
PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook

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PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook
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About This PeopleBook

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	<p>Click to access the Process List page, where you can view the status of submitted process requests.</p>
Report Manager	<p>Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).</p>
Request ID	<p>An ID that represents a set of selection criteria for a report or process.</p>
Run	<p>Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.</p>
SetID	<p>An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.</p>
Short Description	<p>Enter up to 15 characters of text.</p>
User ID	<p>An ID that represents the person who generates a transaction.</p>

PeopleSoft Enterprise Bill Presentment and Account Management Preface

This preface discusses:

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

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

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9 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 Enterprise CRM 9 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.

- 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.

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 9 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.

PeopleSoft Enterprise CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 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 Enterprise CRM 9 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 Natural Language Processing (NLP) and Verity search.

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Order Capture, and the PeopleSoft call center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9 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 Enterprise Integrated FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft Enterprise 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 through the Map Dashboard.

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 9 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.

- 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.

PeopleSoft Enterprise Product and Item Management

The *PeopleSoft Enterprise CRM 9 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.

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools Enterprise 8.48 PeopleBooks.

CHAPTER 1

Getting Started with PeopleSoft Enterprise 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.
- 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 PeopleSoft Customer Connection 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 Enterprise CRM 9 Application Fundamentals PeopleBook*, *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, and *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, with information on where to find the most current version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 9 PeopleBook

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.

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.

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.

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 the enterprise 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.
- 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.

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.

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.
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 *PeopleSoft Enterprise CRM 9 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.
- `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 group box Billing Account Type appears only for the communications industry and is controlled by the 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 *PeopleSoft Enterprise CRM 9 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

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*.

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, <i>not</i> the MSISDN. The IMSI with a maximum of 15 numeric digits is made of 3 components <ul style="list-style-type: none"> • 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)

**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 etc.) 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.

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

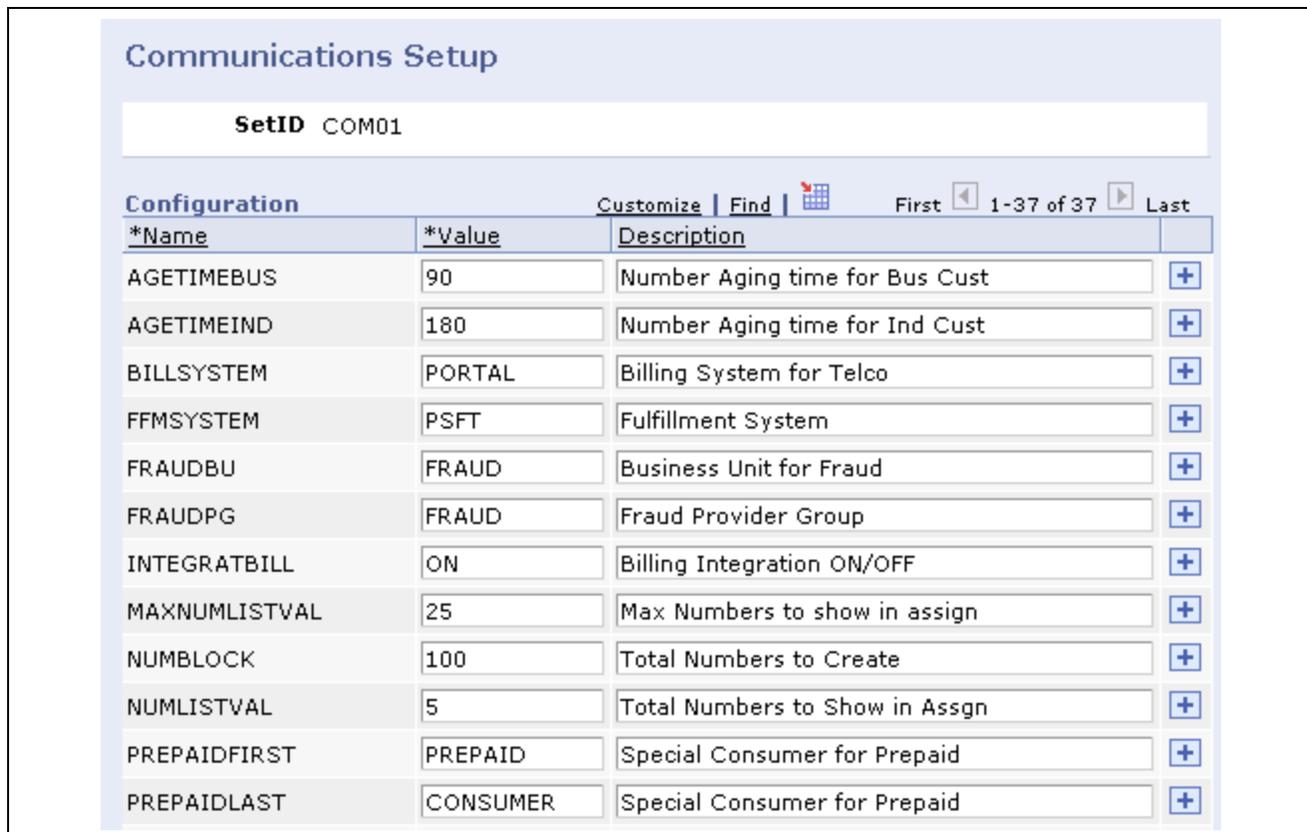
This section discusses how to set up the prepaid consumer customer identity.

Page Used to Set Up the Prepaid Consumer Customer Identity

Page Name	Object 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.



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	Object Name	Navigation	Usage
Communications	BUS_UNIT_RBT	Setup CRM, Business Unit Related, Order Capture Definitions, Communications	Set up communication industry information for Order Capture business units.

Setting Up a Communications Business Unit

Access the Communications page.

