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PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook

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PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook
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Contents

Preface

Oracle's PeopleSoft CRM Bill Presentment and Account Management Preface vii

PeopleSoft Application Fundamentals vii
PeopleSoft Industry Application Fundamentals viii
PeopleSoft Automation and Configuration Tools ix
PeopleSoft Services Foundation x
PeopleSoft Business Object Management x
PeopleSoft Product and Item Management xi
PeopleTools PeopleBooks xi
PeopleBooks and the PeopleSoft Online Library xi

Chapter 1

Getting Started with PeopleSoft Bill Presentment and Account Management 1

Bill Presentment and Account Management Overview 1
Bill Presentment and Account Management Business Processes 1
Bill Presentment and Account Management Integrations 2
Bill Presentment and Account Management Implementation 2

Chapter 2

Understanding Account and Billing Management 3

Billing Account Management 3
Account Creation 4
The Account Framework 5
Account Hierarchies 6

Chapter 3

Understanding Prepaid Accounts for Communication Service Providers 7

Prepaid Accounts 7
Prepaid Account Lifecycle Process 8
Billing and Prepaid Accounts 9

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Asynchronous Messaging 9
Synchronous Messaging 9
Installed Product and Service Relationship 10
Account Activation 10
Single Activation 11
Bulk Activation 11
Common Terminology Used for Prepaid Accounts and Wireless Communication Industry 12

Chapter 4

Setting Up Prepaid Account Management 15

Understanding Prepaid Consumers 15
Setting up the Prepaid Consumer Customer Identity 15
Page Used to Set Up the Prepaid Consumer Customer Identity 15
Setting up the Prepaid Consumer Customer Identity 15
Setting Up a Communications Business Unit 16
Page Used to Set Up a Communications Business Unit 16
Setting Up a Communications Business Unit 17
Enabling Alerts and Scripts for Account Management 18

Chapter 5

Setting Up Application Security for Billing Accounts 19

Understanding Application Security for Billing Accounts 19
Security Enforcement 19
Role-Based Privileges 19
CRM Security Framework 21
Enabling or Disabling Billing Security 22
Understanding Billing Security Enablement 22
Page Used to Disable Billing Security 23

Chapter 6

Managing Accounts and Viewing Bills in the Communications and Energy Industries 25

Understanding Account Creation and Management 25
Understanding Prepaid Account Management 26
Prepaid Account Information 27
Prepaid Account Management Process 27
Managing Accounts 27
Pages Used to Manage Accounts 28
Maintaining Account Details 29

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Maintaining Account Membership 35
Managing Account Balances 36
Managing Account Usage 37
Managing Bill History 39
Viewing Installed Products 40
Viewing Bills 41
Pages Used to View Billing Information 42
Viewing Bill Details 42
Viewing Bill Items Summary 44
Viewing Bill Item Details and Bill Events 44
Managing Disputes 45
Understanding Dispute Creation 46
Page Used to View Dispute History 47
Viewing Dispute History 47
Managing Prepaid Accounts 48
Pages Used to Manage Prepaid Accounts 49
Adding or Maintaining Prepaid Account Details 49
Viewing Account Members 50
Managing Account Balance and Payments 51
Viewing Account Usage 54
Viewing Payment History 54
Creating an Order or Quote for a Prepaid Account 55
Understanding Prepaid Order Creation Scenarios 55
Understanding the Prepaid Order Process 55
Pages Used to Create an Order or Quote for a Prepaid Account 56
Adding a Prepaid Consumer 56
Creating an Order or Quote for a Prepaid Account 57
Setting Up the Prepaid Account 61
Activating Prepaid and Postpaid Services 61
Understanding Service Activation 62
Pages Used to Activate Prepaid and Postpaid Services 62
Converting a Prepaid Account to a Postpaid Account 62

Chapter 7

Setting Up Billing Integration for the Communication and Energy Industries 65

Understanding Billing Systems Integration 65
Postpaid Account EIPs 66
Prepaid Account EIPs 66
Bill-Related EIPs 72
Defining Configuration Parameters 75
Understanding Configuration Parameters 75
Page Used to Define Configuration Parameters 76

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Defining Configuration Parameters for Integration 76

Chapter 8

Managing Billing Accounts for the Financial Services and Insurance Industries 81

Understanding Billing Accounts 81
Billing Accounts 81
Billing Account Component Activation 81
Billing Account Integration 82
Enabling Billing Accounts 82
Page Used to Enable Billing Accounts 82
Enabling the Billing Account Component 83
Viewing Billing Accounts 84
Pages Used to View Billing Accounts 84
Viewing Billing Information 84
Viewing Financial Accounts 85
Viewing Cases 86

Appendix A

Delivered Web Service and Service Operations 87

Delivered Web Services 87
Financial Account Web Service 87
Viewing the Message Elements 88

Index 91

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Oracle's PeopleSoft CRM Bill Presentment and Account Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft industry application fundamentals
- PeopleSoft automation and configuration tools.
- PeopleSoft services foundation.
- PeopleSoft business object management.
- PeopleSoft product and item management.
- PeopleTools PeopleBooks.

Note. All information found in this PeopleBook is applicable to PeopleSoft CRM for High Technology.

PeopleSoft Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

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- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews.

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

PeopleSoft Industry Application Fundamentals

The *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook*contains essential information describing the setup and design of PeopleSoft CRM industry-specific applications and the use of features that are common to multiple applications within PeopleSoft CRM industry applications, including information about:

- Industry-specific tables.
- Industry-specific setIDs and roles.
- Products for industries.
- Arrangements and contracts.
- Industry-specific business objects.
- Application security for financial services.
- Financial accounts.
- Churn management.
- Fraud management.

See Also

PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Industry Application Fundamentals Preface"

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PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are four parts to the PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook:

- Correspondence management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge management.

  This part discusses the setup of Verity search.

- Business Process Management

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the Business Process Execution Language (BPEL) infrastructure to initiate and manage BPEL process instances.
  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
  - The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

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PeopleSoft Services Foundation

The *PeopleSoft CRM 9.1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Integrated FieldService, PeopleSoft Order Capture, and the PeopleSoft call center applications (PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources).

There are three parts to the PeopleSoft CRM 9.1 Services Foundation PeopleBook:

- Solution management.

  Solution management enables users to establish a set of predefined solutions that call center agents and field service technicians can use to resolve customer problems.

- Transaction Billing Processor Integration.

  PeopleSoft Transaction Billing Processor enables PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand services.

- Environmental Systems Research Institute (ESRI) integration.

  The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities.

See Also

PeopleSoft CRM 9.1 Services Foundation PeopleBook, "Oracle's PeopleSoft CRM Services Foundation Preface"

PeopleSoft Business Object Management

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

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- Business Object Management.

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

PeopleSoft Product and Item Management

The *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Oracle's PeopleSoft CRM Product and Item Management Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.

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- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

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Chapter 1

Getting Started with PeopleSoft Bill Presentment and Account Management

This chapter provides an overview of Bill Presentment and Account Management and discusses:

- Bill Presentment and Account Management business processes.
- Bill Presentment and Account Management integrations.
- Bill Presentment and Account Management implementation.

Bill Presentment and Account Management Overview

Bill Presentment and Account Management uses the power of CRM and provides industry-specific functionality to enable you to provide full-featured billing account management for all products and services that you offer to customers.

Note. This PeopleBook focuses on the setup and usage of industry-specific functionality and does not discuss core CRM setup or usage. It is highly recommended that you review the references that appear in each chapter before beginning your implementation.

Bill Presentment and Account Management Business Processes

Bill Presentment and Account Management enables users to:

- Update billing account information, such as nickname or address.
- Manage billing accounts, including changing payment details, adding addresses, viewing account balances and usage, viewing billing and dispute history, and viewing installed services.
- View billing information, including details on bills, bill items, and bill events.
- Create disputes for billing account balances, account usage, bill items, or events.
- Manage both prepaid and postpaid accounts.
- Retrieve current billing and account status information on prepaid accounts from a third-party billing vendor.
- Make one time payments or set up a recurring threshold or monthly payment schedule.

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- Convert a prepaid account to a postpaid account.
- For postpaid accounts, create disputes for account balances, account usage, bill items, or events.

Additionally, communication service providers and energy companies can add accounts.

Bill Presentment and Account Management Integrations

Bill Presentment and Account Management integrates with these PeopleSoft applications:

- Support.
- Self Service Support.
- Order Capture.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the *My Oracle Support* website.

Bill Presentment and Account Management Implementation

Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, with information on where to find the most current version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

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Chapter 2

Understanding Account and Billing Management

This chapter discusses:

- Billing account management.
- Account creation.
- The account framework.
- Account hierarchies.

Billing Account Management

CRM provides billing account management functionality that works differently depending on the industry's needs:

- In the financial services and insurance industries, billing accounts are set up and maintained in the PeopleSoft or third-party billing system and brought into CRM through integration.

  The CRM billing account database is used primarily by customer service representatives (CSRs) to answer inquiries, update billing Accounts and resolve disputes.

- In the communications services and energy industries, billing accounts are created and maintained in the CRM system and brought into the billing system through integration.

  Customers can view and maintain account information in CRM through self-service applications. CSRs use the 360-degree view to access and update billing accounts, and resolve disputes.

  CSRs and customers (using self-service) can view and update account-related information, including services that are associated with the account, associated bills, bill-related disputes, and account relationships. CSRs can view a customer's billing information profile in different levels through one desktop application.

  When a new Billing Account is created through Order Capture business process, the BillTo customer is added to the billing Account with a *Manager* role.

A bill (for example, a cellular phone bill) is a collection of bill items (monthly service charge, federal tax, and so on), and each of these items is linked to one or multiple bill events (for example, call details). During customer interaction, CSRs can review billing information (bill and bill items) in summary and detailed views and view bill images in HTML format, which enables them to address customer inquiries quickly and effectively.

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The billing framework provides front-end billing functionality through the implementation of integration points. For example, the Bill Dispute and Adjustment integration enables CSRs to create disputes on account balance, account usage, bill item, and bill event. Administrators can set up application rules to decide whether a dispute needs to be routed to the Billing department or can be adjusted in the customer's account instantaneously (if the disputable amount does not exceed the threshold value).

Note. Prepaid accounts are slightly different functionally. A positive balance must be available on the prepaid account before services are rendered. The billing framework provides a mechanism for the CSR or customer to top-up the account balance and to check balance and other account information. Disputes are not supported with prepaid accounts.

The CRM system uses cases to handle disputes for the communication and energy industries. When a customer logs a complaint with a CSR regarding a bill dispute, the system captures the dispute information and creates a bill dispute case. If the dispute can be adjusted (determined by configurable application rules) instantly, the system credits the disputable amount back to the account in the CRM system and sends a credit transaction to the billing system for account update. The dispute case is closed. However, if the dispute needs further investigation from the billing side, the system publishes a message to the billing system to begin the process. The case remains open until the dispute is resolved. Bill dispute effects on account balances or billing information are updated and reflected in the CRM system accordingly.

All transactions between CSRs and customers regarding billing inquiries and disputes are captured as interactions.

Note. Bill Disputes functionality is used by Communication and Energy solutions only.

CDH Customer Merge

If CDH integration is activated in the system, merge routines are used to handle the consolidation of customer records for billing accounts.

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Understanding Customer Data Hub Integration."

Account Creation

Billing accounts in the communications services and energy industries are created in two ways:

- Through the order management business process.

  When a new customer places an order for services, the system records account-related information. When the order is saved, a CRM account is created by the business process that is associated with the transaction.

  One of the steps in the order capture business process sends a message to the billing application to create a billing account. When that billing account is created, a message is sent back to PeopleSoft CRM, and the CRM account is updated with the billing account number.

- By a customer service representative (CSR) in response to a request from a customer account manager or billing account administrator.

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Note. Prepaid accounts can be created through an order or imported from a third-party system. Imported prepaid accounts are automatically assigned to the anonymous prepaid customer.

The Account Framework

Accounts provide a framework to manage the services and products that have been purchased or subscribed to by customers of a communications services and energy provider. Invoices, which are typically generated by industry-specific billing applications, are generated at an account level. All requests and orders, whether for new services or changes to existing services, are managed at the account level. Accounts dictate billing information such as bill payment type, invoice frequency, and bill payment information, including credit card numbers. Account setup and management in PeopleSoft CRM industries is generally driven by the requirements of a specific billing application. PeopleSoft CRM industries integrate with any standard billing system, including PeopleSoft Billing.

The accounts framework enables customers to:

- Capture essential information for account creation (primary contact, payment type, payment details, and so on) during new order capture.
- Create accounts either online or as part of a business process that is associated with new order capture.
- Associate an account with a single user or multiple users.

  Multiple users can access services under the same account. For example, a DSL service for a residential customer may have four family members who access the service. Each family member has an individual email ID. Out of these four, the head of the household is the primary contact and is authorized to make changes to payment details, to add, modify, or delete services, and so on. The bills for the DSL service go to the head of household. The other three members of the family can view account details.

  When you assign multiple users to a single account, you select from different roles that determine user privileges.
- Associate either single or multiple products and services with an account.

  You can associate multiple products and services with one account. For example, an account can have both basic telephone service and wireless service.
- Define account types and account associations.
- Associate accounts with a bill, and maintain billing history.
- Associate accounts and addresses.
- Modify account details, which includes adding or removing account users, changing payment details, and changing address information.

  Appropriate enterprise integration points (EIPs) reflect these changes in the billing system.
- Integrate accounts as part of the 360-degree view of the customer and part of the Interactions page.

  This integration is configurable.
- Enable CSRs and administrators to change payment and associated details.

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- Create prepaid and postpaid accounts.
- Support prepaid account functionality. Funds must be available in the account for the services to function properly.

Account Hierarchies

A communications service or energy company's business accounts are supported through account hierarchies, with a parent and child relationship between accounts.

Subordinate Accounts

Subordinate accounts do not receive a bill, although the usage is tracked to the individual account. For example, ABC Company provides cell phones for employees. ABC Company receives an aggregate bill that tracks the usage of each employee. Individual employees, the subordinate accounts, do not receive bills.

Nonsubordinate Accounts

In nonsubordinate accounts, the child account is responsible for bill payment. For example, ABC Company sponsors a corporate credit card. The parent account belongs to the ABC Company, and the child accounts belong to the employees to whom cards have been issued and for whom separate accounts have been defined. The employees are responsible for paying the accounts.

Sponsored Accounts and Sponsoring Accounts

Sponsor accounts are responsible for sponsored rates. For example, a company may sponsor the subscription (monthly cycle fees) for a mobile phone service for its employees. However, the employee is responsible for any additional usage fees. Therefore, the bill item that is associated with the subscription fee is associated with the sponsor bill, not with the employee bill.

Individual Accounts

These accounts are owned by individual customers, and the primary account holder is responsible for associated billing.

Note. These hierarchies, as well as bill consolidation, take place in the billing application.

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Chapter 3

Understanding Prepaid Accounts for Communication Service Providers

This chapter discusses:

- Prepaid accounts.
- Prepaid account lifecycle process.
- Billing and prepaid accounts.
- Installed product and service relationship.
- Bulk account and service creation.

Prepaid Accounts

This section discusses:

- Benefits
- Features
- Implementation considerations

Benefits

All wireless service providers offer their customer the option to pay in advance for wireless services that will be consumed later. This type of service, called a prepaid wireless service (or prepay) has a number of advantages:

- The service provider receives the money up-front.
- When there are no funds available on a prepaid account, the service is suspended.

  This reduces the collections activity required by the service provider.
- Because funds are paid before the service is used, service providers do not need to perform credit verification.

  Customers with poor credit can get access to wireless services.
- Because there is no credit verification there is no need for customer information. Customers can be anonymous.

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Features

The prepaid account offers the following features:

- Anonymous customer for creation of accounts through storefront.
- Pre-provisioning and post-provisioning.
- Integration with fulfillment system.
- Manual or automatic activation depending on the source.
- Holds for customer data validation and number pool validation.
- Searches by phone number.
- Top up and management of the prepaid account.
- Bulk order creation of prepaid accounts and installed services.

Implementation Considerations

Consider the following when planning your implementation:

- Prepaid accounts can be created through a new order or imported from the prepaid billing system. Imported accounts are automatically assigned to the anonymous prepaid consumer.
- Only one account is available per order. Only one prepaid service is available per account.
- Prepaid accounts integrate with installed product for service account handling.
- Prepaid accounts are accessed from the 360-degree view or Service Management by the phone number or customer information.
- The prepaid billing system is the holder of the account information. The CRM prepaid account mirrors what it gets from the prepaid billing system. PeopleSoft provides error handling for situations when the billing system is down.

Prepaid Account Lifecycle Process

The new order BPEL process (Telco New Order BPEL) coordinates the creation of the installed product and the two billing accounts (CRM and external prepaid). The process then notifies the HLR about the new account, plan, and information.

The process involves the following steps:

1. Create the CRM account.
2. Create the installed product in CRM with the status set to either*Pending Call-Activation* if shipping is necessary or *Pending Auto-Activation* if the order was fulfilled at the storefront.
3. Create an account in the external prepaid billing system with the status set to *Activated.* Associate it to the CRM account.

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4. If necessary, the fulfillment system fulfills the order.

   If shipping is involved, the Telco New Order BPEL process will end. A separate BPEL process called Telco Activate Service runs when the customer calls in to activate the service.

5. Assign plan MSISDN numbers to the new account.

6. Activate on the HLR, the IMSI and MSISDN with the selected plan.

7. Hotline the service if there are no funds in the account and set the Installed Product status to *Pending Top-up.* If funds are available set the Installed Product status to *Activated.*

8. The customer can add funds and manage the prepaid account either through self-service or by calling into the call center. Changes to the account can also be made externally through the prepaid billing system facilities and will be reflected in the CRM system.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services."

Billing and Prepaid Accounts

A messaging protocol must be established with the prepaid billing system. Information is retrieved from the prepaid billing system on demand using both synchronous and asynchronous inbound/outbound messaging. The synchronous messages need to be answered for the CRM system to manage the prepaid account.

Asynchronous Messaging

The asynchronous messaging consists of two inbound XML messages coming from the third-party billing system:

- The RBT_IPSTATUS_MSG updates installed product related information from the third party billing system on existing accounts not yet reflected in CRM. This message is used to make updates to the Installed Product status, the prepaid account status, and the Number Management service number where indicated.

- RBT_PPD_BULK_CREATE initiates the bulk creation of prepaid accounts and installed products within CRM. Typically this is used when the service provider wishes to make a large number of pre-provisioned prepaid phones available for sale in the system, such as at a retail outlet.

Synchronous Messaging

The synchronous messaging consists of several outbound XML messages going to the third-party billing system to retrieve account data for display:

- RBT_PPD_BAL_RQST – Request to third party billing system initiated from the Balance and Payments page of the Account component to retrieve current balance and status. Response information is displayed on the page.

- RBT_PPD_USAGE_RQST – Request to third party billing system initiated from the Usage page of the Account component to retrieve usage history. Response information is displayed on the page.

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- RBT_PPD_PAY_RQST – Request to third party billing system initiated from the Payments page of the Account component to retrieve payment history. Response information is displayed on the page.
- RBT_PPD_AUTO_PAY_RQST - Request to third party billing system initiated from the Balance and Payments page of the Account component to retrieve current recurring payment settings. Response information is displayed on the page
- RBT_PPD_TOPUP_SUBMIT - Post to third party billing system initiated from the Balance and Payments page of the Account component to record a credit card or bank account payment. Response information is displayed on the page as an informational message box
- RBT_PPD_VOUCHER_SUBMIT - Post to third party billing system initiated from the Balance and Payments page of the Account component to record a voucher payment. Response information is displayed on the page as an informational message box
- RBT_PPD_UPDATE_AUTOPAY_SUBMIT - Post to third party billing system initiated from the Balance and Payments page of the Account component to add, update, or cancel recurring payment configuration. Response information is displayed on the page as an informational message box.

Installed Product and Service Relationship

You can designate products to be sold only with a prepaid account, a postpaid account, or with no restriction. For example some services are not available through a prepaid account and some are not available through a normal billing cycle account. Most products are available without restriction.

The billing account type of *Prepaid Only*,*Postpaid Only* or *Either* is established when the product is defined. The Billing Options group box, which allows you to specify the types of accounts that can be used to pay for charges of the product (new or installed), appears only for the communications industry as delivered and is controlled by display templates.

When you save a package the system ensures that the package does not contain services that have both the prepaid and postpaid values. If a mix is found, an error is shown and the package not saved.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Setting Up Product Components. and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products.

Account Activation

There are two methods to activate a prepaid service:

- Single activation
- Bulk activation

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Single Activation

In this process a customer purchases a SIM card and phone, usually from a carrier's retail store. The activation of the prepaid service can take place either through an agent at the retail store or through the carrier's call center .

To activate the service through a storefront:

- The Customer Service Representative requests the SIM number.

  This information, together with the SIM management module, is used to identify the IMSI associated with the SIM.

- A MSISDN is selected from the pool of free MSISDNs.
- A service plan is selected, and configured.
- An order is placed which will:
  - Create a Prepaid Account, in *Active* state in the Prepaid billing system.
  - Activate The IMSI and MSISDN with the selected service plan in the HLR. Calls are hot-lined meaning any calls go to the call center until the account has funds added to it.
  - Send the Prepaid billing account number to the CRM system.
  - Update the Installed Product with a status of *Pending Top-up.*
- The account is in *Pending Top-up* status until funds are applied.

  The customer can purchase a prepaid card/voucher to apply funds to the account, or can pay cash at a retail store to apply funds to the account. When funds are applied to the account, the status of the account is changed to *Active.* An account can be in active status as long as the available balance is greater than zero. Some prepaid systems expire funds after a period of non-use, this is determined and controlled by the prepaid system. The CRM system is just reflecting information obtained from the prepaid system.

- The customer can now use the prepaid service

Note. If the activation takes place through a call center, the order needs to be fulfilled and there is an additional step for the customer since they need to call in and activate the phone.

Bulk Activation

In the bulk activation process, a range of accounts are pre-created in *Pre-Active* status, in the prepaid billing system for a range of ICCIDs.

