

Oracle® Communications Billing and Revenue Management Collections Configuration Center Online Help



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About This Content

Provides task and reference information for using the Oracle Communications Collections Configuration Center interface.

Audience

This Help is intended for collections agents.

1

Getting Started with Collections Configuration Center

Collections Configuration Center is part of Oracle Communications Billing and Revenue Management (BRM). It provides a user interface for managing collections scenarios, profiles, actions, and aging buckets. Using Collections Configuration Center, you configure the automated processes that determine how overdue balances are handled within BRM.

For an introduction to Collections Configuration Center, see the following topics:

- [Overview of Collections Configuration Center](#)
- [About the Collections Configuration Center User Interface](#)
- [About Authorization](#)
- [About the User Menu](#)
- [Logging in to Collections Configuration Center](#)
- [Using Keyboard Shortcuts](#)

Overview of Collections Configuration Center

Collections Configuration Center is part of BRM.

Collections Configuration Center allows you to:

- Define scenarios for when and how bill units enter or exit collections.
- Group bill units into currency profiles for targeted collections management.
- Set up and manage a library of actions used in collections scenarios.
- Configure and maintain aging buckets for reporting and action triggers.

You can use the main navigation bar to access the following pages:

- [About the Scenarios Page](#)
- [About the Actions Page](#)
- [About the Profiles Page](#)
- [About the Aging Buckets Page](#)

About the Scenarios Page

The Scenarios page displays a list of all configured scenarios in Collections Configuration Center. You can create, view, edit, duplicate, or delete scenarios from this page. You can also filter, sort, or customize the columns to display fields such as Profile, Entry Amount, Entry Days, and Exit Amount. See "[Creating and Managing Scenarios](#)" for more information.

About the Actions Page

The Actions page displays a list of all available collections actions in Collections Configuration Center. You can create new actions and view, edit, duplicate, or delete existing actions. You can also search for or filter actions. See "[Managing Collections Actions](#)" for more information.

About the Profiles Page

The Profiles page displays a list of all configured collections profiles. You can view existing profiles, create new ones, edit, duplicate or delete profiles from the Organize and Manage Profiles section. Each profile includes details such as profile name, description, and associated currency. See "[Managing Collections Profiles](#)" for more information.

About the Aging Buckets Page

The Aging Buckets page displays all configured aging buckets used to categorize bill units by the number of days they are past due. You can create, view, edit, or remove aging buckets.

About the Collections Configuration Center User Interface

The Collections Configuration Center user interface works in a web browser. When using Collections Configuration Center:

- 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 Collections Configuration Center again.
- Do not open multiple instances of Collections Configuration Center 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 Collections Configuration Center. 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 objects, but not be able to create them yourself.

About the User Menu

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

To access the user menu:

1. From the Collections Configuration Center user interface, click the list in the top right containing the signed-in user's name.
2. Do one of the following:
 - To view Collections Configuration Center Online Help, click **Help**.

- To sign out of Collections Configuration Center, click **Sign Out**.

Logging in to Collections Configuration Center

To log in to Collections Configuration Center, access the URL provided by your administrator and enter your authorized credentials on the login screen.

Using Keyboard Shortcuts

Collections Configuration Center supports keyboard navigation for accessibility. Keyboard shortcuts help users work efficiently across all main features.

[Table 1-1](#) provides information about the available shortcuts:

Table 1-1 Keyboard Shortcuts

Shortcut	Action
Tab	Move focus to the next field or element from top to bottom and left to right.
Shift + Tab	Move focus to the previous field or element, from bottom to top and right to left.
Enter or Space bar	Click a link, a button, or a command on a menu.
Down Arrow	In a table, move to the next row. In a drop-down list, move to the next item in the list.
Up Arrow	In a table, move to the previous row. In a drop-down list, move to the previous item in the list.
Shift + Command or Ctrl + Up Arrow	Reorder the current item up.
Shift + Command or Ctrl + Down Arrow	Reorder the current item down.

2

Managing Collections Profiles

In Oracle Communications Billing and Revenue Management (BRM), you can use Collections Configuration Center to define profiles that organize bill units for collections purposes.

Collections profiles allow you to organize bill units into logical groups. These groups help you apply the same collections actions to multiple bill units that share similar characteristics. When you define a scenario, you select the collections profile that applies to that scenario.