The screenshot shows the 'Communications' page for Business Unit 'COM01'. The page has a navigation bar with 'Internal', 'Self Service', and 'Communications' tabs. Below the navigation bar, there are three main sections:

- Mobile Number Portability:** Contains checkboxes for 'Port-In Allowed' (checked) and 'PAC Required' (unchecked). It also has dropdown menus for '*Temporary Phone Numbers' (set to 'Optional') and '*Port In Cancellations' (set to 'Never allow cancel'). Text boxes include 'OCN' (1234) and 'Network ID' (N13244334433). A 'Default Port-In Days' field is set to 1.
- Pre-Paid Accounts:** Contains checkboxes for 'Prepaid Accounts Allowed' (checked), 'Auto Load CONSUMER,PREPAID' (checked), and 'Do Not Contact' (unchecked). A 'Threshold Amount' field is set to 0. There is a 'Security Question' field.
- Wireless Service Provider:** Includes a 'Find | View All' link and pagination 'First 1 of 3 Last'. It has text boxes for '*Provider ID' (CINGULAR), 'Description' (Cingular), 'Network ID' (C89765), 'Contact Name' (Joe Cingcontact), and 'OCN' (5511). A '*Status' dropdown is set to 'Active'. Below this, there are checkboxes for 'Automatic' (checked), 'Phone' (unchecked), 'Fax Number' (unchecked), and 'Website URL' (checked, with value 'http://www.cingular.com').

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 *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Defining Order Capture Business Units”.

Prepaid Accounts

Prepaid Accounts Allowed Select to enable prepaid accounts.

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 *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

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:

- 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.

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 Enterprise CRM 9 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.

- 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 Enterprise CRM 9 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 *RBAPPSEC* to *Y* (enabled) or *N* (disabled).

See [Chapter 7, “Setting Up Billing Integration for the Communication and Energy Industries,”](#) page 53.

Page Used to Disable Billing Security

Page Name	Object Name	Navigation	Usage
Communications Setup	RBT_CONFIG_PG	<ul style="list-style-type: none"> 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 <i>RBAPPSEC</i> .

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 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:

- 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 account 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 8.48.

Refer to *Enterprise PeopleTools 8.48 PeopleBook: Data Management* for more information on database triggers.

See Also

[Chapter 5, “Setting Up Application Security for Billing Accounts,” page 17](#)

[Chapter 7, “Setting Up Billing Integration for the Communication and Energy Industries,” page 53](#)

Enterprise PeopleTools 8.48 PeopleBook: Data Management

Understanding Prepaid Account Management

This section discusses:

- Prepaid account information.
- Prepaid account management process.

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.

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 customer accounts.

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 [Chapter 3, “Understanding Prepaid Accounts for Communication Service Providers,” page 7](#) and [Chapter 4, “Setting Up Prepaid Account Management,” page 13](#).

Pages Used to Manage Accounts

Page Name	Object Name	Navigation	Usage
Account Details	RBT_ACCOUNT_PG	<ul style="list-style-type: none"> 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.	Modify account information.
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	<ul style="list-style-type: none"> 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.
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.

Account

[Save](#) | [Add Account](#) | [Search](#) | [Next](#) | [360-Degree View](#) | [Add Case](#) | [Correspondence](#) | [Personalize](#)

Account Name Ted Pepper Wireless **Account Number** 100250070
Account Status Active **Account Type** Individual Account
Customer Value Gold★★★★

[Account Details](#) | [Members](#) | [Balance](#) | [Usage](#) | [Bill History](#) | [Dispute History](#) | [D](#)

Customer Details

Consumer Ted Pepper	Contact
--	----------------

Account Details

Account Name Ted Pepper Wireless	Account Type Individual Account
Parent Account	Sponsoring Account
Account Start Date 02/08/2002	Account End Date
SetID COM01	

[Change Account Details](#)

▼ **Current Billing Summary**

Last Bill ID B101	Last Bill Date 02/10/2002
Current Bill ID B100	Current Bill Date 02/10/2002
Bill Start Date 02/10/2002	Bill End Date 02/10/2002
Next Bill Date 02/10/2002	

Billing Details

Billing Cycle Monthly	Cycle Day 11
------------------------------	---------------------

[Change Billing Cycle](#)

Account Details page (1 of 2)

▼ **Payment Method**

Invoice
 Automatic Payment
Account Number 100250070 **Routing Number** 123456789
Bank Name ABC Bank

Credit Card
Credit Card Type **Credit Card Number**
Expiration Month **Expiration Year**
First Name on Card **Last Name on Card**

[Change Payment Details](#)

Address History [Customize](#) | [Find](#) | [View All](#) | [Calendar](#)

	Current Address	Start Date	End Date
□			

[Add New Address](#)

▼ **Account Access Question**

Access Question	Access Answer
------------------------	----------------------

[Change Access Question](#)

Account Details page (2 of 2)

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 [Chapter 7, “Setting Up Billing Integration for the Communication and Energy Industries,” page 53.](#)

Account Details

Status	Displays <i>Active</i> , <i>Closed</i> , <i>On Hold</i> , or <i>Pending Activation</i> . Change account status in the Service Management component.
Type	Valid values are <i>Sponsoring</i> , <i>Sponsored</i> , <i>Parent</i> , <i>Subordinate</i> , and <i>Individual</i> . For information on setting up prepaid accounts, see the Prepaid Account chapters in this PeopleBook. See Chapter 4, “Setting Up Prepaid Account Management,” page 13.
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.

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.
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.

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.
Change Payment Method	Click to access the Change Payment Method page.

See *PeopleSoft Enterprise CRM 9 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.

See *PeopleSoft Enterprise CRM 9 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.

Maintaining Account Membership

Access the Members page.