Typically when a bulk load is performed, the Service Plan associated with each ICCID and the starting balance (usually zero) is specified. A prepaid billing account is created for each ICCID. Each billing account has a status of *Pre-Active.*

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Phone kits that include a handset and a SIM(ICCID) with MSISDN can be packaged and sold by retailers. To activate the service the customer purchases a prepaid card and follows the instruction in the box. No contact is required with a customer service representative to activate the prepaid service. However the prepaid customer can contact the call center, or use self-service for post activation support.

Common Terminology Used for Prepaid Accounts and Wireless Communication Industry

Subscriber Identity Module (SIM) or **SIM Card**

The Subscriber Identity Module or SIM is a smart card that contains a Global System for Mobile Communication (GSM) customer's subscription data. Service is not available without an active SIM card. Each SIM is assigned a unique number, which is known as the SIM number integrated circuit card identity (ICCID). The ICCID identifies the SIM card vendor as well. The ICCID is located on the SIM Card.

International Mobile Subscriber Identity (IMSI)

The IMSI uniquely identifies a subscriber in a GSM network. The IMSI is the primary customer identification element from a network standpoint, *not* the MSISDN.

The IMSI with a maximum of 15 numeric digits is made of 3 components

- Mobile Country Code (MCC) – 3 digit code that identifies the end-users home country
- Mobile Network Code (MNC) – 2 or 3 digit code that identifies the end-users home carrier
- Mobile Subscriber Identification number – 9-10 digit code that identifies the end-user within the home carrier's systems

Mobile Station International ISDN Number (MSISDN)

The MSISDN is the directory number assigned to a GSM end-user by the network operator. The MSISDN is similar to the Mobile Directory Number (MDN) in the TDMA world. The MSISDN which does not exceed 15 digits, follows the numbering plan specific to the country the carrier is operating in. This is the phone number used with the service. The general format is:

- CC: Country Code
- NDC: National significant digit (in the US this would be the NPA, other parts of the world may refer to this as the City Code)
- SN: Subscriber Number (in the US this would be NXX & Line number, other parts of the world may refer to this as the Exchange + Line number)

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International Mobile Equipment Identity (IMEI)

The IMEI is the unique identifier assigned to each GSM mobile device (handset). The device transmits the IMEI when requested. A network operator has an IMEI white list & black list contained in the Authentication Center.

Valid IMEI will be entered into the white list & stolen/fraudulent IMEI will be listed in the Black list. Prior to call connection the Authentication Center will be checked to ensure that the handset making or receiving the call is not on the black list. The IMEI is also stored in the billing system by some network operators. The IMEI is a 15 digit number

Home Location Register (HLR)

The HLR is a network element of a Network. It is a database used for storage and the management of subscriptions. The HLR stores permanent subscriber data such as service profile, location information and activity status. When an end-user is activated, their permanent data (SIM, IMSI, MSISDN and so forth) is entered into the HLR.

Hot-lining

Hot-lining is the process of diverting subscribers from their desired destination to a destination controlled by the service provider. Typically, this means redirecting subscribers from their desired call destination to a call center. In the case of data services this can mean subscribers from their desired web page to another that is specific to the reason the subscribers are being redirected. For prepaid services that have been activated yet have no funds, the phone is hot-lined and phone calls will be diverted to a call center.

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Chapter 4

Setting Up Prepaid Account Management

This chapter provides an overview of prepaid consumers and discusses how to:

- Set up the prepaid consumer customer identity.
- Set up a communications business unit.
- Enable alerts and scripts for account management.

Understanding Prepaid Consumers

A prepaid consumer is anonymous and no records are retained on the system. The order uses this customer when a prepaid account order is placed and the customer is not identified. In order to use this functionality you must set up a prepaid customer in the CDM and associate this customer to the communications setup. The prepaid consumer has the Billing Account Administrator role to ensure they can create accounts.

Setting up the Prepaid Consumer Customer Identity

This section discusses how to set up the prepaid consumer customer identity.

Page Used to Set Up the Prepaid Consumer Customer Identity

Page Name	*Definition Name*	*Navigation*	*Usage*
Communications Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Communications, Communications Setup	Create a customer used when a prepaid account order is placed and the customer is not identified.

Setting up the Prepaid Consumer Customer Identity

Access the Communications Setup page (Set Up CRM, Product Related, Communications, Communications Setup).

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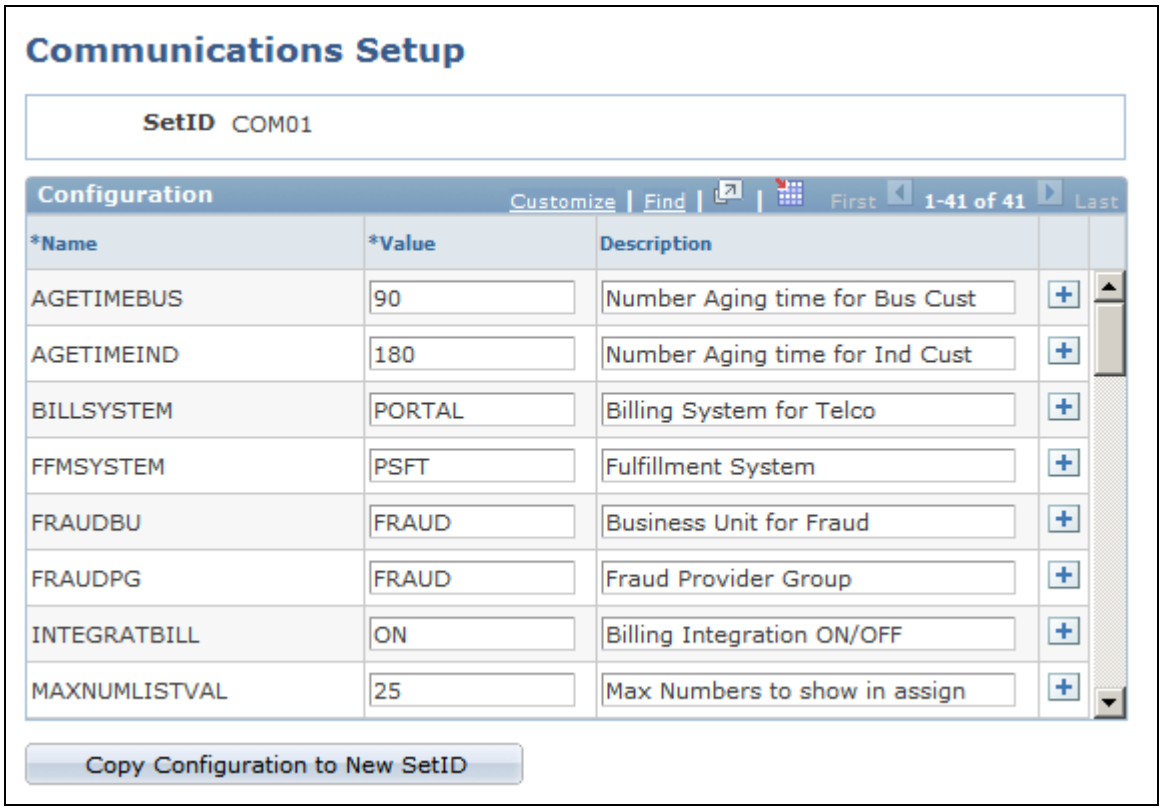

Communications Setup page

Set the PREPAIDFIRST and PREPAIDLAST to the first and last name of the consumer. The Order process will use the prepaid consumer when a prepaid account order is placed and the customer is not identified.

A consumer needs to be created in CDM that can be used in place of a real consumer for Prepaid Services. This consumer will be used if the customer purchasing the prepaid service does not want to be identified. This consumer must have Sold To Consumer,Bill To Consumer, and Ship To Consumer purchasing options selected. In addition, on the Relationships page the consumer must have the *Billing Account Administrator* role to ensure they can create accounts. Once a consumer has been created, the Communications Setup can be modified to use that consumer.

Setting Up a Communications Business Unit

This section discusses how to set up a communications business unit for Prepaid Accounts.

Page Used to Set Up a Communications Business Unit

Page Name	*Definition Name*	*Navigation*	*Usage*
Communications	BUS_UNIT_RBT	Set Up CRM, Business Unit Related, Order Capture Definition, Communications	Set up communication industry information for Order Capture business units.

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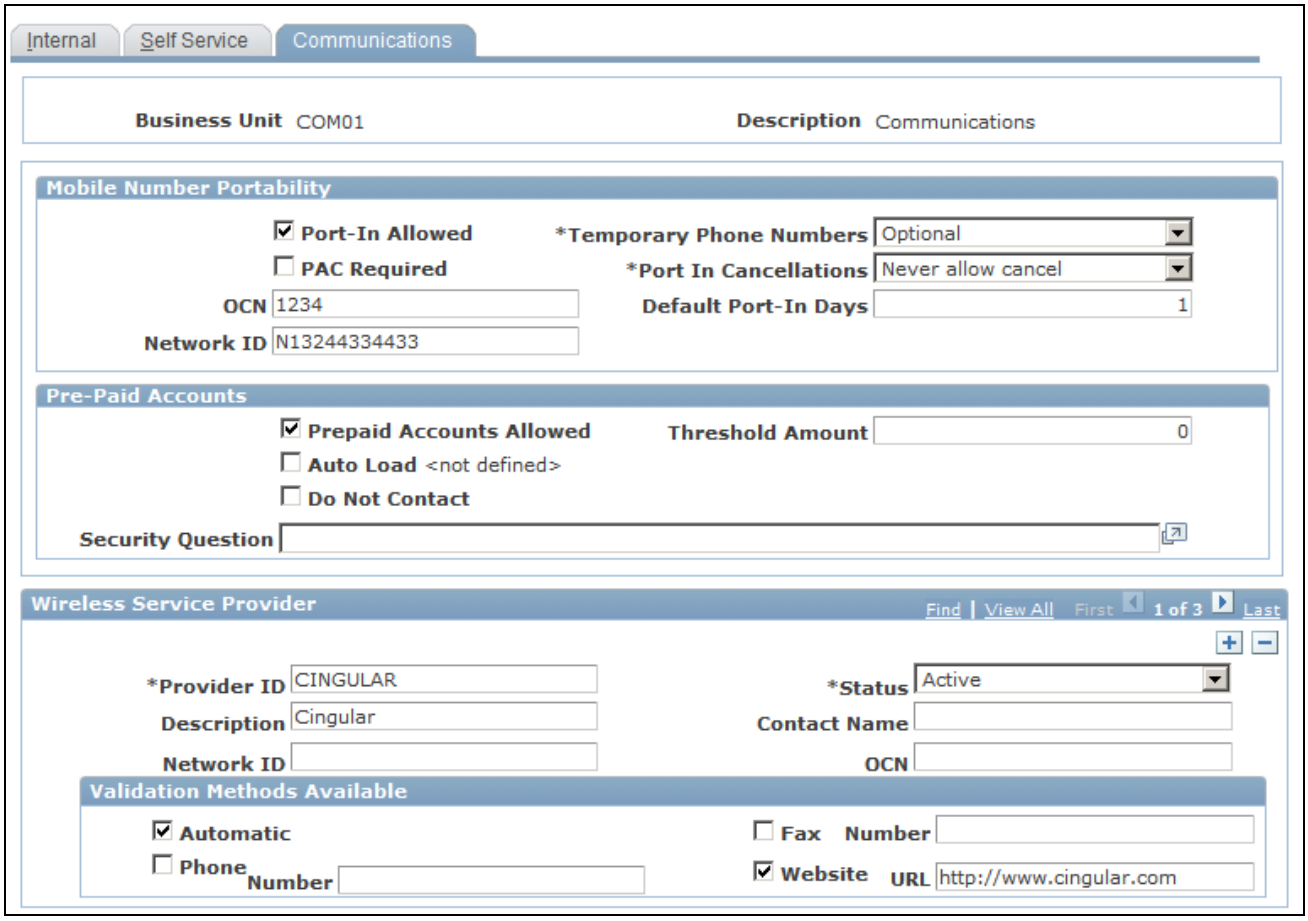
Setting Up a Communications Business Unit

Access the Communications page (Set Up CRM, Business Unit Related, Order Capture Definition, Communications).



Communications page

Note. The Communications page is used to set up a number of the order capture functions specifically designed for the communications industry. This section discusses only those fields applicable to prepaid accounts.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Defining Order Capture Business Units."

Prepaid Accounts

Prepaid Accounts Allowed Select to enable prepaid accounts.

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Threshold Amount	Enter the default threshold for threshold recurring. This amount is used as the default when setting up a Prepaid Account that will use threshold recurring — meaning that when the account balance reaches the specified dollar amount, an automatic top-up request is placed.
Auto Load	Set up whether or not the prepaid customer should automatically be loaded when using Add Prepaid Service from 360. A storefront may want to have the prepaid customer pre-loaded with each prepaid order, however a call center would not. With a call center, because of fulfillment, the customer needs to be identified.
Do Not Contact	Establish the default setting for whether or not Do Not Contact is selected in the CDM.
Security Question	Set up a default for the security question.

Enabling Alerts and Scripts for Account Management

Active Analytics Framework (AAF) is a decision-making system that invokes actions based upon the evaluation of user-defined business rules.

The policy builder provides a user-friendly environment for functional users to construct policies in a natural business language. A policy consists of three parts—a trigger point, conditions and actions:

- *Trigger points.* A trigger point is the occurrence of an event that triggers the evaluation of conditions in policies associated with it. For example the customer calls into a call center and asks about his account.
- *Conditions.* A condition is the if statement, which specifies under what circumstance would some action be performed. In this example, the system checks the account balance against the threshold, and the balance is below the threshold.
- *Actions.* An action is the then statement, which is invoked if the associated conditions are evaluated to true. The system displays an alert message on screen to indicate that the account should be topped up.

Additional examples of alerts include:

- The customer calls into a call center and asks a question about his account. When the account is brought up, an AAF policy fires if the account is prepaid. This policy attempts to upsell the customer and convince them to convert to a postpaid account.
- The customer calls into a call center and asks a question about his account. When the account is brought up, an AAF policy fires if there is no customer information available for the account. The policy's intent is to get customer information by offering a cross sell product at a reduced price.

Policies are sample data. Three trigger points have been added to allow AAF processing in the account component — When Account Balance is Updated, When Account is Displayed, and After an Account is Saved. With these trigger points, new AAF Policies can be created to manage accounts.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

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Chapter 5

Setting Up Application Security for Billing Accounts

This chapter provides an overview of application security for billing accounts and discusses how to enable or disable billing security.

Understanding Application Security for Billing Accounts

This section discusses:

- Security enforcement.
- Role-based privileges.
- CRM security framework.

Security Enforcement

Security is based on the caller's relationship and role on the account. It is enforced through the customer 360-degree view in this way:

When a caller requests a change to a billing account, the customer service representative (CSR) enters caller information into the 360-degree search page. If the caller is a contact for the account, the system uses the business object ID (BO_ID) of the caller to access the caller's role and the membership lists, view lists, functional option groups, and security profiles that are associated with the role.

In the 360-degree view, the Accounts tree node and grid show accounts based on member or manager privileges. If the agent chooses Search Accounts from the tree node or the left navigation, the Configurable Search page opens and the agent can open any Account. In this instance the system is dealing with the contact's privileges and not the agent's. Search Accounts can be disabled if needed.

Role-Based Privileges

Specific privileges are assigned to account members, account managers, and billing account administrators.

Account Members

Account members can:

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- Access accounts where they are assigned as account members.
- Access and modify their own installed services.
- Initiate a case for themselves.
- Create orders for themselves.
- Modify their own installed services.

The *Account Member* role is the most restricted role on an account. Account members cannot view billing on the account, access payment information, or create a dispute.

Account Managers

Account managers have all the privileges of account members for themselves. Additionally, they can:

- View all accounts where they are assigned as account manager and account member.
- View all installed services for related accounts.
- View account balance and account usage.
- View bills related to an account.
- View dispute history.
- Update the account name, sponsoring account, parent account on an account, account access question, billing cycle, and billing address.
- Add a new account member or account manager.

  Account managers can add members or other managers from a list of company contacts or consumer contacts, and update member roles on the account. Only account managers can remove account members from an account.

  Account members can be removed from an account even if they still have installed services assigned. When a member is removed from an account and still has installed services that are linked to the account, the removed member still owns those services but cannot modify the services or access account details.
- Change the primary account manager on an account.
- Create a case for themselves or any account members.
- Create bulk orders for other members on that account.

  Only account managers can create bulk orders for new services (for recipients who are related to the accounts), but every child order from a bulk order is owned by the account member for whom it is ordered.
- Modify installed services for everyone on the account using bulk orders.
- Create new accounts on behalf of companies or consumers for which they are already account managers on existing accounts.

  For example, if John is an account manager on an account for ABC Company, then John can create a new account for ABC Company.

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Billing Account Administrators

Billing account administrators can access all company accounts with the privileges of an account manager.

The billing account administrator is not visible as a role on the account. To assign billing account administrators to a company, you must use the Relationship Viewer in the Company, Person, or 360-Degree View component to assign the role to a contact of the company.

A billing account administrator can:

- Assign another company contact as primary account manager.
- Access all accounts of the company with the privileges of an account manager.
- Create new accounts on behalf of companies for which he is a billing account administrator.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Predefined Security Roles and Sample Users

CRM Security Framework

Access to the billing account functionality in CRM is administered through security profiles that link membership lists, view lists, and functional options together to grant access depending on their role and responsibilities.

This is the list of specific security objects are maintained for each billing account:

- Membership lists.

  For each account, two dynamic and two static membership lists are maintained. The dynamic membership lists are *BILLING_ACCOUNT_ADMINISTRATOR* and *ACCOUNT_MANAGER.* The static membership lists are *ACCOUNT_MANAGER* and for the *ACCOUNT_MEMBER* role.

  When you add a contact to an account in any of the BORM roles on the Members tab of the account object, the membership list for the role is updated.

- Security profiles for the *Billing Account Administrator* and *Account Manager* roles.
- View lists.

  These are created and updated by the system for each account and define the functionality available to each user that is linked to the account.

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- Functional options.

  These are delivered with the system, and control the role-based privileges that are available to an account user. The three functional option groups are:

Group	***Group Code***
Account Manager	ACCMANFOG01
Account Member	ACCMEMFOG01
Billing Account Administrator	BILACCFOG01

Security administrators who thoroughly understand the CRM security framework should view and modify the functional options for each option group.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Enabling or Disabling Billing Security

This section provides an overview of billing security enablement and lists the page used to disable billing application security.

Understanding Billing Security Enablement

By default, billing security is enabled for billing account management in the communications and energy industries. Enterprises that do not use billing application security can disable it on the Communications Setup page by setting the configuration parameter *RBTAPPSEC* to *Y* (enabled) or *N* (disabled).

See and Chapter 7, "Setting Up Billing Integration for the Communication and Energy Industries," page 65.

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Page Used to Disable Billing Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Communications Setup	RBT_CONFIG_PG	• Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup • Set Up CRM, Product Related, Energy, Energy Setup, Energy Setup, Communications Setup	Disable or enable application security for billing applications in the communications and energy industries. The option that controls application security is the *RBTAPPSEC*.

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Chapter 6

Managing Accounts and Viewing Bills in the Communications and Energy Industries

This chapter provides an overview of account creation and management in the communications and energy industries and discusses how to:

- Manage accounts.
- View bills.
- Manage disputes.
- Manage prepaid accounts.
- Create an order or quote for a prepaid account.
- Activate prepaid or postpaid accounts.
- Convert a prepaid account to a postpaid account.

Understanding Account Creation and Management

The account framework enables communication service providers (CSPs) and energy companies to manage the services and products that customers purchase or subscribe to. All requests and orders, whether for new services or changes to existing services, are managed at the account level. Invoices are generated at the account level. Accounts contain billing information such as bill payment type, invoice frequency, and bill payment information, including credit card numbers.

Accounts can have a single or multiple users, and more than one person can use a particular service. For example, a residential DSL customer might have four family members who access the service. Each family member has an individual email ID. Out of these four, the head of the household is the both the account manager and the billing administrator and can add subordinate accounts, make changes to payment details, add, modify, or delete services, and so on. The bills for the service go to the head of household. The other three members of the family are account members and can only view account details and details of their individual usage.

Account Creation

Accounts are created in three ways:

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- Through the Order Management business process to meet specific requirements of a billing application. PeopleSoft CRM integrates with any standard billing system, including PeopleSoft billing. CSPs gather essential information for account creation (primary contact, payment type, payment details, and so on) during new order capture or as part of a business project that is associated with new order capture.
- By a CSR in response to a request from a customer contact. The contact must have either the billing account administrator or account manager role. The system validates the contact's relationship to the company or consumer through the 360-Degree view.
- Bulk import of Prepaid Accounts that are owned by anonymous Prepaid Customer. These accounts are setup for Prepaid Package services that are sold through storefronts.

Regardless of which method is used to create accounts, integration with the postpaid and/or prepaid billing system ensures that the information in CRM and the billing system are in sync.

Account Management

Users with the proper permissions can manage accounts, including:

- Modifying account details such as payment details, billing cycles, and address information.
- Adding users to the account.
- Setting up relationships between accounts.
- Viewing bill history, dispute history, and audits.

There are database triggers on Account that audit the changes made to an account.

Note. Database triggers are not supported on DB2/UNIX platform. Changes to Billing Account cannot be audited on DB2 LUM platform because DB2 LUM does not support database auditing with PeopleTools 8.50.

Refer to *PeopleTools 8.52: Data Management PeopleBook* for more information on database triggers.

See Also

Chapter 5, "Setting Up Application Security for Billing Accounts," page 19

Chapter 7, "Setting Up Billing Integration for the Communication and Energy Industries," page 65

PeopleTools 8.52: Data Management PeopleBook

Understanding Prepaid Account Management

This section discusses:

- Prepaid account information.
- Prepaid account management process.

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Prepaid Account Information

You can view the account information retrieved synchronously from the prepaid billing system. The information displayed includes:

- The account balance available to spend and the status of the prepaid billing account.
- MSISDN or phone number for the prepaid account.
- Usage history and charges for all phone calls, one-time charges.
- Payment history including amount, date, and method.
- Non-services related charges.
- Display the prepaid services associated with a prepaid account.

Note. You can create a prepaid account directly in the Account Details page.

