



BOSS User Guide

IPLOOK Technologies

www.iplook.com

About This Document

Purpose

This document describes how to perform system configuration and service feature configuration in CRM system

Intended Audience

This document is intended for:

- Installation and commissioning engineers
- Technical support engineers
- System Operator

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1

Before You Start

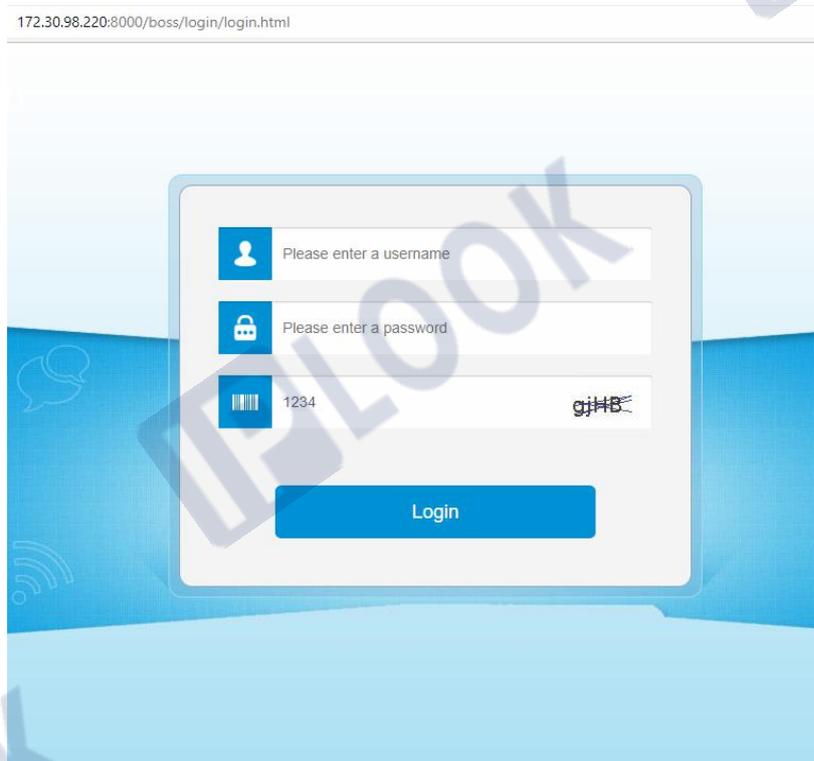
1.1 Logging In to the System

You must log in to the system before using it.

Procedure

Step 1 Open Internet Explorer, enter the URL to the system in the Address text box, and press Enter.

Step 2 Select a language, set Username, Password, and Verification Code, and click Login.



The screenshot shows a web browser window with the address bar containing the URL '172.30.98.220:8000/boss/login/login.html'. The main content area displays a login form with a light blue background. The form consists of three input fields stacked vertically. The first field is labeled 'Please enter a username' and has a blue user icon to its left. The second field is labeled 'Please enter a password' and has a blue lock icon to its left. The third field is for a verification code, showing the number '1234' and a blue barcode icon to its left. Below these fields is a blue button labeled 'Login'.

If you successfully log in to the system, the system home page appears.

1.2 Logging Out of the System

You must log out of the system in security mode when you do not need to use it. Please do not close the Internet Explorer directly.

Prerequisites

You have successfully logged in to the system.

Context

After you log out of the system, the businesses that you handle are stopped. Therefore, you must submit the handled businesses before you log out of the system to prevent data loss.

Procedure

Click  in the upper right corner of the system.

The system is successfully logged out of.

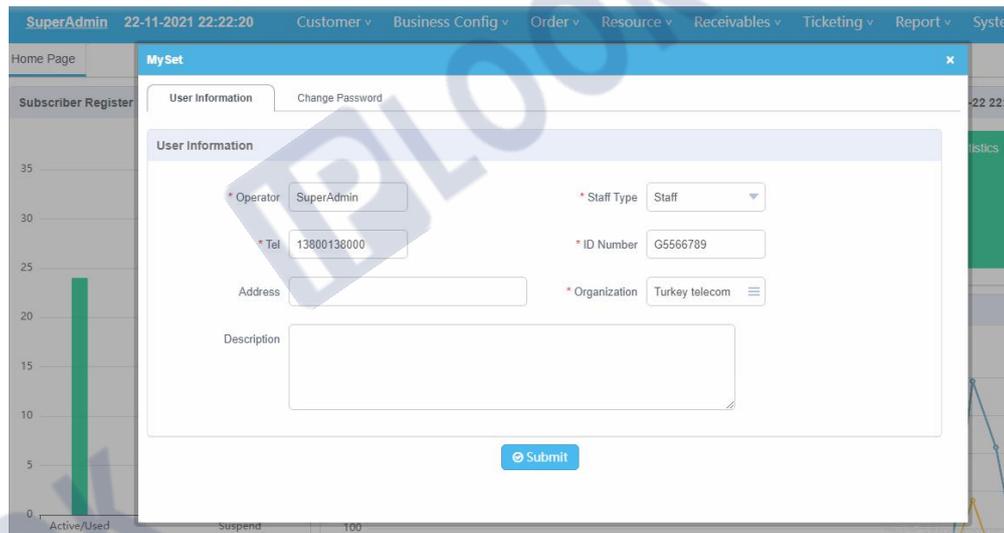
1.3 Changing a Password

You must change a password based on the password rules configured in the system when you log in to the system for the first time, if you need to ensure password security. After you change your password, use the new password to log in to the system.

Procedure

Step 1 Click 'Login Account' link in the upper left corner of the system. The Change Password page appears.

Step 2 Set **Old Password**, **New Password**, and **Confirm Password**. Then, click **Submit**. See following figure.



The screenshot shows a web interface for a user named 'SuperAdmin' on '22-11-2021 22:22:20'. The user is logged in as 'SuperAdmin' with a 'Staff' type. The form displays the following information:

Field	Value
Operator	SuperAdmin
Staff Type	Staff
Tel	13800136000
ID Number	G5566789
Address	
Organization	Turkey telecom
Description	

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

NOTE

The values of **New Password** and **Confirm Password** must be the same. Otherwise, the password fails to be changed.

2

Business Config

2.1 Service Management

2.1.1 Service Information

Communication Service can be PSTN fixed service, mobile services (2G, 3G and 4G), ADSL broadband service and so on. Service management mainly maintains service’s basic information and manages their attributes.

 **NOTE**

Generally speaking all the service configurations should be done by the system developing team. Because all the service configurations is related to program coding according to the basic requirement from Telecom Operator.

Scenario

Creating a Mobile Service in CRM and one-time fees include \$10 SIM Card Fee and \$5 for SIM Replacement .

Procedure

Step 1 On the **Business Config > Service Management > Service Information** page, click  to create the Mobile Service.

Step 2 Fill in the service basic information

Parameters in this Page:

Parameter	Description
Service Code	The code of service should be unique
Service Name	The name of the service which you want to add
Service Type	The options are as follows: <ul style="list-style-type: none"> • Main Service Main service is the basic service • Value Added Service Value Added Service ais dependent on the main service

Inventory Type	The inventory is needed when doing customer-on-boarding
Service Description	Description of the service
Service Ability Selection	<p>The options are as follows:</p> <ul style="list-style-type: none"> • SIM card replacement The service supports the SIM card replacement • Change Number The service supports changing the service number. Service number can be MSISDN Number for mobile service.

Step 3 Add Service Attribute

For Norfolk operator, Service Attributes under each service are as below

Service	Service Attributes
	IMSI
	KI
	OPC
	SelfCare Password

Step 4 Add service relation

Step 5 Add one-time fees including \$10 SIM Card Fee and \$5 for SIM Replacement

Home Page | Service Information

Service Information | Service Relation | One-Time Charge

Operation Type: Please Select

[Add](#) [Search](#) [Reset](#)

Service Name	One-Time Fee Name	Operation Type	Charge Type	Amount(\$)	Operation
Mobile	Sim Replacement Fee	SIM Card Replace	SIM Fee	5	Edit Delete

Page Record: 10 TotalRecord: 1 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

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2.2 Package Management

2.2.1 Package Config Parameters

Package Config Parameters is used to configure the charge item code, which will be used in **Pricing Policy** and **One-Time Charge** configurations of **Package Management** module .

We classify the charge item into several group such as Voice(Mini), Voice(Call), SMS, Data, One-Time Fee, Deposit, Rent, Installation Fee and Default Balance.

Scenario

You want to add a charge item code for Fixed Call in voice group.

Procedure

Step 1 On the **Business Config > Package Management > Package Config Parameters** page, click



Step 2 Set the **Type code** as VOICE, and set the **Type name** as Fixed Call . See the following figure.

Step 3 Click  to save the configuration.

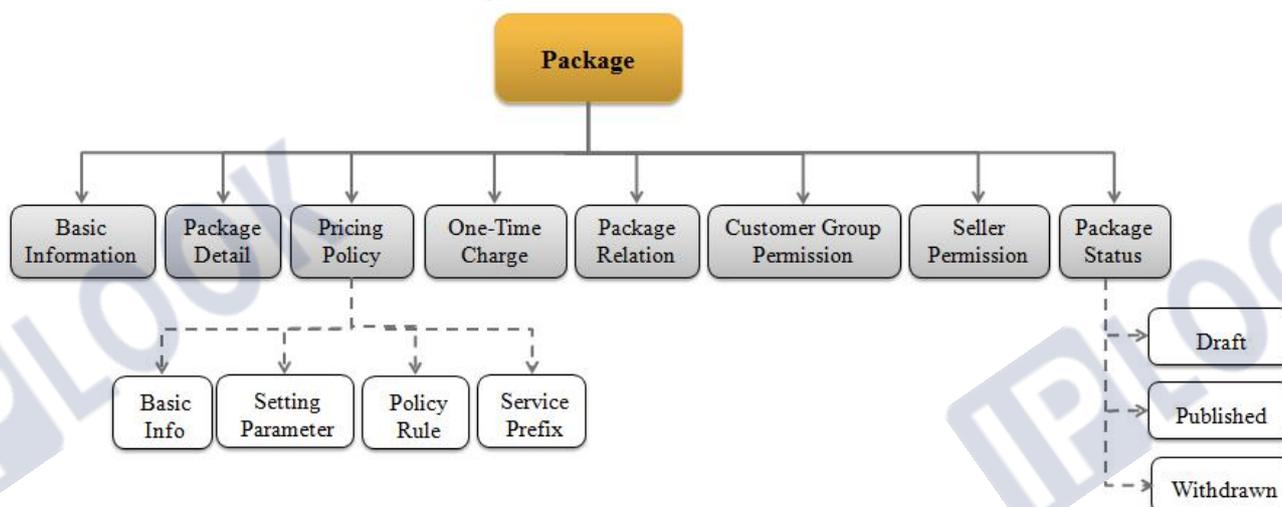
2.2.2 Package Information

2.2.2.2 About Package

Before configuring packages, familiarize yourself with their basic knowledge, such as the concepts, components, classification, status, and relationships between them, and corresponding add, modify, delete, and query operations.

2.2.2.2.2 Package Structure

This topic describes how to configure the elements for a package. A package consists of services and their tariffs. The elements in package are depending on package type.



2.2.2.2.3 Package Type

From the combination perspective, packages can be classified into plan, bundle and value-added service. One customer must just subscribe to only one plan but can subscribe to several bundles or value-added services.

There is a validity restriction for a bundle but no validity restriction for a plan.

Plan is selected in Customer-On-Boarding. Bundle will be bought after Customer-On-Boarding.

◆ **Plan**

The prepaid plan has no package fee and there is no free or benefit usage in the prepaid plan. The rating or pricing policies of prepaid plan are flat tariff.

The postpaid plan has package fee which is monthly rental fee, and the postpaid plan usually contains some free benefit usage.

◆ **Bundle**

A bundle usually contains some free benefit usage which is configured on **Business Config > Package Management > Package Information > Pricing policy > pricing policy** page.

2.2.2.2.4 Packages Priority

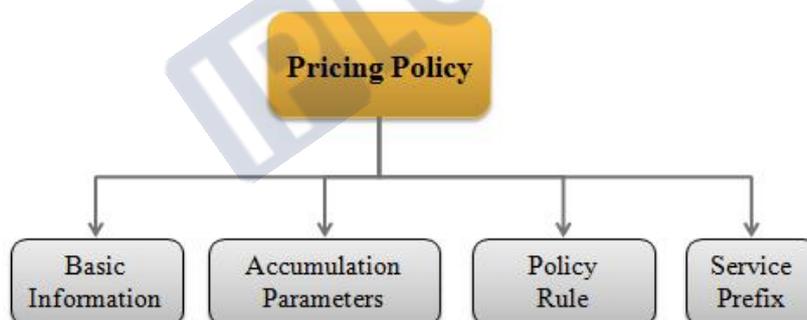
When a customer subscribes to two or more packages, the rating is based on the priorities associated with the packages.

2.2.2.2.5 Packages Detail

Package is consist of service. The **Business Config > Package Management > Package Information >Package detail** page is to add , delete or modify the service to the package.

2.2.2.2.6 Pricing Policy

Billing system do rating is based on the Pricing Policy of related package. The elements in a Pricing Policy are as bellow:



1. Basic Information

Parameters in this Page:

Policy Name	The name of pricing policy
Priority	Rating Priority
Description	Description of the Pricing Policy

2. Accumulation Parameters

Accumulation refers to the cumulative amount of subscriber's service usage in a period of time, such as duration/call for voice service, duration/min for voice service, times for SMS service and flux for data service.