The screenshot displays the 'Account Members' page for account 'BI Wireless Corp Act'. At the top, account details are shown: Account Name (BI Wireless Corp Act), Account Status (Active), Customer Value (Platinum), Account Number (COM100250105), and Account Type (Sponsoring Account). Below this is a navigation bar with tabs for Account Details, Members (selected), Sites, Balance, Usage, Bill History, and Relationships. The main section is a table of account members with columns for Primary Manager, Name, *Role, and Phone Number. Ted Pepper is the primary manager. Below the table are input fields for First Name and Last Name, and an Add button.

Primary Manager	Name	*Role	Phone Number
<input checked="" type="checkbox"/>	Ted Pepper	Account Manager	949/281-2849
<input type="checkbox"/>	Larry Boyd	Account Member	907/558-6986
<input type="checkbox"/>	Kevin McNichols	Account Member	19002345678
<input type="checkbox"/>	Betty Newberry	Account Member	212 7206130

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.



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.

Account

Save | Add Account | Search | Next | 360 360-Degree View | Add Case | Correspondence | Personalize

Account Name Ted Pepper Wireless **Account Number** 100250070
Account Status Active **Account Type** Individual Account
Customer Value Gold★★★★

Account Details | Members | Balance | **Usage** | Bill History | Dispute History | ▶

Account Usage Summary Customize | Find |

Installed Service	Current Balance	Opening Balance	Resource	
	168.00	400.00	Minutes	Dispute Usage

 First ◀ 1 of 1 ▶ Last

Get Usage

Account Usage 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.

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.

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.

Managing Bill History

Access the Bill History page.

Account History

Save | Add Account | 360-Degree View | Add Case | Correspondence | Personalize

Account Name Ted Pepper Wireless **Account Number** 100250070
Account Status Active **Account Type** Individual Account
Customer Value Gold★★★★

Account Details | Members | Balance | Usage | **Bill History** | Dispute History | ▶

Bill History Summary Customize | Find | First ◀ 1-3 of 3 ▶ Last

External Bill Details	Bill Number	Amount	Currency	Start Date	End Date	Bill Due Date
	B100	33.56	USD	04/01/2004	04/30/2004	06/02/2004
	B101	33.56	USD	05/01/2004	05/30/2004	07/02/2004
	B102	33.56	USD	06/01/2004	06/30/2004	08/02/2004

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 Bills

The Account and Billing Framework enables CSPs to tightly integrate their external billing systems with PeopleSoft Enterprise 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.
- 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 53](#)

Pages Used to View Billing Information

Page Name	Object 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.

Bill

Save | Next | Previous | 360 360-Degree View | Personalize

Account Name Ted Pepper Wireless
Account Type Individual Account
Bill Status Pending

Account Number 100250070
Bill Number B101
Customer Value Gold★★★★

Bill Details | Bill Items

Bill Summary

Start Date 05/01/2004 **End Date** 05/30/2004
Parent Bill ID B1000 **Bill Due Date** 07/02/2004

Current Charges

Previous Total 33.56 **Currency** USD
Total Due 33.56

Notes \$30.00 National Service Plan

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.

Viewing Bill Items Summary

Access the Bill Items Summary page.

The screenshot displays the 'Bill Items Summary' page. At the top, there are navigation buttons: Save, Next, Previous, 360-Degree View, and Personalize. Below this, account information is shown: Account Name (Ted Pepper Wireless), Account Type (Individual Account), Bill Status (Pending), Account Number (100250070), Bill Number (B101), and Customer Value (Gold☆☆☆☆). There are two tabs: 'Bill Details' and 'Bill Items', with 'Bill Items' selected. The main content is a table with columns for Description, Bill Amount Due, and Currency. The table lists 11 items, including a \$30.00 National Service Plan and various taxes and fees.

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.

Bill

Save | Next | Previous | 360 360-Degree View | Personalize

Account Name Ted Pepper Wireless	Account Number 100250070
Account Type Individual Account	Bill Number B101
Bill Status Pending	Customer Value Gold★★★★

Bill Item Details

Description \$30.00 National Service Plan Dec. 13 to Jan. 12	
Primary Currency USD	Bill Item ID 1
Total Due 30.00	Total Received 30.00
Disputed Amount 0.00	Amount Adjusted 0.00
Date Opened 01/01/1900	Date Closed 01/01/1900

Dispute Item

[Return to Summary](#)

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	<p>Click to dispute the individual bill item.</p> <p>The system creates a case if the threshold value for the number of dispute cases (RBTMAXDISP) is not reached.</p> <p>The system adjusts the dispute amount immediately if the threshold value for maximum dispute amount in bill event (RBTMAXEVENTUSD) is not reached.</p>

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.

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 <i>Balance</i> , <i>Usage</i> , <i>Event</i> , and <i>Item Dispute</i> .
RBTADJTYPE	The dispute adjustment type. Valid values are <i>Credit</i> or <i>Debit</i> .
RBTAMTADJ	The adjusted amount.
RBTRESOURCE TYPE	The type of resource adjusted. Valid values are <i>Dollars</i> or <i>Minutes</i> .

Data Elements	Description
RBTDISPREASON	The reason for the dispute.
RBTDISPUTEAMT	The disputed amount.
RBTDISPSTATUS	The status of the dispute. Valid values are <i>Approved</i> , <i>Denied</i> , <i>Hold</i> , or <i>Pending</i> .
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	Object 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.