Prepaid Account Management Process

The prepaid account management process enables you to:

- Add or maintain the overall details of the account.
- View the account balance available to spend and top-up the account.
- View the usage and charges for all phone calls.
- View payment amounts, dates, and methods.
- View the prepaid services.
- View the activity on the account.

Managing Accounts

This section discusses how to:

- Maintain account details.
- Maintain account membership.
- Manage account balances.
- Manage account usage.
- Manage bill history.
- View installed products.

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Note. This section discusses managing postpaid accounts. These are accounts of types — *Sponsoring, Sponsored, Parent, Subordinate,* and *Individual*..

Prepaid Accounts are discussed in the Prepaid Account chapters in this PeopleBook.

See and Chapter 3, "Understanding Prepaid Accounts for Communication Service Providers," page 7. and Chapter 4, "Setting Up Prepaid Account Management," page 15.

Pages Used to Manage Accounts

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Details	RBT_ACCOUNT_PG	• Customer Accounts, Search Account, Account Details • Customer Accounts, Add Account, Account Details	Maintain account details, information generated by the billing system, payment information, and address information.
Change Account Details	RBT_CHGACTDTL_SEC	Click the Change Account Details button on the Account Details page.	Update the account information, such as account name and other accounts that are associated to it.
Change Billing Cycle	RBT_CHGBILCYC_SEC	Click the Change Billing Cycle button on the Account Details page.	Modify billing cycle interval and day.
Change Payment Details	RBT_CHNGPAY_PG	Click the Change Payment Details button on the Account Details page.	Modify payment method information.
Add Address	RBT_CHGACTADR_SEC	Click the Add New Address button on the Account Details page.	Add a new billing address.
Change Access Question	RBT_CHGACTACS_SEC	Click the Change Billing Cycle button on the Account Details page.	Modify the security question that callers must answer to obtain account access.
Members	RBT_ACCT_PERSON	• Customer Accounts, Search Account, Members • Customer Accounts, Add Account, Members	Maintain the membership list for an account.
Balance	RBT_ACCT_BAL_PG	Customer Accounts, Search Account, Balance	View current and opening balances and dispute balances.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Usage	RBT_ACCT_USAGE_PG	Customer Accounts, Search Account, Usage	View and dispute account usage.
Bill History	RBT_ACTBILL_REL_PG	Customer Accounts, Search Account, Bill History	View a summary of billing history for the account.
Dispute History	RBT_ACCTCASE_VW_PG	Customer Accounts, Search Account, Dispute History	View a list of disputes that were entered on the account.
Installed Products	RBT_ACCTPROD_PG	Customer Accounts, Search Account, Installed Product	View all installed products associated with the customer and the account.
Audit	RBT_ACCT_AUDIT	Customer Accounts, Search Account, Audit	View the audit trail of account activity.

Maintaining Account Details

Access the Account Details page (Customer Accounts, Search Account, Account Details).

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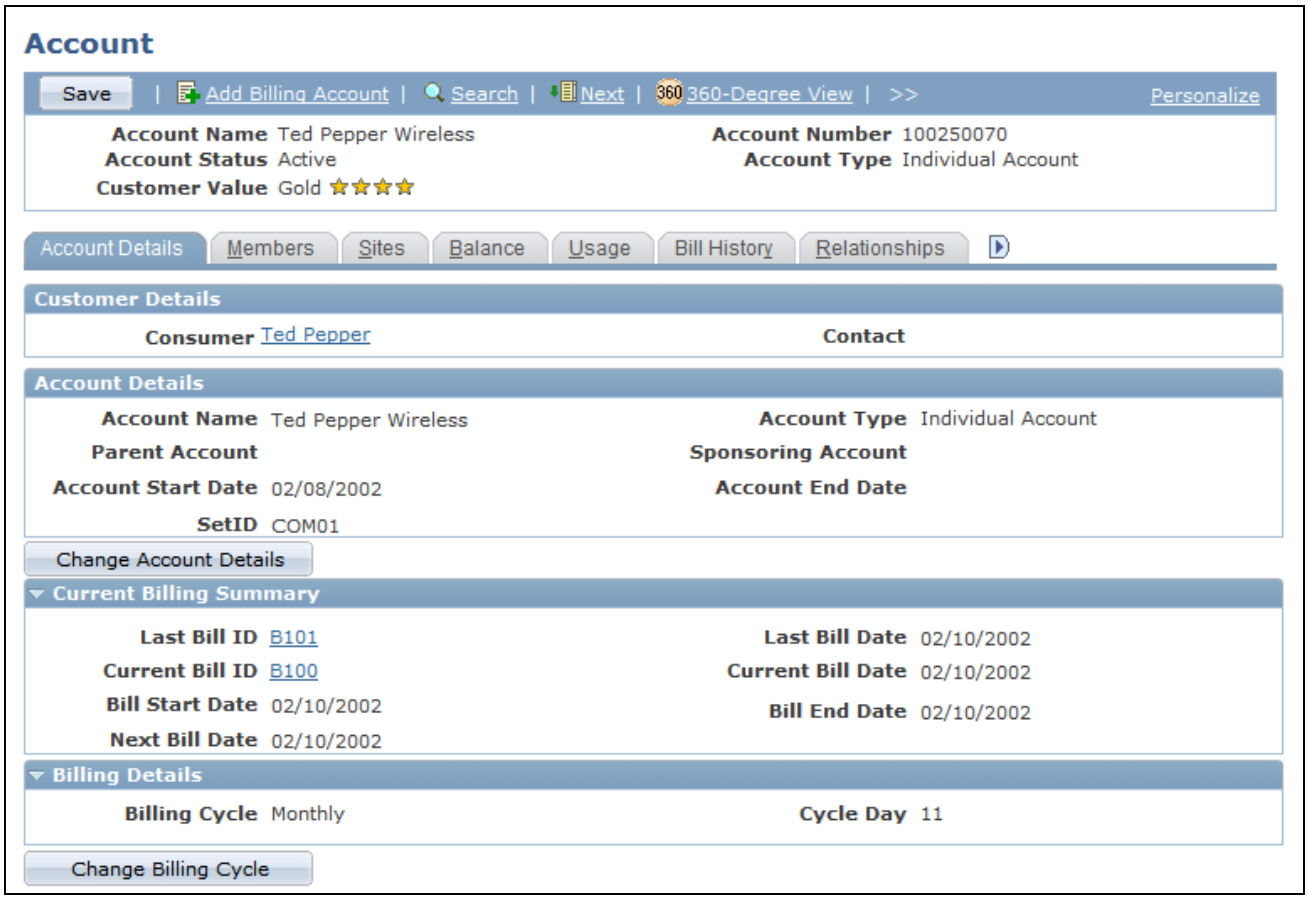

Account Details page (1 of 3)

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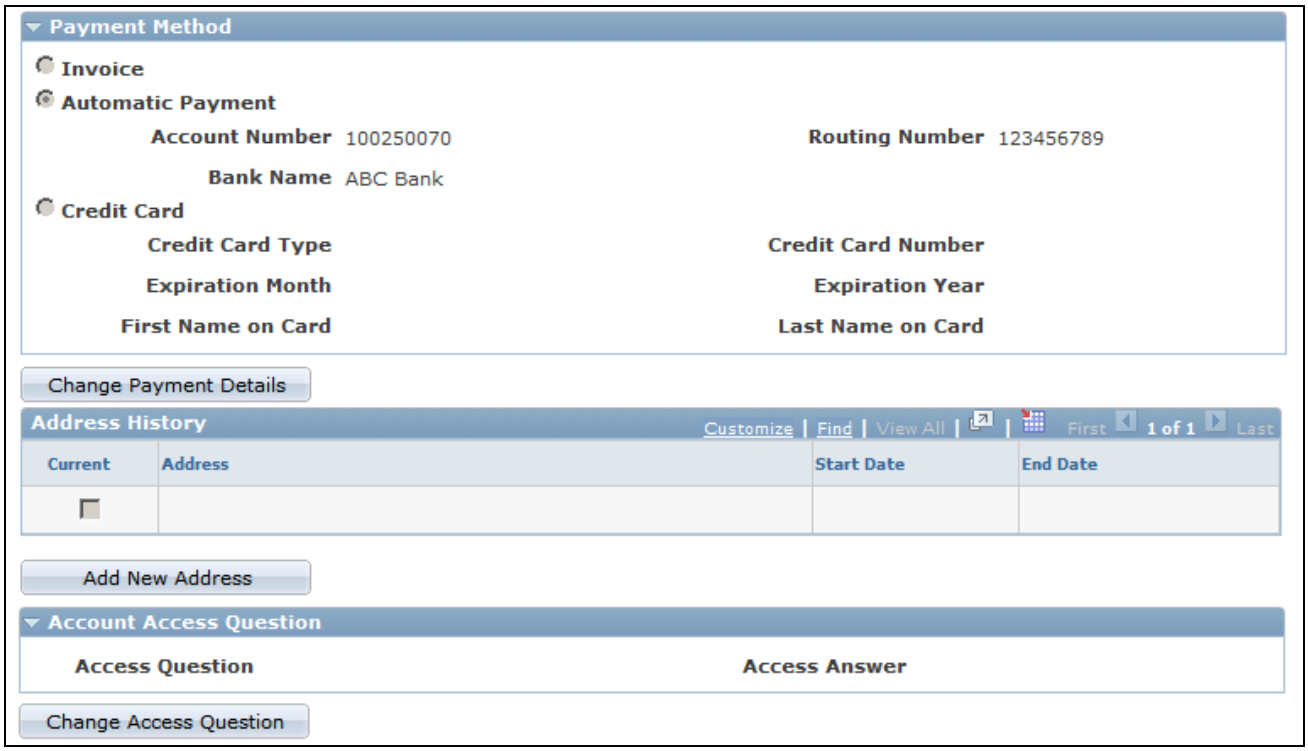

Account Details page (2 of 3)

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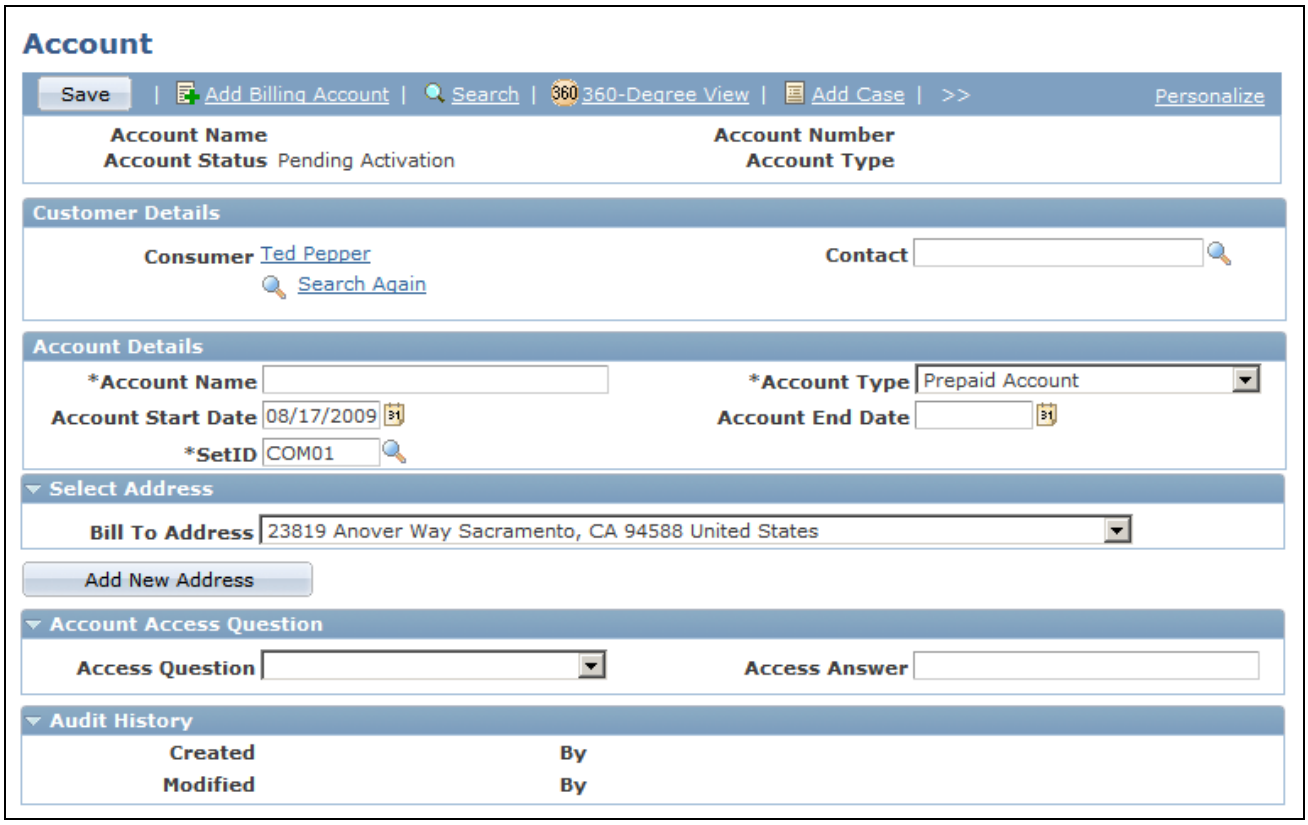

Account Details page with Prepaid account type selected (3 of 3)

When adding an account, the CSR must verify that the caller is an account manager or billing administrator through the 360–Degree View pages before the information on this page becomes enterable. Subsequently, the information is updateable either by authorized persons through self-service pages or when a CSR clicks one of the buttons to access secondary pages. If the account is still in status *Pending Activation*, the information on this page is read-only and the buttons that access secondary pages where you can update information do not appear.

When billing account information is entered on this page or updated on secondary pages, the system both updates the data in CRM and publishes a message to the financial system to update the billing account in that system.

See and Chapter 7, "Setting Up Billing Integration for the Communication and Energy Industries," page 65.

Account Details

Account Status Displays *Active*, *Closed*, *On Hold*, or *Pending Activation*. Change account status in the Service Management component.

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Account Type

Select an account type to associate with the account.

Valid values are *Individual, Parent, Prepaid, Sponsored, Sponsoring,* and *Subordinate.*

When you select the *Prepaid* account type, the Account Details page automatically adjusts to hide the Current Billing Summary, Billing Details, and Payment Method group boxes.

Note. PeopleSoft does not support the prepaid to postpaid conversion process for multilevel product bundles. Therefore, the conversion link is hidden when the account is associated with multilevel product bundles. Conversions can be performed for multilevel product bundles accounts using the convergent order functionality.

For more information on setting up prepaid accounts, see the Prepaid Account chapters in this PeopleBook.

See and Chapter 4, "Setting Up Prepaid Account Management," page 15.

Parent Account

Enter the account number of the parent account, if this is a subordinate account.

Sponsoring Account

Enter the account number of the sponsoring account, if this is a sponsored account.

Start Date and **End Date**

Enter the date service is to begin and end for the account.

Change Account Details

Click to access the Change Account Details page where you can modify account information (Click the Change Account Details button on the Account Details page).

Service Numbers

Displays the service numbers that are directly paid by the account.

This field does not appear if it is not applicable to the account.

Current Billing Summary

These fields are all generated and returned by the billing system.

Last Bill ID

Displays the last bill ID returned by the billing system. This information is updated when the bill is generated in the billing system and the account is updated with the latest bill.

Last Bill Date

Displays the date that the last bill was generated. This information is returned by the billing system and is updated when the bill is generated in the billing system.

Current Bill ID

Displays the current bill ID returned by the billing system. This information is updated when the bill is generated in the billing system.

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Current Bill Date	Displays the date that the current bill was generated. This information is returned by the billing system and is updated when the bill is generated.
Bill Start Date and **Bill End Date**	Displays the start and end date for the current billing period.
Next Bill Date	Displays the date that the next bill will be generated in the billing system.

Billing Details

These fields display details on the billing cycle.

Billing Cycle	Displays the billing cycle, usually monthly, which is generated and returned by the billing system.
Cycle Day	Displays an integer from 1 to 28. The cycle date is generated and returned by the billing system.
Change Billing Cycle	Click to access the Change Billing Cycle page to update the billing cycle or cycle day (Click the Change Billing Cycle button on the Account Details page).

Payment Method

Invoice	Select if the customer elects to be invoiced for this account.
Automatic Payment	Select if the customer elects payment to be automatically withdrawn from a bank account.
Account Number	Displays the number of the account designated for the automatic payment. This field is blank if automatic payment is not selected.
Bank Name	Displays the name of the bank. This field is blank if automatic payment is not selected.
Routing Number	Displays the bank routing number. This field is blank if automatic payment is not selected.
Credit Card	Select if the customer elects payment by credit card.
Credit Card Type	Displays the credit card type (Visa, MasterCard, American Express, Discover, or Diners Club/Carte Blanche). This field is blank if credit card payment is not selected.
Credit Card Number, Expiration Month, Expiration Year, First Name on Card, and **Last Name on Card**	Displays the number, expiration month, expiration year, and customer name on the credit card. These fields are blank if credit card payment is not selected.

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Change Payment Method Click to access the Change Payment Method page (Click the Change Payment Details button on the Account Details page).

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up PeopleSoft Order Capture," Setting Up Credit Card Integration.

Address Information

These fields display the address or addresses associated with the account. You can edit current addresses or add new addresses.

Primary Select if this is the primary address for the account.

Start Date and **End Date** Displays the effective dates for the address.

Edit Click to access the Edit Address page. This button appears only for current or future effective-dated addresses.

Add New Address Click to access the Add New Address page (Click the Add New Address button on the Account Details page).

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Name and Address Information for Business Objects."

Account Access Question

These fields verify the authenticity of the customer.

Access Question Displays a question used by the CSR to authenticate the customer. This data is not sent to the billing system.

Access Answer Displays the answer to the access question. This data is not sent to the billing system.

Change Access Question Click to access the Change Access Question page (Click the Change Billing Cycle button on the Account Details page).

Maintaining Account Membership

Access the Members page (Customer Accounts, Search Account, Members).

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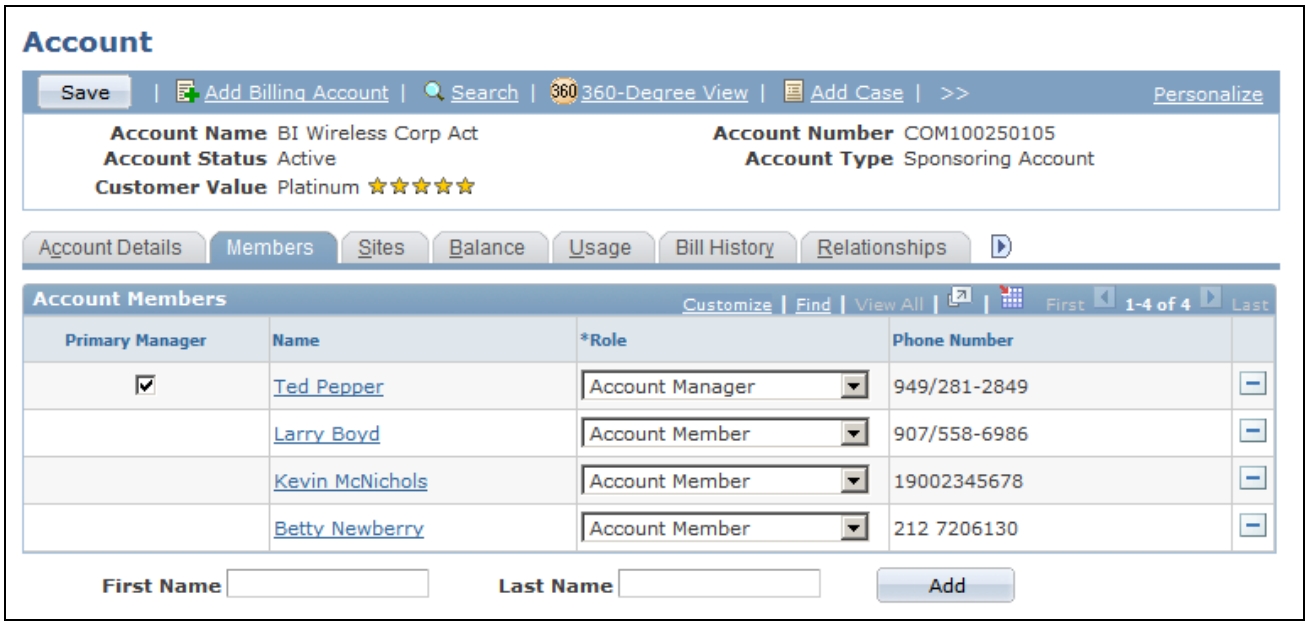

Members page

First Name and **Last Name**	Enter this information and click the Add button to initiate a search for matching names.
Primary Manager	Select this check box to designate the person as the primary manager for the account. You can have multiple account managers but only one primary account manager.
Role	Select the role of the account member. Roles are either *Account Manager* or *Account Member*.

Managing Account Balances

Access the Balance page (Customer Accounts, Search Account, Balance).

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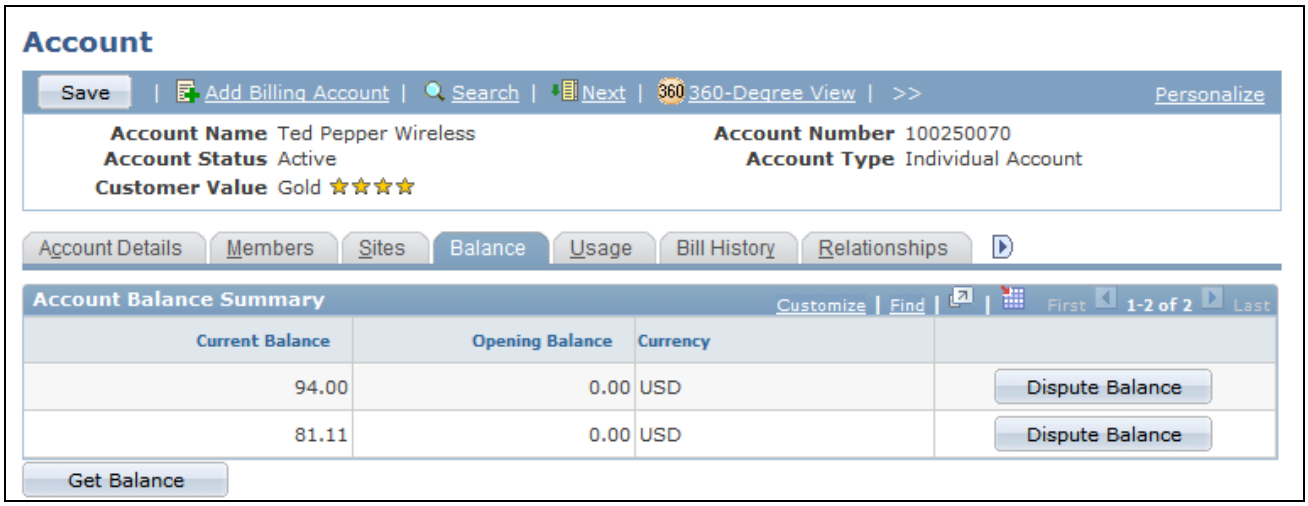

Account Balance page

Current Balance Displays the balance current as of the last call to the billing system.

