

**Oracle® Revenue Management and Billing
for Financial Services**

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About this Document

This document provides a brief description about the new features and enhancements made in the release 2.2.4.0. It indicates the changes made to the existing screens in Oracle Revenue Management and Billing. It also highlights the bug fixes and known issues in the release 2.2.4.0.

This document does not describe the functionality of Oracle Revenue Management and Billing or technical know-how on how to install or upgrade Oracle Revenue Management and Billing. For more detailed information, you can refer to the following documents:

Document	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	Describes the features available in the Banking module. It also contains procedures on how to execute various tasks related to the Banking module.
<i>Oracle Revenue Management and Billing Insurance User Guide</i>	Describes the features available in the Insurance module. It also contains procedures on how to execute various tasks related to the Insurance module.
<i>Oracle Revenue Management and Billing Collections User Guide</i>	Describes the features available in the Collections module. It also contains procedures on how to execute various tasks related to the Collections module.
<i>Oracle Revenue Management and Billing Installation Guide</i>	Lists the pre-requisites, supported platforms, and hardware and software requirements for installing the Oracle Revenue Management and Billing application. It also explains how to install the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Quick Installation Guide</i>	Provides high-level information on how to install the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Upgrade Guide</i>	Lists the pre-requisites for upgrading the Oracle Revenue Management and Billing application from the current release to the new release or service pack. It also explains how to upgrade the Oracle Revenue Management and Billing framework, application, and its database.
<i>Oracle Revenue Management and Billing Upgrade Path Guide</i>	Highlights the framework releases and application service packs that needs to be installed while upgrading from one version to another.
<i>Oracle Revenue Management and Billing Database Administrator's Guide</i>	Provides detailed information on how to install the database for the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Reports Installation Guide</i>	Provides detailed information on how to configure the reporting feature in the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Data Migration Guide</i>	Provides detailed information on how to migrate data from one release to another.

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New Features

This section describes the following new features added in the release 2.2.4.0:

- Transaction Feed Management
- Rules Engine
- Policy
- Charge Type
- List Bill Reconciliation
- Documaker Integration
- EBS Integration
- Inbound Delinquent Customer Upload
- Collection Control Central
- Case Allocation
- Action Result

Transaction Feed Management

Oracle Revenue Management and Billing provides a facility to upload banking transactions received from various product processors or banking applications for billing. You can use Open Data-Link Interface (ODI) to upload transaction data files in various formats, such as CSV, XML, and fixed length. Oracle Revenue Management and Billing provides a sample interface for ODI that maps a CSV flat file to various tables (such as, Transaction Header and Transaction Detail) in the system. You can customize the sample interface to support various other file formats, such as XML and fixed length. You can also upload transaction data directly from various product processors or banking applications.

Once the transaction data is uploaded in the system, you need to:

- Validate Data
- Determine Initial Product
- Create Billable Charges
- Complete Billable Charges

During the transaction feed management process, each transaction goes through various statuses until it is billed to the customer.

The system allows you to search for a feed or a transaction in a feed with different statuses. You can also add a transaction manually in the system. In case of any error, the system allows you to cancel the entire feed or a particular transaction.

There are different batch processes defined in the system to execute the sub-processes in the transaction feed management process.

Rules Engine

A rules engine executes one or more business rules in a runtime production environment. It allows you to define, execute, and maintain these business rules separately from the application code. You can then use these business rules in any program to facilitate operational decisions at runtime. For example, you might use business rules in the Collection module to decide the collection strategy or in the Banking module to derive charges codes or products for the transaction.

A rules engine allows you to classify these rules using the rule type. It also allows you to define the relationship between two or more rules and set the priority for each rule. When a calling program invokes these rules using the rule type, all the effective rules with the specified rule type are executed, starting with the rule having highest priority. For example, a rule with the priority 10 will be executed before a rule with the priority 20.