The screenshot displays the 'Dispute History' page for an account. At the top, there are navigation links like 'Save', 'Add Billing Account', 'Search', '360 360-Degree View', 'Add Case', 'Correspond', and 'Personalize'. Below this, account information is shown: Account Name 'Ted Pepper Wireless', Account Number '100250070', Account Status 'Active', and Account Type 'Individual Account'. A 'Customer Value' of 'Gold★★★★' is also displayed. A breadcrumb trail includes 'Account Details', 'Members', 'Balance', 'Usage', 'Bill History', and 'Dispute History'. The main section is titled 'Dispute History Summary' and includes a table with the following data:

Number	Status	Date Created	Date Closed	Dispute Type	Adjustment Type	Resource Type	Disputed Amount
220490	Approved	07/11/2006		Bal Disp	Credit	Dollars	24.50

At the bottom of the screenshot, there are more navigation links: 'Save', 'Add Billing Account', 'Search', '360 360-Degree View', 'Add Case', 'Correspond', and 'Top of Page'.

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 <i>Credit</i> or <i>Debit</i> .
Resource Type	Displays the unit of measure for the dispute: <i>Dollars</i> or <i>Minutes</i> .
Disputed Amount	Displays the amount of the dispute.

Managing Prepaid Accounts

This section discusses how to manage prepaid accounts.

Pages Used to Manage Prepaid Accounts

Page Name	Object 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.
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.
Installed Products	RBT_ACCTPROD_PG	Customer Accounts, Search Accounts, Installed Products	View the prepaid services.
Audit	RBT_ACCT_AUDIT	Customer Accounts, Search Accounts, Audit	View the activity on the account.

Adding or Maintaining Account Details

Access the Account Details page.

Account Details page

Prepaid Consumer

Click this link to transfer to the Person component.

Create Consumer

Click this link to open the Quick Create search page. 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 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 this link 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.

Change Access Question

Click to change the access question and answer.

Managing Account Balance and Payments

Access the Balance and Payments page.

Account

Search | Previous | Next
[Personalize](#)

Account Name CONSUMER,PREPAID	Account Number 100250140
Account Status Active	Account Type Prepaid Account

Account Details	Balance and Payments	Usage	Payment History	Installed Products	Audit
---------------------------------	-----------------------------	-----------------------	---------------------------------	------------------------------------	-----------------------

Account Balance

Current Balance 52.50	Account Status Active
Expiration Date 05/08/2006	Service Status Installed

Top-Up Settings

Payment Type <input type="text" value="Recurring Threshold Top-Up"/>	
Threshold Amount <input type="text" value="5"/>	
Top-Up Amount <input type="text" value="25.00"/>	

Bank Draft

Routing Number

Account Number

Bank Name

Save Bank Account

Credit Card

Credit Card Type

Expiration Month

First Name on Card

Last Name on Card

[Modify](#)

Credit Card Number

Card Expiration Year

Security Number

Save Credit Card

[Cancel Recurring Payment](#)

Balance and Payments page

Navigating to the Balance and Payments tab 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.

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 fields 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 fields are available for entry.

Selecting *Recurring Threshold Top-Up* displays the Top-Up Amount field and Threshold Amount. Use 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 fields 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.
- Modify** Click this link to modify credit card information.
- 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.

Viewing Account Usage

Access the Usage page.

Account Usage Summary

Date/Time Stamp	Usage Type	Description	Quantity	Units	Unit Price	Charge Amount
03/01/2005 10:42:12.000	Download	Tetris Game 28768	1.0000	Each	2.99000	2.990

Usage page

Navigating to the Usage tab initiates a synchronous call to the billing system for the last 30 days' worth of usage data, which is formatted 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.

Account Payment Summary

Payment Amount	Currency	Payment Date
25.000	USD	03/01/2006

Payment History page

Navigating to the Payment History tab initiates a synchronous call to the billing system for the last 30 days' worth of payment data, which is formatted for display.

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.

Viewing Installed Products

Access the Installed Products page.

Account

Search | Previous | Next | Personalize

Account Name CONSUMER,PREPAID **Account Number** 100250140
Account Status Active **Account Type** Prepaid Account

Account Details | Balance and Payments | Usage | Payment History | **Installed Products** | Audit

Installed Products Summary Customize | Find | First 1 of 1 Last

Description	Status	Owner	Date Installed
3G Prepaid Wireless Services	Activated	Prepaid Consumer	05/04/2006

Installed Products page

The system displays all installed products for the account. The Installed Product link can be used to transfer to the Installed Product component.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “Tracking Installed Products and Assets”

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 will 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.

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	Object 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 <i>Add Prepaid Service</i> 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.

Search For Customer

▼ Search

Organization

First Name

Last Name

Customer ID

Account

Service Phone

Phone

Email

Address

City

State

Postal

Country

[Advanced Search](#)

Actions

- Activate Service
- Add Prepaid Service

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.

Order

Order ID COM0500095 **Order Status** New Order
Customer [Prepaid Consumer](#)

[Entry Form](#) | [Line Details](#) | [Holds](#) | [Notes](#) | [Related Actions](#) | [History](#)

Go To

Customer

Customer [Prepaid Consumer](#) **Account**
Contact

▼ **Order Details**

Business Unit COM01 - Communications ***Status**

Description

Fulfill By

Order page (1 of 3)

Line Summary

[Products](#) | [Pricing Adjustments](#) | [Availability](#)

Line	Product Description	Product ID	*UOM	Order Quantity	Options	List Price	Unit Price	Recurring Price	Recurring Frequency		
1	3G Wireless Prepaid Package	TEL000024	<input type="text" value="Each"/>	1.0000	<input type="button" value="Reconfigure Package"/>	2.80	2.80	7.00	Monthly	<input type="button" value="Print"/>	<input type="button" value="Delete"/>
	3G Voice Services	TEL000013	Each	1.0000	<input type="button" value="Assign Number"/>	0.00	0.00				
	Caller ID	TEL200013	Each	1.0000		1.20	1.20	2.00	Monthly		
	Voice Mail	TEL200016	Each	1.0000		1.60	1.60	5.00	Monthly		
	Nokia 3360	TEL000016	Each	1.0000		0.00	0.00			<input type="button" value="Print"/>	
	3G USIM	TEL000009	Each	1.0000		0.00	0.00				