To work with collections profiles, see the following topics:

- [About Collections Profiles](#)
- [Creating Collections Profiles](#)
- [Editing Collections Profiles](#)
- [Deleting Collections Profiles](#)

About Collections Profiles

By default, all bill units are assigned to a single collections profile. You can use the default profile if it meets your requirements. Collections profiles allow you to organize bill units into logical groups. These groups help you apply the same collections actions to multiple bill units that share similar characteristics. Each scenario must reference a collections profile.

Set up collections profiles in Collections Configuration Center to allow you to configure the details using an opcode. For more information about this configuration, see "Setting Up Collections Profiles" in *BRM Collections Manager*.

Creating Collections Profiles

To create a collections profile:

1. From the Home page, click **Profile** at the bottom left.
The **Organize and Manage Profiles** page appears.
2. Click **Create Profile** in the top right corner.
The Create Profile dialog box appears.
3. Enter the following:
 - **Profile Name:** Enter a name for the new profile.
 - **Description:** Enter a description (optional).
 - **Currency:** Select a currency from the drop-down list.

Note

The combination of **Profile Name** and **Currency** must be unique. If a profile already exists with the same name and currency, you will need to choose a different profile name or currency.

4. Click **Create Profile** to add the profile.

The new profile appears in the list on the **Organize and Manage Profiles** page.

Editing Collections Profiles

You can edit a collections profile to change the profile name, description, and currency.

To edit a collections profile:

1. From the Home page, click **Profile** at the bottom left.

The **Organize and Manage Profiles** page appears.

2. Locate the profile you want to edit and click following menu icon at the end of the row:



3. Select **Edit**.

The **Edit Profile** dialog box appears

4. Update the following fields as needed:

- **Profile Name:** Enter a new name for the profile. The profile name must be unique.
- **Description:** Update the description for the profile. This field is optional.
- **Currency:** Select a different currency from the list. The profile name and currency combination must be unique.

5. Click **Save Profile** to apply your changes.

The updated profile details appear in the profiles list.

Duplicating Collections Profiles

To duplicate a collections profile:

1. From the Home page, click **Profile** on the bottom left.

The **Organize and Manage Profiles** page appears.

2. Locate the profile you want to duplicate and click the following menu icon at the end of the row:



3. Select **Duplicate**.


A message appears in the bottom right corner when the duplicate is created successfully and the duplicate profile will be displayed in the list. See "[Editing Collections Profiles](#)" to edit the duplicated profile.

Deleting Collections Profiles

To delete a collections profile:

Note

You cannot delete a profile if it is associated with existing scenarios.

1. On the Home page, click **Profile** on the bottom left.
The **Organize and Manage Profiles** page appears.
2. Locate the profile you want to delete and click the following menu icon at the end of the row:

3. Select **Delete**.
4. Confirm that you want to delete the profile.

3

Managing Collections Actions

In Oracle Communications Billing and Revenue Management (BRM), you can manage collections actions to define the steps taken for bill units in collections scenarios. From the **Actions** page, you can view, create, duplicate and delete actions.

To work with collections actions, see the following topics:

- [About Collections Actions](#)
- [Creating Collections Actions](#)
- [Editing Collections Actions](#)
- [Duplicating Collections Actions](#)
- [Deleting Collections Actions](#)
- [Actions Data Reference](#)

About Collections Actions

Collections actions are individual steps that are performed in the process of collecting overdue balances, such as sending a dunning letter, applying a late fee, or making a courtesy phone call.

When you define a collections action, you specify the following:

- The collections action name
- The action type: manual, one of several system types, or custom
- For bill units in a collections group, the target bill units: the specified bill unit only (Self), the parent and all child bill units (All Members and Parent), or all child bill units (All Members)

Creating Collections Actions

You can create new actions to use in collections scenarios.

To create a collections action:

1. From the Home page, click the **Actions** tab at the bottom.
The View and Manage Actions page appears.
2. Click **Create Action** at the top right.
The **Create Action** dialog box appears.
3. In the **Action Name** field, enter a name for the action.
4. From the Action Type list, select an action type:
 - **Dunning Letter**: Sends a dunning letter to the selected action target. You must also select a value in the **Template** field.
 - **Invoice Reminder**: Sends an invoice reminder to the selected action target. You must also select a value in the **Template** field.