Accumulation is used as a billing factor for configuring benefit Pricing Policy.

We don't add or configure any accumulation parameters when creating a flat tariff Pricing Policy.

◆ **Flat Tariff Pricing Policy**

Like the pay-as-you-go-rate tariff is the flat tariff .

◆ **Benefit Pricing Policy**

Benefit Pricing Policy is mainly to define or realize the free usage of one package, especially the Bundle package. And sometimes we call the free usage as benefit. For example, \$20 Data Bundle Package containing 5GB Free data usage, when we configure this bundle package, we need to use the flux accumulation to define it's free of charge when the flux accumulation is less than 5GB.

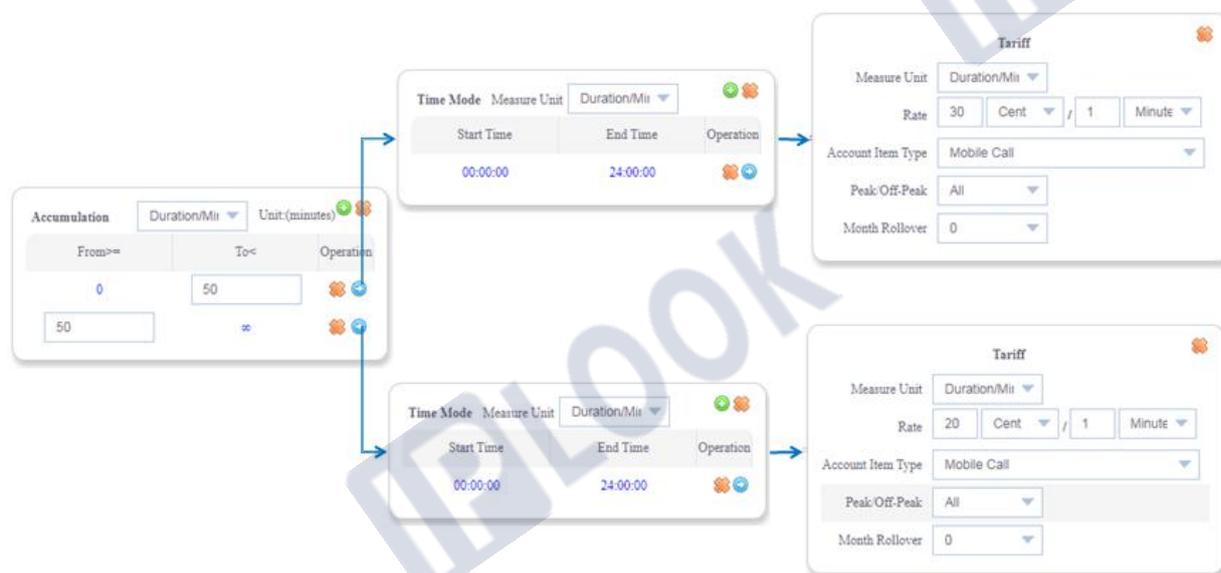
3. Policy Rule

Policy Rule are decision-making models used in Pricing Policy Domain. Rules are developed according to empirical designs, including the Accumulation Rule and Time Rule.

◆ Accumulation Rule

This rule is used to rate the accumulated usage (call duration, data flux and etc.) for multiple parts and charge users by rank. When a subscriber's service usage reaches a specified value, the system divides the usage into ranks, calculates the fee for each rank based on the rate specified for each rank, and obtains the sum total of all the fees.

Example-Step Rank Accumulation Rule

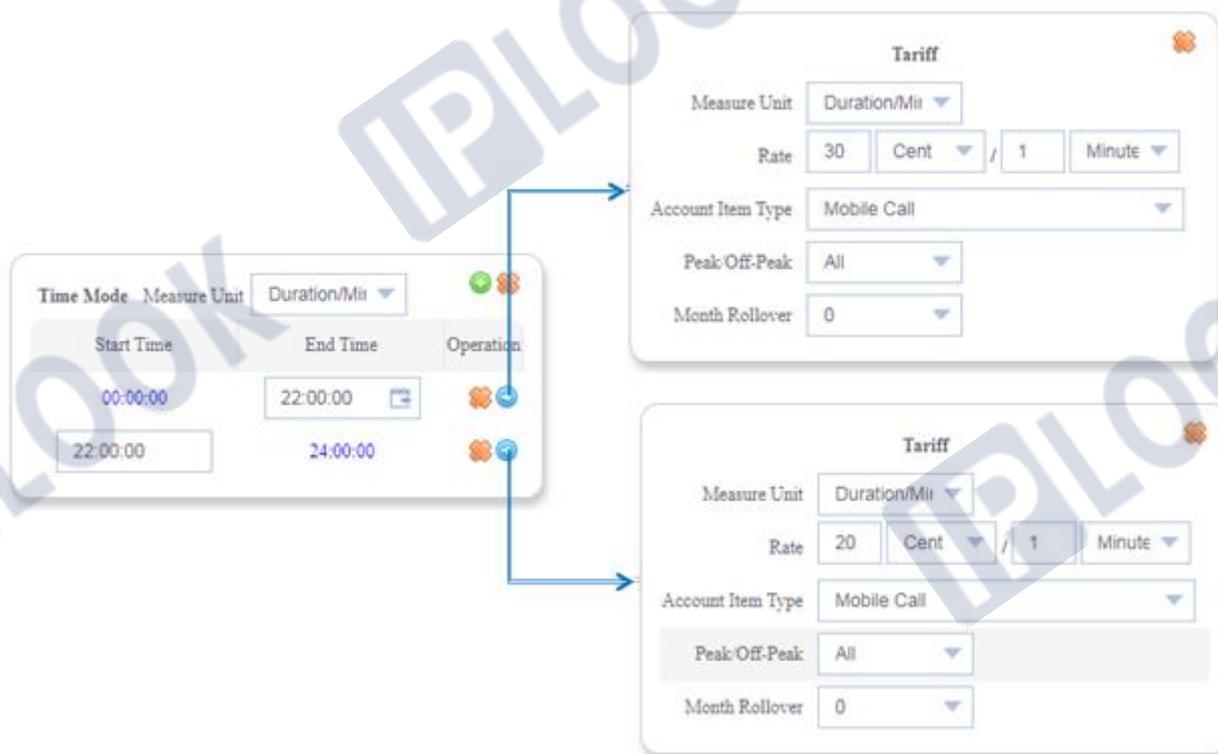


Assume that the charge rate is 30Cents/1 Minute if the call duration is equal to or shorter than 50 minutes and 20Cents/1 Minute if the call duration exceeds 50 minutes. Fees are calculated based on the tariff specified for each rank and are summed up to obtain the final fee. A call lasting for 65 minutes is charged as follows: $50 \times 30 + 15 \times 20 = 1800\text{Cents}$. For details about the configuration, see the figure above.

◆ Time Rule

This rule is used to rate the usage for multiple time spans by rank.

Example-Charging Based on Time Span



Assume that a user is charged 30Cents/1 Minute for a local mobile call from 00:00 to 22:00 every day and 20Cents/1 Minute from 22:00 to 24:00. If the user makes a local call at 21:28 in a day and the call duration is 45 minutes, the call is charged as follows: $32 \times 30 + 13 \times 20 = 1220$ Cents. For details about the configuration, see the figure above.

Parameters in Policy Rule Page:

Measure Unit	Duration/Call for voice service, Duration/Min for voice service, Times for SMS service Flux for data service
Account Item Type	The drop-down options are setting in The Business Config > Package Management > Package Parameters

4. Service Prefix

Service Prefix is used to distinguish call to country, call to PSTN and call to mobile. And the configurations of Service Prefix are setting on the **Business Config > Service Management > Service Prefix Configuration** page.

The selected Service Prefix will have related restriction on the related Pricing Policy.

5. Operation For Pricing Policy

In the CRM system, you can click an icon or right-click to perform Pricing Policy related operations. The following table describes the Pricing Policy operations and related icon.

Operation	Icon	Description
Create Catalog		Creates a Pricing Policy catalog.

Refresh Catalog		Refresh the whole Pricing Policy catalog..
Edit Catalog		Edit the name of a Pricing Policy catalog. This shortcut menu is displayed only when you put the mouse on the Policy catalog which you want to edit.
Delete Catalog		Delete a Pricing Policy catalog. This shortcut menu is displayed only when you put the mouse on the Policy catalog which you want to delete.
Add New Policy		Add a New Policy. This shortcut menu is displayed only when you right-click a Policy catalog.
Delete Pricing Policy		Delete a Pricing Policy. This shortcut menu is displayed only when you put the mouse on the Pricing Policy which you want to delete.
Edit Pricing Policy		Pricing Policy can be modified only when the package is in draft status. If you want to edit Pricing Policy, just left-click the Policy catalog then you can do the modification.

2.2.2.2.7 Packages One-Time Charge

One-Time Charge of package can be SIM card fee, SIM card replacement fee, package fee and default balance of the package.

Package is consist of service. When we add a service to one package, the service one-time charge will be inherited to the package by default.

2.2.2.2.8 Packages Relation

To restrict relationships between packages, you must configure the relationships. Relationships between packages include **Belong to** relationship, **Against** relationship, and **Gift** relationship.

◆ **Belong to**

The **Belong to** relationship is used to map the bundle package to a plan package. What kind of bundles can a customer buy which depends on what bundles are mapped to the plan which the customer has subscribed to.

◆ **Against**

Package A is against package B means customer cannot buy package A and package B at the same time and just can buy one of them.

◆ **Gift**

Package A is Gift of package B means the package A will be a bonus for the customer when customer buy package B.

2.2.2.2.9 Packages Customer Group Permission

Packages Customer Group permission is to restrict the packages can be bought by what kind of customer group.

2.2.2.2.10 package Seller Permission

Packages Seller permission is to restrict the packages can be sold by which seller or CSR.

2.2.2.2.11 package Status

Package status includes Draft, Published and Withdrawn. When certain conditions are met, the status of a package can change from one to another. The following figure shows the package status transmission.



◆ **Draft**

The initial status of a package is Draft after creation. A package in the Draft state can be directly changed to the Published state. A Package in the Draft state cannot be used.

◆ **Published**

Only a package in the Published state can be directly used by a subscriber in **Customer-On-Boarding**. A package in the Published state cannot be changed to the Draft state, but can be changed to the Withdrawn state.

◆ **Withdrawn**

You can withdraw a package that cannot bring profits for a carrier any more or does not meet new requirements.

The package operations are different when the package is in different status. The following table shows the operations in each different status.

Status	Operation	Description
Draft	Publish	
	Modify	Everything can be modified except the package type.
	View	
	Delete	
Published	View	
	Modify	Configurations can be modified are as below: <ul style="list-style-type: none"> ● Package Relation ● One-Time Charge ● Customer Group Permission ● Seller Permission Configurations can't be modified are as below: <ul style="list-style-type: none"> ● package basic information ● pricing policy ● package detail
	Withdraw	
Withdrawn	View	

2.2.2.2.12 How to design a package

You can use the following table template to analyze and design the package which you are planning to create.

Basic Info	List out the basic package information such as package name, package type and etc.
-------------------	--

Package Detail	List out what kind of service is the package consist of.
Pricing Policy For Flat Tariff	List out all the Pricing Policies for flat tariff like the tariff of Pay-As-You-Go.
Pricing Policy For Benefit	List out all the Pricing Policies for benefit detail.
One-Time Charge	For example: \$10 SIM Card Fee \$5 for SIM Replacement
Relation	Especially for the Bundle Package, you should know the bundle should be mapped to which plan.
Customer Group	<i>Packages Customer Group permission</i> is to restrict the packages can be bought by what kind of customer group.
Seller Permission	<i>Packages Seller permission</i> is to restrict the packages can be sold by which seller or CSR.

2.2.2.3 Configuring Local Mobile Plan

Scenario

We are going to create a **Local Mobile Plan** for mobile prepaid service , and the composition of the plan is as bellow:

Basic Info	Name: Local Mobile Plan Type: Plan
Package Detail	Mobile Service
Pricing Policy For Flat Tariff	Fixed Call \$0.55/Min Mobile Call\$ 0.55/Min IDD (AUS & NZ) \$0.90/Min IDD (The Others) \$1.15/Min Local SMS \$0.14/Time International SMS \$0.40/Time
Pricing Policy For Benefit	Null
One-Time Charge	\$10 For Default Balance
Relation	Null
Customer Group	Local Normal
Seller Permission	All CSR

Procedure

Step 1 On the **Business Config > Package Management > Package Information** page, click  to create the package.

Step 2 Input the package Information and click  to save the configuration

SuperAdmin 22-11-2021 22:28:51 Customer v Business Config v Order v Resource v Receivables v Ticketing v Report v System

Home Page Package Information

Package Basic Information Pricing Policy Package Relation Package Detail One-Time Charge Customer Group Seller Permission

Package Information

* Package Name FAT Test Data PKG

* Effective Date 01-08-2021

* Package Type Bundle

* Validity 15

Description only for test pkg_01

* Payment Type Prepaid

* Expiry Date 31-08-2024

Priority very high

* Cyclicity No

Submit Back

Step 3 Configure the Pricing Policies.