Opening Balance Displays the balance at the start of the billing cycle.

Dispute Balance Click to open a case with a case type of *Bill Dispute*. The dispute type is *Balance Dispute*.

The system creates a case if the threshold value for the number of dispute cases (RBTMAXDISP) is not reached.

The system adjusts the dispute amount immediately if the threshold value for the maximum dispute amount (RBTMAXBALUSD) is not reached.

Important! An error occurs when you click this button without first launching the 360-degree view, and selecting the customer. When you have selected the customer, return to the Account Details page and click the Dispute Balance button to create the dispute case.

Get Balance Click to retrieve the current balance from the billing system.

The system sends a request to the billing system to retrieve the latest account balance.

Managing Account Usage

Access the Usage page (Customer Accounts, Search Account, Usage).

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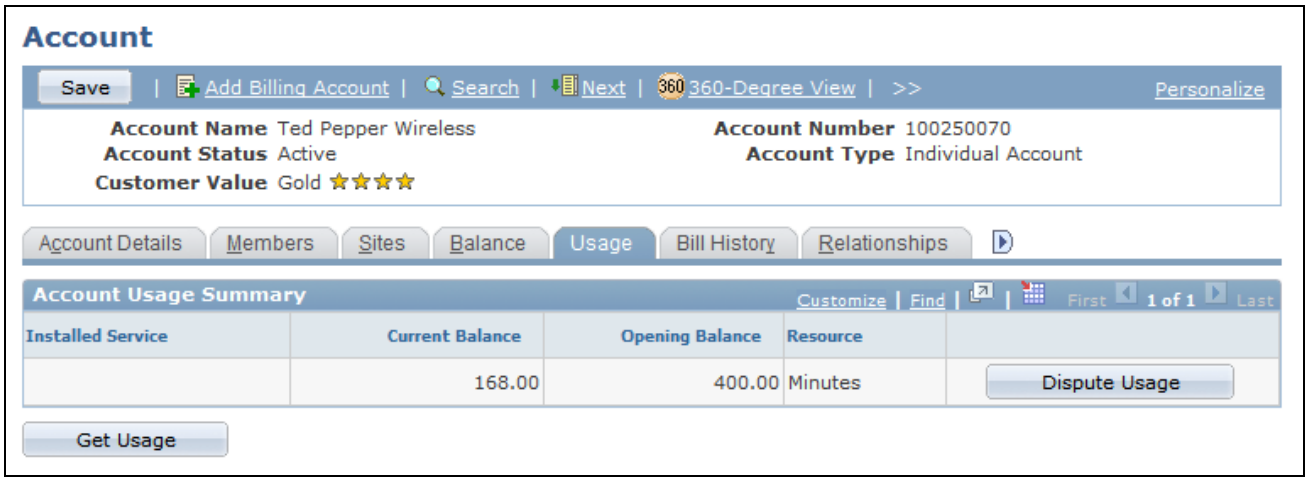
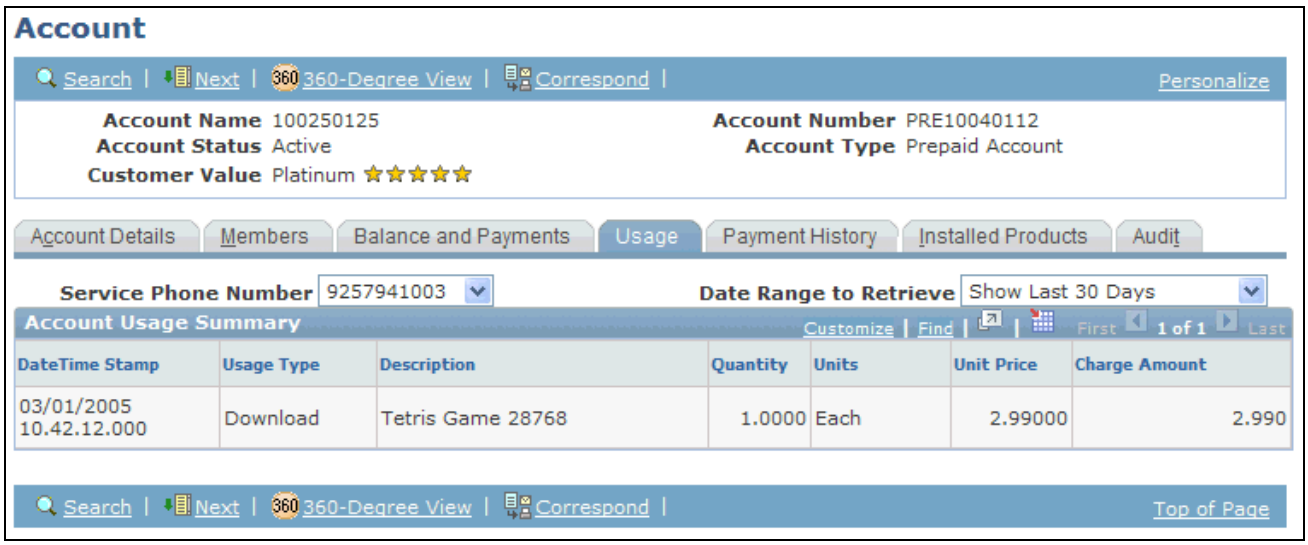


Account Usage page



Account Usage page for prepaid accounts

Current Balance Displays the balance current as of the last call to the billing system.

Opening Balance Displays the balance at the start of the billing cycle.

Resource Displays the unit of measure, such as minutes.

Dispute Usage Click to open a case with a case type of *Bill Dispute*. The dispute type is *Usage Dispute*.

The system creates a case if the threshold value for the number of dispute cases (RBTMAXDISP) is not reached.

The system adjusts the dispute amount immediately if the threshold value for the maximum dispute amount in usage (RBTMAXUSAGEMINS) is not reached.

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Get Usage

Click to retrieve the current usage numbers from the billing system.

The system sends a request to the billing system to retrieve the latest account usage information.

Prepaid Accounts

The following fields are only available for the *Prepaid* account type.

Service Number

Select a service number to review information related to its usage.

Note. Usage information cannot display for service numbers that are indirectly paid by either non-primary split billing accounts or accounts owning the group offers.

Date Range to Retrieve

Select a period of time to view usage information for the selected account and service number.

When you select a service number and date range, the fields in the Account Usage Summary group box automatically populate with usage information related to that service number.

Note. If the account is associated only with a single service number, the usage information displays automatically with a default date range of 30 days.

Date Time Stamp

Displays the date and time associated with the usage line item.

Usage Type

Displays the type of usage associated with the usage line item.

Description

Displays a description of the service associated with the usage line item.

Quantity

Displays the number of services associated with the usage line item.

Units

Displays the number of units associated with the service in the usage line item.

Unit Price

Displays the unit price associated with the service in the usage line item.

Charge Amount

Displays the total amount charged for the service.

Managing Bill History

Access the Bill History page (Customer Accounts, Search Account, Bill History).

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Bill History page

Bill Number	Click to access details of the bill number returned by the billing system.
Amount	Displays the bill amount returned by the billing system.
Start Date and **End Date**	Displays the start and end date for the bill returned by the billing system.
Bill Due Date	Displays the bill due date returned by the billing system.
Get All Bills	Click to display all bills for this account. The system sends a request to the billing system to retrieve the latest billing data.

Viewing Installed Products

Access the Installed Products page (Customer Accounts, Search Accounts, Installed Products).

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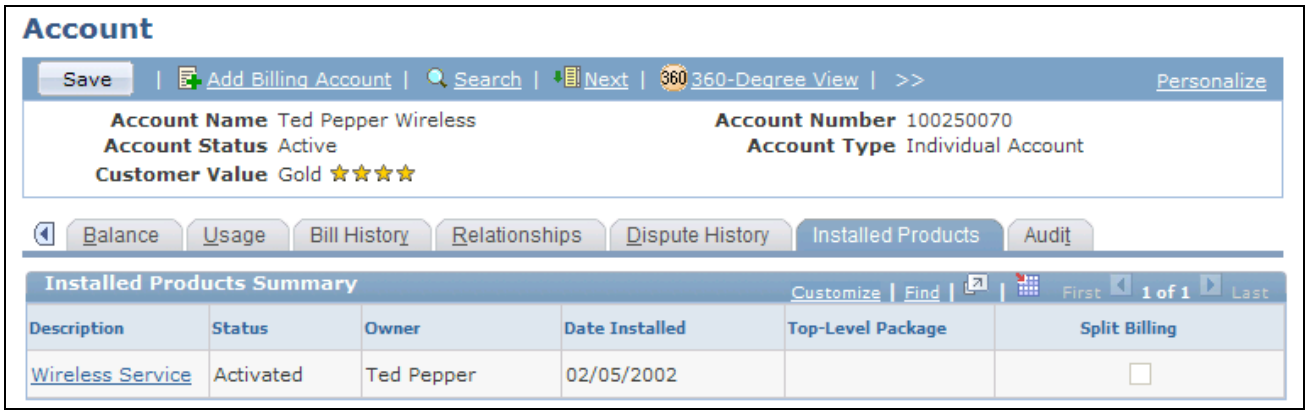

Installed Products page

The system displays all installed products that are associated to the account.

Description Displays the description of an installed product that is associated to the account. Click the link to transfer to the corresponding installed product record.

Top-Level Package Displays the description of the top-level service which contains the installed product that is paid by the account. This field is applicable to installed products that are created for multilevel product bundles.

See and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products," Understanding Multilevel Installed Products.

Split Billing Indicates, when selected, that the corresponding installed product is created for a split billing product and the account pays for its charges partially.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Orders and Service Management.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products"

Viewing Bills

The Account and Billing Framework enables CSPs to tightly integrate their external billing systems with PeopleSoft CRM and display account and billing information in one application desktop. In the CRM system, account and billing information is viewable using both the Account and View Bills components.

This section discusses how to:

- View bill details.

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- View bill items summary.
- View bill item details and bill events.

See Also

Chapter 7, "Setting Up Billing Integration for the Communication and Energy Industries," page 65

Pages Used to View Billing Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Bill Details	RBT_BILL_PG	Customer Accounts, View Bills, Bill Details Click View Bill Details on the Bill History page	Use this page to view account information, bill summary, and current charges.
Bill Items Summary	RBT_BILLITEMS_PG	Customer Accounts, View Bills, Bill Details, Bill Items Summary Click the View Bill Details button on the Bill History page, and select the Bill Items Summary page.	Use this page to view the list of items in the bill.
Bill Item Details	RBT_ITEMDETAILS_PG	Click Fetch Bills on the Bill Items Summary page	Use this page to view the selected bill item in detail and create bill disputes.

Viewing Bill Details

Access the Bill Details page (Customer Accounts, View Bills, Bill Details).

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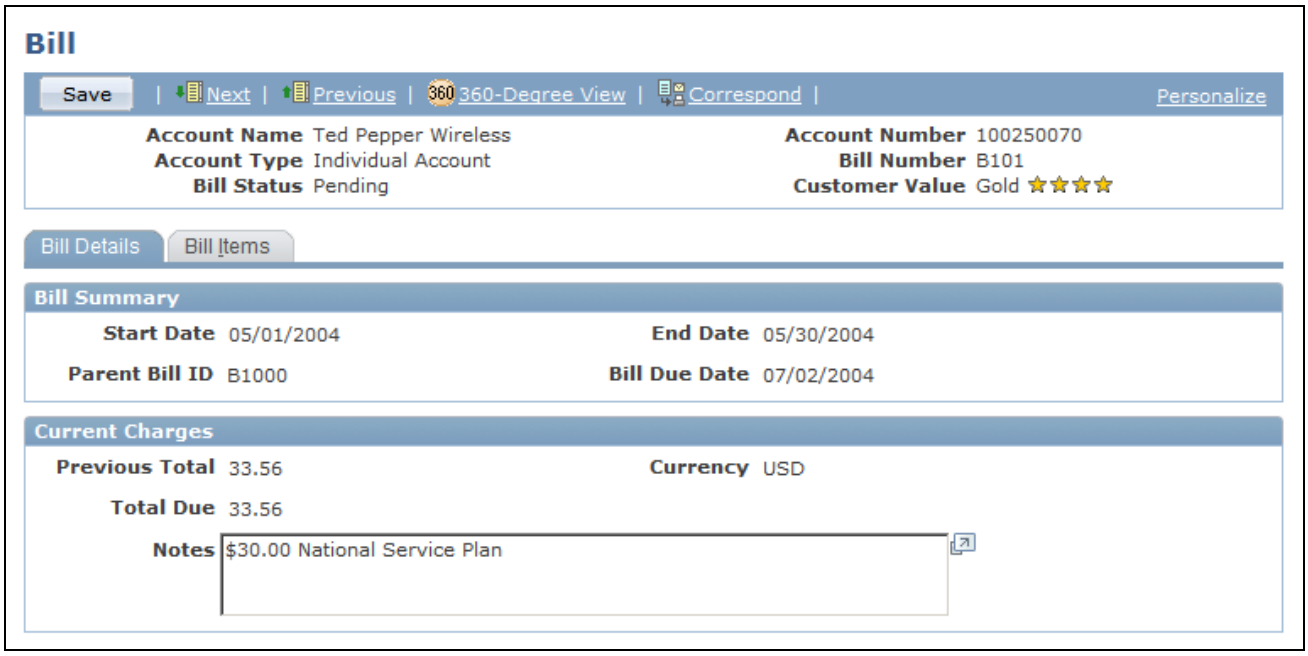

Bill Details page

The Bill Details page provides information about the selected bill. Fields in the Account Details section are populated from the CRM system, whereas the rest are retrieved from the billing application.

Account Number	The account number with which this bill is associated.
Account Name	The name of the owner of the account.
Bill Number	A unique bill identifier that is generated in the billing system. Note that the bill number is not the same as the account number.
Bill Status	The current status of this bill.
Start Date	The first day of the billing cycle.
Parent Bill ID	The billing ID of the parent account, which is generated in the CRM system.
End Date	The last day of the billing cycle.
Bill Due Date	The date by when this bill should be paid.
Previous Total	The total payment due from the last bill.
Currency	The currency used for the Previous Total and Total Due fields.
Total Due	The account balance due.

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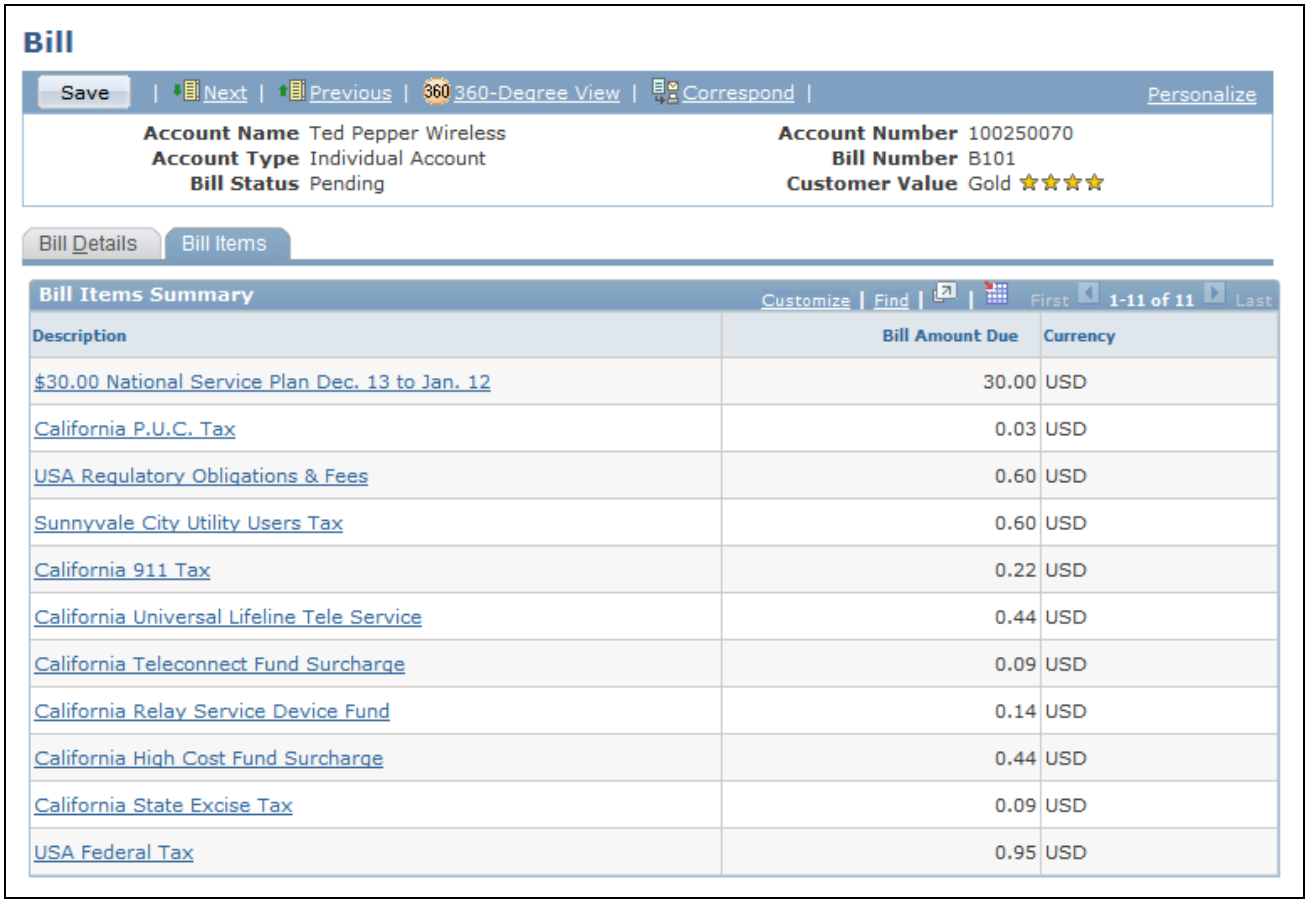
Viewing Bill Items Summary

Access the Bill Items Summary page (Customer Accounts, View Bills, Bill Details, Bill Items Summary).



Description	Bill Amount Due	Currency
$30.00 National Service Plan Dec. 13 to Jan. 12	30.00	USD
California P.U.C. Tax	0.03	USD
USA Regulatory Obligations & Fees	0.60	USD
Sunnyvale City Utility Users Tax	0.60	USD
California 911 Tax	0.22	USD
California Universal Lifeline Tele Service	0.44	USD
California Teleconnect Fund Surcharge	0.09	USD
California Relay Service Device Fund	0.14	USD
California High Cost Fund Surcharge	0.44	USD
California State Excise Tax	0.09	USD
USA Federal Tax	0.95	USD

Bill Items Summary page

Bill Number The unique bill identifier that is generated in the billing application.

Fetch Bills Click to view the associated bill item in detail.

Viewing Bill Item Details and Bill Events

Access the Bill Item Details page (Click Fetch Bills on the Bill Items Summary page).

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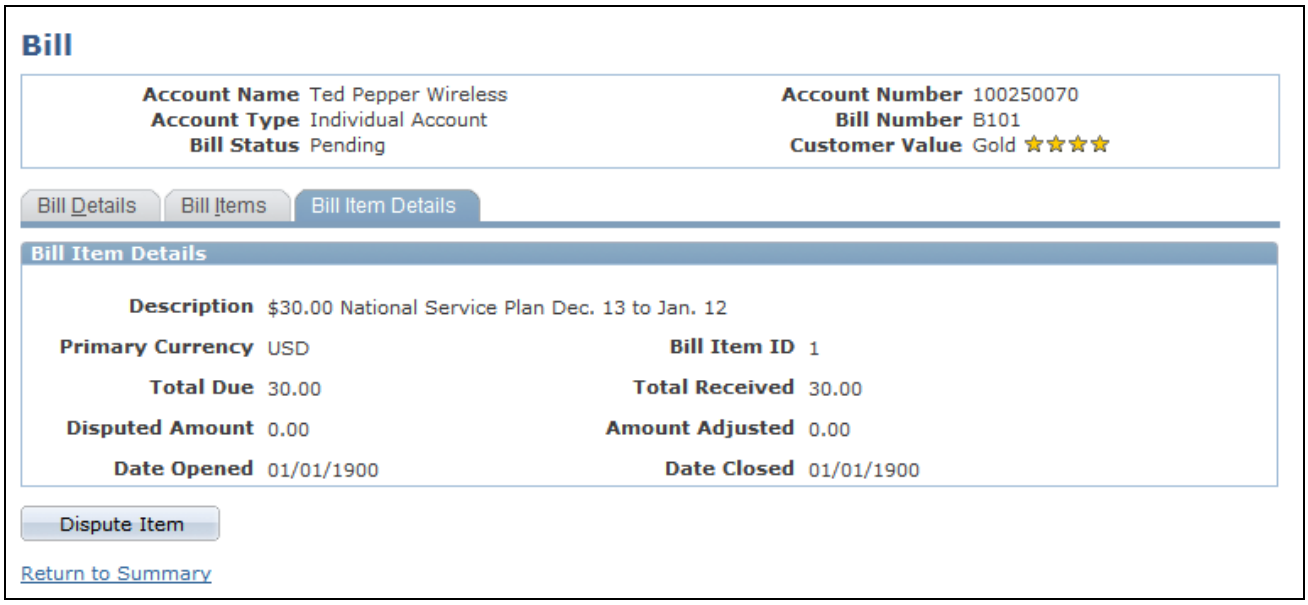

Bill Item Details page

Fields in the Bill Item Details section provide detailed information about a selected bill item. You can create bill disputes based on the item itself or its bill events (for example, phone call).

