposit Payments](#)
- [Converting Deposits to Prepayments](#)
- [Requesting Deposit Refunds](#)
- [Approving Deposit Refund Requests](#)

## Creating Deposits

To create a deposit:

1. From the **Actions** menu, select **Deposits**, then select **Create**.

 **Note:**

You can also use the **Create** button on the **Deposits** page for the account.

The **Create Deposit** wizard appears.

2. On the **Details** page, select **Account**, **Package**, **Device**, or **Service** at the top of the page.
3. Depending on the deposit type, do the following:
  - For **Package**, select a package.
  - For **Device**, select a device category.
  - For **Service**, select a service type and log in.
4. Select a deposit specification from the **Deposit Specification Name** list.  
Billing Care displays the deposit amount next to the deposit specification.
5. Select the start date from which the deposit is applicable.
6. For device deposits, select a bill unit from the **Bill Unit** list, and optionally select a service.
7. Select **Override** if you want to override the deposit amount. This is available if you selected a design specification that includes the override option.

If you select **Override**, select one of the following:

- **Override deposit:** Enter an amount.  
**Specify discount:** Enter a value as an amount or percentage.
8. For overrides, you can optionally change the **Deposit Validity Value** and **Deposit Release Type**.
  9. Click **Continue**.

The **Payment** page appears.

10. Do one of the following:
  - Select **Yes** for **Charge payment method on file immediately**. Then click **Continue**.
  - Select **No** for **Charge payment method on file immediately**, then select one of the following as the way to pay:
    - **Convert prepayment to deposit:** If you select this, click **Show Payments** to select the prepayment.
    - **Collect payment:** If you select this, enter an amount and a payment method.

Click **Continue**

- Select **Skip** at the bottom of the page to add the charge to the regular billing cycle.

The **Deposit Details** page appears.

11. Review the details, then click **Finish**.

#### Related Topics

[Create Deposit Wizard Details Page Reference](#)

## Create Deposit Wizard Details Page Reference

Use the **Details** page of the **Create Deposit Wizard** to set up the details for a deposit.

Field	Description
<b>Create Deposit for</b>	Select <b>Account</b> , <b>Package</b> , <b>Device</b> , or <b>Service</b> .
<b>Package</b>	For package deposits, select a package.
<b>Device Category</b>	For device deposits, select a device category.
<b>Service Type And Login</b>	For service deposits, select a service and login.
<b>Deposit Specification Name</b>	Select a deposit specification. The list displays the deposit specifications valid for the deposit type you selected.
<b>Start Date</b>	Enter a date.
<b>Deposit applies to</b>	For device deposits, select a bill unit from the <b>Bill Unit</b> list.
<b>Select Service</b>	For device deposits, optionally select this, then select a service from the list.
<b>Override</b>	For deposit specifications that have an override option, select if you want to override the deposit amount.
<b>Override deposit</b>	For overrides, select this to specify an override amount.
<b>Override Amount</b>	Enter the amount of the override.
<b>Specify discount</b>	For overrides, select this to discount the deposit by a specified amount or percentage.
<b>Discount Value</b>	Enter a value and select <b>Amount</b> or <b>Percentage</b> .
<b>Deposit Validity Value</b>	For overrides, enter the number of days, weeks, months, or years for which the deposit is valid.
<b>Deposit Release Type</b>	For overrides, select how the deposit is released after its validity period ends: <ul style="list-style-type: none"> <li>• <b>Prepayment:</b> Customers use the deposit to pay other billed charges.</li> <li>• <b>Refund:</b> You refund the deposit to the customer.</li> </ul>

## Viewing Deposits

To view a customer's deposits:

1. On the account page, from the **Actions** menu, select **Deposits**, then select **View All**.

The **Deposits** page lists the account's deposits on the left side.

2. Click a deposit to see its details.

You can click **Create** on this page to start creating a new deposit. See "[Creating Deposits](#)".