◆ **Pricing Policy Catalog**

Package Basic Information Pricing Policy

Pricing Policy

Please Input

- Voice Pricing Group
 - National Normal Call
 - National Special Call
 - International Call
 - Answer Free
- Sms Pricing Group
 - National Normal SMS
 - National Special SMS
 - International SMS
 - Receive Free

◆ **Pricing Policy For Mobile Call \$ 0.55/Min**

Figure-1 Basic Information

Basic Information Setting Parameters Policy Rule

Add Policy

* Policy Name: * Round Mode:

* Policy Type: * Event Type:

Description:

Figure-2 Setting Parameters

Basic Information **Setting Parameters** Policy Rule

ID	Accumulation Code	Accumulation Name	Operation
No record			

Page Record: TotalRecord: 0 TotalPage: 0 CurrentPage: 1

Figure-3 Policy Rule

Basic Information Setting Parameters **Policy Rule**

Time Mode Measure Unit: Duration/Sec

Start Time	End Time	Operation
00:00:00	12:00:00	<input type="button" value="Add"/> <input type="button" value="Delete"/>
12:00:00	24:00:00	<input type="button" value="Add"/> <input type="button" value="Delete"/>

Tariff

Measure Unit:

Rate: Cents / Mins

Minimum:

Account Item Type:

Tariff

Measure Unit:

Rate: Cents / Mins

Minimum:

Account Item Type:

◆ **International Call**

Figure-1 Basic Information

Basic Information Setting Parameters Policy Rule

Add Policy

* Policy Name: * Round Mode:

* Policy Type: * Event Type:

Description:

Figure-2 Setting Parameters

Basic Information **Setting Parameters** Policy Rule

ID	Accumulation Code	Accumulation Name	Operation
No record			

Page Record: TotalRecord: 0 TotalPage: 0 CurrentPage: 1

Figure-3 Policy Rule

Basic Information Setting Parameters **Policy Rule**

Time Mode	Measure Unit	Duration/Sec	Operation
Start Time		End Time	
00:00:00		06:00:00	
06:00:00		18:00:00	
18:00:00		24:00:00	

Rate

Measure Unit:

Rate: Dollars / Mins

Minimum:

Account Item Type:

Tariff

Measure Unit:

Rate: Dollars / Mins

Minimum:

Account Item Type:

Step 4 Configure the Package Detail.

Package Information			
Package Basic Information	Pricing Policy	Package Relation	Package Detail
Package Detail			
NO.	Details Name	Details Type	Details Quantity
301335	Mobile	Main Service	1

Step 5 Configure the One-Time Charge.

Home Page | Package Information

Package Basic Information	Pricing Policy	Package Relation	Package Detail	One-Time Charge	Customer Group	Seller Permission
Package Detail						
S/N	Details Name	Details Type	Details Quantity			
30148483	Mobile	Main Service	1			

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Step 6 Configure the Customer Group Permission

Package Basic Information	Pricing Policy	Package Relation	Package Detail	One-Time Charge	Customer Group	Seller Permission
Customer Group						
<input type="checkbox"/>	Group ID	Group Name	Created Date	Operator		
<input checked="" type="checkbox"/>	1128	Local Prepaid Mobile	04-11-2020	SuperAdmin		
<input type="checkbox"/>	1129	Tourist Prepaid Mobile	04-11-2020	SuperAdmin		

Page Record: 10 TotalRecord: 2 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#)

[Submit](#) [Back](#)

Step 7 Configure the Seller Permission

Package Basic Information	Pricing Policy	Package Relation	Package Detail	One-Time Charge	Customer Group	Seller Permission
Seller Permission						
<input type="checkbox"/>	Role ID	Role Name	Created Date	Operator		
<input checked="" type="checkbox"/>	1300	Test Role	31-08-2021	SuperAdmin		
<input checked="" type="checkbox"/>	1299	Finance	29-01-2021	SuperAdmin		
<input checked="" type="checkbox"/>	1296	AdminRole	06-11-2020	SuperAdmin		
<input checked="" type="checkbox"/>	1295	CSRRole	05-11-2020	SuperAdmin		
<input checked="" type="checkbox"/>	1004	SuperRole	19-06-2015	SuperAdmin		
<input checked="" type="checkbox"/>	1	SuperRole1	20-05-2015	SuperAdmin		

Page Record: 10 TotalRecord: 6 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

[Submit](#) [Back](#)

Step 8 Change the package status from draft to published. Only a package in the Published state can be directly used by a subscriber in Customer-On-Boarding.

2.2.2.4 Configuring Local Mobile Bundle A

Scenario

We are going to create a **Local Mobile Plan** for mobile prepaid service , and the composition of the plan is as below:

Basic Info	Name: Local Mobile Bundle A Type: Bundle
Package Detail	Mobile Service
Pricing Policy For Flat Tariff	Null
Pricing Policy For Benefit	1GB Free Data, 200 Mins Free Mobile Call, 100 Local SMS
One-Time Charge	\$40 For Package Fee
Relation	Belong To <u>Local Mobile Plan</u>
Customer Group	Local Normal
Seller Permission	All CSR

Procedure

Step 1 On the **Business Config > Package Management > Package Information** page, click  to create the package.

Step 2 Input the package Information and click  to save the configuration

Home Page | Package Information

Package Basic Information | Pricing Policy | Package Relation | Package Detail | One-Time Charge | Customer Group | Seller Permission

Package Information

* Package Name: Local Mobile Bundle A

* Effective Date: 01-04-2021

* Package Type: Bundle

* Validity: 90

Description: Data-Voice Bundle Test

* Payment Type: Prepaid

* Expiry Date: 30-09-2021

Priority: very high

* Cyclicity: No

Step 3 Configure the Pricing Policies.

◆ **Pricing Policy Catalog**

Pricing Policy  

- [-] Data-1GB
 - [+] Data-1GB
- [-] Voice-10Mins
 - [+] Voice 200Mins
- [-] SMS
 - [+] 100 SMS Free

◆ **Pricing Policy For 200 Mins Free Mobile Call**

Figure-1 Basic Information

Basic Information Setting Parameters Policy Rule

Add Policy

* Policy Name: * Round Mode:

* Policy Type: * Event Type:

Description:

Figure-2 Setting Parameters

Basic Information **Setting Parameters** Policy Rule

ID	Accumulation Code	Accumulation Name	Operation
10124	L01	National call	<input type="button" value="Delete"/>

Page Record: TotalRecord: 1 TotalPage: 1 CurrentPage: 1

Figure-3 Policy Rule

Basic Information Setting Parameters **Policy Rule**

Accumulation National call Unit.(Sec)

From>=	To<	Operation
0	1200	[Icon]

Time Mode Measure Unit Duration/Sec

Start Time	End Time	Operation
00:00:00	24:00:00	[Icon]

◆ Pricing Policy For 200 Free National SMS

Figure-1 Basic Information

Basic Information Setting Parameters Policy Rule

Add Policy

* Policy Name:

* Policy Type:

Description:

* Round Mode:

* Event Type:

Figure-2 Setting Parameters

Basic Information **Setting Parameters** Policy Rule

+ Add

ID	Accumulation Code	Accumulation Name	Operation
10139	L02	National sms	[Delete]

Page Record:

TotalRecord: 1 TotalPage: 1 CurrentPage: 1

Figure-3 Policy Rule

Basic Information Setting Parameters **Policy Rule**

Accumulation National sms Unit:(Times)

From>=	To<	Operation
0	200	

Time Mode Measure Unit Times

Start Time	End Time	Operation
00:00:00	24:00:00	

◆ Pricing Policy For 1GB Free Data

Figure-1 Basic Information

Basic Information Setting Parameters Policy Rule

Add Policy

* Policy Name Data-1GB

* Policy Type Billing Policy

Description

* Round Mode Floor

* Event Type Data Service

[Submit](#) [Back](#)

Figure-2 Setting Parameters

Basic Information **Setting Parameters** Policy Rule

[Add](#)

ID	Accumulation Code	Accumulation Name	Operation
10123	L05	Data Service	Delete

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

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Figure-3 Policy Rule

Basic Information Setting Parameters **Policy Rule**

Accumulation Data Service Unit (MB) +

From >=	To <	Operation
0	20	+

Time Mode Measure Unit Flux +

Start Time	End Time	Operation
00:00:00	24:00:00	+

Step 4 Configure the Package Detail.

Package Basic Information Pricing Policy Package Relation **Package Detail** One-Time Charge Customer Group Seller Permission

Package Detail

S/N	Details Name	Details Type	Details Quantity
30148486	Mobile	Plan	1

[Back](#)

Step 5 Configure the One-Time Charge.

Package Basic Information Pricing Policy Package Relation Package Detail **One-Time Charge** Customer Group Seller Permission

One-Time Charge

[Add](#)

One-Time Fee Name	Charge Type	Price(\$)	Operation
Voice Bundle Fee	One-Time Charge	28	Edit Delete

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Step 6 Configure the Customer Group Permission

Package Basic Information Pricing Policy Package Relation Package Detail One-Time Charge **Customer Group** Seller Permission

Customer Group

<input type="checkbox"/>	Group ID	Group Name	Created Date	Operator
<input checked="" type="checkbox"/>	1128	Local Prepaid Mobile	04-11-2020	SuperAdmin
<input checked="" type="checkbox"/>	1129	Tourist Prepaid Mobile	04-11-2020	SuperAdmin

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Step 7 Configure the Seller Permission

Package Basic Information		Pricing Policy	Package Relation	Package Detail	One-Time Charge	Customer Group	Seller Permission
Seller Permission							
<input type="checkbox"/>	Role ID	Role Name	Created Date	Operator			
<input checked="" type="checkbox"/>	1300	Test Role	31-08-2021	SuperAdmin			
<input checked="" type="checkbox"/>	1299	Finance	29-01-2021	SuperAdmin			
<input checked="" type="checkbox"/>	1296	AdminRole	06-11-2020	SuperAdmin			
<input checked="" type="checkbox"/>	1295	CSRRole	05-11-2020	SuperAdmin			
<input checked="" type="checkbox"/>	1004	SuperRole	19-06-2015	SuperAdmin			
<input checked="" type="checkbox"/>	1	SuperRole1	20-05-2015	SuperAdmin			
Page Record: 10		TotalRecord: 6 TotalPage: 1 CurrentPage: 1			First Previous Next		

Step 8 Change the package status from draft to published. Only a package in the Published state can be directly used by a subscriber in Customer-On-Boarding.

3 Resource

3.1 Configuring Basic Data

3.1.1 Warehouse Information

Warehouse information is used to manage Inventory. Before saving inventory into the warehouse, you must configure Warehouse information.

Scenario

Assume that you want to configure information about Warehouse Norfolk Internal..

Procedure



Step 1 On the **Resource > Warehouse Info** page, click

Step 2 Set the warehouse information as following figure.

Step 3 Click



3.1.2 Inventory Information

NOTE

Generally speaking, configurations of Inventory related to the Customer-on-boarding process should be done by the system developing team. Because all the service configurations is related to program coding according to the basic requirement from Telecom Operator.

Scenario

Assume that you want to configure information about ICCID Inventory.

Procedure

Step 1 On the **Resource > Inventory Info** page, click 

Step 2 Set the Inventory information as following figure and click **Submit**

Add Inventory Information

* Inventory Name <input type="text"/>	* Inventory Code <input type="text"/>
Recycle Type No Recycling	* Inventory Price(\$) <input type="text" value="0"/>
* Inventory Sale All	* Inventory Rent(\$) <input type="text" value="0"/>
Inventory Feature <input type="text"/>	
Manufacturer <input type="text"/>	
Description <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>	

Submit
Back

Step 3 Click [Modify Attribute !](#) to Set the ICCID Attribute

+ Add
Q Search

Inventory ID	Inventory Name	Inventory Sale	Inventory Price(\$)	Inventory Rent(\$)	Inventory Type	Operation
1041	IMSI	All	0	0	IMSI	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Action ▾</div> <ul style="list-style-type: none"> <input type="checkbox"/> Edit <input checked="" type="checkbox"/> Edit Attribute <input type="checkbox"/> privilege <input type="checkbox"/> Delete

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Step 4 Configure the Inventory attribute and click **Submit**

Configure Inventory Attribute

* Attribute ID	* Attribute Code	* Attribute Name	* Mandatory	* Dynamic	* Attribute Value	Operation
1400	<input type="text" value="0001"/>	<input type="text" value="KI"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	+ -
1401	<input type="text" value="0003"/>	<input type="text" value="OPC"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	+ -

Submit
Back

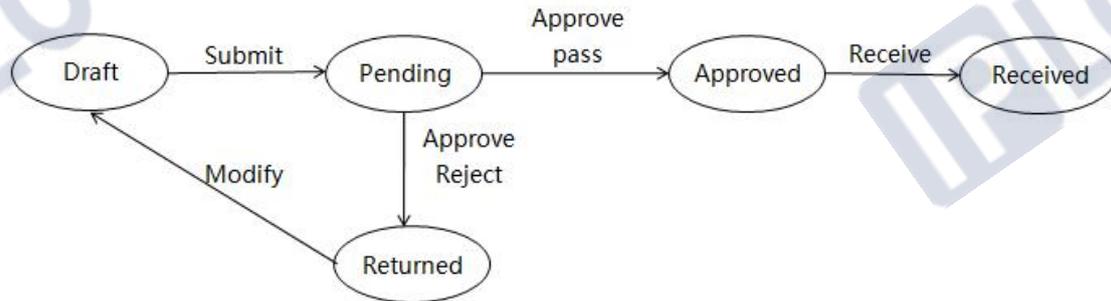
3.2 Stock/Transfer Mgmt

3.2.1 Stock Management

Stock Management refers to a process of receiving inventories and saving them to the warehouse.