Each rule contains one or more criteria. Depending on whether the criteria are satisfied, the system either executes the next criteria or indicates whether the rule is true or false. The rules engine allows you to define what should happen when the rule is true or false. In both the cases, you can enforce the system to either:

- Execute any dependent rule
- Execute a rule with the same rule type having lower priority
- Return the output parameters and their values to the calling program

Oracle Revenue Management and Billing provides you with the Rule Check utility. It allows you to validate whether rules defined with a specific rule type get executed as expected. On validating, it indicates the sequence in which the rules were executed, the total execution time, and displays the output parameters of the rule that was successfully executed.

Policy

Oracle Revenue Management and Billing uses a separate policy entity to record insurance policy details. The information about the policies which are to be billed can be received from an external system, such as Policy Administration System, or can be maintained in the system.

A set of people, such as subscriber, dependents, brokers, underwriting companies, operating companies, employee, and employers, are associated with the policy. The system allows you to associate these persons with the policy. You can also define characteristics for each policy and policy – person combination.

A policy must be linked to an account against which the policy is to be billed. Otherwise, a bill for a policy will not get generated in the system.

Each policy must be linked to at least one contract. You can define, edit, or cancel charges associated with a contract.

Charge Type

In Insurance, until Version 2.2.3.0, the bill segments were created for Premium, Fees, Taxes and Commission while generating a bill for a contract. To enforce flexibility in this model, the charge type is introduced. The charge types are various types of charges, such as Premium, Fees, Down Payment, Taxes, and Commission. You can create your own charge types in the system.

You can create a recurring or non recurring billable charge for a charge type. However, you can select a charge type while creating billable charges for contracts only when the charge type is linked to the contract type to which the contract belongs. You can link a charge type to more than one contract type.

List Bill Reconciliation

Oracle Revenue Management and Billing provides you with the facility to reconcile a list bill against the information received from the group customer. The reconciliation process starts only after a list bill is completed. A reconciliation object is created for each list bill once it is completed. In case you want to regenerate a reconciliation object, you need to reopen the bill and complete it once again.

A line is created for each bill segment in the reconciliation object. A user needs to enter the amount reported by the group customer for each reconciliation object line. In addition, when the reported and the billed amounts do not match, a user needs to enter the reason for such discrepancy and the date from when the reason is effective.

On submitting a reconciliation object, the reported and the billed amounts of each reconciliation object line are compared. Based on the comparison and the current status of the reconciliation object, the system changes the status of the reconciliation object line.

A case is created for each reconciliation object line where the reported and the billed amounts do not match. The case type is determined from the reason code specified for each unmatched line. This is because each reason code is mapped to a case type in the system.

Each case goes through a workflow which helps in resolving the case automatically. You can use the sample case workflow (defined for the Add, Terminate, or the Update reason codes) available in the demo database. Or, you can also create your own case workflow for each reason code.

A user can process the payment for a list bill via transfer from the fiduciary contract balance. Therefore, group customers should have a fiduciary contract associated with the account through which payments can be made for the list bills.

Documaker Integration

You can integrate Oracle Revenue Management and Billing with Oracle Documaker to generate bills (related to insurance industry) and correspondence in the PDF format. When you want to print a bill in the PDF format, the data is sent in the XML format to Oracle Documaker which then uses the correct template and prints the bill in the PDF format. Similarly, when you want to print a correspondence, the data is sent in the XML format to Oracle Documaker which then uses the correct template and prints the correspondence in the PDF format.

You can print a bill or correspondence in the PDF format either directly from the screen or using the batch process. At present, you can print the following different types of list and individual bills in the PDF format:

- Individual Bill for Property and Casualty
- Individual Bill for Life
- Individual Bill for Healthcare
- List Bill for Life
- List Bill for Healthcare
- List Agency Bill
- Individual Consolidated Bill

In addition, you can print the following correspondence in the PDF format:

- Notice of Intent to Cancel
- Past Due
- Expiring Credit Card

- Auto-Pay Changes Confirmation

At present, Oracle Revenue Management and Billing only supports integration with Oracle Documaker 12.0.