## Reversing Deposits

You can reverse a deposit, for example, if it was created by mistake. To do this:

1. On the customer's **Deposits** page, select a deposit, then select **Reverse** from the **Actions** menu.

The Reverse dialog box appears.

2. Enter a reason for the reversal in the **Notes** box.
3. Click **Reverse**.

## Transferring Deposits

You can transfer a deposit to another account. For example, a customer might want to transfer a deposit to a friend or family member. Any interest accrued on the deposit is also transferred.

To transfer a deposit:

1. On the **Deposits** page of the account that currently owns the deposit, select the deposit.

2. From the **Actions** menu, select **Transfer**.

The Transfer dialog box appears.

3. Enter the amount to transfer.
4. Search for and select the destination account.
5. Select the bill unit for the transferred deposit from the **Bill Info** list.
6. If there is a service associated with the deposit, click **Select Service** and select a service from the list.
7. Click **Transfer**.

## Updating Deposits

You can update a customer's deposit details.

To update deposit details:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Update**.

The Update dialog box appears.

3. You can modify the validity value, the duration, the release type, and the amount. If the amount is updated, then a new deposit object is created.
4. Enter a reason for the changes in the **Notes** box.
5. Click **Update**.

## Update Dialog Box

Use the Update dialog box to modify a customer's deposit details.

Field	Description
Deposit Specification Name	Displays the deposit specification name.

Field	Description
Deposit Validity Value	Enter a number and select <b>Days</b> , <b>Weeks</b> , <b>Months</b> , or <b>Years</b> from the <b>Select</b> list to specify how long the deposit is valid.
Deposit Release Type	Select how the deposit is released after its validity period ends: <ul style="list-style-type: none"> <li>• <b>Prepayment:</b> Customers use the deposit to pay other billed charges.</li> <li>• <b>Refund:</b> Customers get a refund of the deposit.</li> </ul>
Deposit Amount	Enter the deposit amount.
Notes	(Optional) Enter a reason for the changes.

## Making Deposit Payments

Customers can make a deposit payment in multiple ways. They can pay immediately, pay with the next bill, convert a prepayment to a deposit payment, or pay with a payment received in advance.

For example, a customer purchases a service that has a \$500 deposit charge. At the time of purchase, the customer makes a \$100 payment and wants to pay the remaining amount after a month. The customer can do any of the following:

- Pay the remaining \$400 payment with the next bill.
- Pay the entire \$400 at once by cash/card.
- Use any available balance amount or prepayment amount to pay.

To make a payment for a deposit:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Make Payment**.  
The Make Payment dialog box appears.
3. For **Charge payment method on file immediately**:
  - Select **Yes** to use the account's current payment method to pay the amount immediately.
  - Select **No** to pay the amount with a balance or prepayment amount.
4. If you select **No**, select an option for **How would you like to pay?**:
  - **Convert prepayment to deposit:** Enter a payment number or click **Show Payments** to select a payment.
  - **Collect Payment:** Enter the amount and the receipt number, and select the payment method.

### Note:

You can combine both options to pay the deposit.

5. Click **Submit**.

## Converting Deposits to Prepayments

You can release and refund a deposit payment of your customer in multiple ways. Your customer can choose to get a complete refund or convert all or part of the deposit amount to an advance payment for another service.

For example, a customer has a \$1000 balance in a deposit. The customer can opt to use \$200 as a prepayment for another deposit or a bill.

To convert a deposit to prepayment:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Convert to prepayment**.

The Convert to prepayment dialog box appears.

3. Enter the amount of the prepayment.
4. Enter any notes about the prepayment.
5. Click **Convert**.

## Requesting Deposit Refunds

A customer can request a deposit refund. For example, a customer might do this if the service associated with the deposit is terminated.

To request a refund for a deposit:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Request Refund**.

The Request Refund dialog box appears.

3. Enter the refund amount.

 **Note:**

For a full refund, any interest accrued on the deposit is also transferred.

4. Enter any notes about the refund.
5. Click **Request**.

If the deposit specification used for this refund was configured to require approval, see "[Approving Deposit Refund Requests](#)".