Item Status	The status of the bill item.
Total Received	The total amount received for the bill item.
Disputed Amount	The amount in the bill item that is in dispute.
Amount Adjusted	The adjusted amount.
Date Opened	The start date of the dispute.
Date Closed	The end date of the dispute.
Dispute Item	Click to dispute the individual bill item. The system creates a case if the threshold value for the number of dispute cases (RBTMAXDISP) is not reached. The system adjusts the dispute amount immediately if the threshold value for maximum dispute amount in bill event (RBTMAXEVENTUSD) is not reached.

Managing Disputes

This section provides an overview of dispute creation and discusses how to view dispute history.

Note. Dispute management is not applicable to prepaid accounts.

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Understanding Dispute Creation

You must enter a case to dispute a bill amount or usage. On the case, if the amount in dispute is below a configured threshold, the dispute is resolved immediately, otherwise the CRM system captures and passes the following data elements from the case to the billing system:

Data Elements	***Description***
CASE_ID	The dispute case ID.
BUSINESS_UNIT	The business unit for which the case is opened.
RBTBILLID	The bill identification number internal to the CRM system.
RBTACCTID	The account ID internal to the CRM system.
RBTBILLSYSACCTID	The corresponding account ID internal to the billing system.
RBTBILLSYSTEM	The external billing system name.
RBTBILLSYSID	The bill ID internal to the billing system.
RBTBILLITEMID	The bill item ID internal to the CRM system.
RBTBILLSYSITEMID	The bill item ID internal to the billing system.
RBTEVENTID	The bill event ID internal to the CRM system.
RBTBILLSYSEVENTID	The bill event ID internal to the billing system.
RBTDISPTYPE	The dispute type. Valid values are *Balance,Usage, Event,* and *Item Dispute.*
RBTADJTYPE	The dispute adjustment type. Valid values are *Credit* or *Debit.*
RBTAMTADJ	The adjusted amount.

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Data Elements	*Description*
RBTRESOURCETYPE	The type of resource adjusted. Valid values are *Dollars* or *Minutes.*
RBTDISPREASON	The reason for the dispute.
RBTDISPUTEAMT	The disputed amount.
RBTDISPSTATUS	The status of the dispute. Valid values are *Approved, Denied,Hold,* or *Pending.*
DESR254	The dispute note.

Note. The same logic applies to all disputes. The only difference is that in each type of dispute, the use of configuration threshold values is different.

Page Used to View Dispute History

Page Name	*Definition Name*	*Navigation*	*Usage*
Dispute History	RBT_ACCTCASE_VW_PG	Customer Accounts, Account, Dispute History	View dispute history, both billing and usage. Disputes can be generated in the self-service component or the Account component.

Viewing Dispute History

Access the Dispute History page (Customer Accounts, Account, Dispute History).

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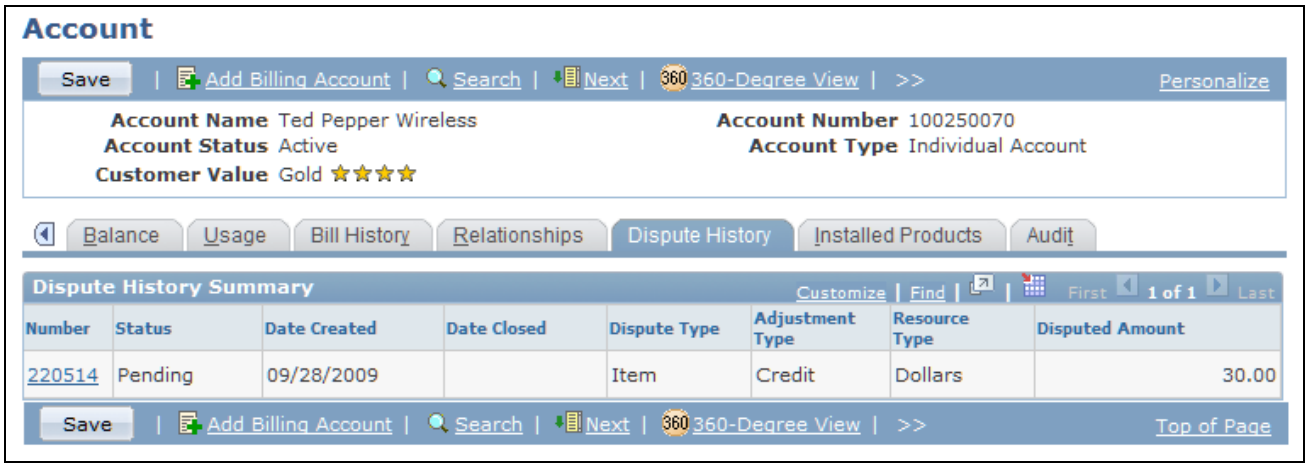

Dispute History page

Number	Displays the number assigned to the dispute. Click the link to access the dispute details.
Status	Displays *Approved*, *Denied*, *Hold*, or *Pending*.
Date Created and **Date Closed**	Displays when the dispute was created and resolved.
Dispute Type	Displays *Bal Dispute* (balance dispute), *Usage Dispute*, or *Event*.
Adjustment Type	Displays *Credit* or *Debit*.
Resource Type	Displays the unit of measure for the dispute: *Dollars* or *Minutes*.
Disputed Amount	Displays the amount of the dispute.

Managing Prepaid Accounts

This section discusses how to manage prepaid accounts.

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Pages Used to Manage Prepaid Accounts

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Details	RBT_ACCOUNT_PG	Customer Accounts, Search Accounts, Account Details	Maintain the overall details of the account. **Note.** You cannot use Add Account to add or create a prepaid account or to navigate to any prepaid account functionality. Prepaid accounts can only be created through the order process or imported.
Members	RBT_ACCT_PERSON	Customer Accounts, Search Accounts, Members	Maintain the membership list for an account.
Balance and Payments	RBT_ACCT_BAL_PG	Customer Accounts, Search Accounts, Balance and Payments	View the account balance available to spend and top-up the account.
Usage	RBT_ACCT_USAGE_PG	Customer Accounts, Search Accounts, Usage	View the usage and charges for all phone calls.
Payment History	RBT_ACTBILL_REL_PG	Customer Accounts, Search Accounts, Payment History	View payment amounts, dates, and methods.

Adding or Maintaining Prepaid Account Details

Access the Account Details page (Customer Accounts, Search Accounts, Account Details).

Company and **Contact**

Displays the name of the contact or consumer who is associated with the prepaid account. Click the link to transfer to the Person component.

The system displays *Prepaid Consumer* if the customer is not yet determined and theAuto Load option is selected on the Communications page of business unit definition.

By default, the auto load option takes the PREPAIDFIRST (delivered value: PREPAID) and PREPAIDLAST (delivered value: CONSUMER) configuration settings that are defined on the Communications Setup page as the first and last name of the prepaid consumer. When this option is enabled, the order process will use the prepaid consumer when a prepaid account order is placed and the customer is not identified.

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Create Consumer

Click to open the Quick Create search page. This link appears if the customer is not yet identified. Here you can search for an existing consumer or create a new one to associate to the account when the customer decides not to remain anonymous, or enough information is gathered to create a known consumer. Many prepaid accounts will not have an associated consumer, only the default prepaid consumer is used, which is *Prepaid Consumer*.

Change Account Details

Click to change the account details. For prepaid accounts, only the account name may be updated here.

Convert to Postpaid Account

Click to open the Conversion Order page to initiate a Prepaid to Postpaid Service conversion. This moves the consumer from a prepaid billing account where services are paid for prior to usage, to a postpaid billing account where services are paid for after usage. The prepaid account is closed but the two accounts are linked so that the history is preserved.

Note. If the account is associated with a conversion order that is currently in progress, this link is hidden so that no duplicate conversion orders can be created for that account. Instead, a link named *Conversion Order <order number> In Progress* appears, clicking the link transfers you to the conversion order.

Change Access Question

Click to change the access question and answer.

See Also

Chapter 6, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," Maintaining Account Details, page 29

Viewing Account Members

Access the Members page (Customer Accounts, Search Accounts, Members).

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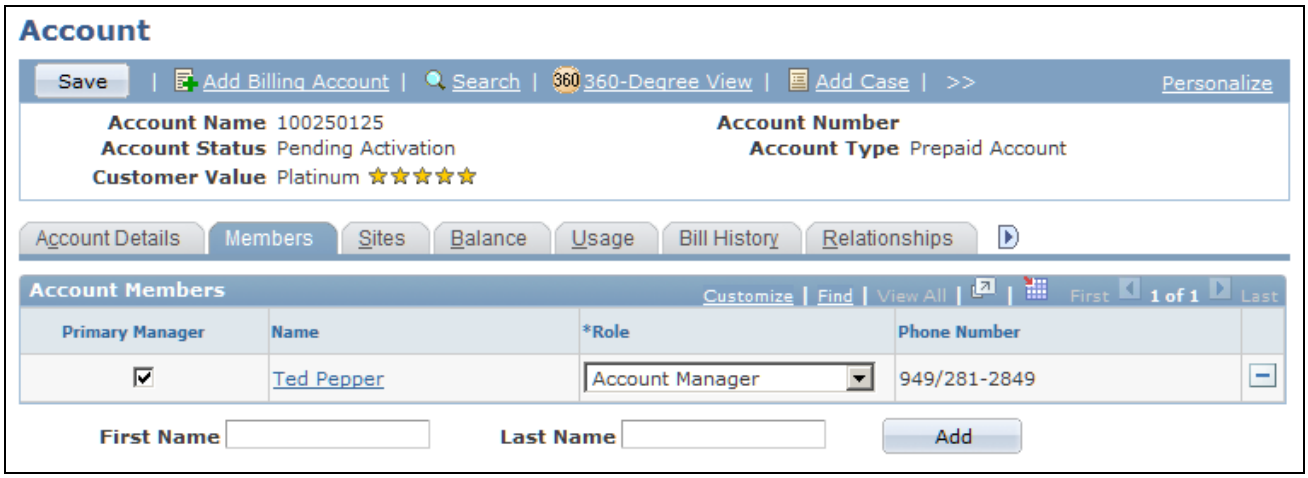

Members page

See and Chapter 6, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," Maintaining Account Membership, page 35.

Managing Account Balance and Payments

Access the Balance and Payments page (Customer Accounts, Search Accounts, Balance and Payments).

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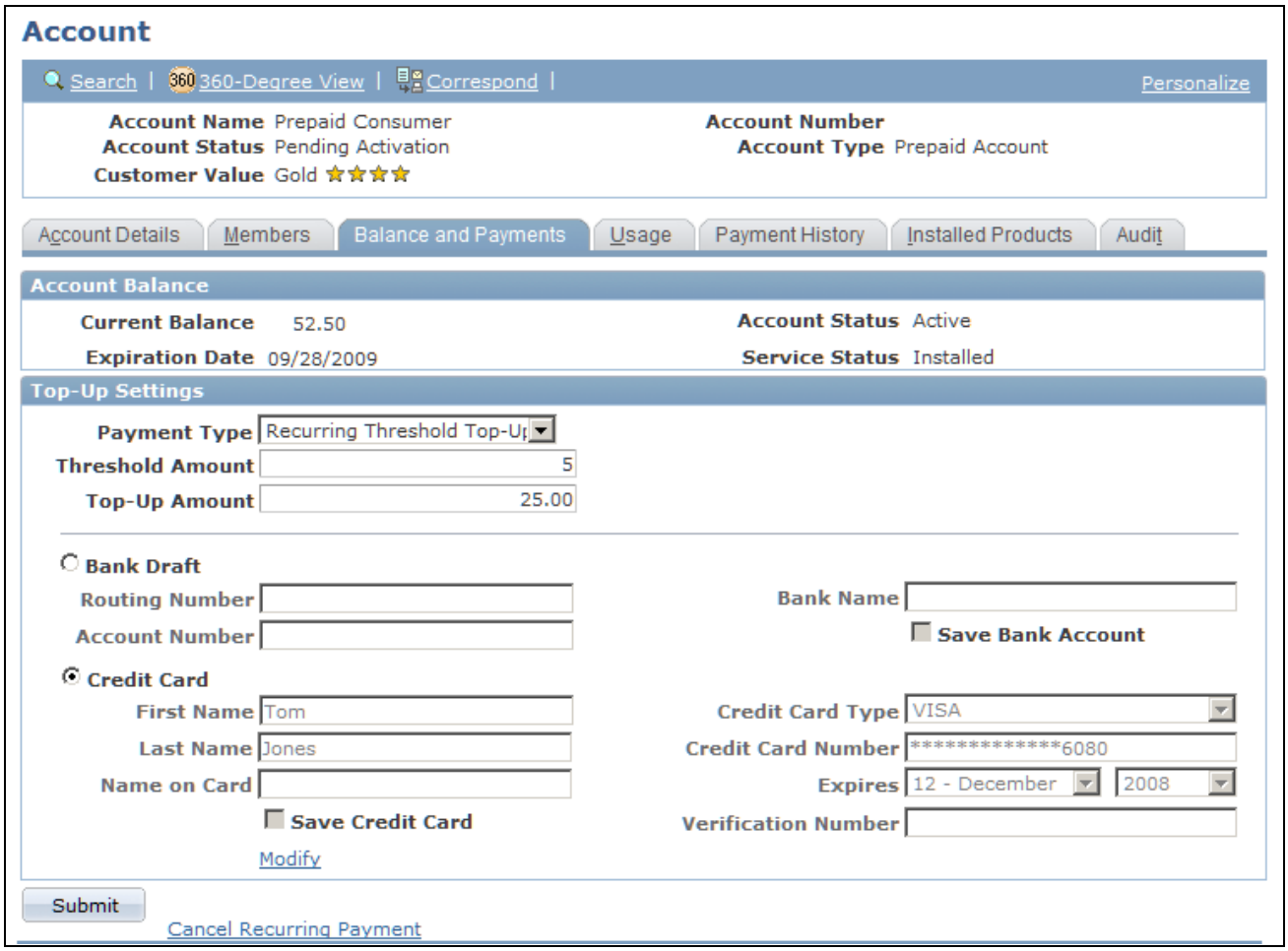

Balance and Payments page

Navigating to the Balance and Payments page initiates the synchronous call to the billing system to retrieve the current balance, balance expiration date, top-up settings, and statuses for the account and service. If the statuses differ from what the application has on record, the statuses will be updated accordingly.

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Top-Up Settings

Payment Type

Indicate the type of top up being made.

Selecting *One Time Payment* displays the Top-Up Amount field. The Bank Draft and Credit Card details are available for entry. A one time payment can be made even if a recurring payment is already set up.

Selecting *Recurring Monthly Top-Up* displays the Top-Up Amount field. Use this setting if the customer wants to set up a monthly top-up payment. The Bank Draft and Credit Card details are available for entry.

Selecting *Recurring Threshold Top-Up* displays the Top-Up Amount field and Threshold Amount. Us this setting if the customer wants to set up a threshold recurring top-up, meaning when the balance of the account gets down to the Threshold Amount, top-up the Top-Up Amount. The Bank Draft and Credit Card fields are available for entry.

Selecting *Voucher* displays the Voucher Number field. The Bank Draft and Credit Card details are not available for entry.

Threshold Amount

This field is displayed only if Recurring Threshold Top-Up is selected as the payment type. Once the balance falls to this amount, a new top-up payment is automatically triggered.

Top-Up Amount

Enter the amount to be charged to increase the account balance.

Bank Draft

Select to use bank draft as the payment method. Enter the relevant information as related fields are available for edit when this option is selected.

Select the Save Bank Account field if you wish to save the entered information for future use.

Credit Card

Select to use credit card as the payment method. Enter the relevant information as related fields are available for edit when this option is selected.

Select the Save Credit Card field if you wish to save the entered information for future use.

See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization.

Modify

Click to update the saved credit card information that is currently displayed. To save the change for future use, select the Save Credit Card field prior to submitting the payment.

Voucher Number

Enter a voucher number if the selected payment type is *Voucher*.

Submit

Click to submit the payment.

Cancel Recurring Payment

Click this link to cancel an existing recurring payment. This link is available only if a recurrent payment is currently in effect.

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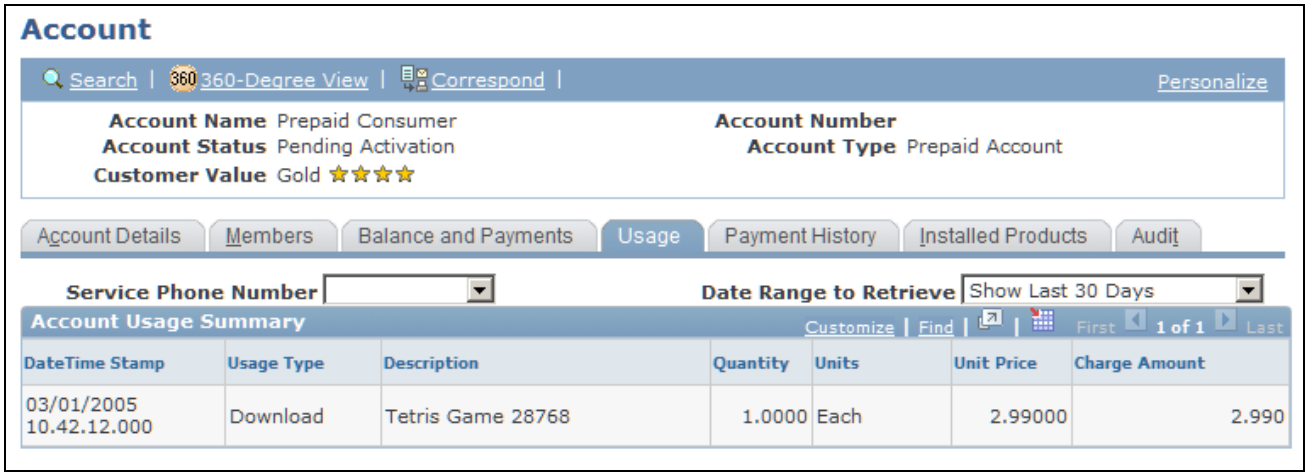
Viewing Account Usage

Access the Usage page (Customer Accounts, Search Accounts, Usage).



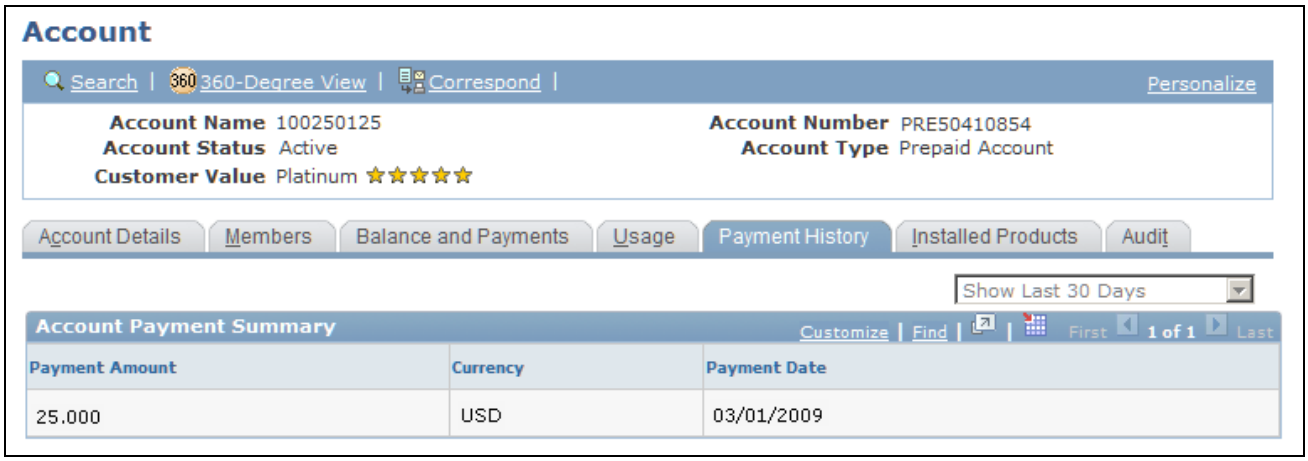
Usage page

Navigating to the Usage page initiates a synchronous call to the billing system, which by default retrieves usage data of the past 30 days for display.

The Date Range to Retrieve drop-down list box can be used to increase or reduce the time increment, with the synchronous call being repeated for the appropriate span.

Viewing Payment History

Access the Payment History page (Customer Accounts, Search Accounts, Payment History).



Payment History page

Navigating to the Payment History tab initiates a synchronous call to the billing system, which by default retrieves payment data of the past 30 days for display.

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The drop-down list box above the grid can be used to increase or reduce the time increment, with the synchronous call being repeated for the appropriate span upon selection.

Creating an Order or Quote for a Prepaid Account

This section provides an overview of the prepaid order process and discusses how to create an order or quote for a prepaid service.

Understanding Prepaid Order Creation Scenarios

There are a couple of scenarios for creating an order with a prepaid account. The source of the order determines how the order is created and what information is required.

In the storefront scenario, the customer goes to a storefront and picks a pre-provisioned phone and service. The agent takes the order and submits with the appropriate information. In this scenario the customer name and information is not required by either the account or the order. A new installed product is created. An external prepaid billing account is created and the network is notified about the new account, plan, and information. The customer leaves the storefront with an activated service.

In a call center scenario, the customer calls in to order phone, SIM, and service. The agent takes the order and submits with the appropriate information. In this scenario the customer will be known and the consumer created. The fulfillment system will fulfill the phone and SIM and ship to the customer. The customer calls in once the order is received to activate the service. The installed services and accounts are activated during the customer call. This additional *activation* step is necessary when the order is placed through the call center to avoid possible theft. A third scenario when the customer purchases a shrink wrapped phone/service combination from a department store. The customer will need to call in to activate the service and possibly obtain the phone number. The customer name and information is not required by either the account or the order. The installed product and account are already created in the CRM system through the Bulk import of Prepaid Accounts.