EBS Integration

You can integrate Oracle Revenue Management and Billing (ORMB) with Oracle E-Business Suite (EBS) using Oracle Data Integrator (version 11.1.1.5.0). The data is sent from ORMB to EBS (General Ledger and Accounts Payable) to support the following transactions:

When in ORMB	Then in EBS
A bill is created or cancelled.	The general ledger is updated with the journal information.
A payment is created or cancelled.	
An adjustment is created.	
An adjustment is created which creates an A/P request.	The customer and A/P request information is used to create one-time supplier and supplier site. Accounts payable invoice is created and associated with the supplier and supplier site.

In addition, the data is sent from EBS (General Ledger and Accounts Payable) to ORMB to support the following transactions:

When in EBS	Then in ORMB
A payment is created for an invoice related to an ORMB A/P request.	The payment information is received from EBS. The A/P request is updated with the payment information.
A check related to an invoice which is linked to an A/P request is re-issued.	
A check related to an invoice which is linked to an A/P request is declared as void and the liability is closed.	The A/P request and its associated adjustment are cancelled.

Inbound Delinquent Customer Upload

Oracle Revenue Management and Billing provides a facility to upload delinquent accounts from an external system. Once the data is received in the XML format, a Fact object is created for each delinquent account. Through a batch process, you can validate the data. Once the data is validated, a person, account, contract, and an adjustment record for the overdue amount are created in the system.

During the upload process, each Fact object goes through various statuses until the data is uploaded in the system.

Case Allocation

Oracle Revenue Management and Billing provides a facility to automatically or manually assign a case to a group at any given point of time in its lifecycle. You can define a case group and then add users in the group. A user can belong to multiple groups. Besides adding users in a group, you can define the maximum number of cases that can be assigned to a group.

For each case type and case status combination, you can define a set of groups to which a case of that type should be assigned. At a time, a case is assigned to only one group based on the priority defined for the group. Usually, a case is assigned to a group with the highest priority. But, if a group reaches the maximum case limit, the case is assigned to a group with the consecutive priority.

The system allows you to view the allocation history of a case.

Note: At present, the system does not automatically assign cases to a user in a group. However, you can manually assign a case to a user in a group.

Collection Control Central

Collection Control Central allows you to quickly search for and find the account and/or case information. Besides viewing the account details, you can view the main customer details, all the customers linked to the account, all the contracts associated with the account, collection details of each contract, financial transactions created for each contract, and cases created for each contract.

Moreover, while viewing the case information, you can view the actions performed on the case, customer contacts created on the case, promise to pay created on the account, and other cases created on the contract.

Action Result

A task that a user performs to recoup a debt is called an action. Oracle Revenue Management and Billing allows you to maintain and track the actions performed on a case and their outcomes (results). You can define different types of actions. Each action type belongs to an action category. Also, you can define different types of outcomes (results). Each result type belongs to a result category.

You can define a set of result types for each action type indicating that an action might lead to any of these outcomes. For each case type and case status combination, you can define a set of action types. As a result, when you log an action against a case, you will be able to select either of those actions which are valid for the case type and case status combination. And, based on an action, you will be able to select the results that are valid for the action.

Once you log an action performed on a case and its results, you will not be able to modify the details.

Enhancements

This section lists the enhancements made to the following features:

- Price List Hierarchy and Multi Price List Assignments
- Account Identifier Types
- Alternate Sequential Invoice Numbers
- Division-Specific Product Characteristics
- Advanced Search for an Account
- Approval Workflow
- Insurance Control Central
- Statement Construct
- Billing
- Promise to Pay
- Overdue Monitor

Price List Hierarchy and Multi Price List Assignments

Oracle Revenue Management and Billing allows you to define price list hierarchy. It helps you to derive the product pricing from the parent price list if the product pricing is not available in the price list (assigned to the account, customer, or the parent customer). However, if the product pricing is not available in the parent price list, the system will search for the product pricing in the parent's parent price list (i.e. in the grandparent price list) and continue till it reaches the last level in the hierarchy.

In other words, when you define a price list hierarchy and assign the price list to an account or a customer, the account or customer can avail the product pricing listed on the parent or grandparent price list if it is not available on the assigned price list. However, if the product pricing is available on both the assigned and the parent price lists, the system derives the product pricing from the assigned price list.