## Approving Deposit Refund Requests

Deposit specification profiles can be configured to require refund approval. An individual deposit requires refund approval if it's associated with such a deposit specification profile. See "[Creating a Deposit Specification Profile](#)" for information.

To approve deposit refund requests:

1. On the Billing Care landing page, click **Deposit Refund Requests**.


The **Deposit Refund Requests** page appears, listing refund requests by account number. The page shows refund requests that are approved, partially approved, pending, or rejected. The list includes only deposits that require refund approval.

You can't change refunds already approved or partially approved.

 **Note:**

You can click an account number to open that account in a new tab.



2. Select the angle bracket icon  for the row you want to update, or double-click inside the row.

Billing Care replaces the row with fields for the refund amount and notes.

3. Verify or change the amount and enter any notes.
4. Click **Approve** or **Reject**.



# Installments

You can enable your customers to pay bills in installments in Oracle Communications Billing Care.

To work with installments, see the following topics:

- [Working with Installment Specifications](#)
- [Working with Installment Schedules](#)

## Working with Installment Specifications

Installment specifications provide the rules for installment payment schedules that you create. A specification includes the minimum value for installments, the maximum interval between non-equal installments, and the specification's validity period.

You can also add eligibility criteria to a specification. For example, you can have the specification be eligible only for a particular customer segment, category, or field.

**Note:**

You cannot modify an installment specification. However, you can change the end date.

To work with the installment specifications, see the following topics:

- [Creating Installment Specifications](#)
- [Finding Installment Specifications](#)
- [Editing an Installment Specification](#)

## Creating Installment Specifications

To create an installment specification:

1. On the Billing Care landing page, click **Installment Configuration**.  
The **Installment Specifications** page appears.
2. Click **Create**.  
The Create Installment Specification dialog box appears.
3. Enter the following:
  - A unique name.
  - The minimum value for installment payments. Select **Percentage** or **Amount (in Account currency)** to specify the type of value you entered. Percentages must be less than 100.
  - The maximum number of days between non-equal installments.

- The maximum number of non-equal installments.
  - Start and end dates for when the installment specification is valid. If you don't enter a start date, the specification is valid from the creation date. If you don't enter an end date, the specification never expires.
  - The G/L ID.
4. (Optional) In the Eligibility Criteria section, do the following:
    - Select the criteria class or subclass. For example, select **Service**.
    - Select a field from the criteria class, for example, **Effective\_T** (the effective timestamp).
    - Select an operator. The list shows operators that apply to the field you selected, for example, =.
    - Enter a value for the eligibility criteria. The type of value is dependent on the selected field. For example, if you selected **Effective\_T**, you enter a date.
  5. Click the + icon, next to the row, to create another eligibility criteria. Click the – icon, to delete an eligibility criteria.

 **Note:**

If you create multiple eligibility criteria, the installment specification is applicable only when all the criteria are met.

6. Click **Finish**.

## Finding Installment Specifications

To search for existing installment specifications:

1. On the **Installment Specifications** page, click **Search**.  
The Search dialog box appears.
2. Filter the search by either name, status, or both. For name, enter all or part of a name. You can also use the asterisk (\*) as a wildcard for one or more characters. For status, select **Active** or **Expired**.
3. Click **Search**.  
The **Installment Specifications** page displays the specifications that match the filters you set.

 **Note:**

You can sort the results using the up or down arrows next to each column.

## Editing an Installment Specification

To edit an installment specification:

1. On the **Installment Specifications** page, find the specification you want to edit. See "[Finding Installment Specifications](#)".

2. Select the installment specification.  
The **Edit Installment Specification** page appears.
3. Make the edits you want. For more information on the fields and descriptions, see "[Creating Installment Specifications](#)".
4. Click **Finish**.

## Working with Installment Schedules

Create an installment schedule for a customer's bills or bill items to enable the customer to pay the amount due in periodic installments.

You can select multiple bill units for an account and divide the total bill amount into equal or unequal installment payments. For unequal installments, you can set up the amount for each payment.