In any of these scenarios, funds may or may not be available on the account. If funds are available the activated service status will be *Activated.* If funds are not available, the service status with be *Pending Top-up.*

Understanding the Prepaid Order Process

These steps illustrate a typical process for creating a prepaid order.

1. The agent goes to the 360-degree search page and uses the User Link drop-down list box to *Add Prepaid Service.*

2. The agent is transferred to the order.

   Depending on the business unit setting for Default Prepaid Customer, the prepaid consumer may be loaded in the Customer group box. The agent can choose to manually load the prepaid consumer, load an existing customer, or use Quick Create to create a new consumer.

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3. The Source field determines whether or not a customer is required and whether or not fulfillment is involved. If the Source is *Storefront* – meaning that the order does not need to ship, the customer does not need to be identified, and the prepaid consumer can be used on the order.

   If this is a call center operation, the customer is required. The prepaid consumer cannot be used, because the order needs to be shipped. The customer may request to have the Privacy or Do Not Contact flag set to prohibit further contact by the call center. The default for this flag can be set in the business unit setup.

4. The Accounts sub page enables the agent to create a new prepaid account. The Prepaid Account radio button is automatically selected. When the order is created from the 360–degree view using Add Prepaid Service, the Existing Account and Account Number fields in the Recurring Billing Summary are hidden.

5. The agent initializes the prepaid account. The default setup for the account is a Payment Type of *Voucher*. The Access Question defaults from the Business Unit Order Communications Setup page.

   The Payment Types can be *one-time,monthly recurring*, and *threshold recurring.* The Threshold Amount is displayed only when threshold recurring is selected.

Pages Used to Create an Order or Quote for a Prepaid Account

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Customer	RB_TD_AGT_SRCH_COM	Click the Customer 360–Degree View link.	Start the prepaid order process.
Order	RO_FORM	Select *Add Prepaid Service* in the Action drop-down list box on the Customer Search page and click Go.	Set up the prepaid account.
Prepaid Account Setup	RO_PP_ACCT_SEC	Click the Prepaid Account Details link on the Order page.	Add payment details for the prepaid account.

Adding a Prepaid Consumer

Access the Search for Customer page (Click the Customer 360–Degree View link).

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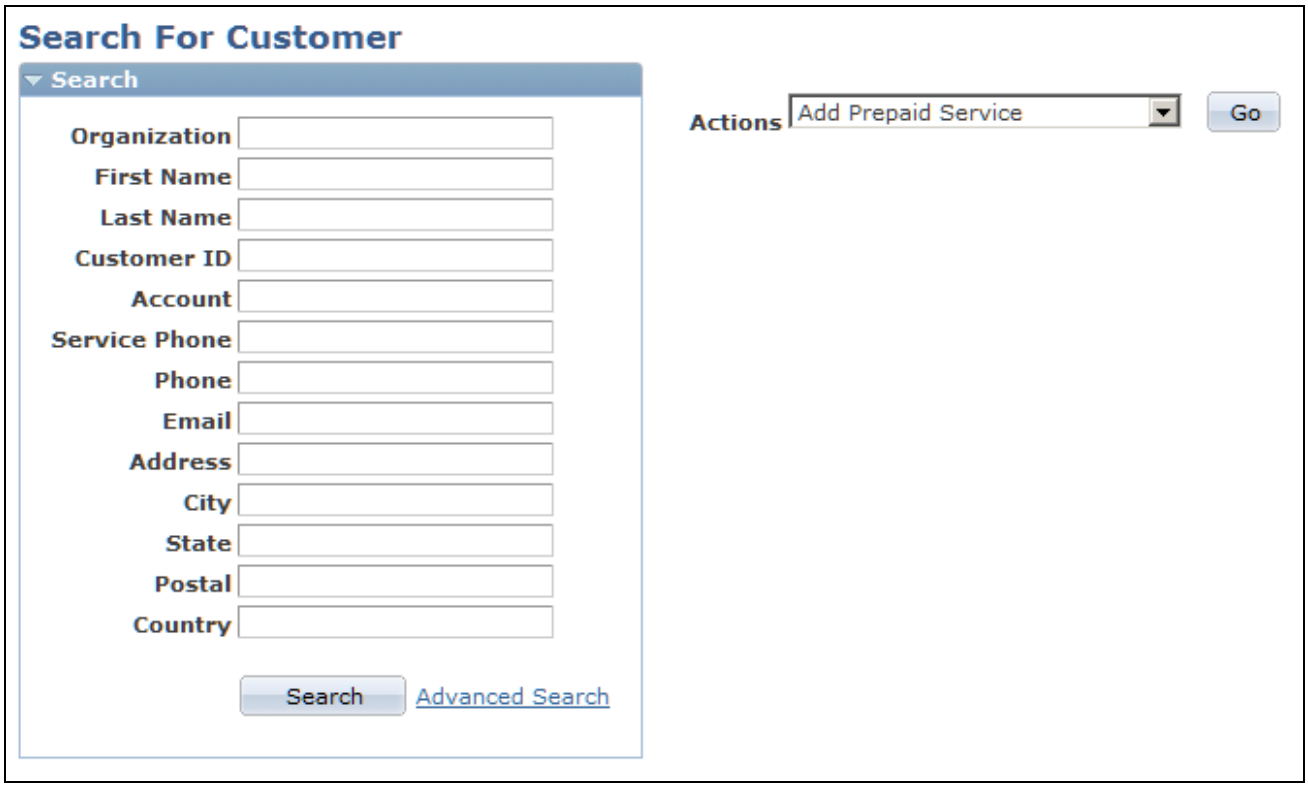

Search for Customer page

Use the Customer 360–Degree View Search page to add a prepaid service.

Creating an Order or Quote for a Prepaid Account

Access the Order page (select *Add Prepaid Service* in the Action drop-down list box on the Search for Customer page and click Go).

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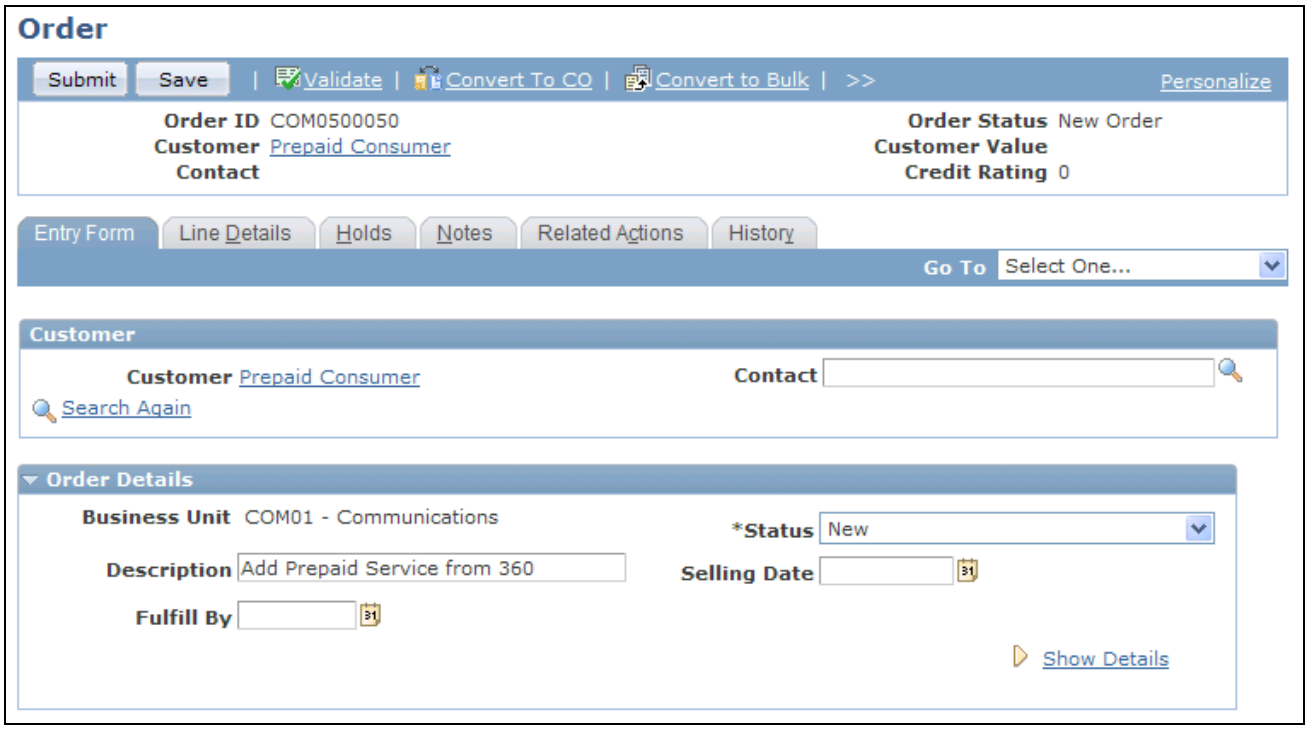
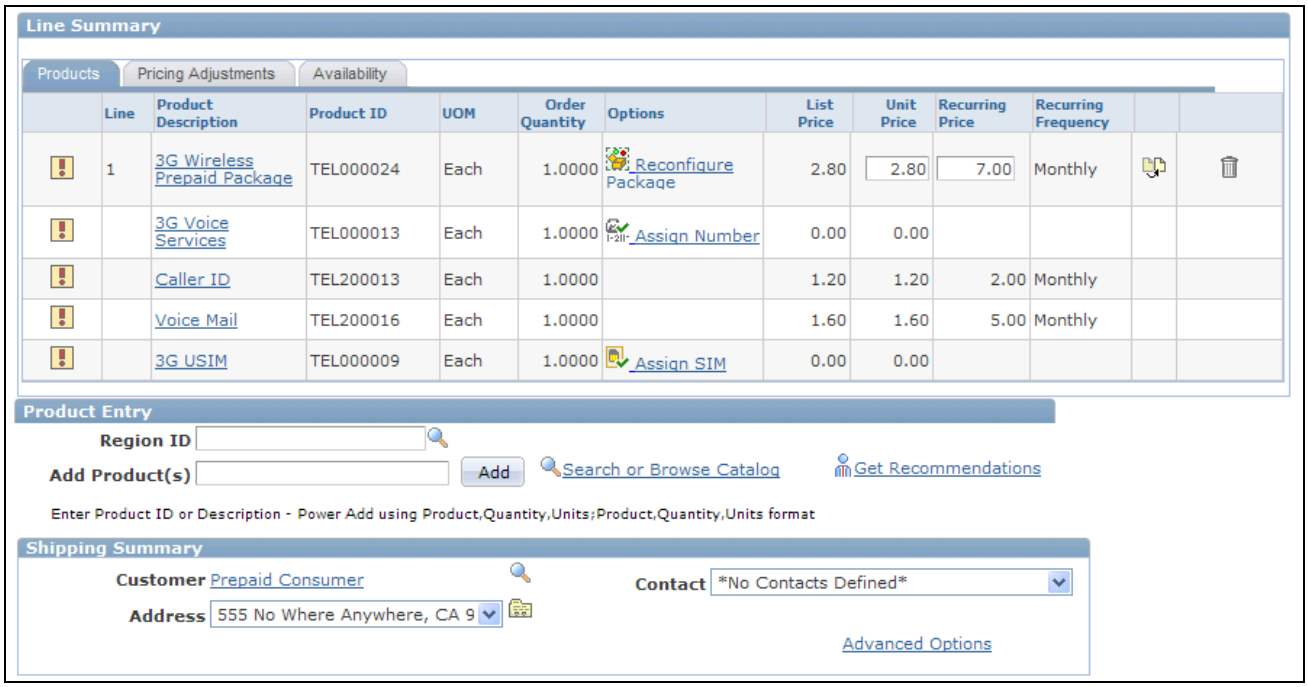


Order page (1 of 5)



Order page (2 of 5)

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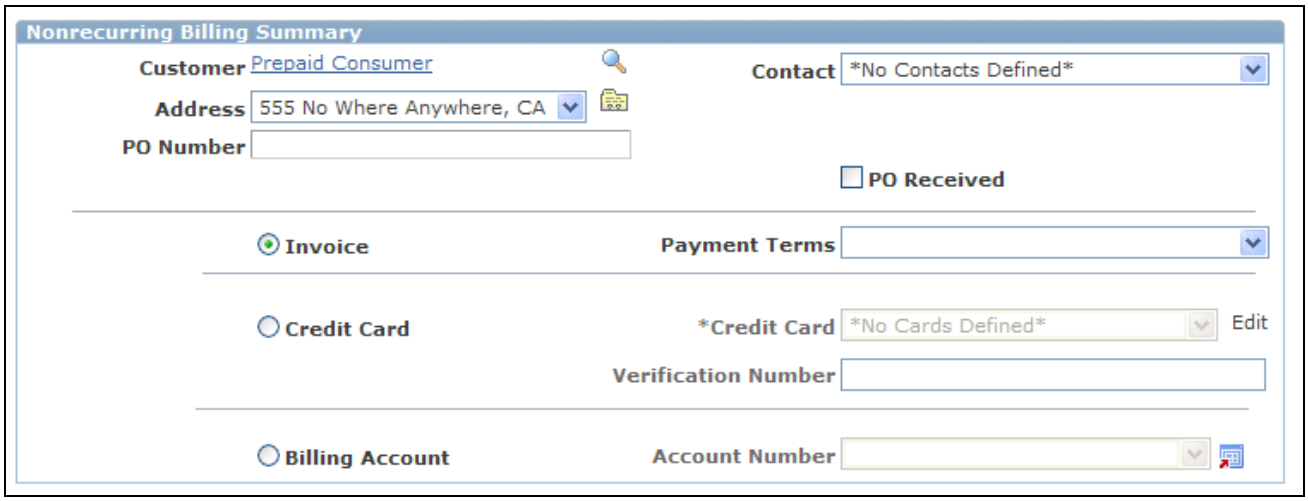
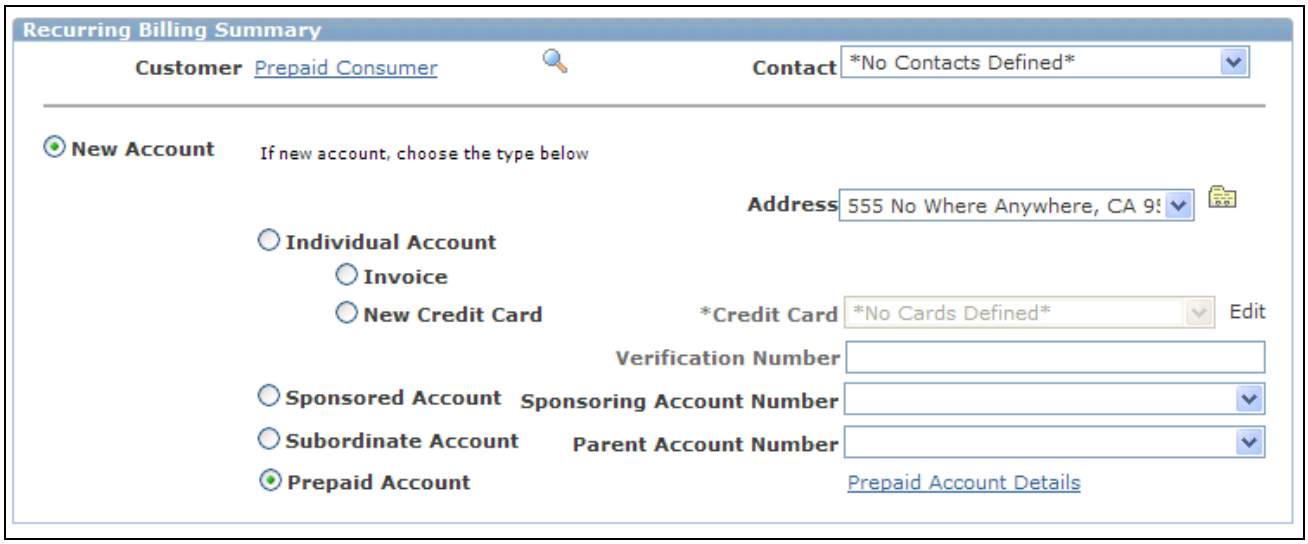


Order page (3 of 5)



Order page (4 of 5)

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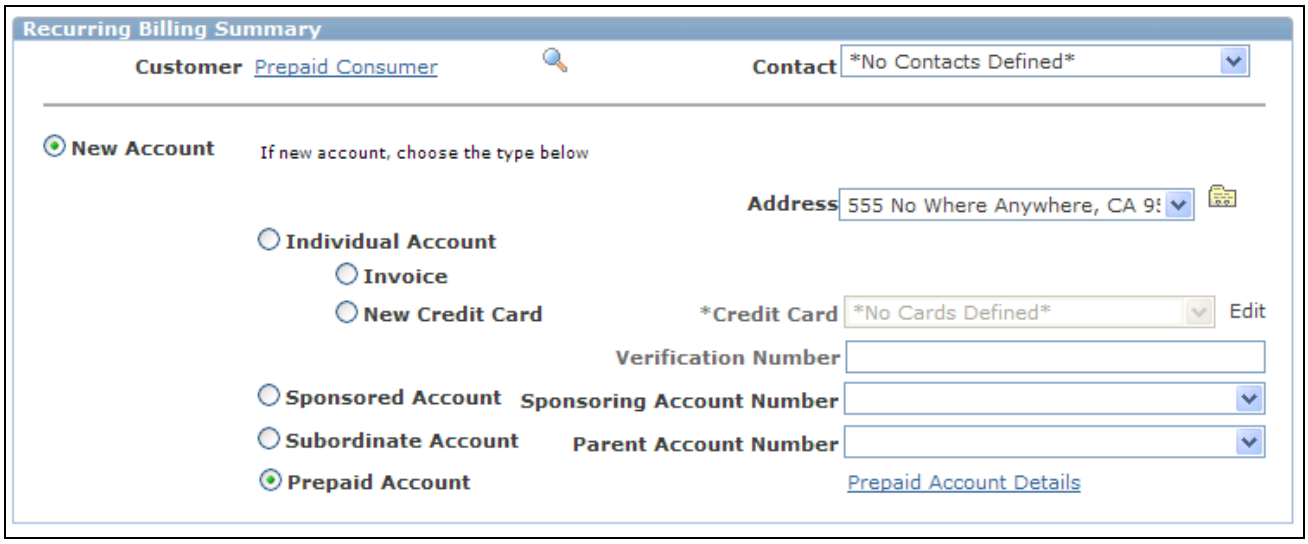
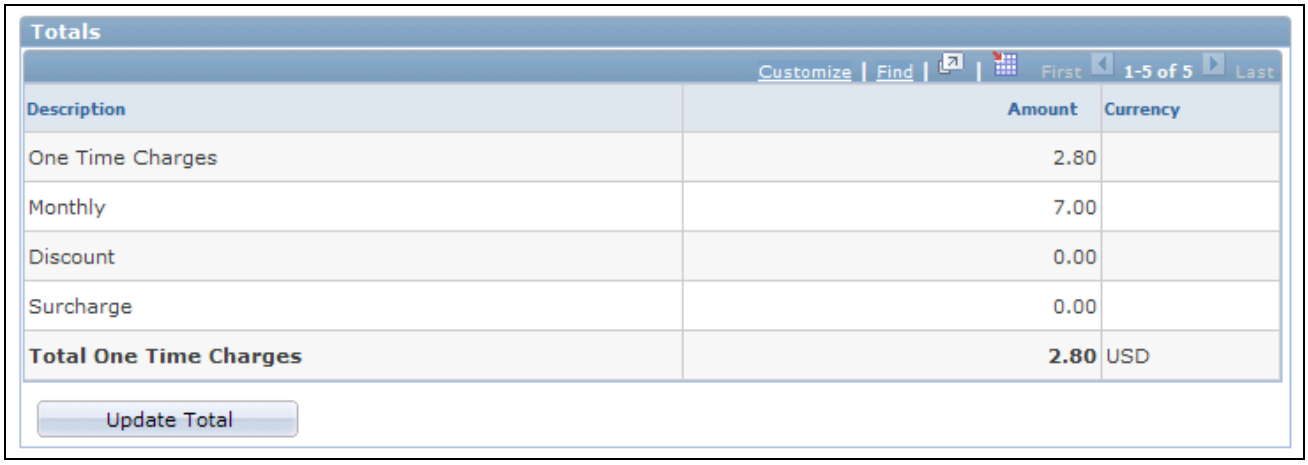


Order page (4 of 5)



Description	Amount	Currency
One Time Charges	2.80	
Monthly	7.00	
Discount	0.00	
Surcharge	0.00	
Total One Time Charges	**2.80**	USD

Order page (5 of 5)

Use the Order page to enter details for the prepaid account purchase.

Holds are available to:

- Check the number pool, making sure the pool used for the MSISDN is appropriate to the account type. The MSISDN may not be required during the order process depending on BU settings and the source of the order. The MSISDN may be supplied during Activation if the order is being placed at a call center and the business process of the site dictates numbers being provided during activation.
- Check that the product ordered can be purchased with a prepaid account and that there is not a mix of products.
- Confirm that there is only one service for the prepaid order
- Validate prepaid account information.
- Check that orders coming from the Call Center do not use the prepaid consumer.