You can define multiple parent price lists for a price list. But, only one parent price list is effective for a particular duration. Two or more price lists can have the same parent price list.

You can also assign multiple price lists to an account or a customer along with the priority or order in which the pricing should be considered.

Account Identifier Types

Oracle Revenue Management and Billing now allows you to define account identifier types. When you create an account, an account identifier type allows you to define the various types of identification associated with the account. For example, bank account number, account name, International Bank Account Number (IBAN), etc.

You can use an account identifier type for an account only when the account identifier type is associated with the division to which the account belongs.

Alternate Sequential Invoice Numbers

Oracle Revenue Management and Billing now allows you to configure the application to generate alternate sequential bill or invoice numbers which can be either unique across the globe or within the division. However, you can only generate alternate sequential bill or invoice numbers for bills that are complete and for which the alternate sequential bill or invoice numbers are not yet generated.

Division-Specific Product Characteristics

Oracle Revenue Management and Billing now allows you to define division-specific product characteristics. For example, you can use a characteristic to define whether a product is taxable for a division. You can define division-specific product characteristics either while defining or editing a product or while defining or editing a division.

Advanced Search for an Account

Oracle Revenue Management and Billing provides you with the facility to limit the search results based on the division and/or account relationship type along with other search criteria. You can also search for an account using various account identifiers defined for an account.

Approval Workflow

The following changes are made to enhance the Approval Workflow feature:

- **Search by Approval Transaction ID** – Besides searching price assignment requests created for an account, a customer, or a price list, you can also search for a price assignment request using the Approval Transaction ID.
- **Search by Customer Identification Types** – In the **Approve Price Assignment**, **Modify Price Assignment**, and the **Resolve Price Assignment** screens, you can search for a customer using various IDs (such as Customer ID, SSN, and so on) linked to the customer.

Insurance Control Central

Insurance Control Central now allows you to quickly search for and find the policy and/or account information. Besides viewing the account details, you can view all the policies which are billed through the account, financial and payment history of the account, invoice schedule for the account, contracts linked to the account, and the bills generated for the account.

Moreover, while viewing the policy details, you can view contracts associated with the policy, financial transactions related to the contract, invoice schedule for the contract, billable charges created for the contract, and the persons associated with the policy.

Statement Construct

The following changes are made to enhance the Statement Construct feature:

- **Increased the Limit on the Statement Construct** – Initially, you were able to consolidate financial details of up to 500 accounts and/or contracts using the statement construct. Now, the maximum limit has been extended from 500 to 1500; thereby allowing you to consolidate financial details of up to 1500 accounts and/or contracts.

Billing

The following changes are made to enhance the Billing feature:

- **Exclude from Stacking** – The **Account – Exclude bundle (C1_F_BEX)** is an account characteristic type used to indicate whether the account should be excluded while stacking billing quantities. If this characteristic type is set to **Y**, the account is excluded while stacking. However, if you create a customized characteristic type (for example, **STACK**) to provide the same functionality, the system does not exclude the account while stacking when the **STACK** characteristic type is set to **Y**. This technical issue has been resolved by adding the **Characteristic type for Account Exclusion for Aggregation** parameter in the **C1_RATEVALUE** and **C1_RATE_STEP** algorithm types. We recommend that you update the parameters in the corresponding algorithms.
- **Display Exchange Rate** – To store the exchange rate used for currency conversion as a characteristic in the **Bill Segment Calc Line Characteristics** screen, the **Characteristic Type for Exchange Rate** parameter is added in the **BS-CRE-PRICE** and **C1-GENBSEGPA** algorithm types. We recommend that you update the parameters in the corresponding algorithms.
- **FT GL Extension** - In case where the account's invoice currency and the division's base currency were different, the system was not accurately picking up the exchange rate during currency conversion. To resolve this issue, the following two algorithm types are created:
 - **C1-SATPBLPPS** – This algorithm type will create FT GL extension records for bills to record the equivalent financial amount in the division's base currency. You need to create an algorithm of this algorithm type and attach it on the Post-Processing (Billing) algorithm spot of the contract type.
 - **FTFREZFTGLEX** - This algorithm type will create FT GL extension records for adjustments and payments to record the equivalent financial amount in the division's base currency. You need to create an algorithm of this algorithm type and attach it on the FT Freeze algorithm spot of the customer class.
- **Recurring Bill Segments** - The system now allows you to create recurring bill segments at the intervals defined in the bill period or at the set policy invoice frequency. However, the policy invoice frequency is used in combination with the contract start date to arrive at the dates when the recurring bill segments must be created.