- **Late Fee:** Charges a late fee for the selected action target. You must also set **Charge** to either **Both**, **Percent**, or **Amount** and the following:
 - If **Charge** is set to **Both**, set the **Operator** to **Sum**, **Minimum**, or **Maximum** and then also set the **Percent** and **Amount**.
 - If **Charge** is set to **Percent**, set the **Percent**.
 - If **Charge** is set to **Amount**, set the **Amount**.
 - **Finance Charge:** Charges a finance charge to the action target. You must also specify a **Currency** and a **Percent** of the overdue balance to charge.
 - **Custom Action:** Indicates a custom action type that you can add.
5. (Invoice Reminder or Policy Action types only) Enter or select the name of the template to use.
 6. (Late Fee types only) Specify the currency type and the late fee amount or percentage to charge.
 7. (Finance Charge types only) Specify the percentage of xxx to charge.
 8. From the **Action Target** list, select a target for the action: **Self**, **All Members**, or **All Members and Parent**.
 9. (Optional) In the **Description** field, enter a description of the action.
 10. Click **Create Action** to save the action.

The new action appears in the View and Manage Actions list.

Editing Collections Actions

You can edit certain fields of an existing collections action. Editable fields include Action Target (Self, All Members, All Members and Parent), Description, and Percent (for applicable action types). You cannot change the action name or type.

To edit a collections action:

1. On the View and Manage Actions page, locate the action you want to edit.
2. Click the following menu icon at the end of the row:



3. Select **Edit**.

The **Edit Action** dialog box appears.

Note

When editing a collections action, you can't change the **Action Name** or **Action Type**.

4. Update the information as needed. See "[Actions Data Reference](#)" for details of the information you can edit.
5. Click **Save Action** to apply your changes, or **Cancel** to exit without saving.

Collections Configuration Center saves the changes and returns you to the action list.

Duplicating Collections Actions

You can create a collections action by duplicating an existing action.

To duplicate a collections action:

1. On the View and Manage Actions page, locate the action you want to duplicate.
2. Click the following menu icon at the end of the row:



3. Select **Duplicate**.

The duplicated action appears in the actions list.

Deleting Collections Actions

You can remove actions that are no longer needed.

To delete a collections action:

1. On the **View and Manage Actions** page, locate the action you want to delete.
2. Click the following menu icon at the end of the row:



3. Select **Delete**.

A confirmation dialog box appears.

4. Click **Delete** to confirm that you want to delete the selected action.

The action is removed from the list.

Actions Data Reference

[Table 3-1](#) contains information about the data used to create and edit collections actions.

Table 3-1 Actions Data Reference

Field Name	Required	Description
Action Name	Yes	Enter a unique name for the action. Note: When editing a collections action, you can't change the Action Type.
Action Target	Yes	Select the target for the action. Options include Self, All Members, and All Members and Parent.
Description	No	Optionally, enter a description to clarify the action's purpose or behavior.

Table 3-1 (Cont.) Actions Data Reference

Field Name	Required	Description
Action Type	Yes	<p>Select the type of action:</p> <ul style="list-style-type: none"> • Dunning Letter: Sends a dunning letter to the selected action target. You must also select a value in the Template field. • Invoice Reminder: Sends an invoice reminder to the selected action target. You must also select a value in the Template field. • Late Fee: Charges a late fee for the selected action target. • Finance Charge: Charges a finance charge to the action target. You must also specify a Currency and a Percent of the overdue balance to charge. • Custom Action: Indicates that a custom action should be added. <p>Note: When editing a collections action, you can't change the Action Type.</p>
Currency	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Select a currency for the action.</p>
Charge	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Choose how to assess the charge (for example, Both, Percent, or Fixed Amount).</p>
Operator	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Select an operator (for example, SUM).</p>
Percentage	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Enter the percentage for the action if required. For example: % 30</p>
Amount	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Enter a fixed amount if required by the action type. For example: \$200</p>
Template	Yes	<p>Available if the Action Type is set to Late Fee or Finance Charge. Select a template for the action, such as for a Dunning Letter or Invoice Reminder.</p>

4

Creating and Managing Scenarios

In Oracle Communications Billing and Revenue Management (BRM), learn how to work with Scenarios using Collections Configuration Manager. A scenario is a set of conditions and actions that define how Collections Configuration Center handles overdue bill units.