Inventory Stocking Transaction Status

Inventory stocking transaction status includes Draft, Pending, Returned, Approved and Received. When certain conditions are met, the status of a Inventory stocking transaction status can change from one to another. The following figure shows the Inventory stocking transaction status transmission.



The inventory stocking transaction is finished Only when the inventory stocking transaction status in the **Received** state.

The following table shows the operations in each different status.

Status	Operation	Description
Draft	Modify	
	Submit	
	Delete	
Pending	Approve	
Returned	Modify	
	Delete	
Approved	Receive	
	Delete	
Received		The inventory stocking transaction is finished Only when the inventory stocking transaction status in the Received state.

Scenario

Assume that you want to stock a batch of ICCID inventories to Norfolk Center Warehouse.

Prerequisites

- ICCID Inventory Basic Information has been set On the **Resource > Inventory Info** page.
- Norfolk Center Warehouse has been created in CRM system.

Procedure

Step 1 Download the ICCID Import Template

1. On the **Resource > Stock/Transfer Mgmt > Stock Management** page, click 
2. Chose [Download](#)

Batch Import -

Choice Download Template Import

3. Locate the IMSI Inventory

Inventory Details

Filter Items Inventory Name

Choice	Inventory Name	Inventory Price(\$)
<input checked="" type="radio"/>	IMSI	0

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1

4. Locate and select the Norfolk Center Warehouse

Warehouse Details -

Filter Items Warehouse Name

Choice	Warehouse Name	Operator	Contact Number
<input checked="" type="radio"/>	Turkey Central Warehouse	Admin	016888177
<input type="radio"/>	Turkey Dispatch-WH	Admin	123456789
<input type="radio"/>	Turkey Internal	Admin	99999999
<input type="radio"/>	Test_Warehouse_01		

Page Record: 5 TotalRecord: 4 TotalPage: 1 CurrentPage: 1

5. Click the  icon to download the template

Page Record: 5 TotalRecord: 3 TotalPage: 1 CurrentPage: 1



Step 2 Input the IMSI Inventory Data in the template excel file which you just downloaded

Resource ID:	1041	Resource Name:	IMSI	Warehouse ID:	1024	Warehouse Name:	Turkey Central Warehouse
Batch Name:	Test for imsi inventory load						
Resource Serial Number	1400 Attribute Value(RQ)	1401 Attribute Value(OPC)					
T00000001	#122222222222330aadd	1					
T00000002	#122222222222330aadd	1					
T00000003	#122222222222330aadd	1					

Step 3 Import the excel file data into the system

1. On the **Resource > Stock/Transfer Mgmt > Stock Management** page, click 

2. Chose **Import** , then click **File** to locate the file, then click **Submit**

The screenshot shows a web interface for 'Import'. At the top, there is a blue header with the word 'Import'. Below it, a section titled 'Batch Import' contains a 'Choose:' label with two radio buttons: 'Download' and 'Import' (which is selected). Below this, another 'Batch Import' section shows a 'File:' label followed by the path 'C:\fakepath\Resource_Template'. To the right of the path are two buttons: a blue 'File' button and a green 'Submit' button.

Step 4 Change the Inventory stocking transaction status from draft to received.

Firstly **Submit**

S/N	Create Time	Inventory Name	Warehouse	Batch Number	Batch Name	CSR	Status	Operation
1	29-07-2020	ICCID	Norfolk Center Warehouse	S202007291345181445	ICCID-20200729001	bosstest	Draft	Modify Submit Delete

Secondly **Approve**

S/N	Create Time	Inventory Name	Warehouse	Batch Number	Batch Name	CSR	Status	Operation
1	29-07-2020	ICCID	Norfolk Center Warehouse	S202007291345181445	ICCID-20200729001	bosstest	Pending	Approve

Third **Receive**

S/N	Create Time	Inventory Name	Warehouse	Batch Number	Batch Name	CSR	Status	Operation
1	29-07-2020	ICCID	Norfolk Center Warehouse	S202007291345181445	ICCID-20200729001	bosstest	Approved	Receive Delete

After receive operation the status is received

S/N	Create Time	Inventory Name	Warehouse	Batch Number	Batch Name	CSR	Status	Operation
1	29-07-2020	ICCID	Norfolk Center Warehouse	S202007291345181445	ICCID-20200729001	bosstest	Received	

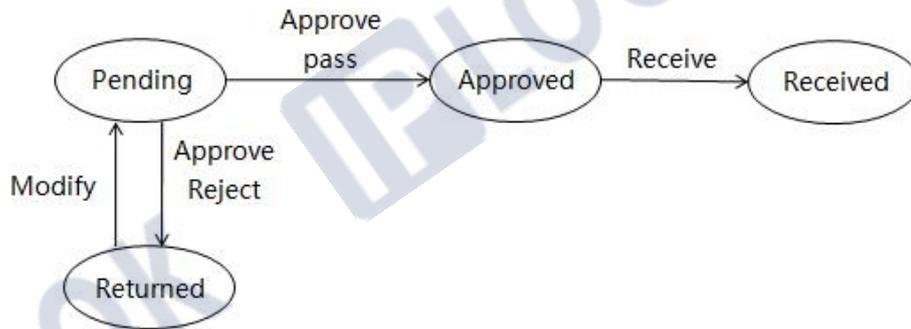
The inventory stocking transaction is finished Only when the inventory stocking transaction status in the **Received** state.

3.2.2 Transfer Management

You can transfer inventories from one warehouse to another one.

Inventory Transferring Transaction Status

Inventory transferring transaction status includes Draft, Pending, Returned, Approved and Received. When certain conditions are met, the status of a Inventory transferring transaction status can change from one to another. The following figure shows the Inventory transferring transaction status transmission.



The inventory transferring transaction is finished Only when the inventory transferring transaction status in the **Received** state.

The following table shows the operations in each different status.

Status	Operation	Description
Pending	Approve	
Returned	Modify	
	Delete	
Approved	Receive	
	Delete	
Received		The inventory transferring transaction is finished Only when the inventory transferring transaction status in the Received state.

Scenario

Assume that you want to transfer ICCID inventories from the **Norfolk Center Warehouse** to the **Norfolk Dispatch-WH** warehouse.

Prerequisites

- ICCID Inventory Basic Information has been set On the **Resource > Inventory Info** page.
- **Norfolk Center Warehouse** and **Norfolk Dispatch-WH** warehouse have been created in CRM system.
- ICCID Inventories have been stocked into the **Norfolk Center Warehouse**, and the ICCID Inventories haven't been used. The batch number is **S202007291345181445** and the batch name is **ICCID-20200729001**

Procedure

Step 1 On the **Resource > Stock/Transfer Mgmt > Transfer Management** page, click  **Add**.

Step 2 Set **Out Warehouse** and **In Warehouse** as shown in following figure.

Addition Allocate

* Out Warehouse: * In Warehouse:

Remarks:

Step 3 You can use the batch number or batch name to locate and select the Batch Information

Query Batch Info

Inventory Name: Inventory Code:

Batch Number: Batch Range:

Batch Name:

Choose	Batch Number	Batch Name	Inventory Name	Inventory Code	Total	Available
<input checked="" type="checkbox"/>	S202007291345181445	ICCID-20200729001	ICCID	IS0002	10	10

Page Record: Total Record: 1 Total Page: 1 Current Page: 1

Step 4 Select the inventories which you want to transfer

Inventory Info

Query Terms: Value:

Choose	Batch Number	Inventory Name	Inventory Code	Inventory Number
<input checked="" type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728001
<input checked="" type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728002
<input checked="" type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728003
<input checked="" type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728004
<input checked="" type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728006
<input type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728007
<input type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728008
<input type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728009
<input type="checkbox"/>	S202007282317365257	ICCID	IS0002	20200728010
<input type="checkbox"/>	S20200728233173417	ICCID	IS0002	ICCID202007281001

Step 5 Confirm the inventory detail information which you want transfer and Click **Submit**

Inventory Detail

Batch Number	Batch Name	Inventory Name	Inventory Number	Price	Operation
S202007282317365257	ICCID-20200728	ICCID	20200728001	0	Delete
S202007282317365257	ICCID-20200728	ICCID	20200728002	0	Delete
S202007282317365257	ICCID-20200728	ICCID	20200728003	0	Delete
S202007282317365257	ICCID-20200728	ICCID	20200728004	0	Delete
S202007282317365257	ICCID-20200728	ICCID	20200728006	0	Delete

Step 6 Change the Inventory transferring transaction status from pending to received.

Firstly [Approve](#)

Created Time	Out Warehouse	In Warehouse	Batch Number	Batch Name	Transferring No.	CSR	Status	Operation
29-07-2020 13:55:19	Norfolk Center Warehouse	Norfolk Dispatch-WH	S202007282317365257	ICCID-20200728	T202007291355192706	boست	Pending	<input type="button" value="Approval"/>

Secondly [Receive](#)

Created Time	Out Warehouse	In Warehouse	Batch Number	Batch Name	Transferring No.	CSR	Status	Operation
29-07-2020 13:55:19	Norfolk Center Warehouse	Norfolk Dispatch-WH	S202007282317365257	ICCID-20200728	T202007291355192706	boostest	Approved	Receipt Inventory Delete

After receive operation the status is **received**

Created Time	Out Warehouse	In Warehouse	Batch Number	Batch Name	Transferring No.	CSR	Status	Operation
29-07-2020 13:55:19	Norfolk Center Warehouse	Norfolk Dispatch-WH	S202007282317365257	ICCID-20200728	T202007291355192706	boostest	Received	

The inventory transferring transaction is finished Only when the inventory transferring transaction status in the **Received** state.

3.3 Inventory Query Management

3.3.1 Inventory View

Inventory View is used to check current inventory resources in a warehouse.

It shows **Inventory Name, Warehouse, Inventory Type, Inventory Quantity, Alarm Value** of a inventory resource.

Inventory View

Q Query

Number	Inventory Name	Warehouse	Inventory Type	Inventory Quantity	Alarm Value	Operation
1	Krone Pair	Norfolk Center Warehouse	Krone Pair	10	10	Adjustment Alarm
2	Phone	Norfolk Center Warehouse	Phone	10	10	Adjustment Alarm
3	Cicuit Number	Norfolk Internal	Cicuit Number	2		Adjustment Alarm
4	Cicuit Number	Norfolk Center Warehouse	Cicuit Number	11	10	Adjustment Alarm
5	Cicuit Number	Norfolk Dispatch-WH	Cicuit Number	4	10	Adjustment Alarm
6	MSISDN	Norfolk Internal	MSISDN	4	10	Adjustment Alarm
7	ADSL	Norfolk Dispatch-WH	ADSL	1		Adjustment Alarm
8	MSISDN	Norfolk Dispatch-WH	MSISDN	1	10	Adjustment Alarm
9	ICCID	Norfolk Dispatch-WH	ICCID	9	33333	Adjustment Alarm
10	MSISDN	Norfolk Center Warehouse	MSISDN	26	10	Adjustment Alarm

Parameters in this Page:

Parameter	Description
Inventory Name	
Warehouse	
Inventory Type	
Inventory Quantity	Inventory Quantity is the Available Quantity. The Inventory Quantity value will turn red, if the Available Quantity is not more than alarm value
Alarm Value	

3.3.2 Inventory Status

Inventory Status is used to check status of each inventory resource .

Only the inventory status in the **In Stock** state can be directly used by a subscriber **in Customer-On-Boarding**.

Number	In-Warehouse Time	Inventory Name	Warehouse	Batch Number	Batch Name	Inventory Number	Inventory Status	Operation
1	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323109	In Stock	Adjust Status
2	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323108	In Stock	Adjust Status
3	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323107	In Stock	Adjust Status
4	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323106	In Stock	Adjust Status
5	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323105	In Stock	Adjust Status
6	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323104	In Stock	Adjust Status
7	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323103	In Stock	Adjust Status
8	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323102	In Stock	Adjust Status
9	29-07-2020 14:16:36	PSTN	Norfolk Center Warehouse	S202007291416274877	psn_number_01	672323101	In Stock	Adjust Status

Parameters in this Page:

Parameter	Description
In-Warehouse Time	The time to save the inventory resource into the warehouse.
Inventory Name	
Warehouse	
Batch Number	
Batch Name	
Inventory Number	
Inventory Status	<p>The options are as follows:</p> <ul style="list-style-type: none"> • Main Service • In Stock - Available Status. Only the inventory status in the In Stock state can be directly used by a subscriber in Customer-On-Boarding process. • Occupied - the Inventory resource status is occupied when CSR doing customer-on-boarding the Inventory resource has been secreted and the customer-on-boarding hasn't been finished. • Sold • Damage • Lost

3.3.3 Inventory Status Overview

Inventory Status Overview is used to check current inventory in a warehouse.

It shows Total quantity, In Stock quantity, Occupied quantity, Sold quantity, Damage quantity, and Lost quantity of a inventory.