You can cancel existing installments if the customer decides to pay the remaining amount all at once. You can also view the available installment payment schedules for an account.

### **Note:**

- Installment schedules with a status of open can only be canceled. If you cancel a schedule, the status for individual installments that are charged, broken, or paid will be unchanged.
- When you cancel an installment schedule, the pending installment amount will be charged as a lump sum amount to the customer's current bill in progress. Customers are still required to pay any remaining installments with a charged status, by the agreed-upon date.

To work with the installment payment schedule, see the following topics:

- [Creating an Installment Schedule](#)
- [Viewing Installment Schedules](#)
- [Canceling an Installment Schedule](#)

## Creating an Installment Schedule

### **Note:**

You can create an installment payment schedule while viewing the installment payment schedule.

You create an installment payment schedule for a customer's bill.

To create an installment payment schedule:

1. From the **Actions** menu, select **Installment Schedule**, then select **Create**.  
The Create Installment Schedule dialog box appears.

 **Note:**

You can also start creating a schedule from the **View Installment Schedules** page.

2. On the **Select Specification** page, select a specification.  
Specifications with eligibility criteria that apply to the current account are listed. Information about the selected specification appears.
3. Click **Continue**.  
The **Select Bills** page appears.
4. Select a bill unit, then click **Show Bills**.  
A list of bills appears.
5. Select any combination of bills and bill items.
6. Click **Continue**.  
The **Details** page appears.
7. Enter the number of installments, the start date, and whether you want to bill immediately or with the existing billing cycle.  
The total bill amount is divided equally by the number of installment payments and appears in the **Installment Proposal** section.
8. To manually change any dates or amounts, select **Manual Entry of Installment Details**. You can then edit the dates and amounts.  
If you create unequal amounts:
  - The maximum interval between installment dates is 20 days.
  - The amounts you enter must add up to the total amount.
9. Click **Continue**.
10. Review, then click **Finish**.

## Viewing Installment Schedules

To view the installment payment schedules:

1. From the **Actions** menu, select **Installment Schedule**, then select **View All**.  
The **Installment Schedule** page appears and lists all the installment schedules for the account.
2. Select a schedule. The page displays the date, amount, and status of each payment.
3. To see the details of the installment schedule, click **View Details**.  
The Installment Schedule Details dialog box appears listing the bills and amounts.
4. Click **OK**.

## Canceling an Installment Schedule

To cancel an installment schedule:

1. From the **Actions** menu, select **Installment Schedule**, then select **View All**.

The **Installment Schedule** page appears and lists the installment schedules for the account.

2. Select an installment schedule and click **Cancel Installment**.

A dialog box appears asking you to confirm.

3. Click **Confirm**.

# Notifications

You can configure notification specifications for your customers by using Oracle Communications Billing Care.

To work with notification specifications, see the following topics:

- [About Notification Specifications](#)
- [Creating a Notification Specification for Delivery Within A Day](#)
- [Creating a Notification Specification for In-Advance Delivery](#)
- [Creating a Notification Specification for Post-Event Delivery](#)
- [Modifying a Notification Specification](#)
- [Finding Notification Specifications](#)
- [Create Notification Specification Wizard Reference](#)

## About Notification Specifications

Notification specifications provide the rules for sending messages to your customers through an external notification application. They define which customers can receive each type of message as well as how and when to deliver the message.

Each notification specification defines the following:

- The business event associated with the specification, such as **CustCreate**, **ProductTermination**, or **BillDue**.  
The business event indicates whether the message is generated when an account is created, when a product is canceled, when a bill is almost due, or so on.
- The delivery window:
  - Within a day after an event occurs
  - Minutes, hours, days, weeks, or months *before* an event occurs, such as one week before a bill becomes due
  - Minutes, hours, days, weeks, or months *after* an event occurs, such as five days after a bill is past due
- The specification's validity period, such as now through December.
- The criteria an account must meet to receive a message, such as a customer type, zip code, or payment method.
- The message's delivery method, such as text, email, or IVR.
- The message's delivery time of day, such as immediately, at 14:00, or any time outside of the silent period.
- The opt-in defaults, such as whether customers are automatically opted in to receive notification messages.