To work with scenarios, see the following topics:

- [About Scenarios](#)
- [Creating a Scenario](#)
- [Editing a Scenario](#)
- [Duplicating a Scenario](#)
- [Deleting a Scenario](#)
- [Scenario Data Reference](#)

About Scenarios

Scenarios control when bill units enter or exit the collections process and specify an ordered list of actions to take against a bill unit in collections. You associate each scenario with a currency profile and define the actions and criteria that guide its operation. Scenarios are the foundation of collections management and allow you to standardize and automate bill unit handling.

You can view a scenario by clicking the scenario name in the list. The scenario details open in a read-only panel on the side.

Note

You must associate each scenario with one currency profile.

You must create profiles and actions before associating them with a scenario.


Creating a Scenario

When you create a collections scenario, you select from a list of actions that you have previously defined and then specify the following characteristics:

- The order in which the actions should take place.
- The number of days after entering collections that the action should be completed. For example, 5 days after entering collections.
- Whether an action is optional or mandatory.

To create a scenario:

1. From the Home page, click **Scenarios** from the bottom left.

2. Click **Create Scenario** in the top-right corner of the Scenarios page.
3. On the General Information page, enter the following details for your scenario and click **Continue**:
 - **Scenario Name**: Enter a unique and descriptive name.
 - **Description**: Optionally, provide a description to help identify the scenario's purpose.
4. On the Select Profile page, assign a currency profile to the scenario. Each scenario must be linked to a single currency profile. Do one of the following and click **Continue**:
 - Choose an existing profile from the list by clicking on the row (not the name) for that profile.
 - Click **Create Profile** to define a new profile. See "[Creating Collections Profiles](#)" for more information.
5. On the Entry & Exit Criteria page, specify the thresholds for bill units entering or leaving the scenario and click **Continue**.
 - **Entry Criteria**: Specify values such as
 - **Amount**
 - **Days**
 - **Severity**These values define when bill units become subject to this scenario.
 - **Exit Criteria**: Enter a value in the **Amount** field, lesser than the entry amount, which indicates the threshold for bill units to exit the scenario.
6. Click **Continue**.
7. On the Additional Entry Criteria page, you can refine your scenario by adding more targeted conditions, if appropriate for your business needs, and click **Continue**. To add parameters:
 - a. Click **Add Parameters**, select the parameters you want to use out of options like Payment Method, Business Type, Account Status, Attribute, Pending Balance, Customer Name, Creation Date, and click **Choose Parameters**.
 - b. For each parameter that you have added, select an operator from the list and select or enter a value. For example, if you select Creation Date parameter, select the Operator from options such as Between, Before and After and then, enter or select the Date value and click **Continue**.
8. On the Select Actions page, assign the collection actions for this scenario:
 - To select existing actions, click **Add Actions**, select the actions from the list, and click **Choose Actions**.
 - You can also click **Create Actions** to define a new custom action. See "[Creating Collections Actions](#)" for more information.
 - To add the same action more than once, click the menu icon and select Duplicate.
 - To remove an action from your scenario, select the box next to the action and click Remove.
 - To change the order of the actions in the list, drag the  icon at the end of the row to the new position. However, the order the actions are performed in is based on the number of days, rather than the order in the list.

Note

Actions are generally performed based on the number of days configured; however, if multiple actions have the same number of days, they will be processed in the order they appear in the list.

The Review Details & Create Scenario page presents a summary of all scenario settings.

9. For each action you select, update the **Activate After** field to indicate how many days after the bill unit enters collections the action should be preformed, and select whether the action is **Mandatory** or **Optional** in the Action Mode field. Only manual actions should be optional.
10. Review the information carefully. When you are satisfied with all details, click **Create Scenario**.

A message will confirm that your scenario was created successfully.

You will be redirected to the View and Manage all Configured Scenarios page, where your new scenario appears in the list.

Editing a Scenario

You can edit a collections scenario to meet your changing business needs.

To edit an existing collections scenario:

1. On the View and Manage all Configured Scenarios page, click the following menu icon at the end of the row for the scenario you want to edit:



2. Select **Edit**.
3. Update the information as needed. See "[Scenario Data Reference](#)" for details of the information you can edit.
4. Click **Save Scenario**.

The changes are saved to the scenario.

Duplicating a Scenario

To duplicate an existing scenario:

1. On the View and Manage all Configured Scenarios page, select the row for the scenario you want to duplicate.
2. Click the following menu icon at the end of the row:



3. Select **Duplicate**.
4. A confirmation dialog appears. When you confirm, a new scenario is created with **(Duplicate)** prefixed to the scenario name, and all other details copied from the original scenario.