Promise to Pay

Initially, this feature was called **Pay Plan** in the **Collections** module. It is now renamed to **Promise to Pay**. The following changes are made to enhance the Promise to Pay feature:

- Initially, when you created a promise to pay, it was created with the **Active** status. Now, when you create a promise to pay, it is created with the **Pending** status. Only when the start date is equal to the current date, the status of the promise to pay is changed to **Active**.
- Using the **Generate** button in the **Promise to Pay** screen, you can now automatically generate a payment schedule based on the following parameters:
 - Number of Repayments
 - Repayment Value
 - Frequency
 - Repayment Start Date
- The following algorithm spots are added in the **Promise to Pay Type** screen:
 - **Validation** – Used to validate a payment schedule.
 - **Generation** – Used to generate a payment schedule.
 - **Active** – Used to execute a business logic when the status of a promise to pay changes to **Active**.
 - **Kept** - Used to execute a business logic when the status of a promise to pay changes to **Kept**.
- The Promise to Pay Monitor (formerly, known as Pay Plan Monitor) is enhanced to:
 - Apply payments to future scheduled payments
 - Provide additional grace days (i.e. grace days defined in addition to the one defined in the pay method) via an algorithm
 - Provide threshold limit on the payment via an algorithm

Overdue Monitor

The Overdue Monitor process is enhanced to do the following:

- An appropriate case type is determined based on the delinquent account's details and a case is created using the case type.
- If any case type is no longer valid for an account, the system searches for open cases created using that case type, changes the status of those cases to **Closed**, and then creates new cases using the new case type.
- If an account is no longer delinquent, the status of all the cases created for the account is changed to **Closed**.

Rules engine is used to define the rules which are used in the Overdue Monitor process to determine the case type.

Technology Upgrade

To upgrade to the Oracle Revenue Management and Billing release 2.2.4.0, existing customers will have to first upgrade to Oracle Revenue Management and Billing Framework Version 2.2.0. For more information, refer to *Oracle Revenue Management and Billing Upgrade Guide*.

User Interface (UI) Level Changes

The following table lists changes made to the existing screens in Oracle Revenue Management and Billing:

Screen	Changes
Banking Control Central	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Additional query option named Additional Account Details is added which allows you to perform advanced search for an account. • The Account Number field is replaced with the Primary Account Identifier field in the Search Criteria section.
Manage Products	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Create Product and the Edit Product zones are removed from the screen. • The Edit column is added in the Search Products zone. On clicking the Edit icon in the Edit column, you can edit the details of the product. • The Add link is added in the upper right corner of the Search Products zone. On clicking the link, you can create a new product or bundle. • When you select a predefined characteristic type from the Characteristic Type list, the Search icon appears corresponding to the Characteristic Value field. On clicking the Search icon, you can search for a predefined characteristic value. • The description of the characteristic value appears when you specify the value for a predefined characteristic type. • While creating or editing a product or a bundle, a tab based screen appears where you can also define division-specific product characteristics.