Inventory Status Overview

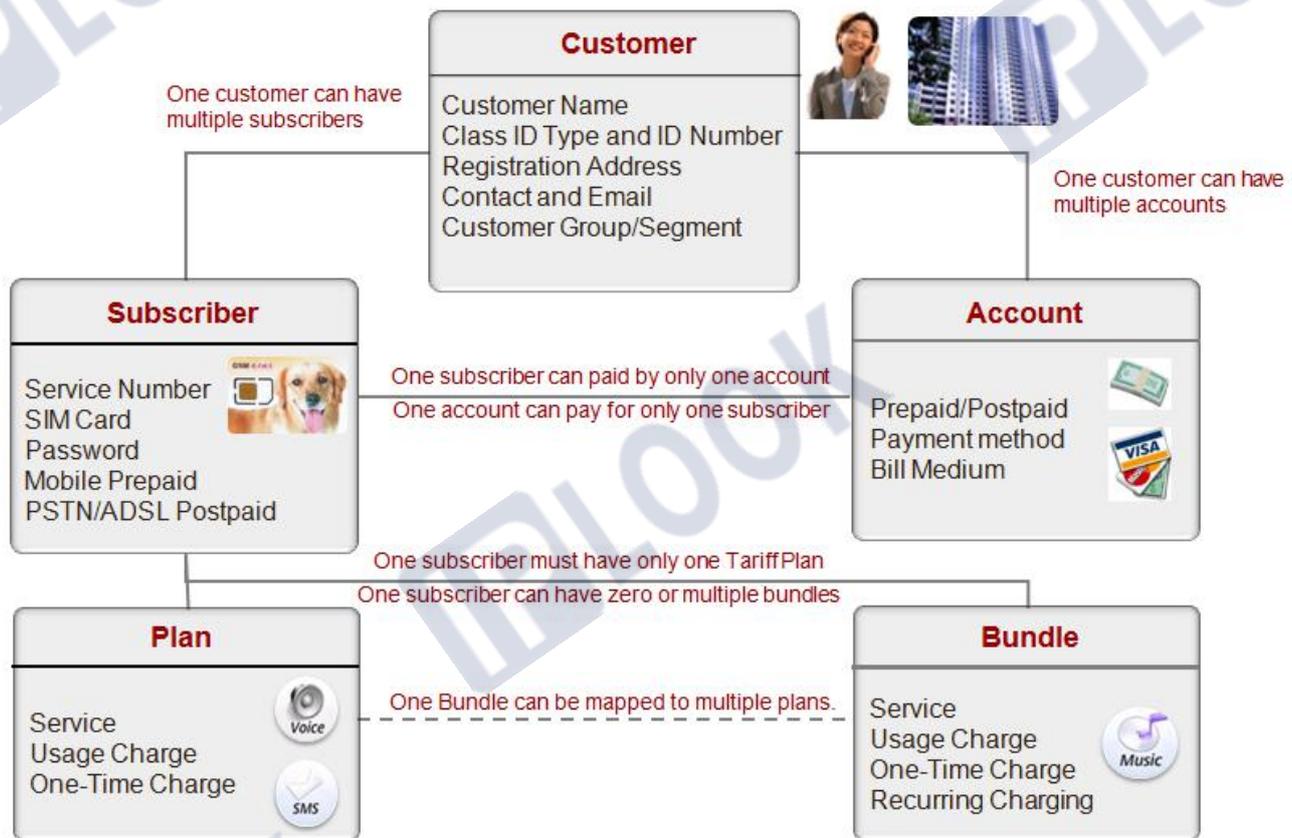
Warehouse Inventory Batch Number Batch Name [Query](#)

Warehouse	Inventory	Batch Number	Batch Name	Total	In Stock	Occupied	Sold	Damage	Lost
Norfolk Center Warehouse	MSISDN			58	8	0	50	0	0
Norfolk Center Warehouse	MSISDN	S202006111333294754		8	2	0	6	0	0
Norfolk Center Warehouse	MSISDN	S202006151129026282		4	3	0	1	0	0
Norfolk Center Warehouse	MSISDN	S202006220033411751	t1	3	3	0	0	0	0
Norfolk Center Warehouse	MSISDN	S202007151258527441	Test	1	1	0	0	0	0
Norfolk Center Warehouse	MSISDN	S202007291125061016	672351001-10	10	9	0	1	0	0
Norfolk Center Warehouse	ICCID			70	9	0	59	1	1
Norfolk Center Warehouse	ICCID	S202006111333294754		5	2	0	3	0	0
Norfolk Center Warehouse	ICCID	S202007151304128180	test	1	1	0	0	0	0
Norfolk Center Warehouse	ICCID	S202007282317365257	ICCID-20200728	5	4	0	1	0	0

4 Customer

4.1 Customer Profile Management

4.1.1 Data Model



Customer

Customer can be a real person or a organization.

subscriber

Subscriber can be one telecom service bought by a customer.

Account

Account is a balance account.

Relationships

- One customer can have multiple subscribers.
- One customer can have multiple accounts.
- One subscriber can be paid by only one account.
- One account can pay for only one subscriber.
- One subscriber must have only one Tariff Plan.
- One subscriber can have zero or multiple bundles.
- One Bundle can be mapped to multiple plans.

4.1.2 Prepaid Customer On-boarding

Prepaid Customer On-boarding is mainly to create a new subscriber with mobile service, in CRM GUI. And system will do Auto-Provisioning from CRM to related nodes of core network.

Scenario

Assume that you want to create a new subscriber with mobile service as following figure

Customer Group	Normal
Plan	Local Mobile Plan
MISDN	672350160
IMSI	8969001070000803924

Prerequisites

- **Plan**

The Local Mobile Plan, the package detail of which should be **mobile service**, has been created and the plan status must be **published**.

The Local Mobile Plan should be **prepaid** plan.

The Local Mobile Plan has been set the permission to be sold to **Normal** customer group.

The Local Mobile Plan has been set the permission to be sold by the **CSR** who is going to create a new subscriber.

- **MSISDN**

The MSISDN of 672350160 has been stocked into the warehouse and the **CSR** has the permission to operate the related warehouse.

The status of the MSISDN of 672350160 should be **In stock**.

- **ICCID**

The ICCID of 8969001070000803924 has been stocked into the warehouse and the **CSR** has the permission to operate the related warehouse.

The status of the ICCID of 8969001070000803924 should be **In stock**.

Procedure

Step 1 On the **Customer > Customer Profile Management > Customer On-boarding** page, click



Step 2 Set the customer, account and credit card information. Field mark with red star mark is mandatory field, they can't be null value.

Customer Choice

Customer Choice New Customer Pre-Existing Customers

Customer Information

* Title Mr Mrs Ms Master Miss Dr Unknown*

* First Name Middle Initial * Last Name

Date of Birth

Country

P.O.Box

ID Type

* Customer Group

Street Address

* Residency Status

Town/City

Email

Contact Phone

ID File Upload

Account Information

* Account Name:

* Payment Type:

* Bill Medium:

* Service Type:

* Email:

Step 3 Click “Next” to continue process.

Step 4 Select plan, MSISDN and IMSI

Locate and select plan

Select package

Package Name:

Select	Package Name	Package Type	Payment Type	Description
<input checked="" type="radio"/>	Local Mobile Plan	Plan	Prepaid	Fixed Call \$0.55/Min Mobile Call \$ 0.55/Min IDD (AUS&NZ) \$0.90/Min IDD (The Others) \$1.15/Min Local SMS \$0.14/Time International SMS \$0.40/Time

Page Record: TotalRecord: 1 TotalPage: 1 CurrentPage: 1

Select Service number

Select Service Number ✕

Number: 🔍 Query

<input type="radio"/> 672350365	<input type="radio"/> 672350143	<input checked="" type="radio"/> 672350160	<input type="radio"/> 672350164	<input type="radio"/> 672350165
<input type="radio"/> 672350166	<input type="radio"/> 672350169	<input type="radio"/> 672350174	<input type="radio"/> 672350175	<input type="radio"/> T1
<input type="radio"/> T2	<input type="radio"/> T3	<input type="radio"/> T4	<input type="radio"/> 627356087	<input type="radio"/> 672351002
<input type="radio"/> 672351004	<input type="radio"/> 672351005	<input type="radio"/> 672351006	<input type="radio"/> 672351007	<input type="radio"/> 672351008
<input type="radio"/> 672351009	<input type="radio"/> 672351010	<input type="radio"/> 172351009		

Page Record: TotalRecord: 23 TotalPage: 1 CurrentPage: 1 First Previous Next Last GO

Select ICCID

Select ✕

Number: 🔍 Query

<input type="radio"/> 600000012	<input type="radio"/> 600000016	<input type="radio"/> 600000018	<input type="radio"/> 600000020	<input type="radio"/> 8000002
<input type="radio"/> 8000003	<input type="radio"/> 8000004	<input type="radio"/> 8000005	<input type="radio"/> 8000007	<input type="radio"/> 8000008
<input type="radio"/> 8098709	<input type="radio"/> 20200728001	<input type="radio"/> 20200728002	<input type="radio"/> 20200728003	<input type="radio"/> 20200728004
<input type="radio"/> 20200728006	<input type="radio"/> 20200728007	<input type="radio"/> 20200728008	<input type="radio"/> 20200728009	<input type="radio"/> 20200728010
<input type="radio"/> ICCID202007281001	<input type="radio"/> 8969001070000803908	<input checked="" type="radio"/> 8969001070000803924	<input type="radio"/> 8969001070000803932	<input type="radio"/> 8969001070000803940

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Confirm the plan, service number and IMSI information

Home Page Customer On-boarding

Choice	Package Name	Package Type	Payment Type	Description
<input checked="" type="radio"/>	Local Mobile Plan	Plan	Prepaid	Basic Package

Page Record: TotalRecord: 1 TotalPage: 1 CurrentPage: 1 First Previous Next Last

Package Detail

Mobile

Installation

* MSISDN Choice

Service Attribute

* IMSI Choice * Service Type

Mobile
Mobile
CPE

Step 5 click to next step

Step 6 Select payment method and click pay to do the payment

Cost Details			
Cost Name	Cost Type	Unit Price	Total
Balance	Balance	10.00	10.00
SIM Card Fee	One-Time Charge	10.00	10.00
Tax Rate	0 %		
			Cost 20.00
			Tax 0.00
			Total Cost: 20.00 \$

Payment	
* Payment Method:	Cash

Step 7 Print the receipt

PAYMENT RECIEPT

Accept From: Chen
 Norfolk Island Kingston Stree 12
 Email: tom@gamil.com
 Tel: 672351003

Receipt Number 2007-0000010263
 Account Number 10404
 Order Number 13309
 Payment Method Cash
 Seller bosstest
 Paid Date 29-July-2020
 Print Date 29-July-2020

Details			
Plan/Bundle ->	Local Mobile Plan	672350160	On-Boarding 29-0
Service->	Mobile	672350160	On-Boarding 29-07-2020 00:00:
00 KI	28DFD60A6F6CF776E8134E2A569A0581		
ICCID	8969001070000803924		
IMSI	554010100080392		
VMS	No VMS service		
Sim Type	Local		
CUG ID	Customer		
Inventory->	ICCID-8969001070000803924	1	
Inventory->	MSISDN-672350160	1	

No	Description	Amount
1	Default Balance	\$ 10.00
2	SIM Fee	\$ 10.00
	Subtotal	\$ 20.00
	VAT 0 %	\$ 0.00
	Poundage	\$
	Total Payment	\$ 20.00

4.1.3 Buy Bundle

Scenario

Assume that you want buy bundle for a subscriber with service number 672350160. The following figure shows the subscribe basic information.

Customer Group	Normal
Plan	Local Mobile Plan
Service Number	672350160

The name of the bundle which the subscribe want to buy is **Local Mobile Bundle A**.

Prerequisites

- **Bundle**

The Local Mobile Bundle A has been created and the status must be **published**.

The Local Mobile Bundle A should have been mapped to the **Local Mobile Plan**

The Local Mobile Bundle A has been set the permission to be sold to **Normal** customer group.

The Local Mobile Bundle A has been set the permission to be sold by the **CSR** who is going to create a new subscriber.

Procedure

Step 1 go to **Customer > Customer Profile Management > Buy Bundle** page.