For example, you can specify to send account creation messages to Canadian customers via email at 15:00 local time. Likewise, you can specify to send bill-due reminder messages to New York customers via text at noon, three days before the bill is due.

After you create a notification specification:

- You cannot delete it. However, you can change the end date to make it expired.
- You cannot change its name and associated business event.

## Creating a Notification Specification for Delivery Within A Day

To create a notification specification for delivering messages to customers within a day after an event occurs:

1. On the landing page, click **Notifications Configuration**.  
The **Notifications Specification** page appears.
2. Click **Create**.  
The **Trigger Criteria** screen appears. See "[Trigger Criteria Screen](#)" for details.
3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.
4. Enter general information about the notification specification:
  - Enter a unique name  
**Note:** You cannot modify the name after the notification specification has been created.
  - Enter a brief description
  - Select the business event that the specification applies to
  - Select a validity end date  
**Note:** If you do not select an end date, the notification specification never expires.
5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.
6. Click **Delivery Details**.  
The **Delivery Details** screen appears. See "[Delivery Details Screen](#)" for details.
7. In **Select Delivery Methods**, select how to deliver messages to your customers.  
You can select one or more delivery options.
8. In the **Trigger Time** list, select one of the following:
  - **Predefined time:** Delivers messages at a specified time of day after an event occurs. You must also enter the time of day to deliver messages, such as 09:00.
  - **Real time:** Delivers messages immediately after an event occurs.
9. In **Notification Defaults**, specify one of the following:
  - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
  - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.

- Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
10. Click **Review**.  
The **Review** screen appears. See "[Review Screen](#)" for details.
  11. Review the details of your notification specification.  
To make changes, click **Delivery Details** at the top left.
  12. Click **Finish**.

## Creating a Notification Specification for In-Advance Delivery

You can create notification specifications for delivering in-advance messages to your customers for the following business events:

- **BalanceExpiry**: A customer's balance is about to expire
- **BillDue**: A customer's bill is almost due
- **CollectionsActionDue**: A collections action is about to be performed against a customer
- **InstallmentDue**: A customer's installment payment is almost due
- **ProductExpiry**: A customer's subscription is about to expire
- **ServiceLifeStateChangeExpiry**: A customer's service life cycle is about to change
- **SuscriptionRenewalDue**: A customer's subscription is almost due for renewal

To create a notification specification for delivering messages before an event occurs:

1. On the landing page, click **Notifications Configuration**.  
The **Notification Specifications** page appears.
2. Click **Create**.  
The **Trigger Criteria** screen appears. See "[Trigger Criteria Screen](#)" for details.
3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.
4. Enter general information about the notification specification:
  - Enter a unique name  
**Note:** You cannot modify the name after the notification specification has been created.
  - Enter a brief description
  - Select the business event that the specification applies to
  - Select a validity end date  
**Note:** If you do not select an end date, the notification specification never expires.
5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.
6. Click **Delivery Details**.  
The **Delivery Details** screen appears. See "[Delivery Details Screen](#)" for details.
7. In **Select Delivery Methods**, select how to deliver messages to your customers.



You can select one or more delivery options.

8. In the **Trigger Time** list, select **Fixed time in advance**.
9. Do one of the following:
  - To deliver messages at a specified time: In **Time**, select the delivery time of day in 24-hour format and then click **OK**.
  - To deliver messages outside of the silent period: Enable the **Don't send notification during silent time** option. This prevents messages from being delivered to customers at inconvenient times, such as at night.  
  