Region ID

Add Product(s)

Enter Product ID or Description - Power Add using Product,Quantity,Units;Product,Quantity,Units format

Shipping Summary

Customer [Prepaid Consumer](#) **Contact**

Address

[Advanced Options](#)

Order page (2 of 3)

Nonrecurring Billing Summary

Customer Prepaid Consumer 🔍

Address 555 No Where Anywhere, CA 📄

PO Number

Contact *No Contacts Defined* ▼

PO Received

Invoice

Credit Card

Payment Terms ▼

***Credit Card** *No Cards Defined* ▼ [Edit](#)

Recurring Billing Summary

New Account If new account, choose the type below

Individual Account

Invoice

New Credit Card

Sponsored Account

Subordinate Account

Prepaid Account

***Credit Card** *No Cards Defined* ▼ [Edit](#)

Account Number 🔍

Account Number 🔍

[Prepaid Account Details](#)

Totals

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

Update Total

Order page (3 of 3)

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.

Setting Up the Prepaid Account

Access the Prepaid Account Setup page. Information entered will be used when creating the prepaid account and will be handed off to the prepaid billing system.

Prepaid Account Setup

Top-Up Settings

*Payment Type

*Top-Up Amount

Payment Methods

Bank Draft

Bank Routing No. Bank Name

Bank Account No.

Credit Card

Credit Card Type Credit Card Number

Expiration Month Expiration Year

First Name on Card Last Name on Card

Account Access Question

Security Question

Access Answer

* Required Field

Prepaid Account Setup page

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

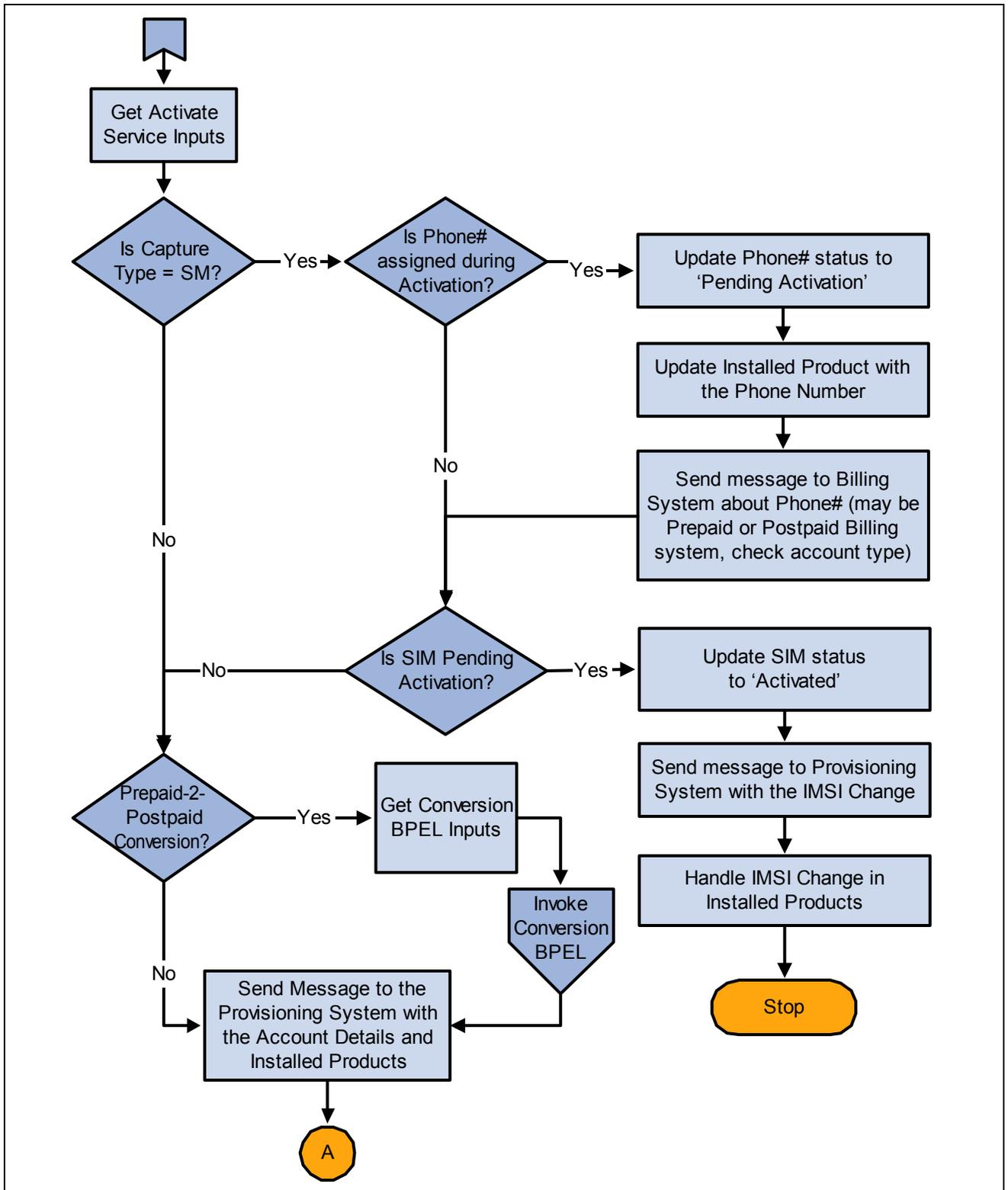
Payment Type	Values for payment type are <i>One Time Payment, Recurring Monthly Top-Up, Recurring Threshold Top-Up, and Voucher.</i>
Top-Up Amount	Enter the top-up amount.