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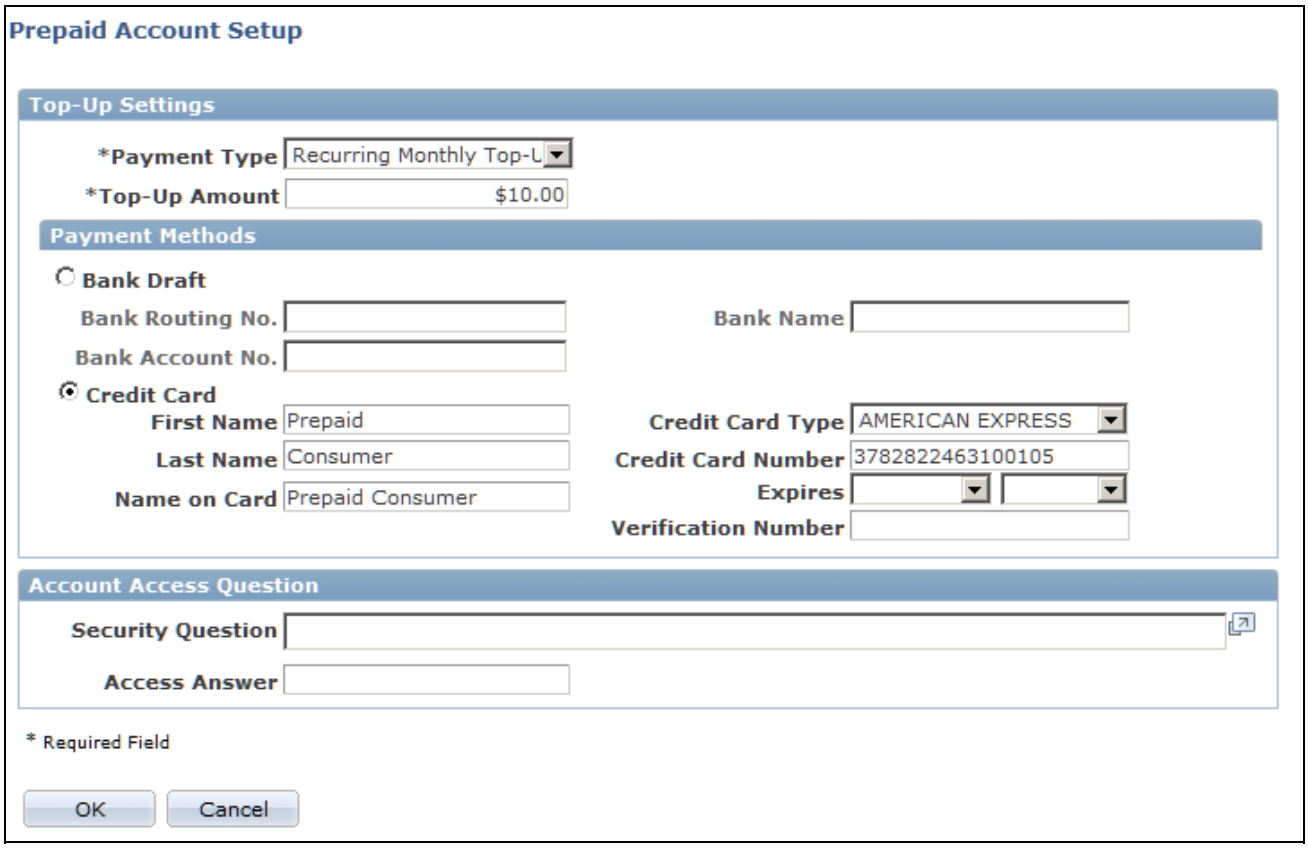
Setting Up the Prepaid Account

Access the Prepaid Account Setup page (click the Prepaid Account Details link on the Order page).

Information entered will be used when creating the prepaid account and will be handed off to the prepaid billing system.



Prepaid Account Setup page

Note. The Prepaid Account Setup page changes depending on the Payment Type selection.

Payment Type Values for payment type are *One Time Payment*,*Recurring Monthly Top-Up*,*Recurring Threshold Top-Up*, and *Voucher*.

Top-Up Amount Enter the top-up amount.

Activating Prepaid and Postpaid Services

This section provides an overview and discusses how to activate prepaid and postpaid services.

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Understanding Service Activation

Refer to the *Service Management Activate Service Process Flow* section for details and flowchart diagrams that illustrate the process for activating prepaid and postpaid wireless services.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Service Management Activate Service Process Flow.

Pages Used to Activate Prepaid and Postpaid Services

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Customer	RB_TD_AGT_SRCH_COM	Click the Customer 360–Degree View link.	Search for accounts in status of *Pending Activation.*
Manage Service	RO_ORDER_CAPTURE	Service Management, Maintain Service	View and maintain activated services.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management"

Converting a Prepaid Account to a Postpaid Account

At times it is beneficial for a customer to convert a prepaid account to a postpaid account. To convert a prepaid account to a regular postpaid account:

1. From the 360-degree Search, type in the customer's phone number.

   If the customer is the special prepaid customer, the CSR is automatically transferred to the accounts page for the phone number. If the customer is known to the system, the CSR will need to select the prepaid account for the customer.

2. Select the Convert Account link. Transfer to the order form with the consumer information filled in and the new account request.

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3. If a consumer has not yet been created for the customer, customer data is required. Use Quick Create on the Prepaid Account page to create the consumer. The system will modify the consumer on the existing prepaid account and installed products to this new customer.

   If you are using Quick Create on the Conversion Order page, then the Prepaid account does not get updated to the new consumer. This does not affect the conversion and the prepaid account will still be closed, however it will continue to say *Prepaid Consumer*.

   After using Quick Create on a Prepaid account to create a new Consumer, you must set the consumer's BillTo/SoldTo/ShipTo preferences before submitting a conversion order. To set the preferences:

   a. Click the Consumer Name link on the Prepaid Account to open Consumer Details in new window.

   b. In the new window select the Details link.

   c. Select the BillTo/SoldTo/ShipTo check boxes.

   d. Click Save. You will get a message to select a single sold to address.

   e. Click tab to return to the main page and click the More... link above the address.

   f. Select the Sold to check box and Save. Close that window.

   g. Return to the Prepaid Account window and click the Convert to Postpaid link

      These steps will also resolve the holds if you have already submitted your order.

4. Select the new plan for the customer. Optionally a new MISISDN, a new SIM, or phone may be entered.

5. Fill in the new account information.

6. Submit order.

7. Run holds, especially the credit check hold and the customer hold.

8. After holds complete successfully, the Telco New Order BPEL process is run with a special command to convert the accounts and create the new installed products.

Within the Telco New Order BPEL process, the *Postpaid Conversion* sub-BPEL process is run, which coordinates the shutdown of the old account and installed services and the activation of the new account and installed services. Refer to the *Prepaid to Postpaid Account Conversion Process Flow* section for details and a flowchart diagram that illustrates the process for converting prepaid accounts to postpaid accounts.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Prepaid to Postpaid Account Conversion Process Flow.

The BPEL process performs these actions:

1. Creates account in external Postpaid billing System.

2. Creates a new account in CRM and links it to both the external postpaid account and to the old prepaid account.

3. Creates the new installed services for the postpaid services and links them to the new CRM account.

4. Notifies HLR about the new service.

5. Notifies HLR about the shutdown of the old service.

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6. Shuts down the prepaid account in the external billing system.
7. Disconnects the old installed services in CRM.
8. Moves equipment (SIM, handset) from the old CRM account to new CRM account.
9. Flags SIM and MSISDN in the SIM Management and Number Management systems from prepaid to postpaid.
10. Transfers the balance from external prepaid billing system to the external postpaid billing system.
11. Activates the new services.

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Chapter 7

Setting Up Billing Integration for the Communication and Energy Industries

This chapter provides an overview of billing systems integration and discusses how to define configuration parameters.

Understanding Billing Systems Integration

Integration with billing systems facilitates seamless data flow between PeopleSoft CRM and third-party billing applications, enabling communication and energy service providers to provide superior customer service. Customer service representatives (CSRs) can access a complete, multidimensional view of all customer information (accounts, billings, installed services, and so on), as well as account and billing application functionality.

This integration is implemented by using enterprise integration points (EIPs). EIPs provide two-way communication with the billing system, and leverage the application functionality in account, billing and service management (for example, update account information, view bill details, and change service features) to support the entire customer lifecycle, from acquisition through support.

Note. The discussion on integration in this chapter focuses on the functional account and billing frameworks, workflow, and predefined inbound and outbound messages that are delivered with the application. Some degree of configuration is required during the implementation project to integrate specific industry solutions offered by PeopleSoft with third-party or legacy billing applications.

Enterprise Integration Points

The EIPs that are delivered with Bill Presentment and Account Management use the PeopleSoft Integration Broker to manage the integration with billing systems. Integration Broker is an industry-standard tool that enables open flow of information between systems, which is extremely critical for system-to-system integration. It accomplishes true internet system integration by leveraging internet technologies, such as XML and HTTP.

Request and reply messages for all EIPs are stored in Integration Broker. Configuration parameters provide the ability to activate all or a subset of prebuilt EIPs.

Most billing EIPs are initiated by a customer-facing event that occurs in a particular industry solution (for example, a new service order, service change order, viewing accounts, changing account information, viewing bills, and disputing bills). Some are driven by business projects (for example, creating accounts through the order management process). Several EIPs are built into components themselves (for example, account view or bill view).

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See Also

Chapter 6, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," page 25

Postpaid Account EIPs

This table lists the account-related EIPs for postpaid accounts:

Purpose	*EIP name*
Create account.	RBT_NEWACT_REQ_MSG
View account balance and usage.	RBT_ACTBAL_REQ_MSG RBT_ACTUSG_REQ_MSG
Change payment details.	RBT_PAYINFO_MSG
Change billing address.	RBT_CHANGADDR_MSG
Change account details.	RBT_CHGACTDETAIL
Change account access question and answer	RBT_CHGACCTACCESS

Note. RBT_CHANGADDR_MSG is not triggered if the address is changed in the CDM component.

Prepaid Account EIPs

These EIPs relate specifically to prepaid accounts. In some cases, they will replace the functionality of the account EIPs listed above because the application will be communicating with a prepaid billing system where some postpaid concepts do not apply.

The application employs synchronous messaging to retrieve real-time data about prepaid accounts from the third-party prepaid billing system and format it for user display. This data is not stored locally.

Each of the synchronous prepaid EIPs is delivered in a test configuration where the application will message itself and return some sample data. Once the customer has established a relationship with a prepaid billing provider, the messages should be redirected to the Integration Broker node established to communicate with that provider.

In order to initiate a message, the user must have the indicated permission list in his user security profile.

The prepaid account EIPs are:

- Prepaid Balance Request EIP
- Prepaid Recurring Payment Details Request EIP
- Prepaid Usage History Request EIP

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- Prepaid Payment History Request EIP
- Top-up Payment Submit EIP
- Update Recurring Payment EIP
- Voucher Payment Submit EIP
- Prepaid Bulk Load EIP
- Installed Product and Account Update EIP

Prepaid Balance Request EIP

Initiated from the Balance and Payments page, this message retrieves the current balance and statuses of the account and service, as well as any funds expiration date.

This table describes the Prepaid Balance Request EIP:

Category	*Description*
EIP	Prepaid Balance Request
Request Message	RBT_PPD_BAL_RQST
Message Type	Outbound Synchronous
Message Called From	RBT_ACCT_BAL_PG.Activate
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidBalRqst

* This is a delivered test response message and should be removed for implementation.

Prepaid Recurring Payment Details Request EIP

Initiated from the Balance and Payments page, this message retrieves the details of any existing recurring payment on file with the prepaid billing system including type (Monthly or Threshold), credit card or bank account settings, top-up amount, and threshold amount if applicable.

This table describes the Prepaid Recurring Payment Details EIP:

Category	*Description*
EIP	Prepaid Recurring Payment Details
Request Message	RBT_PPD_AUTOPAY_RQST

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Category	*Description*
Message Type	Outbound Synchronous
Message Called From	RBT_ACCT_BAL_PG.Activate
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidAutoPayRqst

* This is a delivered test response message and should be removed for implementation.

Prepaid Usage History Request EIP

Initiated from the Usage page, this message retrieves the details of phone usage as provided by the prepaid billing system. Activity is retrieved for the last 30 days by default. A drop-down list box on the page can be used to select 60 or 90 days of data at which time the message is repeated for the appropriate range.

This table describes the Prepaid Use History Request EIP:

Category	*Description*
EIP	Prepaid Usage History
Request Message	RBT_PPD_USE_RQST
Message Type	Outbound Synchronous
Message Called From	RBT_ACCT_USAGE_PG.Activate
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidUseHistRqst

* This is a delivered test response message and should be removed for implementation.

Prepaid Payment History Request EIP

Initiated from the Payment History page, this message retrieves the details of past payments as provided by the prepaid billing system. Activity is retrieved for the last 30 days by default. A drop-down list box on the page can be used to select 60 or 90 days of data at which time the message is repeated for the appropriate range.

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This table describes the Prepaid Pay History Request EIP:

Category	*Description*
EIP	Prepaid Payment History
Request Message	RBT_PPD_PAY_RQST
Message Type	Outbound Synchronous
Message Called From	RBT_ACTBILL_REL_PG.Activate
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidPayHistRqst

* This is a delivered test response message and should be removed for implementation.

Top-up Payment Submit EIP

Initiated from the Submit button in the Top-up group on the Balance and Payments page, this message sends one-time payment data to the prepaid billing system. The billing system performs any credit charging or bank drafts and returns a success or failure response. The response is formatted and displayed for the user.

This table describes the Top-up Payment Submit EIP:

Category	*Description*
EIP	Top-up Payment Submit
Request Message	RBT_PPD_TOPUP_SUBMIT
Message Type	Outbound Synchronous
Message Called From	RBT_ACCOUNT_CMP.RBT_PREPAID_WRK.SUBMIT_PB
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidTopUpSubmit

* This is a delivered test response message and should be removed for implementation.

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Update Recurring Payment EIP

Initiated from the Submit button in the Top-up group on the Balance and Payments page, this message sends recurring payment setting changes to the prepaid billing system. This includes updates to credit card or bank information and threshold or top-up amounts.

This message is also used to cancel an existing recurring payment. However the cancel version is initiated from the Cancel Recurring Payment link that appears below the Top-up group box when a recurring payment exists.

This table describes the Update Recurring Payment EIP:

Category	*Description*
EIP	Update Recurring Payment
Request Message	RBT_PPD_UPDT_AUTOPAY_SUBMIT
Message Type	Outbound Synchronous
Message Called From	RBT_ACCOUNT_CMP.RBT_PREPAID_WRK.SUBMIT_PB
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidAutoPayUpdtRqst

* This is a delivered test response message and should be removed for implementation.

Voucher Payment Submit EIP

Initiated from the Submit button in the Top-up group on the Balance and Payments page, this message sends a voucher ID, typically purchased at retail, to the prepaid billing system for crediting to the account balance. The billing system will determine the monetary value attached to the voucher ID.

This table describes the Voucher Payment Submit EIP:

Category	*Description*
EIP	Voucher Payment Submit
Request Message	RBT_PPD_VOUCHER_SUBMIT
Message Type	Outbound Synchronous
Message Called From	RBT_ACCOUNT_CMP.RBT_PREPAID_WRK.SUBMIT_PB

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Category	*Description*
Reply Message	RBT_PPD_SYNCHTEST_INB*
Channel Name	N/A for synchronous
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidVoucherSubmit

* This is a delivered test response message and should be removed for implementation.

Prepaid Bulk Load EIP

This inbound EIP is used to load large volumes of prepaid accounts into the application. Depending on the fields populated, each xml row will create a new prepaid account assigned to the anonymous prepaid consumer, and the related installed services such as prepaid wireless package, SIM card, and handset. The account and services are then ready to be activated once the corresponding package is sold at retail.

This table describes the Prepaid Bulk Load EIP:

Category	*Description*
EIP	Prepaid Bulk Load
Request Message	RBT_PREPAID_BULK_CREATE
Message Type	Inbound Asynchronous
Message Called From	N/A
Reply Message	N/A
Channel Name	RBT_PREPAID_ACCT_QUEUE
Permission List	CRPPDUSER
Application Class Message Handler	RB_EIP_SET:RBT_PrepaidBulk Create

Installed Product and Account Update EIP

This inbound EIP is used to update the application data to reflect changes that have occurred outside of the CRM system. Examples would be changes made directly to the prepaid billing system or customers activating service by keying vouchers directly to their phone.

The message can include updates to account and installed product statuses as well as change of phone number.

This table describes the Installed Product and Account Update EIP:

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Category	*Description*
EIP	Installed Product and Account Update
Request Message	RBT_IPSTATUS_MSG
Message Type	Inbound Asynchronous
Message Called From	N/A
Reply Message	N/A
Channel Name	RBT_PREPAID_ACCT_QUEUE
Permission List	CRPPDUSER
Application Class Message Handler	RBT_IPSTATUS_MSG:STATUS

Bill-Related EIPs

The bill-related EIPs are:

- Get Bill List EIP
- View Bill Items EIP
- View Bill Events EIP
- Create Disputes and Adjustments EIP
- Change Bill Cycle EIP

Get Bill List EIP

PeopleSoft CRM industry solutions enable CSRs to get all bills that are associated with an account over a period of time. Billing data is retrieved from the billing system and viewable by CSRs as well as customers (using the self-service application).

To mitigate the dependencies on billing systems to access bill-related information, you can replicate bills on a monthly basis and force CRM industry solutions to access the local data store. The CRM system does not replicate billing information automatically.

This table describes the Get Bill List EIP:

Category	*Description*
EIP	Get Bill List
Request Message	RBT_GETBILL_REQ_MSG

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Category	*Description*
Message Type	Outbound Synchronous
Message Called From	Account Component
Reply Message	RBT_GETBILLS_RPLY_MSG
Channel Name	RBT_BILL_CHNL
Configuration Parameter Used	RBTBILL, RBTBILLCYCLES

View Bill Items EIP

A customer can contact a CSR and inquire about bill items that are associated with an account.

This table describes the View Bill Items EIP:

Category	*Description*
EIP	View Bill Items
Request Message	RBT_GETBILLITEMS_REQ_MSG
Message Type	Outbound Synchronous
Message Called From	Account Component
Reply Message	RBT_GETBILLITEMS_RPLY_MSG
Channel Name	RBT_BILL_CHNL
Configuration Parameter Used	RBTBILLITEM

View Bill Events EIP

A customer can contact a CSR and inquire about bill events (within bill items) that are associated with an account.

This table describes the View Bill Events EIP:

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Category	*Description*
EIP	View Bill Events
Request Message	RBT_GETBILLEVENTS_REQ_MSG
Message Type	Outbound Synchronous
Message Called From	Billing Component
Reply Message	RBT_GETBILLEVENTS_RPLY_MSG
Channel Name	RBT_BILL_CHNL
Configuration Parameter Used	RBTBILLEVENT

Create Disputes and Adjustments EIP

As a bill dispute is saved in the CRM system, it needs to be reflected in the billing system accordingly so that proper adjustments can be made to customers' accounts in a timely fashion. Customers can create bill disputes through CSRs, or by themselves using the self-service application. Disputes can be raised against bill items (for example, if the wrong rate plan is used to calculate long distance charges), bill events (for example, dropped calls), or account balance and usage (for example, an account is not credited accurately).

This table describes the Create Disputes and Adjustments EIP:

Category	*Description*
EIP	Create Dispute
Request Message	RBT_BILL_DISP_MSG
Message Type	Outbound Asynchronous
Message Called From	Case Component
Channel Name	RBT_BILLDISP_CHNL

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Category	*Description*
Configuration Parameters	RBTMAXDISP, RBTMAXITEMUSD (bill item dispute), RBTMAXEVENTUSD, RBTMAXEVENTMIN (bill event dispute), RBTMAXBALUSD (account balance dispute), RBTMAXUSAGEMINS (account usage dispute)

Change Bill Cycle EIP

A change to the billing cycle in CRM must be reflected in the billing system to ensure that invoices are generated on the correct dates.

This table describes the Change Bill Cycle EIP:

Category	*Description*
EIP	Change Bill Cycle
Request Message	RBT_CHGBILLCYCLE
Message Type	Outbound Asynchronous
Message Called From	Account Component
Channel Name	RBT_NEWACT_CHNL
Configuration Parameters	These are not configuration parameters

Defining Configuration Parameters

This section provides an overview of configuration parameters and discusses how to define configuration parameters for integration.

Understanding Configuration Parameters

You must complete two setups for the integration with billing systems to run properly:

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- Integration Broker setup.
  - Set up integration gateway properties.
  - Set up local and remote nodes.
  - Define integration messages and corresponding channels.
- CRM setup.

  You can enable or disable messaging for EIPs and define threshold values for application rules (to handle disputes). These configuration options are the same for customers in the communications industry and the energy industry. The financial industry and the insurance industry share the same configuration parameters.

  The threshold rules that you define enable CSRs to address and settle complaints quickly by making instantaneous adjustments to disputes with insignificant disputing values—for example, less than 1.0 USD in a bill dispute or one minute in a usage dispute. For example, a customer in the communications industry files a bill event dispute on a long distance call that he did not make. According to the preceding configuration, if this dispute amount is less than (or equal to) 1.0 USD, the CRM system makes the adjustment automatically. The system credits the customer's account with the amount in dispute and sends a message for an account update; the case is then closed.

Page Used to Define Configuration Parameters

Page Name	*Definition Name*	*Navigation*	*Usage*
Communications Setup	RBT_CONFIG_PG	• Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup • Set Up CRM Product Related, Energy, Energy Setup, Energy Setup, Communications Setup (for the energy industry)	Define billing integration parameters for the communications industry and the energy industry.

Defining Configuration Parameters for Integration

Access the Communications Setup page (Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup).