If a business event occurs during the silent time configured in your system, the message is delivered after the silent time ends.
10. In **Fixed time value** and **Unit**, enter the number of minutes, hours, days, weeks, or months before an event occurs to deliver messages. For example, enter 3 Days.
11. In **Notification Defaults**, specify one of the following:
  - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
  - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.
  - Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
12. In **Aggregate Notifications**, specify whether to consolidate multiple notifications for a customer into one message.
13. Click **Review**.  
The **Review** screen appears. See "[Review Screen](#)" for details.
14. Review the details of your notification specification. If you see any mistakes, click **Delivery Details** at the top left to make changes.
15. Click **Finish**.

## Creating a Notification Specification for Post-Event Delivery

You can create notification specifications for delivering post-event messages to your customers for the following business events:

- **PostBalanceExpiry**: A customer's balance has expired
- **PostBillDue**: A customer's bill is past due
- **PostCollectionsActionDue**: A collections action is past due
- **PostInstallmentDue**: A customer's installment payment is past due
- **PostProductExpiry**: A customer's subscription expired
- **PostServiceLifeStateChangeExpiry**: A customer's service life cycle has changed
- **PostSubscriptionRenewalDue**: A customer's subscription is past due for renewal

To create a notification specification for delivering messages after an event has occurred:

1. On the landing page, click **Notifications Configuration**.  
The **Notification Specifications** page appears.
2. Click **Create**.

The **Trigger Criteria** screen appears. See "[Trigger Criteria Screen](#)" for details.

3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.
4. Enter general information about the notification specification:
  - Enter a unique name.  
**Note:** You cannot modify the name after the notification specification has been created.
  - Enter a brief description.
  - Select the business event that the specification applies to.
  - Select a validity end date. If you don't select an end date, the notification specification never expires.
5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.
6. Click **Delivery Details**.  
The **Delivery Details** screen appears. See "[Delivery Details Screen](#)" for details.
7. In **Select Delivery Methods**, select how to deliver messages to your customers.  
You can select one or more delivery options.
8. In the **Trigger Time** list, select **Fixed time after due date**.
9. Do one of the following:
  - To deliver messages at a specified time: In **Time**, select the delivery time of day in 24-hour format and then click **OK**.
  - To deliver messages outside of the silent period: Enable the **Don't send notification during silent time** option. This prevents messages from being delivered to customers at inconvenient times, such as at night.  
  
If a business event occurs during the silent time configured in your system, the message is delivered after the silent time ends.
10. In **Fixed time value** and **Unit**, enter the number of minutes, hours, days, weeks, or months after an event to deliver messages. For example, 45 minutes or 1 week.
11. In **Notification Defaults**, specify one of the following:
  - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
  - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.
  - Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
12. In **Aggregate Notifications**, specify whether to consolidate multiple notifications for a customer into one message.
13. Click **Review**.  
The **Review** screen appears. See "[Review Screen](#)" for details.
14. Review the details of your notification specification.  
To make changes, click **Delivery Details** at the top left.

15. Click **Finish**.

## Modifying a Notification Specification

You can modify a notification specification's validity date, trigger criteria, delivery method, and delivery time, but you cannot change its name or associated business event.

To modify a notification specification:

1. Search for and open the notification specification that you want to modify. See "[Finding Notification Specifications](#)" for more information.

The **Edit Notification Specification** wizard appears.

2. In the **Trigger Criteria** screen, modify the description, validity end date, or trigger criteria. See "[Trigger Criteria Screen](#)" for details.
3. Click **Continue** or **Delivery Details**.
4. In the **Delivery Details** screen, modify the delivery method, delivery time, notification defaults, or aggregation settings. See "[Delivery Details Screen](#)" for details.
5. Click **Continue** or **Review**.
6. In the **Review** screen, review the details of your notification specification.



### Tip:

If you see any mistakes, click **Delivery Details** at the top left to make changes.

See "[Review Screen](#)" for details.

7. Click **Finish** to save your changes.

## Finding Notification Specifications

To find an existing notification specification:

1. On the **Notification Specifications** page, click **Search** at the top left.

The **Search** dialog box appears.

2. Enter the search criteria. You can search by the name of the notification specification or business event, the delivery method, and the notification specification status.