Screen	Changes
Manage Price Lists	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Create Price List and the Edit Price List zones are removed from the screen. • The Edit column is added in the Search Price List zone. On clicking the Edit icon in the Edit column, you can edit the details of the price list. • The Add link is added in the upper right corner of the Search Price List zone. On clicking the link, you can create a new price list. • The Parent Price List Description and the Parent Price List Effective Date fields are added in the Search Price List zone. • The Parent Price List Description, Parent Price List Effective From Date and the Parent Price List Effective To Date columns are added in the Search Price List zone. • While creating or editing a price list, a tab based screen appears where you can also define price list hierarchy. • When you select a predefined characteristic type from the Characteristic Type list, the Search icon appears corresponding to the Characteristic Value field. On clicking the Search icon, you can search for a predefined characteristic value. • The description of the characteristic value appears when you specify the value for a predefined characteristic type.
Product Relationship Maintenance	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Edit Product, Search Products to Assign, and the Products – Add/Edit zones are removed from the screen. Instead, the Product Information zone is added in the screen. • The Add/Edit link is added in the upper right corner of the Assigned Products zone. On clicking the link, you can add or remove products from the group or bundle. • While adding a product to a group or a bundle, you can search for a product by clicking the Search icon corresponding to the Product field.

Screen	Changes
Price List Assignment (Account), Price List Assignment (Customer)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Edit Price List Assignment and the Assign Price List zones are removed from the screen. • The Historical Assigned Price Lists zone is added in the screen. • The Edit column is added in the Assigned Price Lists and the Historical Assigned Price Lists zones. On clicking the Edit icon in the Edit column, you can edit the details of the price list assignment. • The Priority, Price List Inheritance, and the Assignment Status columns are added in the Assigned Price Lists zone. • The Assign column is added in the Search Price List to Assign zone. On clicking the Assign icon in the Assign column, you can assign the price list to the account or the customer. • The Priority, Price List Inheritance and the Assignment Status fields are added.
Add Product Pricing, Override Product Pricing, Edit Assigned Pricing	<p>The following changes are made to these screens:</p> <ul style="list-style-type: none"> • The Pricing Status, Ignore Transaction, Do Not Aggregate Transaction and the Schedule fields are added in these screens. • When you select a predefined characteristic type from the Characteristic Type list, the Search icon appears corresponding to the Characteristic Value field. On clicking the Search icon, you can search for a predefined characteristic value. • The description of the characteristic value appears when you specify the value for a predefined characteristic type. • Initially, when you defined single tier with the maximum value as blank (for example, 0 to BLANK), an error occurred. Now, to resolve this issue, the system will automatically replace the blank space with 9999999999999999.99.
Manage Exchange Rates	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Initially, when you searched for exchange rates, up to 300 records that match the search criteria were displayed. Now, the limit has been extended to 3000; thereby allowing you to view up to 3000 records that match the search criteria.

Screen	Changes
Division	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Account Identifier Types tab is added which allows you to associate account identifier types with a division. • The Product Characteristics tab is added which allows you to define division-specific product characteristics.
Approve	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Approve button is renamed to Accept Changes, the Reject button is renamed to Return to Submitter, and the Cancel button is renamed to Revert to Original. • The Cancel button is added which helps to exit from the screen.
Approve Price Assignment	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • In the Search Criteria section, the Customer ID field is replaced with the Customer Identification Type and the Customer Identification Value fields. • In addition, the Transaction ID field is added in the Search Criteria section. • In the Search Results section, the Customer ID column is renamed to Customer Identification Value. • The Approve button is renamed to Accept Changes, the Reject button is renamed to Return to Submitter, and the Cancel button is renamed to Revert to Original. • The Cancel button is added which helps to exit from the screen.
Modify Price Assignment	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • In the Search Criteria section, the Customer ID field is replaced with the Customer Identification Type and the Customer Identification Value fields. • In addition, the Transaction ID field is added in the Search Criteria section. • In the Search Results section, the Customer ID column is renamed to Customer Identification Value.

Screen	Changes
Resolve Price Assignment	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • In the Search Criteria section, the Customer ID field is replaced with the Customer Identification Type and the Customer Identification Value fields. • In addition, the Transaction ID field is added in the Search Criteria section. • In the Search Results section, the Customer ID column is renamed to Customer Identification Value.
Approval Workflow Settings	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • If the C1-REGENUI application service is added in the user's user group, only then the user can automatically regenerate the Input and Display UI maps associated with a group. Otherwise, an error message is displayed.
Invoicing Group Maintenance — Add/Edit, Invoicing Group Information	<p>The following changes are made to these screens:</p> <ul style="list-style-type: none"> • The Cancel button is renamed to Remove Member in the Edit Member Account Assignment zone.
Insurance Control Central	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Additional query option named Policy is added which allows you to search for a policy.
Control Central (Policy Information)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Policy Nominee, Policy Nominee Details, and the Policy Cancellation zones are removed from the screen. • The Policy Contract Details, Policy Billable Charges, and the Policy Person Summary zones are added in the screen.
Control Central (Account Information)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Account Policy Summary zone is removed from the screen. • The Policies Linked to Account, Policy Contract Details, Account Invoice Schedule, and the Account Invoice Schedule Details zones are added in the screen.