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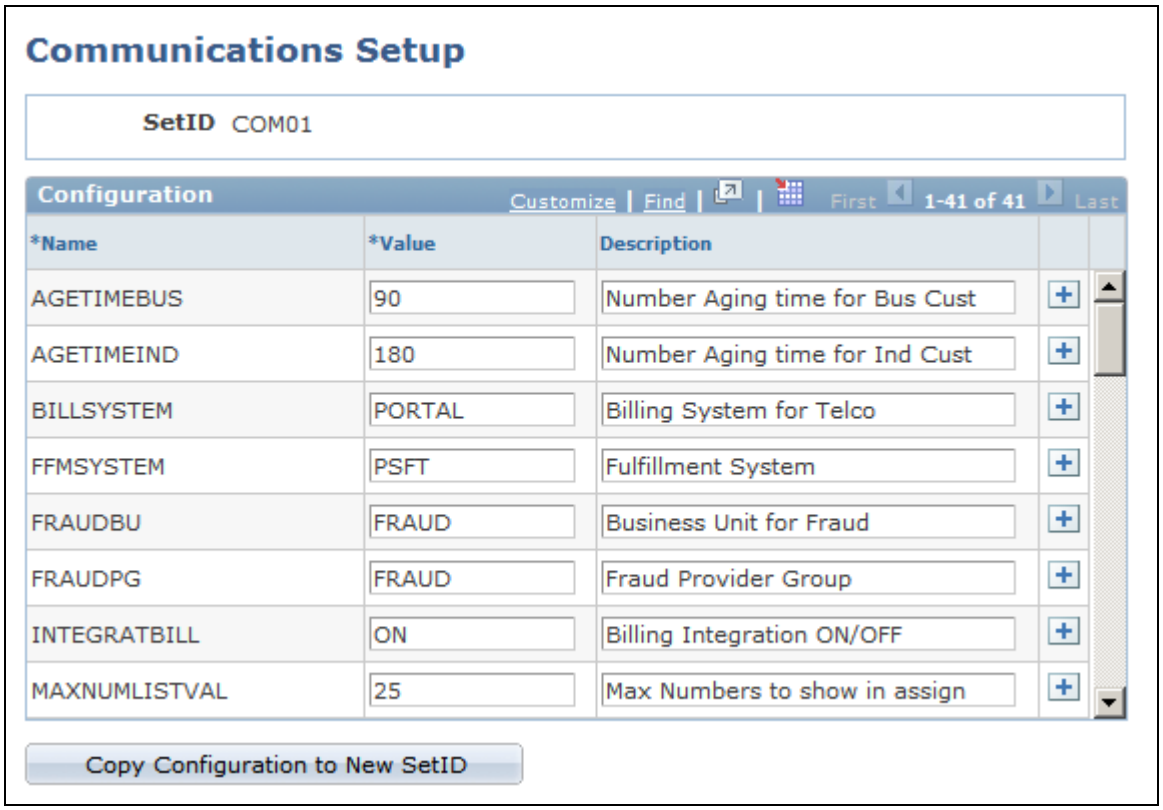

Communications Setup page

The following table lists configuration parameters that are used to integrate with billing systems. These parameters can be used to turn integration functionality on or off and to enable or disable integration messaging, at the message level, for each EIP:

Parameter	***Description***
INTEGRATBILL	Turns integration on or off. If this variable is turned off, no messages are published. If this variable is turned on, messaging for an individual EIP can be turned on or off by setting the corresponding configuration parameter.
RBTACCOUNT	Enables the CRM system to send a message to the billing system asking for new account creation. Set the parameter to *1* to turn it on, *0* to turn it off.
RBTACTIVATION	Enables the CRM system to send a message to the billing system asking for service activation. Set the parameter to *1* to turn it on, *0* to turn it off.

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Parameter	***Description***
RBTADDR	Enables the CRM system to publish address changes to the billing system. This message is published only when changes are made in the Account component. Set the parameter to *1* to turn it on, *0* to turn it off.
RBTBALANCE	Enables the CRM system to send a message to the billing system asking for account balance information. Set the parameter to *1* to turn it on, *0* to turn it off. If this parameter is off, the system reads data from local tables.
RBTBILL	Enables the CRM system to send a message to the billing system asking for bill summary of an account. Set the parameter to *1* to turn it on, *0* to turn it off. If this parameter is off, the system reads data from local tables.
RBTBILLITEM	Enables the CRM system to send a message to the billing system asking for bill item information. Set the parameter to *1* to turn it on, *0* to turn it off. If this parameter is off, the system reads data from local tables.
RBTBILLEVENT	Enables the CRM system to send a message to the billing system asking for bill event information. Set the parameter to *1* to turn it on, *0* to turn it off. If this parameter is off, the system reads data from local tables.
RBTDISPUTE	Enables the CRM system to send a message to the billing system regarding a bill dispute. Set the parameter to *1* to turn it on, *0* to turn it off.
RBTPAYMENT	Enables the CRM system to send a message to the billing system effecting a change in payment information. Set the parameter to *1* to turn it on, *0* to turn it off.
RBTSERVICE	Enables publication of messaging that is related to service management (for example, change, new, suspend, resume, or disconnect service) to the billing system. Set the parameter to *1* to turn it on, *0* to turn it off.
RBTUSAGE	Use this parameter to enable the CRM system to send a message to the billing system asking for account usage information. Set the parameter to *1* to turn it on, *0* to turn it off. If this parameter is off, the system reads data from local tables.

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See Also

PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook, "Setting Up Industry-Specific Functionality," Setting Up Configuration Tables for Energy and Communications

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Chapter 8

Managing Billing Accounts for the Financial Services and Insurance Industries

This chapter provides an overview of billing accounts for the financial services and insurance industries and discusses how to:

- Enable billing accounts.
- View billing accounts.

Understanding Billing Accounts

This section discusses:

- Billing accounts.
- Billing Account component activation.
- Billing account integration.

Billing Accounts

CRM enables customers to have multiple billing accounts with multiple products and services within each billing account. Billing account information is read-only and populated in CRM through integration with billing systems. It is stored in the Billing Account component and enables customer service representatives (CSRs) to answer and resolve billing inquiries, which account for the majority of phone calls that are received by a call center in the financial services and insurance industries. CSRs can access the Case component directly from the Billing Account page to create cases based on billing inquiries.

Billing Account Component Activation

The Billing Account component is flexible and configurable for all CRM industries. When the system is delivered, the Billing Account Enabled option on the FSI Options page is cleared (disabled) for all users. Administrators can select the option to enable the Billing Account component for the financial services and insurance industries. Additionally, the Billing Account component appears only for users with the proper permission to access the component.

When the Billing Account Enabled is selected:

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- The Billing Account and Billing System. fields appear on the configurable search pages for the Financial Account and the Billing Account components.
- The Billing Account field appears on the Case search page so that users can search for issues based on the billing account.
- The Billing Account appears on the main Case page and the main Financial Account page.

Billing Account Integration

Integration is required to third-party billing systems. Third-party billing systems are the source of all billing account data that is stored in CRM. You must implement the Create Billing Account enterprise integration point (EIP) to populate this information in the CRM Billing Account component.

This EIP also establishes the relationship between financial accounts and billing accounts.

This table lists the minimum information (attributes) that must be obtained from the third-party system:

Attribute	*Description*
Account Number	The account number in the third-party billing system. The combination of the account number and the system source code values provide a unique identifier.
System Source Code	The billing system from which the account number originated.
Owner ID/Payer ID	The party that is responsible for paying the bill.
Account Type	Maps to the third-party billing system account type. Current values include *Individual* and *Sponsored.*
Related Policies or Related Cases (industry dependent)	For each billing account, customers see each of the related policies or related cases.

Enabling Billing Accounts

This section discusses how to enable the Billing Account component.

To enable the Billing Account component, use the FSI Options (RBF_OPTIONS) component.

Page Used to Enable Billing Accounts

Page Name	*Definition Name*	*Navigation*	*Usage*
FSI Options	RBF_OPTIONS	Set Up CRM, Product Related, Financial Services, FSI Options, FSI Options	Enable the Billing Account component.

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Enabling the Billing Account Component

Access the FSI Options page (Set Up CRM, Product Related, Financial Services, FSI Options, FSI Options).

FSI Options page

Account Options

Billing Account Enabled Select to enable the Billing Account component.

Account Subscription Option

This section is available if CDH and CRM integration is activated.

Enable Duplicate Prevention Select to enable the CDH duplicate prevention logic for creating financial accounts. When enabled, the logic checks if the customer, who is currently selected in a new financial account, already exists in the system. To do so, a match rule in CDH is executed to determine if the business object on the new financial account already exists before that financial account is created.

If a matching record is found with a match score that is greater than the match threshold set of the match rule, then this business object (customer) is assumed to be a duplicate of what exists on the Financial Account input XML message. As a result, no new business object is created, and the new financial account is created with the existing, matching business object. If no matching record is found, then both business object and the new financial account are created as new.

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Viewing Billing Accounts

This section discusses how to:

- View billing information.
- View financial accounts.
- View cases.

Pages Used to View Billing Accounts

Page Name	*Definition Name*	*Navigation*	*Usage*
Billing Account	RBT_ACCOUNT_CMP	Customer Accounts, Review Billing Accounts, Review Billing Accounts, Billing Account	View billing accounts.
Financial Accounts	RBI_ACCOUNT_PG	Customer Accounts, Review Billing Accounts, Review Billing Accounts, Financial Accounts	View financial accounts (policies) that are associated with a particular billing account.
Cases	RBI_ACCTCASE_VW_PG	Customer Accounts, Review Billing Accounts, Review Billing Accounts, Cases	View all cases that are associated with a particular billing account. This page displays all issues regardless of status.

Viewing Billing Information

Access the Billing Account page (Customer Accounts, Review Billing Accounts, Review Billing Accounts, Billing Account).

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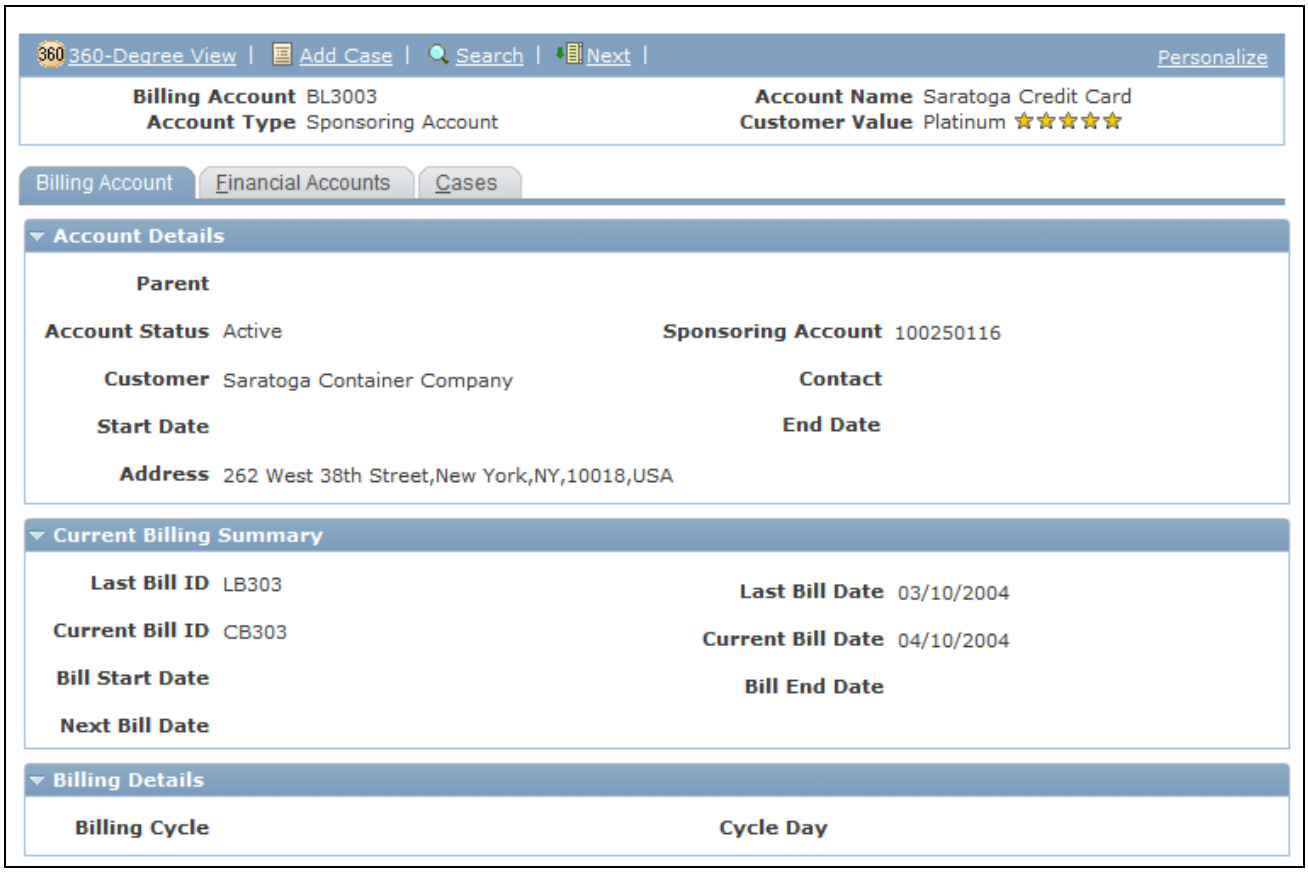

Billing Account page

Account Type Displays what the type of the account is. Account types are: *Individual*, *Parent*, *Sponsored*, *Sponsoring*, or *Subordinate*.

Billing System Maps to the third-party system source code. This field, in conjunction with the Account Number field, uniquely identifies a billing account.

Viewing Financial Accounts

Access the Review Billing Accounts - Financial Accounts page (Customer Accounts, Review Billing Accounts, Review Billing Accounts, Financial Accounts).

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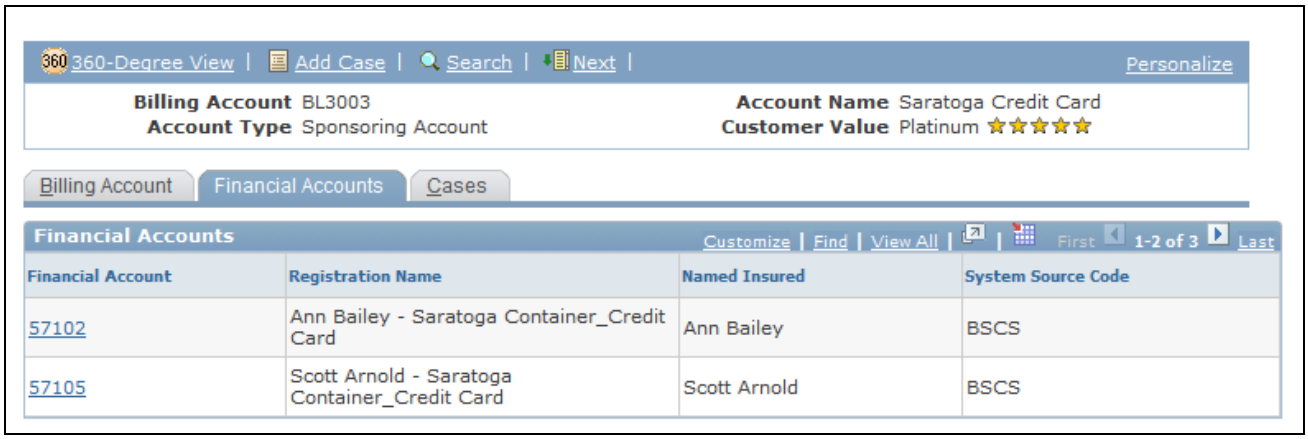


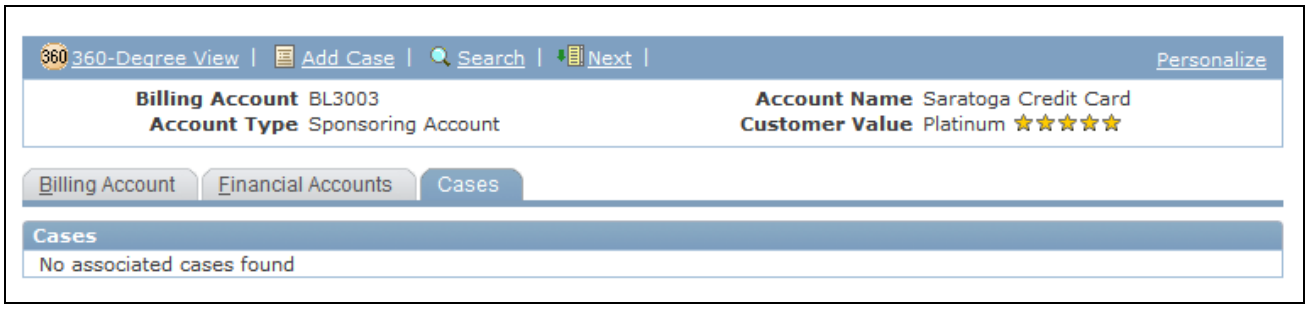
Review Billing Accounts - Financial Accounts page

Financial Account Displays the financial accounts that are associated with a particular billing account. This field also provides a link to the related financial accounts.

System Source Code Displays the billing system from which the billing account number originated.

Viewing Cases

Access the Review Billing Accounts - Cases page (Customer Accounts, Review Billing Accounts, Review Billing Accounts, Cases).



Review Billing Accounts - Cases page

See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases."

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Appendix A

Delivered Web Service and Service Operations

This appendix discusses the delivered web services and service operations for financial accounts.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Order Capture Delivered Business Processes and Web Services"

Delivered Web Services

This section discusses:

- The financial account web service.
- How to view the message elements.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Financial Account Web Service

A web service is available with the following operations:

- Create Account

  Takes financial account data as input and creates a financial account record and associated child records in the CRM system.

- Get Account

  Returns a financial account record and its associated child record based on a passed unique identifier.

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- Search Account

  Returns a list of financial account records and the associated child records based on criteria field values passed via the input message.

- Update Account

  Modifies the attributes of the financial account data structure.

- Change Account Address

  Takes the account number and new address data as input and changes the address in the CRM system for that account.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	***Operation Type***	***Request Message***	***Response Message***
Create Account (RBF_FINACCOUNT_CREATE)	Synchronous	RBF_FINACCOUNT_CREATE_REQ	RBF_FINACCOUNT_CREATE_RES
Get Account (RBF_FINACCOUNT_GET)	Synchronous	RBF_FINACCOUNT_GET_REQ	RBF_FINACCOUNT_GET_RES
Search Account (RBF_FINACCOUNT_SEARCH)	Synchronous	RBF_FINACCOUNT_SEARCH_REQ	RBF_FINACCOUNT_SEARCH_RES
Update Account (RBF_FINACCOUNT_UPDATE)	Synchronous	RBF_FINACCOUNT_UPDATE_REQ	RBF_FINACCOUNT_UPDATE_RES
Change Account Address (RBF_FINACCOUNT_ACTADRCHG)	Synchronous	RBF_FINACCOUNT_ACTADRCHG_REQ	RBF_FINACCOUNT_ACTADRCHG_RES

Viewing the Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RBF* or *RBI* in the Message Name field and click Search.

   The system lists all the messages that are related to financial services or insurance.

3. Select the message you want to view.

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4. Click the message name link under the Parts grid.

   The system opens the Message Definition page in a new browser.

5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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Index

A

account activation
    bulk activation 11
    single activation 11
Account Balance page 36
account balances, managing 36
Account Details page 29
accounts
    creating 4
    framework for managing 5
    hierarchies 6
    individual 6
    non - subordinate 6
    overview 3
    sponsoring 6
    subordinate 6
Account Usage page 37
application fundamentals vii
asynchronous message
    RBT_IPSTATUS_MSG 9
    RBT_PPD_BULK_CREATE 9
automation and configuration tools ix

B

Bill Details page 42
bill dispute 4
bill events, viewing 44
Bill History page 39
Billing Account - Financial Accounts page 85
Billing Account page 84
billing accounts *See Also* accounts
    enabling 82
    understanding 81
billing accounts, viewing 84
billing systems integration, understanding 65
Bill Item Details page 42, 44
Bill Items Summary page 42, 44
Bill Presentment and Account Management
    business processes 1
    implementation 2
    integrations 2
    overview 1
bills
    viewing 41
BPEL process
    Telco New Order BPEL 8
business object management x

C

Cases page 86
Change Bill Cycle EIP 75
communication industries, integrating with 65
Communications Setup pate 76
configuration parameters, defining 75
configuration parameters, integrations 77
configuration parameters, understanding 75
Create Disputes and Adjustments EIP 74

D

dispute
    page for creation 42
Dispute History page 47
disputes 3
    creating 46

E

EIPs
    Change Bill Cycle 75
    Create Disputes and Adjustments 74
    Get Bill List 72
    Installed Product and Account Update 71
    Prepaid Balance Request 67
    Prepaid Bulk Load 71
    Prepaid Payment History Request 68
    Prepaid Recurring Payment Details Request 67
    Prepaid Usage History Request 68
    Top-up Payment Submit 69
    Update Recurring Payment 70
    View Bill Events 73
    View Bill Items 73
    Voucher Payment Submit 70
energy industries, integrating with 65

F

Financial Services
    integration 2
financial services industries, integrating with 81
FSI Options page 83

G

Get Bill List EIP 72

H

hierarchies, account 6
HLR *See* Home Location Register
Home Location Register 13
Hot-lining 13

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I

IMEI
See International Mobile Equipment Identity
implementation 2
IMSI *See* International Mobile Subscriber Identity
individual accounts 6
Installed Product and Account Update EIP 71
Installed Products page - Account 40
insurance industries, integrating with 81
INTEGRATBILL parameter 77
integration
billing and prepaid accounts 9
configuring 76
International Mobile Equipment Identity 13
International Mobile Subscriber Identity 12

M

MCC *See* Mobile Country Code
MNC *See* Mobile Network Code
Mobile Country Code 12
Mobile Network Code 12
Mobile Station International ISDN Number 12
MSISDN
See Mobile Station International ISDN Number

N

non - subordinate accounts 6

P

prepaid accounts
and billing 9
benefits 7
features 8
implementation considerations 8
lifecycle 8
Telco New Order BPEL 8
Prepaid Balance Request EIP 67
Prepaid Bulk Load EIP 71
Prepaid Payment History Request EIP 68
Prepaid Recurring Payment Details Request EIP 67
Prepaid Usage History Request EIP 68
product and item management xi

R

RBTACCOUNT parameter 77
RBTACTIVATION parameter 77
RBTADDR parameter 78
RBTBALANCE parameter 78
RBTBILLEVENT parameter 78
RBTBILLITEM parameter 78
RBTBILL parameter 78
RBTDISPUTE parameter 78
RBTPAYMENT parameter 78
RBTSERVICE parameter 78
RBTUSAGE parameter 78

S

services foundation x
SIM Card *See* Subscriber Identity Module
single activation 11
sponsored accounts 6
subordinate accounts 6
Subscriber Identity Module 12
synchronous message 9
RBT_PPD_AUTO_PAY_RQST 10
RBT_PPD_BAL_RQST 9
RBT_PPD_PAY_RQST 10
RBT_PPD_TOPUP_SUBMIT 10
RBT_PPD_UPDATE_AUTOPAY_SUBMIT 10
RBT_PPD_USAGE_RQST 9
RBT_PPD_VOUCHER_SUBMIT 10

T

Top-up Payment Submit EIP 69

U

Update Recurring Payment EIP 70

V

View Bill Events EIP 73
View Bill Items EIP 73
Voucher Payment Submit EIP 70

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