Step 2 You can use Service Number, Customer Name, Account ID or Customer ID to filter, locate and select the subscriber and account

Customer Info

Query Type: Service Number Value: Q Query

Select	Customer Name	Nationality	ID Number	Email Address	Contact Phone
<input checked="" type="radio"/>	Chen	Resident	35003331	tom@gamil.com	672351003

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1 First Previous Next Last

Select Account

Account ID: Account Name: Q Query

Select	Account ID	Account Name	Payment Type
<input checked="" type="radio"/>	10404	Tom	Prepaid

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1 First Previous Next Last

Step 3 Select Bundle

Select package

Package Name: [Q Query](#)

Select	Package Name	Package Type	Payment Type	Description
<input checked="" type="radio"/>	Local Mobile Bundle A	Bundles	Prepaid	Total Price is A\$ 40 bundle validity is 30 days 2GB Data, 200 Mobile Mins, 200 Local SMS
<input type="radio"/>	Local Mobile Bundle C	Bundles	Prepaid	Total Price is A\$ 100 bundle validity is 30 days 8GB Data, 500 Mobile Mins, 500 Local SMS
<input type="radio"/>	Local Mobile Add-on 2GB Data	Bundles	Prepaid	Data Add-on 2 offer 2 GB Data for A\$ 20 with 30 Days
<input type="radio"/>	Local Mobile Add-on 4GB Data	Bundles	Prepaid	Data Add-on 4 offer 4 GB Data for A\$ 50with 30 Days
<input type="radio"/>	Local Mobile Add-on 8GB Data	Bundles	Prepaid	Data Add-on 8 offer 8 GB Data for A\$80 with 30 Days

Step 4 click [Submit](#) to next step

Step 5 Select payment method and click pay to do the payment

Buy Bundle

Cost Details

Cost Name	Cost Type	Unit Price	Total
Bundle Fee	One-Time Charge	40.00	40.00

Tax Rate % Cost 40.00

Tax 0.00

Total Cost 40.00 \$

Payment

* Payment Method:

[Cancel](#) [Pay](#)

Step 6 Print the receipt

PAYMENT RECEIPT

Accept From: Chen
 Norfolk Island Kingston Street 12
 Email:ton@gamil.com
 Tel:672351003

Receipt Number | 2007-0000010264
 Account Number | 10404
 Order Number | 13327
 Payment Method | Cash
 Seller | bosstest
 Paid Date | 29-July-2020
 Print Date | 29-July-2020

Details			
Plan/Bundle ->	Local Mobile Bundle A	672350160	On-Boarding
29-07-2020 08:08:08			

No	Description	Amount
1	Package Fee	\$ 40.00
	Subtotal	\$ 40.00
	VAT 0 %	\$ 0.00
	Poundage	\$
	Total Payment	\$ 40.00

Customer Signature:

Cashier Signature:

4.1.4 Manage Customers

This module is mainly to view Customer Information or modify customer information.

4.1.4.2 View Customer Information

Scenario

Assume that you want to vie a new customer Information. The customer basic Information as below.

Customer Name	Chen
Service Number	672350160

Procedure

- Step 1** Go **Customer > Customer Profile Management > Manage Customers** page
- Step 2** Use customer name or service number to locate the customer that you want to view, and click the [customer name](#), which has a link to customer's profile, in the query result list.

Customer ID	Customer Name	Contact Number	Region	Created Time	Seller	Status	Operation
20199	Chen	672351003	Kingston	29-07-2020	bosstest	Normal	Modify

Step 3 View that customer information including 3 taps, which are **Basic Information, package Information and Payment Information.**

1. Basic Information

- Basic Information contains Customer Information, Account Information and Credit Card Information.
- ID File can be download in Customer's basic Information, and you just need to click the ID File link.

Figure-1 Customer basic information

Customer Information

First Name: Chen Last Name: Tom Birthday: 02-07-1997

Nationality: Resident Country: Norfolk Island

Town: Kingston

Gender: Male Email: tom@gamil.com

ID Type: Driving License ID Number: 35003331

Contact Number: 672351003 Fax: 672351003

Zip Code: 35013243

ID File: [Tom file.docx](#) Customer Group: Normal

Address: Norfolk Island Kingston Stree 12

Figure-2 Account information

Account ID	Account Name	Service Nbr	Payment Type	Base Package	Balance(\$)	Expiry Time	Email	Created Time
10404	Tom	672350160	Prepaid	Local Mobile Plan	10.00	28-08-2020 17:45:09	tom@gamil.com	29-07-2020

2. Package Information

I think it's better to rename the **Package Information** to **Subscriber Information**, because everything under this tap is base on a subscriber.

Package is owned by subscriber, so we need to select one subscriber before we view the package information, and then all the packages under this subscriber, service attributes (like IMISI, OPC and etc.) , inventory information and payment information will be shown up.

Figure-1 Select a subscriber

Basic Information | **Package Information** | Payment Information

Service Number: Created Date: - [Q Query](#)

Choose	Service Name	Service Number	Service Status
<input checked="" type="radio"/>	Mobile	672350160	Normal

Figure-2 Package list of the subscriber

Plan/Bundle Information

Package Name: [Q Query](#)

Package Inst ID	Package Inst Name	Package Type	Account ID	Effective Time	Expiry Time	Created Time	Status	Operation
1599	Local Mobile Plan	Plan	10404	29-07-2020 00:00:00	31-07-2020 23:59:59	29-07-2020 17:45:09	Valid	View
1634	Local Mobile Bundle A	Bundles	10404	29-07-2020 00:00:00	28-08-2020 20:10:45	29-07-2020 20:10:39	Valid	View
1604	Local Mobile Add-on 2GB Data	Bundles	10404	29-07-2020 17:45:15	28-08-2020 17:45:15	29-07-2020 17:45:15	Valid	View

Page Record: 5 TotalRecord: 3 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

To each package record, we can click [View](#), which is in the last column of the package record, to view the **Free Benefits** of the package.

Figure-3 Free Benefits of a Package

Free Benefits

Free Benefits

Free Benefits	Account Type Name	Total	Used	Left
Times	Free National SMS	200sms	0sms	200sms
Duration/Min	Free Mobile Mins	3HH:20MM:0SS	0HH:0MM:0SS	3HH:20MM:0SS
Flux	Use Free Data	2GB:0MB:0KB	0KB	2GB:0MB:0KB

Page Record: 5 TotalRecord: 3 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

Figure-4 Service Attributes of the subscriber

Service Attribute Information

Service Type: **Mobile** | OPC: **1** | KI: **1234567890abcdef1111111111111111** | IMSI: **460110123456003** | SelfCare Password: **888288** | Speed: **gold**

Figure-5 Inventory Information of the subscriber

Inventory Information						
Inventory Name: <input type="text"/>		Inventory Serial Number: <input type="text"/>		<input type="button" value="Q Query"/>		
Inventory Type	Inventory Name	Inventory Serial Number	Inventory Quantity	Operator	Warehouse	Created Date
ICCID	ICCID	8969001070000803924	1	bosstest	Norfolk Center Warehouse	29-07-2020
MSISDN	MSISDN	672350160	1	bosstest	Norfolk Center Warehouse	29-07-2020

Page Record: TotalRecord: 2 TotalPage: 1 CurrentPage: 1

Figure-6 Payment Information of the subscriber

Payment Information						
Pay Time: <input type="text"/> - <input type="text"/>		<input type="button" value="Q Query"/>				
Operation Type	Operation Name	Service Number	Create Time	CSR	Amount(\$)	
Business	Local Mobile Bundle A	672350160	29-07-2020 20:09:41	bosstest	40.00	
Business	Local Mobile Plan	672350160	29-07-2020 17:38:33	bosstest	20.00	

Page Record: TotalRecord: 2 TotalPage: 1 CurrentPage: 1

3. Payment Information

Payment Information shows all the payment of the customer. One customer can have multiple subscribers. Customer's Payment Information contains all the subscribers' Payment Information.

Manage Customers						
Basic Information		Package Information		Payment Information		
Service Number: <input type="text"/>		<input type="button" value="Q Query"/>				
Pay Time: <input type="text"/> - <input type="text"/>						
Operation Type	Operation Name	Service Number	Create Time	CSR	Amount(\$)	
Business	Local Mobile Bundle A	672350160	29-07-2020 20:09:41	bosstest	40.00	
Business	Local Mobile Plan	672350160	29-07-2020 17:38:33	bosstest	20.00	

4.1.4.3 Modify Customer Information

You can modify the customer Information including **Basic Information**, **Account Information** and **Credit Card Information** in CRM system.

Scenario

Assume that you want to Modify a new customer Information. The customer basic Information as below.

Customer Name	Chen
Service Number	672350160

Procedure

Step 1 Go **Customer > Customer Profile Management > Manage Customers** page

Step 2 Use customer name or service number to filter and locate the customer that you want to view, and click **Modify** which is in the last column of the record.

Manage Customers								
Customer Name:	Chen	Service Number:		Payment Type:		Q Query		
Advanced Search								
Customer ID	Customer Name	Contact Number	Region	Created Time	Seller	Status	Operation	
20199	Chen	672351003	Kingston	29-07-2020	bosstest	Normal	Modify	

Step 3 Modify the Basic Information and click **Save** to save the modification

Basic Information		Account Information	
Customer Information			
* First Name:	Chen	Last Name:	Tom
* Nationality:	Resident	* Birthday:	02-07-1997
* Town:	Kingston	* Country:	Norfolk Island
* Gender:	Male	Email:	tom@gamil.com
* ID Type:	Driving License	* ID Number:	35003331
* Contact Number:	672351003	Fax:	672351003
Zip Code:	35013243	* Customer Group:	Normal
ID File:	Tom file.docx	+ Choose	
Address: Norfolk Island Kingston Stree 12			

Step 4 Modify the Account Information and click **Save** to save the modification

Basic Information		Account Information	
Account Information			
* Account Name:	Tom	* Service Type:	Mobile
* Payment Type:	Prepaid	* Email:	tom@gamil.com
* Bill Medium:	Email		

4.2 Customer Subscription Mgmt

4.2.1 Subscription Information

Subscription Information is about the profile view of a subscriber.

Firstly you should go **Customer > Customer Subscription Mgmt > Subscription Information** page.

Secondly you can use Service Number, Customer Name, Account ID or Customer ID to filter, locate and select the subscriber you want to view, and click the **View** in the last column of the record.

Subscriber Information							
Filter Items	MSISDN	18612345605	<input type="button" value="Search"/>				
Customer Name	Service Name	MSISDN	Customer Type	Status	Created Date	Operator	Operation
OPC T 05	Mobile	18612345605	Local Prepaid Mobile	Active/Used	22-11-2021 19:45:08	SuperAdmin	View

4.2.1.1 Basic Information

Basic information shows the subscriber's basic information and service attributes.

Basic Info	Package Info	Payment Info	Cdr List	
Customer Name	OPC T 06	Contact Phone		
MSISDN	18612345606	Status	Active/Used	
Balance	\$ 10.00	Expiry Date	21-01-2022 19:46:33	
Service Attribute Information				
Service Type	Mobile	OPC	1	
KI	1234567890abcdef1111111111111111		IMSI	460110123456006
SelfCare Password	514579		Speed	gold
Inventory Information				
Inventory Sale	Inventory Number	Inventory Price(\$)		

4.2.1.2 Package Information

Basic Info	Package Info	Payment Info	Status Management	Provisioning Status View	Cdr List				
Plan/Bundle Information									
Choice	Package Name	Package Type	Package Inst ID	Effective Date	Expiry Date	Package Fee(\$)			
<input type="radio"/>	Local Mobile Plan	Plan	1599	29-07-2020 17:45:15	31-07-2020 23:59:59	0			
<input checked="" type="radio"/>	Local Mobile Add-on 2GB Data	Bundles	1604	29-07-2020 17:45:15	28-08-2020 17:45:15	0			
<input type="radio"/>	Local Mobile Bundle A	Bundles	1634	29-07-2020 20:10:45	28-08-2020 20:10:45	0			
Page Record: 5	TotalRecord: 3 TotalPage: 1 CurrentPage: 1				First	Previous	Next	Last	GO

when you click one record, it will show the Free benefits of the package.

Free Benefits				
Free Benefits	Account Type Name	Total	Used	Left
Flux	Use Free Data	2GB:0MB:0KB	0KB	2GB:0MB:0KB
Page Record: 5	TotalRecord: 1 TotalPage: 1 CurrentPage: 1			
	First	Previous	Next	Last
				GO

4.2.1.3 Payment Information

Subscription Information						
Basic Info	Package Info	Payment Info	Status Management	Provisioning Status View	Cdr List	
Payment Info						
Payment Time	Service Number	Operation Type	Operation Description	Charge Type	Cashier	Amount(\$)
29-07-2020 20:09:41	672350160	Local Mobile Bundle A-672350160	Package Fee	Buy Bundle	bosstest	40.00
29-07-2020 17:38:33	672350160	Local Mobile Plan-672350160	Default Balance	Customer ON-boarding	bosstest	10.00
29-07-2020 17:38:33	672350160	Local Mobile Plan-672350160	SIM Fee	Customer ON-boarding	bosstest	10.00
Page Record: 5		TotalRecord: 3 TotalPage: 1 CurrentPage: 1 First Previous Next Last GO				

4.2.1.4 Cdr List

Cdr list contains Data Cdr, Voice Cdr, SMS Cdr, Transfer Cdr and Rent Cdr.

Figure-1 Parameters In Date Cdr

Data Cdr	Voice Cdr	SMS Cdr	Transfer Cdr	Rent Cdr		
Data List						
Date: 01-07-2020 - 30-07-2020 <input type="button" value="Query"/>						
Service Number	Start Time	End Time	Duration(HH:MM:SS)	Data Usage(GM:BM:KM)	Package Name	Charge(\$)
No record						

Figure-1 Parameters In Voice Cdr

Data Cdr	Voice Cdr	SMS Cdr	Transfer Cdr	Rent Cdr					
Voice List									
Date: 01-07-2020 - 30-07-2020 <input type="button" value="Query"/>									
Service Number(Calling)	Service Number(Called)	Call Type	Charge Type	IMSI	Start Time	End Time	Duration(HH:MM:SS)	Package Name	Amount(\$)
No record									

Figure-3 Parameters In SMS Cdr

Data Cdr	Voice Cdr	SMS Cdr	Transfer Cdr	Rent Cdr				
Message List								
Date: 01-07-2020 - 30-07-2020 <input type="button" value="Query"/>								
Service Number(Calling)	Service Number(Called)	Call Type	Charge Type	IMSI	Start Time	End Time	Package Name	Amount(\$)
No record								
Page Record: 5		TotalRecord: 0 TotalPage: 0 CurrentPage: 1 First Previous Next Last GO						

Figure-4 Parameters In Transfer Cdr

Data Cdr Voice Cdr SMS Cdr **Transfer Cdr** Rent Cdr

Transfer Info ↻

Date: 01-07-2020 - 30-07-2020 Q Query

Transfer Number(Out)	Transfer Number(In)	Transfer Type	Transfer Time	Amount(\$)
No record				

Page Record: 5 TotalRecord: 0 TotalPage: 0 CurrentPage: 1 First Previous Next Last GO

Figure-5 Parameters In Rent Cdr

Data Cdr Voice Cdr SMS Cdr Transfer Cdr **Rent Cdr**

Package Rent Cdr ↻

Date: 01-07-2020 - 30-07-2020 Q Query

Service Number	Charge Type	Charge Time	Amount(\$)
No record			

Page Record: 5 TotalRecord: 0 TotalPage: 0 CurrentPage: 1 First Previous Next Last GO

4.2.2 Sim Replacement

If a customer want to use the old MISDN number when his SIM is broken or lost, the customer can replace his SIM.