### Tip:

Use an asterisk (\*) as a wildcard to match one or more characters at the start or end of words or numbers.

3. Click **Search**.

The **Notification Specifications** page displays the search results. You can enter more criteria to refine the search if there are many results. You can also sort the results using the up or down arrows next to the column names.

- Select a notification specification name to open it.

Billing Care displays the selected notification specification.

## Create Notification Specification Wizard Reference

Use the Create Notification Specification wizard to create a notification specification, which defines the customers that can receive a specified message as well as how and when to deliver the message.

The Create Notification Specification wizard includes the following screens:

- [Trigger Criteria Screen](#)
- [Delivery Details Screen](#)
- [Review Screen](#)

### Trigger Criteria Screen

Use the **Trigger Criteria** screen to specify general information about the notification specification, such as its name and the business event it applies to.

Field	Description
<b>Copy existing notification specification</b>	Select to reuse the details from an existing notification specification. If you select this option, the following field also appears. In <b>Notification Specification to Copy</b> , select the notification you want to copy from the list.
<b>Notification Specification Name</b>	Enter a unique name.
<b>Description</b>	Enter a brief description.
<b>Business Event Name</b>	Select the business event that this notification specification applies to.
<b>End Date</b>	Select an end date for the notification specification's validity period. If left blank, the notification specification never expires. The notification specification is considered expired if the end date is less than or equal to the current date.

#### Notification Trigger Criteria Section



Use the Notification Trigger Criteria section to specify the criteria for this notification specification. All accounts that meet the criteria will receive the specified message.

Field	Description
<b>Criteria</b>	Select the criteria to use, such as <b>Service</b> or <b>Profile</b> .
<b>Field</b>	Select the field to include, such as <b>Effective_T</b> .
<b>Operator</b>	Select an operator, such as equals (=). <b>Note:</b> All operators for the selected field appear in the <b>Operator</b> list. Select an appropriate operator.

Field	Description
Value	Enter the value for the eligibility criteria. <b>Note:</b> This field is dependent on the selected field. For example, if you select service and effective timestamp as the criteria and field, the value type will be <b>Criteria Date</b> . It prompts you to select a date from the calendar.

## Delivery Details Screen

Use the **Delivery Details** screen to specify when and how to deliver messages to your customers.

Field	Description
Select Delivery Methods	Select one or more methods for delivering messages to your customers: <ul style="list-style-type: none"> <li><b>IVR:</b> Delivers messages through interactive voice response (IVR).</li> <li><b>SMS:</b> Delivers messages through text.</li> <li><b>EMAIL:</b> Delivers messages through email.</li> </ul>
Trigger Time	Select one of the following options: <ul style="list-style-type: none"> <li><b>Fixed time in advance:</b> Delivers messages a specified amount of time <i>before</i> an event occurs. For example, one week before a subscription expires.</li> <li><b>Fixed time after due date:</b> Delivers messages a specified amount of time <i>after</i> an event occurs that hasn't been resolved. For example, one week after a bill is past due.</li> <li><b>Predefined time:</b> Delivers messages at the time of day you specify.</li> <li><b>Real time:</b> Delivers messages immediately after an event occurs.</li> </ul> <b>Note:</b> The available options depend on the business event and how your system is configured.
Time	Select the time of day to deliver messages, such as at 14:00. <b>Note:</b> This option is grayed out when the <b>Don't send notifications during silent time</b> option is selected.
Fixed Time Value and Unit	Enter the number of hours, days, weeks, months, or years <i>before</i> or <i>after</i> an event occurs in which to deliver the message. <b>Note:</b> This option is available for only the <b>Fixed Time in advance</b> and <b>Fixed time after due date</b> trigger times.
 	Select the <b>+</b> icon to add a new <b>Fixed Time Value and Unit</b> row, and the <b>-</b> icon to remove a row.