Activating Prepaid and Postpaid Services

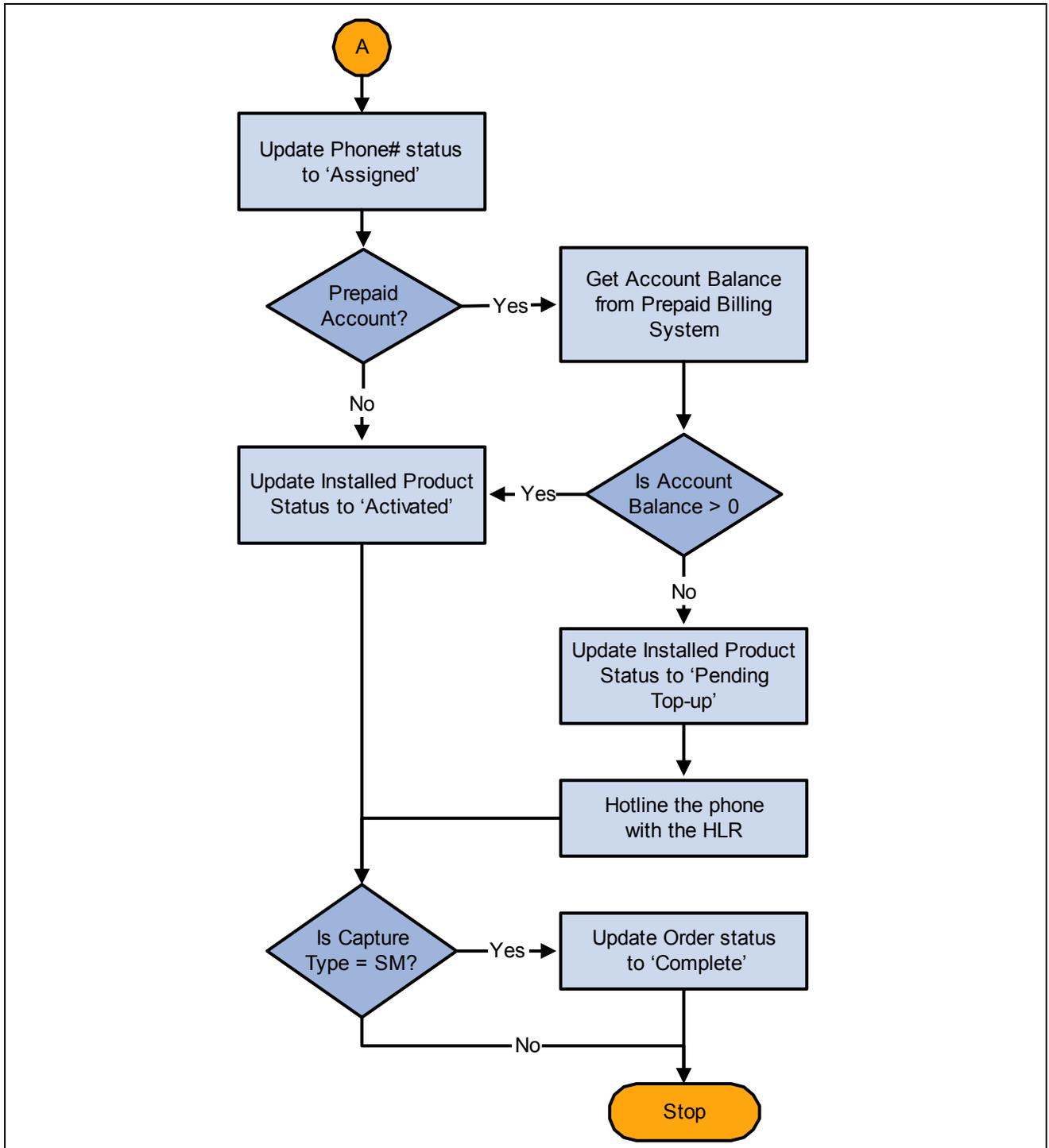
This section provides an overview and discusses how to activate prepaid and postpaid services.

Understanding Service Activation

These diagrams illustrate the activation process:



Service Activation (1 of 2)



Service Activation (2 of 2)

Pages Used to Activate Prepaid and Postpaid Services

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

See Also

PeopleSoft Enterprise CRM 9 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.
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.