Scenario

Assume that a customer want to replace a new SIM. Customer's basic information is as following figure.

Customer Name	Chen
MISDN	672350160
New ICCID	8969001070000803924

Prerequisites

- **ICCID**

The New ICCID has been stocked into the warehouse and the **CSR** has the permission to operate the related warehouse.

The status of the New ICCID should be **In stock**.

Procedure

- Step 1** Go **Customer > Customer Subscription Mgmt > Sim Replacement** page
- Step 2** Use Service Number, Customer Name, Account ID or Customer ID to filter, locate and select the subscriber.
- Step 3** Click the **[SIM Card Change](#)** in the last column of the record.
- Step 4** Input new ICCID , click **Use** to Confirm if the new ICCID is available, and Click **Submit** to continue next step

Customer Info

Query Type: Service Number Value: 672350160

No.	Customer Name	Service Name	Service Number	Status	Created Time	Operation
1	Chen	Mobile	672350160	Normal	29-07-2020	<input type="button" value="SIM Card Change"/>

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1

SIM Card Change Information

Old ICCID: 8969001070000803924 * New ICCID: 8969001070000803957

Step 5 Select payment method and click pay to do the payment of SIM Replacement Fee

Cost Details

Cost Name	Cost Type	Unit Price	Total
Sim Replacement Fee \$5	One-Time Charge	5.00	5.00

Tax Rate 0 % Cost 5.00
Tax 0.00
Total Cost 5.00 \$

Payment

* Payment Method: Cash

Step 6 Print the receipt

PAYMENT RECEIPT

Accept From: Chen
 Norfolk Island Kingston Stree 12
 Email:ton@gmail.com
 Tel:672351003

Receipt Number 2007-0000010272
 Account Number 10404
 Order Number 13341
 Payment Method
 Seller bosstest
 Paid Date 30-July-2020
 Print Date 30-July-2020

Details

Service->	Mobile	672350160	SIM Card Replacement	30-07-20
20 00 KI 0.00	28DFD00A6F6CF776E8134E2A569A0581	To	53B90DA79B267A9CE98FDA440197	
ICCID	8969001070000803924	To	8969001070000803957	
DMSI	554010100080392	To	554010100080395	

No	Description	Amount
1	Sim Replacement Fee	\$ 5.00
	Subtotal	\$ 5.00
	VAT 0 %	\$ 0.00
	Poundage	\$
	Total Payment	\$ 5.00

Customer Signature:

Cashier Signature:

5 Receivables

5.1 Prepaid Top-Up

5.1.1 Top-Up

You can make a Top-Up for an account in cash or by credit card, debit card, check, or PR.

Scenario

You want to make a Top-Up of \$30 in cash for a prepaid subscriber at 672350160

Procedure

Step 1 Go **Prepaid Top-Up > Top-Up** page

Step 2 Use **Service Number, Customer Name, Account ID** or **Customer ID** to filter, locate and select the subscriber or account for Top-Up

Subscriber Choice

Query Type: Service Number

Select	Customer Name	Customer ID	Account ID	Service ID	Service Name	Service Number	Customer Group	Status	Created Time
<input checked="" type="radio"/>	Chen	20199	10404	266	Mobile	672350160	Normal	Active/Used	29-07-2020 17:45:09

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1

Step 3 Set Top-Up Amount, Taxes Rate, Payment Method and Remark

Top-Up

Balance(\$): 10.00

* Top-Up Amount(\$):

Discount Amount(\$):

Taxes(\$):

* Payment Method:

Total Amount(\$):

Remark:

Parameters in this Page:

Parameter	Description
Top-Up Amount	The discount amount is depended on the Top-Up Amount.
Discount Amount	The configurations of Top-Up Amount and Discount Amount are setting on the Business Config > Package Management > Recharge Configuration page.
Taxes	The options of tax rate are as follows: <ul style="list-style-type: none"> • 0% • 5% • 10%
Payment Method	The options are as follows: <ul style="list-style-type: none"> • Cash • Credit Card You need to input Credit Card Number, when you chose Credit card. • Debit Card You need to input Debit Card Number, when you chose Debit card. • Check You need to input Check Number, when you chose Check. • PR
Remark	Description of the Top-up

Step 4 Confirm Top-Up Information and Click Payment

Step 5 Print the receipt

PAYMENT RECEIPT

Accept From: Chen
 Norfolk Island Kingston Street 12
 Email:ton@gmail.com
 Tel:672351003

Receipt Number 2007-00000000194
 Account Number 10404
 Service Number 672350160
 Payment Method Cash
 Seller bosstest
 Paid Date 30-07-2020 15:49:52
 Print Date 30-07-2020 15:49:54

No	Description	Amount
1	Deposit for Unbilled Charges	\$ 30
Subtotal		\$ 30
VAT		\$ 0
Poundage		\$ 0
Total Payment		\$ 30

Remark:Top up \$30

Customer Signature:

Cashier Signature:

5.1.2 Top-Up Reversal

Top-Up reversal is used to reverse customer's Top-Up and refund customer.

Procedure

- Step 1** Go **Prepaid Top-Up > Top-Up Reversal** page
- Step 2** Use Receipt No., Service Number, Customer Name, Account ID, Customer ID or Payment Time to filter, locate and select the Top-Up record.
- Step 3** Confirm the Payments Information and click Submit to reverse the Top-Up

Top-Up Reversal

RefNo.:

Type: Service Number Value: 672350160

Payment Time: to: [Q Query](#)

Choice	Customer Name	Customer ID	Account ID	Service Number	Operation Type	Payment Time	Top-Up Amount(\$)	Discount Amount(\$)	Paid Amount(\$)	Invoice ID	Operation
<input checked="" type="radio"/>	Chen	20199	10404	672350160	Cash	30-07-2020 15:49:52	30.00	0	30.00	194	bosstest

Page Record: 5 TotalRecord: 1 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

Payments Information

Top-Up Amount(\$): 30.00 Payment Method: Cash

Discount Amount(\$): 0 Paid Amount(\$): 30.00

Payment Time: 30-07-2020 15:49:52 Operation Type: Cash

Customer Name: Chen Contact Number: 672350160

[Submit](#) [Cancel](#)

5.1.3 Top-Up Records

Top-Up records is used to view Top-Up records and reprint the receipt of relate Top-Up.

We can use Receipt No., Service Number, Customer Name, Account ID , Customer ID or Payment Time to filter and locate the Top-Up records, which you want to view.

Top-Up Records

RefNo.:

Type: Service Number Value:

Payment Time: to: [Q Query](#)

Invoice ID	Customer Name	Customer ID	Account Id	Service Number	Top-Up Time	Payment Method	Top-Up Amount(\$)	Discount Amount(\$)	Paid Amount(\$)	Staff Name	Operation
2007-000000000194	Chen	20199	10404	672350160	30-07-2020 15:49:52	Cash	30.00	0	30.00	bosstest	Print Invoice
2007-000000000184	Penney	20063	10112	672356666	29-07-2020 09:37:44	Visa	10.00	0	10.09	By Customer Self	Print Invoice
2007-000000000180	Penney	20063	10112	672356666	28-07-2020 16:39:37	Visa	5.00	0	5.04	By Customer Self	Print Invoice
2007-000000000179	rqiang	20160	10315	672356002	28-07-2020 09:38:03	Cash	20.00	0	20.00	SuperAdmin	Print Invoice
2007-000000000178	rqiang	20160	10315	672356002	28-07-2020 09:37:34	Cash	70.00	0	70.00	SuperAdmin	Print Invoice

Page Record: 5 TotalRecord: 98 TotalPage: 20 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

For each Top-Up record, we can click [Print Invoice](#) , which is in the last column of the record , to reprint the receipt of relate Top-Up.

5.2 Payment Records Mgmt

5.2.1 My Payment Records

Context

My Payment Records is used by CSR to check how many payments that the CSR has not submitted the related cash to the financial department.

My payment records contains all the payments including the Top-Up records, Customer-On-Boarding Payment, Buy-Bundle Payment, SIM Replacement Payment and etc.

CSR, logging into the CRM system, can only see his own payment records on **Receivables > Payment Records Mgmt > My payment records** page.

Before CSR submits the related cash to the finance department, CSR should close the payment records, print out the **CLOSING BATCH RECEIPT** and check his hand's cash is same as what the **RECEIPT** shows.

Scenario

CRS wants to close the all the payment records, which the CSR has not given the related cash to the financial department.

Procedure

Step 1 Go **Receivables > Payment Records Mgmt > My payment records** page click **Query**

Step 2 Select the payment records you want to close and click **Batch Close**

My Payment Records

Type: List by details 1. Query

2. Select

<input type="checkbox"/>	Staff Name	Deal Time	Operation	Customer	Product Name	Unit	Amount(\$)
<input checked="" type="checkbox"/>	bosstest	30-07-2020 19:34:10	Cash Payment	Chen	Collect Payment	1	10.00
<input checked="" type="checkbox"/>	bosstest	30-07-2020 19:32:58	NewOpen Fee	Chen	Local Mobile Add-on SGB Data	1	80.00
						2	90.00

TotalRecord: 3 TotalPage: 1 CurrentPage: 1

3. Click

Step 3 Print the Closing Batch Receipt

7/30/2020

CRM

CLOSING BATCH RECEIPT

Receipt Number: 202007-00000023
 Staff Name: bosstest
 Staff ID: 1725
 Closing Time: 30-07-2020 19:42:08

Staff ID	Staff Name	Deal Time	Operation	Customer	Product Name	Unit	Amount (\$)
1725	bosstest	30-07-2020 19:34:10	Cash Payment	Chen	Collect Payment	1	10.00
1725	bosstest	30-07-2020 19:32:58	NewOpen Fee	Chen	Local Mobile Add-on SGB Data	1	80.00
						2	90.00

Staff Signature:

Finance Signature:

Step 4 Check if CSR's hand-hold cash is same as what the Closing Batch Receipt shows

Step 5 Sign on the Closing Batch Receipt and submit both cash and receipt to the financial department

5.2.2 My Closed Payment Records

Context

My Closed Payment Records is used by CSR to check how many payments that he has given the related cash to the financial department .

CSR, logging into the CRM system, can only see his own closed payment records on [Receivables > Payment Records Mgmt > My Closed payment records](#) page.

Scenario

CRS wants to view his closed payment records, which the CSR has submitted the related cash to the financial department.

Procedure

Step 1 Go [Receivables > Payment Records Mgmt > My Closed payment records](#) page.

Step 2 Use **Closing Batch Receipt No.** or **Batch closing Operation time** to filter closed payment records.

My Closed Payment Records

Closing Number:

Start Date: End Date:

Closing Number	Staff Account	Staff Name	Transactions	Amount(\$)	Operating Time	Operation
202007-00000023	bosstest	bosstest	2	90.00	30-07-2020 19:42:08	Print Detail
202007-00000022	bosstest	bosstest	30	694.04	30-07-2020 17:10:09	Print Detail
202007-00000021	bosstest	bosstest	1	30.00	30-07-2020 16:53:37	Print Detail

Page Record: TotalRecord: 3 TotalPage: 1 CurrentPage: 1

Step 3 Click the **Export** to export the search result to excel file

5.2.3 All Open Payment Records

Context

All Open Payment Records is used by financial department personal to check how many payments that financial department has not collected the related cash from CSR.

Scenario

Financial department personal wants to view all open payment records.

Procedure

Step 1 Go [Receivables > Payment Records Mgmt > All Open payment records](#) page.

Step 2 Use **Staff Id**, **Staff Name** and **Time** to filter open payment records.

All Open Payment Records

Staff ID: Staff Name:
 Start Date: 30-07-2020 End Date: 30-07-2020 [Q Query](#)

[Export](#)

Staff ID	Staff Name	Deal Time	Operation	Customer	Product Name	Unit	Amount(\$)
1	SuperAdmin	30-07-2020 16:58:35	NewOpen Fee	PSTN02	Local Mobile Add-on 2GB Data	1	20.67
1	SuperAdmin	30-07-2020 16:58:35	NewOpen Fee	PSTN02	Local Mobile Plan	1	20.67
1	SuperAdmin	30-07-2020 09:55:01	NewOpen Fee	zengjiandong	Visitor Mobile Plan	1	30.67

TotalRecord: 3 TotalPage: 1 CurrentPage: 1 [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

Step 3 Click the [Export](#) to export the search result to excel file

5.2.4 All Closed Payment Records

Context

All Closed Payment Records is used by financial department personal to check how many payments that financial department has collected the related cash from CSR.