Collections Configuration Center creates a new scenario with the details you provided.

Deleting a Scenario

Note

You cannot delete scenarios that are in use or associated with active collections.

To delete a collections scenario:

1. On the View and Manage all Configured Scenarios page, select the row of the scenario you want to delete.
2. Click the following menu icon at the end of the row:



3. Select **Delete**.
4. Confirm that you want to delete the scenario.

Collections Configuration Center removes the scenario from the list.

Scenario Data Reference

[Table 4-1](#) contains information about the data used to create and edit scenarios.

Table 4-1 Scenario Details

Field	Required	Description	Validation
Scenario Name	Yes	A unique name for the scenario	Must not duplicate existing scenario names.
Description	No	An optional description for reference	Text only.
Profile	Yes	The collections profile to associate with the scenario	Must exist; only one per scenario.
Entry Amount	Yes	Minimum overdue balance for entry	Must be a number greater than 0.
Entry Days	Yes	Minimum days overdue for entry	Must be a whole number greater than 0.
Severity	Yes	Scenario severity	Must be a number greater than 0.
Exit Amount	Yes	Balance at which bill unit exits scenario	Must be a number greater than or equal to 0. This amount must be less than the Entry Amount.
Additional Criteria	No	Optional parameters for advanced filtering. By default, the following parameters are available: <ul style="list-style-type: none">• Account Status• Attribute• Business Type• Creation Date• Customer Name• Payment Method• Pending Balance	Operator and value required if added.

Table 4-1 (Cont.) Scenario Details

Field	Required	Description	Validation
Action Mode	Yes	Specifies whether the action is required (Mandatory) or can be skipped (Optional) as part of the scenario.	Must be either "Mandatory" or "Optional".
Activate After	No	Indicates how many days after the bill unit enters collections the action should be performed.	Must be a whole number greater than or equal to 0.

5

Managing Aging Buckets

In Oracle Communications Billing and Revenue Management (BRM), learn how aging buckets divide overdue balances into categories based on the number of days overdue. You can use aging buckets to monitor the status of unpaid balances, drive collection actions, and view trends in bill unit aging.

To work with aging buckets, see the following topics:

- [About Aging Buckets](#)
- [Adding Buckets](#)
- [Modifying Buckets](#)
- [Removing Buckets](#)

About Aging Buckets

You use aging buckets to categorize bill units by the number of days they are past due, allowing you to assign collections actions based on a bill unit's bucket.

For each bucket, you define the maximum days a bill unit can be past due. For example:

- **30 days:** Holds bills that are 1 to 30 days overdue
- **60 days:** Holds bills that are 31 to 60 days overdue
- **90 days:** Holds bills that are 61 to 90 days overdue

Note

Bill units older than 90 days fall into an implicit fourth bucket.

When a bill unit exceeds a bucket's range, the system moves it to the next bucket. You create or modify aging buckets to fit your business or reporting needs. The system supports up to ten buckets.

Review and update aging bucket values regularly to reflect changes in collection processes or reporting requirements. Discuss any updates with affected business or accounting teams to ensure data continuity.

Adding Buckets

You can define and adjust aging buckets to categorize overdue balances.

When you create aging buckets, assign a unique value for days to each bucket and define at least one aging bucket. If you modify bucket definitions, the system immediately updates how it classifies overdue balances.

To add buckets:

1. From the Home page, click **Aging Bucket** on the bottom left.
The **View and Manage Aging Bucket** page appears.
2. Click **Add Bucket**.
A new bucket appears in the list.
3. In the **Days** field for the new bucket, enter the number of days for this bucket.

Modifying Buckets

If you modify bucket definitions, the system immediately updates how it classifies overdue balances.

To modify an existing bucket:

1. From the Home page, click **Aging Bucket** from the bottom left and locate the bucket you want to update.
2. In the **Days** field, enter a new value to update the number of days for that bucket.

Your updated bucket will be saved.

Removing Buckets

To remove an aging bucket:

1. From the Home page, click **Aging Bucket** from the bottom left and locate the bucket you want to delete.
2. Click the **Delete** icon for the bucket that you want to remove.
3. Select **Delete** when prompted to permanently delete the bucket.