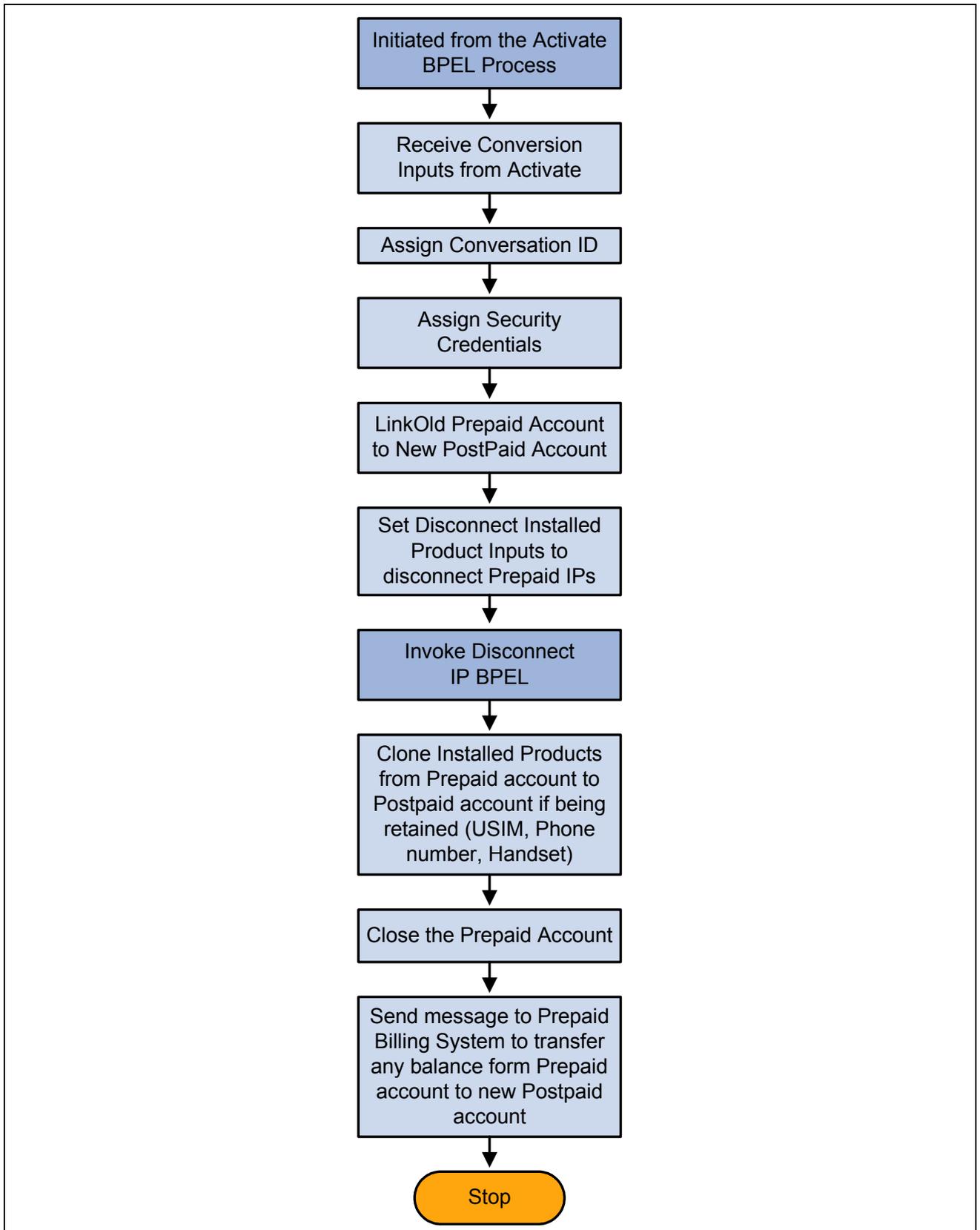
If you are using Quick Create on the Conversion Order page, then the Prepaid account does not get updated to the new consumer. This does not affect the conversion and the prepaid account will still be closed, however it will continue to say *Prepaid Consumer*.

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 checkboxes.
 - 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 checkbox 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. This diagram illustrates the Prepaid to Postpaid Conversion process:



Postpaid conversion BPEL process

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.
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.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services”.

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 Enterprise 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).

See Also

[Chapter 6, “Managing Accounts and Viewing Bills in the Communications and Energy Industries,” page 21](#)

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
- 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
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.

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.

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

Category	Description
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
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

Category	Description
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:

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
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:

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

Category	Description
Channel Name	RBT_BILLDISP_CHNL
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:

- 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	Object Name	Navigation	Usage
Communications Setup	RBT_CONFIG_PG	<ul style="list-style-type: none"> • 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.

Communications Setup

SetID COM01

Configuration [Customize](#) | [Find](#) | First Last

*Name	*Value	Description	
AGETIMEBUS	90	Number Aging time for Bus Cust	+
AGETIMEIND	180	Number Aging time for Ind Cust	+
BILLSYSTEM	PORTAL	Billing System for Telco	+
FFMSYSTEM	PSFT	Fulfillment System	+
FRAUDBU	FRAUD	Business Unit for Fraud	+
FRAUDPG	FRAUD	Fraud Provider Group	+
INTEGRATBILL	ON	Billing Integration ON/OFF	+
MAXNUMLISTVAL	25	Max Numbers to show in assign	+
NUMBLOCK	100	Total Numbers to Create	+
NUMLISTVAL	5	Total Numbers to Show in Assgn	+
PREPAIDFIRST	PREPAID	Special Consumer for Prepaid	+
PREPAIDLAST	CONSUMER	Special Consumer for Prepaid	+
RBTACCOUNT	1	New Account Message flag	+
RBTACTACS	1	Account Access flag	+
RBTACTDET	1	Account Detail flag	+
RBTACTIVATION	1	Service Activation Message flg	+
RBTACTUSGRESTYP	MINS	Account Usage Resource Type	+
RBTADDR	1	Address Info Message Flag	+
RBTAPPSEC	Y	Security	+
RBTBALANCE	0	Account Balance Message flag	+
RBTBILL	0	Get Bill Message flag	+

Communications Setup page (1 of 2)

RBTBILLCYC	<input type="text" value="1"/>	Bill Cycle flag	<input type="button" value="+"/>
RBTBILLCYCLES	<input type="text" value="3"/>	Number of Bills to be fetched	<input type="button" value="+"/>
RBTBILLEVENT	<input type="text" value="0"/>	Get Bill Event Message flag	<input type="button" value="+"/>
RBTBILLITEM	<input type="text" value="0"/>	Get Bill Item Message flag	<input type="button" value="+"/>
RBTDISPUTE	<input type="text" value="0"/>	Bill Dispute Message flag	<input type="button" value="+"/>
RBTMAXBALUSD	<input type="text" value="5"/>	Maximum Disputable Amount	<input type="button" value="+"/>
RBTMAXDISP	<input type="text" value="5"/>	Max No. of Cases allowed	<input type="button" value="+"/>
RBTMAXEVENTMIN	<input type="text" value="1"/>	Max Minutes allowed for Disp	<input type="button" value="+"/>
RBTMAXEVENTUSD	<input type="text" value="1"/>	Max Amount allowed for Disp	<input type="button" value="+"/>
RBTMAXITEMUSD	<input type="text" value="5"/>	Maximum allowed Item Disp	<input type="button" value="+"/>
RBTMAXUSAGEMINS	<input type="text" value="10"/>	Maximum Disputable Minutes	<input type="button" value="+"/>
RBTPASTACTIONS	<input type="text" value="30"/>	Past Churn Actions in n Days	<input type="button" value="+"/>
RBTPAYMENT	<input type="text" value="1"/>	Payment Info Message flag	<input type="button" value="+"/>
RBTSERVICE	<input type="text" value="1"/>	Service Related Message flag	<input type="button" value="+"/>
RBTUSAGE	<input type="text" value="0"/>	Account Usage Message flag	<input type="button" value="+"/>
RBTUSEMINS	<input type="text" value="YES"/>	Bill Dispute Usage Minutes flg	<input type="button" value="+"/>