Field	Description
<b>Notification Defaults</b>	<p>Select whether customers receive messages for this notification type:</p> <ul style="list-style-type: none"> <li>• <b>Sent by default, but customers can unsubscribe:</b> By default, customers are automatically subscribed to receive messages for this notification type. However, customers can unsubscribe at any time.</li> <li>• <b>Not sent by default, but customers can subscribe:</b> By default, customers <i>do not</i> receive messages for this notification type. However, customers can subscribe to receive messages at any time.</li> <li>• <b>Always sent to customers:</b> Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.</li> </ul>
<b>Aggregate Notifications</b>	<p>Select whether to consolidate multiple notifications for a customer into one message:</p> <ul style="list-style-type: none"> <li>• Select <b>Aggregate Notifications</b> to consolidate multiple notifications into one message sent to the customer.</li> <li>• Deselect <b>Aggregate Notifications</b> to send separate messages to the customer for each notification.</li> </ul> <p><b>Note:</b> This option is available for only the <b>Fixed Time in advance</b> and <b>Fixed time after due date</b> trigger times.</p>
<b>Don't send notifications during silent time</b>	<p>Select this option to prevent messages from being delivered during the systemwide silent period configured in your system.</p> <p><b>Note:</b> This option is available for only the <b>Fixed Time in advance</b> and <b>Fixed time after due date</b> trigger times.</p>

## Review Screen

Use the **Review** screen to view the configuration of the notification specification you created.

Field	Description
<b>Delivery Details</b>	Click to return to the previous screen and make changes to the notification specification.
<b>Notification Specification Name</b>	Displays the name of the notification specification.
<b>Description</b>	Displays the description of the notification specification.
<b>Business Event Name</b>	Displays the business event that this notification specification applies to.
<b>End Date</b>	Displays when the validity period ends for this notification specification. If no date is listed, the specification never expires.
<b>Delivery Methods</b>	Displays the methods for delivering messages to your customers, such as SMS or Email.

Field	Description
<b>Trigger Time</b>	<p>Displays when messages will be delivered to your customers:</p> <ul style="list-style-type: none"> <li>• <b>ADVANCE:</b> Delivered a specified amount of time before an object expires.</li> <li>• <b>PREDEFINED:</b> Delivered at a specified time of day after an event occurs.</li> <li>• <b>REALTIME:</b> Delivered immediately after an event occurs.</li> <li>• <b>AFTER DUE DATE:</b> Delivered a specified amount after an object expires.</li> </ul>
<b>Time</b>	Displays the time of day that messages will be delivered.
<b>Notification Defaults</b>	<p>Displays the default subscription options for receiving messages:</p> <ul style="list-style-type: none"> <li>• <b>Sent by default, but customers can unsubscribe:</b> By default, customers are automatically subscribed to receive messages for this notification type.</li> <li>• <b>Not sent by default, but customers can subscribe:</b> By default, customers <i>do not</i> receive messages for this notification type.</li> <li>• <b>Always sent to customers:</b> Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.</li> </ul>
<b>Don't send notifications during silent time</b>	<p>Displays whether messages can be delivered during the silent period:</p> <ul style="list-style-type: none"> <li>• <b>Yes:</b> Messages <i>cannot</i> be delivered during the silent period.</li> <li>• <b>No:</b> Messages can be delivered during the silent period.</li> </ul> <p><b>Note:</b> This field is displayed only for the <b>ADVANCE</b> and <b>AFTER DUE DATE</b> trigger times.</p>
<b>Aggregate Notifications</b>	<p>Displays whether to consolidate multiple notifications for a customer into one message:</p> <ul style="list-style-type: none"> <li>• <b>Yes:</b> Notifications are consolidated into one message sent to the customer.</li> <li>• <b>No:</b> Separate messages are sent for each notification.</li> </ul> <p><b>Note:</b> This field is displayed only for the <b>ADVANCE</b> and <b>AFTER DUE DATE</b> trigger times.</p>
<b>Finish</b>	<p>Click to create the notification specification and save your changes.</p> <p><b>Note:</b> After your notification specification is created, you cannot change its name or associated business event.</p>
<b>Cancel</b>	Click to exit the notification specification without saving your changes.