Scenario

Financial department personal wants to view all closed payment records.

Procedure

Step 1 Go **Receivables > Payment Records Mgmt > All Closed payment records** page.

Step 2 Use **Closing Batch Receipt, Staff Id, Staff Name** and **Time** to filter closed payment records.

All Closed Payment Records

Closing Number: Staff Account: Staff Name:
 Start Date: 30-07-2020 End Date: 30-07-2020 [Q Query](#)

[Export](#)

Closing Number	Staff Account	Staff Name	Transactions	Amount(\$)	Operating Time	Operation
202007-00000023	bosstest	bosstest	2	90.00	30-07-2020 19:42:08	Print Detail
202007-00000022	bosstest	bosstest	30	694.04	30-07-2020 17:10:09	Print Detail
202007-00000021	bosstest	bosstest	1	30.00	30-07-2020 16:53:37	Print Detail

Page Record: 10 [TotalRecord: 3 TotalPage: 1 CurrentPage: 1](#) [First](#) [Previous](#) [Next](#) [Last](#) [GO](#)

Step 3 Click the [Export](#) to export the search result to excel file

6 Ticketing

6.1 About Ticketing

Once Customer reports an issue, CSR can create a ticket in the CRM.

When ticket is created initially, it will be assigned to CSR Dept and to the guy who created this ticket.

Once Its assigned, corresponding engineer should see this ticket and receive SMS & email notifications.

The progress and update on the ticket should be continued via "CRM Ticketing portal" on the corresponding ticket till the closure of the ticket.

Once problem is fixed; we should send an email/SMS that the issue is fixed to the Customer.

6.2 Create Ticket

Procedure

Step 1 Go **Ticketing > Ticketing Management > Ticketing** page and click **Add**.

Step 2 Set the ticket information as shown in following figure

The screenshot shows the 'Creating Ticketing' form with the following details:

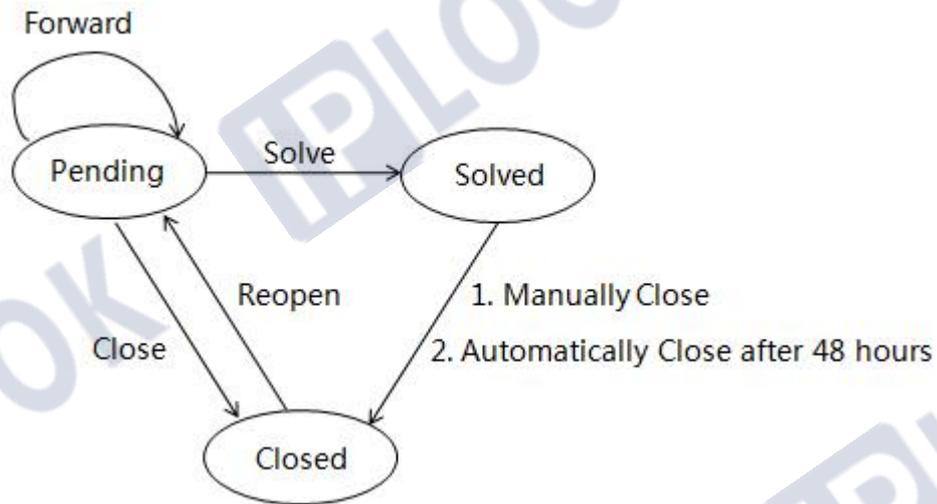
- Customer Name:** Rojhon zhang (with a '+ Select' button)
- Account Id:** 10107
- Department:** Norfolk telecom
- Type:** Problem
- Priority:** Urgent
- Attachment:** (with an 'Upload' button)
- Customer Id:** 20061
- Service Number:** 672359999
- Engineer:** dhillip1
- Severity:** Critical
- Category:** HLR
- Description:** Can't Call

At the bottom of the form, there are two buttons: 'Save' (highlighted with a red box) and 'Return'.

Step 3 Click **Save**

6.3 Ticketing Status

The following **Figure** shows ticket status transition.



◆ **Pending**

The initial status of a ticketing is pending after creation.

Engineer can close pending ticket, when Engineer check there is nothing wrong with ticket .

Engineer can change the pending ticket to solved state, when Engineer solve the pending ticket .

Engineer can forward the pending ticket to another Engineer, when he can't solve the pending ticket .

◆ **Solved**

Once problem of the ticket is solved, the system will send an email/SMS that the issue is fixed to the Customer. Engineer can close the solved ticket when the customer give feedback to him saying the problem is really fixed.

The solved ticket will be closed automatically after 48 hours since it has been solved.

◆ **Closed**

If the ticket is closed but customer call a CSR report the problem happens again, the CSR can reopen the closed ticket to pending ticket.

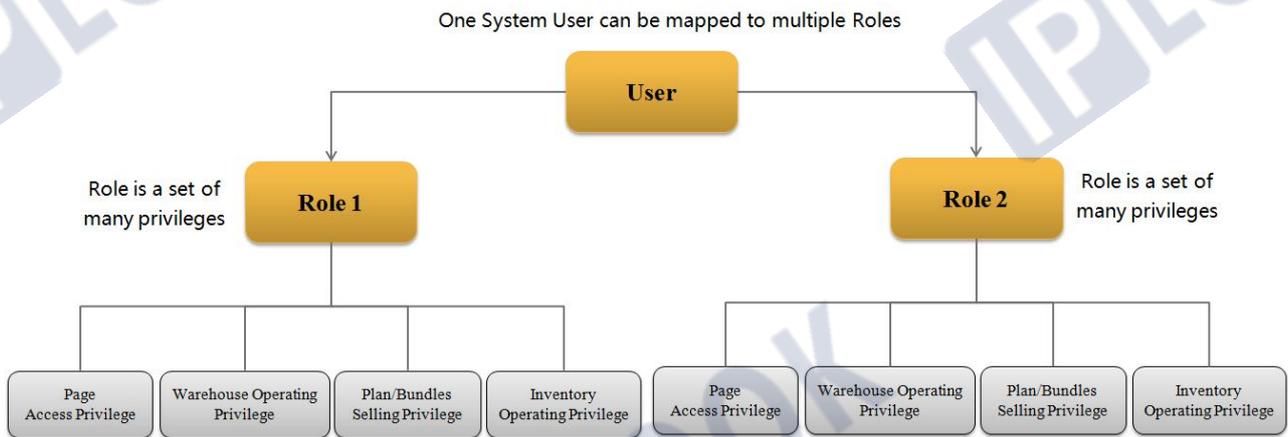
6.4 Ticketing Flow Informaion

Ticketing Flow	
1.18-06-2020 17:24:50 -> [Norfolk telecom: bosstest] -> Submit -> [Norfolk telecom: dhilip1].	Description: test
2.18-06-2020 17:28:29 -> [Norfolk telecom: bosstest] -> Close.	Description: test
3.18-06-2020 17:29:48 -> [Norfolk telecom: bosstest] -> Reopen -> [Norfolk telecom: agent_yang].	Description: test
4.18-06-2020 17:30:55 -> [Norfolk telecom: bosstest] -> Forward -> [Norfolk telecom: master_dealer].	Description: forward
5.18-06-2020 17:31:16 -> [Norfolk telecom: bosstest] -> Solve.	Description: solve
6.28-06-2020 20:08:01 -> Close after 48 hours	
6.28-06-2020 20:08:01 -> [Norfolk telecom: bosstest] -> Close.	

7 System

7.1 Privilege

7.1.1 Privilege Data Model



Privilege

The CRM privilege contains Page Accessing Privilege, Warehouse Operating Privilege, Plan/Bundles Selling Privilege and Inventory Operating Privilege.

Role

Role is a set of many privileges, and a role can have one or multiple privileges and a privilege can be granted to one or multiple roles.

User

One CRM system User can be mapped to multiple roles.

NOTE

We can grant or revoke privileges to a role but we can't directly grant or revoke privilege to a user.

If two users are mapped to same roles, then they have the same privileges.

7.1.2 Create a Role

Procedure

Step 1 Go **System > Privilege > User Privilege Management** page and click **Add**.

Step 2 Set Role basic Information and click **Save**

Step 3 Grant or Revoke CRM Pages accessing Privilege to the Role.

There is a CRM pages tree and you just need to mark the sign on the related page, which means you grant the page accessing privilege to the Role. If you remove the sign from the page, then you will revoke the page accessing privilege from the role.

You must click the **Submit** after you mark or remove the sign, then the granting or revoking operation will works.

Step 4 Grant Warehouse Operating Privilege to the Role,

The warehouse privilege contains Warehouse Management Privilege and Warehouse Approval Privilege.

You just need to mark the sign on the related record then you will grant the related privilege to the role. If you remove the sign from the records, then you will revoke the related privilege from the role.

You must click the **ADD** after you mark or remove the sign, then the granting or revoking operation will works.

Warehouse Management Privilege	Warehouse Approval Privilege	Warehouse Name	Warehouse Administrator
<input type="checkbox"/>	<input type="checkbox"/>	Norfolk Center Warehouse	Admin
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Norfolk Dispatch-WH	Admin
<input type="checkbox"/>	<input type="checkbox"/>	Norfolk Internal	Admin
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agent Warehouse	Admin
<input type="checkbox"/>	<input type="checkbox"/>	Dhilip warehouse	bosstest
<input type="checkbox"/>	<input type="checkbox"/>	dealer_zhang warehouse	SuperAdmin

Step 5 Grant Plan/Bundle Selling Privilege to the Role

You just need to mark the sign on the related record then you will grant the related Plan/Bundle Selling privilege to the role. If you remove the sign from the records, then you will revoke the related Plan/Bundle Selling privilege from the role.

You must click the **ADD** after you mark or remove the sign, then the granting or revoking operation will works.

Select	Package Code	Package Name	Package Type	Effective Time	Expiry Time
<input checked="" type="checkbox"/>	54	CUG-02-PKG		25-05-2020	29-05-2021
<input checked="" type="checkbox"/>	55	CUG-01-PKG		25-05-2020	30-06-2021
<input type="checkbox"/>	109	Visitor Mobile Plan		01-07-2020	01-07-2999
<input type="checkbox"/>	110	Tourist Mobile SIM		01-07-2020	01-07-2999
<input type="checkbox"/>	111	Tourist Mobile Add-On 2GB Data		01-07-2020	01-07-2999
<input type="checkbox"/>	114	Tourist Mobile Add-On 25 IDD Mins (AUS & NZ)		01-07-2020	01-07-2999

Step 6 Grant CRM Inventory Operating Privilege to the Role.

The Inventory privilege contains Stock Management Privilege, Stock Query Privilege and Stock Sales Privilege.

You just need to mark the sign on the related record then you will grant the related privilege to the role. If you remove the sign from the records, then you will revoke the related privilege from the role.

You must click the **ADD** after you mark or remove the sign, then the granting or revoking operation will works.

Role Information Function Privilege Warehouse Privilege Plan/Bundles Privilege **Inventory Privilege**

Inventory Name: Inventory Code:

Inventory: Privilege Status:

2. Click

Stock Management Privilege	Stock Query Privilege	Stock Sales Privilege	Inventory Name	Inventory Price	Inventory Code	Inventory Type
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MSISDN	0	IS0001	MSISDN
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ICCID	0	IS0002	ICCID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADSL	0	IS0003	ADSL
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PSTN	0	IS0004	PSTN
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone	10000		Phone
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Krone Pair	0		Krone Pair
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Circuit Number	0		Circuit Number

1. Mark

7.1.3 Create a CRM System User

Procedure

Step 1 Go **System > Privilege > User Management** page and click **Add**.

Step 2 Set User basic Information and click **Add**

User Basic Information

* Staff Name: * Staff Type:

* Tel: * ID Number:

* User Account: * Email:

Address: * Organization:

Desc:

Step 3 Map the role privileges to the User

You just need to mark the sign on the related record then you will grant the related privilege to the role. If you remove the sign from the records, then you will revoke the related privilege from the role.

You must click the **Save** after you mark or remove the sign, then the granting or revoking operation will works.

User Management

User Basic Information **Role Privilege**

Role Name: Role Code: Privilege Status:

2. Click

Operation Privilege	Issue Privilege	Role Name	Role Code	Effective Time	Expiry Time
<input type="checkbox"/>	<input type="checkbox"/>	sale staff	RC10002	19-06-2015	19-06-2015
<input type="checkbox"/>	<input type="checkbox"/>	SuperRole	RC10003	19-06-2015	19-06-2015
<input type="checkbox"/>	<input type="checkbox"/>	CSP	RC10005	09-04-2020	09-04-2020
<input type="checkbox"/>	<input type="checkbox"/>	agent_vip	RC10006	21-04-2020	21-04-2020
<input type="checkbox"/>	<input type="checkbox"/>	test_role	RC10011	27-05-2020	27-05-2020
<input type="checkbox"/>	<input type="checkbox"/>	Agent	RC10012	02-06-2020	02-06-2020
<input type="checkbox"/>	<input type="checkbox"/>	agent_role_test_09	RC10017	09-06-2020	09-06-2020
<input type="checkbox"/>	<input type="checkbox"/>	dealer_zhang	RC10018	09-06-2020	09-06-2020
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Finance	RC10027	31-07-2020	31-07-2020

1. Mark