Communications Setup page (2 of 2)

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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> to turn it off.

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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> 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 <i>1</i> to turn it on, <i>0</i> to turn it off. If this parameter is off, the system reads data from local tables.

See Also

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook, “Setting Up Industry-Specific Functionality,” Setting Up Configuration Tables for Energy and Communications

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:

- 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 <i>Individual</i> and <i>Sponsored</i> .
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	Object Name	Navigation	Usage
FSI Options	RBF_OPTIONS	Set Up CRM, Product Related, Financial Services, FSI Options, FSI Options	Select the Billing Account Enabled option to enable the Billing Account component.

Enabling the Billing Account Component

Access the FSI Options page.



FSI Options page

Billing Account Enabled Select to enable the Billing Account component.

Viewing Billing Accounts

This section discusses how to:

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

Pages Used to View Billing Accounts

Page Name	Object Name	Navigation	Usage
Billing Account	RBT_ACCOUNT_CMP	Customer Accounts, Review Billing Accounts, Billing Account, Billing Account	View billing accounts.
Financial Accounts	RBI_ACCOUNT_PG	Customer Accounts, Review Billing Accounts, Billing Account, Financial Accounts	View financial accounts (policies) that are associated with a particular billing account.
Cases	RBI_ACCTCASE_VW_PG	Customer Accounts, Review Billing Accounts, Billing Account, 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.

The screenshot shows the 'Billing Account' page for account BL3003. At the top, there are navigation links: '360 360-Degree View', 'Create Case', 'Return to Search', and 'Next in List', along with a 'Personalize' link. The account information is displayed as follows:

- Billing Account:** BL3003
- Account Type:** Sponsoring Account
- Account Name:** Saratoga Credit Card
- Customer Value:** Platinum ★★★★★

Below this, there are tabs for 'Billing Account', 'Financial Accounts', and 'Cases'. The 'Account Details' section is expanded, showing:

- Parent Account:**
 - Account Status:** Active
 - Customer:** Saratoga Container Company
 - Start Date:**
 - Address:** 262 West 38th Street, New York, NY, 10018, USA
- Sponsoring Account:**
- Contact:**
- End Date:**

The 'Current Billing Summary' section shows:

- Last Bill ID:** LB303
- Last Bill Date:** 03/10/2004
- Current Bill ID:** CB303
- Current Bill Date:** 04/10/2004
- Bill Start Date:**
- Bill End Date:**
- Next Bill Date:**

The 'Billing Details' section shows:

- Billing Cycle:**
- Cycle Day:**

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 Billing Account - Financial Accounts page.

The screenshot shows the 'Billing Account - Financial Accounts' page. It features the same account information as the previous screenshot. The 'Financial Accounts' tab is selected, displaying a table of associated financial accounts. The table has the following columns: 'Financial Account', 'Registration Name', 'Named Insured', and 'System Source Code'. There are also navigation options like 'Customize', 'Find', 'View All', and 'First 1-3 of 3 Last'.

Financial Account	Registration Name	Named Insured	System Source Code
57102	Ann Bailey - Saratoga Container_Credit Card	Ann Bailey	BSCS
57103	Tom Snow - Saratoga Container_Credit Card	Tom Snow	BSCS
57105	Scott Arnold - Saratoga Container_Credit Card	Scott Arnold	BSCS

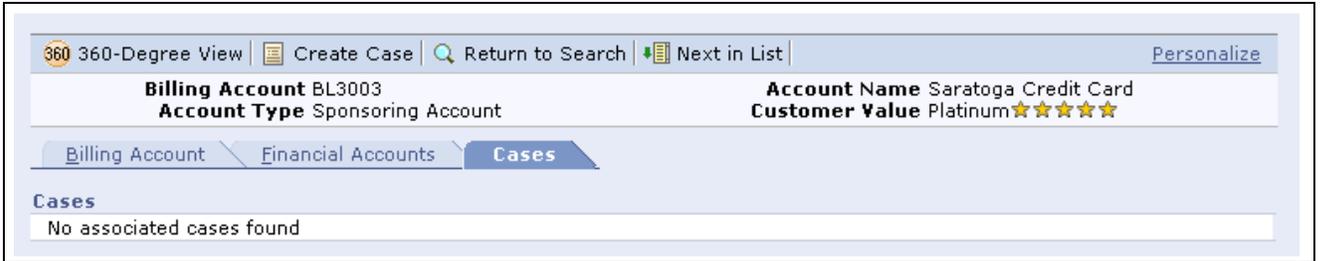
Billing Account - Financial Accounts page

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 Cases page.



Cases page

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Managing Cases”.

APPENDIX A

Delivered Web Service and Service Operations

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

See Also

PeopleSoft Enterprise CRM 9 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 Enterprise CRM 9 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.
- 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_ACTADDRCHG)	Synchronous	RBF_FINACCOUNT_ACTADDRCHG_REQ	RBF_FINACCOUNT_ACTADDRCHG_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.
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.

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> .
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
yield by operation	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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