Screen	Changes
Pay Plan	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Premium Bill Amount, Premium Bill Amount Type, and the Bill Fee Amount columns are removed. Instead, the Charge Type and the Amount columns are added. • When you edit an invoice schedule, the Status column indicates whether the contract charge has been cancelled or not.
Account	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Account Identifiers tab is added which allows you to define identifiers for an account. • The Bill Lead Days field is added in the Main tab.
Contract	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Policy ID field is added in the Main tab.
Billable Charge	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Charge Type, Recurring Flag, Frequency, and the Bill Period fields are added in the Main tab. • The Characteristics tab is added which allows you to define characteristics for a billable charge. • The Pricing Information tab is added. It allows you to view the details of the product pricing which is used for creating a billable charge.
Contract Type	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Contract Category tab is added which allows you to map a product, risk, or coverage (defined in the external system) to the contract type defined in Oracle Revenue Management and Billing.
Bill Segment Calc Line Characteristics	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Initially, during currency conversion, the appropriate exchange rate was picked up from the existing system, but the same was not revealed on any user interface. Now, the exchange rate used during currency conversion will be displayed as characteristic in the Bill Segment Calc Line Characteristics screen.
Pay Plan Type	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The screen is renamed to Promise to Pay Type. • The Validation Algorithm, Generation Algorithm, Active Algorithm, and the Kept Algorithm columns are added in this screen.

Screen	Changes
Pay Plan	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none">• The screen is renamed to Promise to Pay.• The Generate button is added in the Schedule Payments section.

Discontinued Features

No existing features are deprecated in the release 2.2.4.0. However, the following software is deprecated in this release:

- Oracle Utilities Customer Care and Billing V2.2.0 XAI Client

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 2.2.4.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

- Upgrade and Install
- Banking
- Insurance
- Collections
- Documentation

Upgrade and Install

9299899	HIBERNATE UPGRADE FROM 3.2.5 TO 3.2.7 IS MANDATORY
Issue	The current framework version (FW 2.2.0 and SP8 onwards) only supports Hibernate 3.2.7. Ensure that you have upgraded to Hibernate 3.2.7 before installing the application.
Workaround	None

Banking

10008523	SEARCH RESULT FOR EXCHANGE RATE NOT DISPLAYED CORRECTLY
Issue	Searching for the lowest precision rate (0.000000000000000001 /0.0000000000000000011/ 0.0000000000000000023) from the Search Exchange Rate zone results in displaying the rate in exponential format "IE -18".
Workaround	None

9680627	SYSTEM GENERATES BILL FOR THE FIRST EFFECTIVE DATE IF THE PERSON HAS TWO ACCOUNTS WITH DIFFERENT EFFECTIVE DATES
Issue	For a person having two accounts and two contracts with different effective dates, the system generates bill for the account that has earlier effective date. It does not generate bill for the second account with a later effective date.
Workaround	None

10301512	VALIDATION RULES FOR ADHOC CHARACTERISTIC TYPES ARE NOT TRIGGERED IN THE MANAGE PRODUCTS, MANAGE PRICE LISTS, ADD PRODUCT PRICING, OVERRIDE PRODUCT PRICING, AND EDIT ASSIGNED PRICING SCREENS
Issue	When you associate adhoc characteristic types with a product, price list, and a price assignment, validations defined for adhoc characteristic types are not triggered in the Manage Products, Manage Price Lists, Add Product Pricing, Override Product Pricing , and the Edit Assigned Pricing screens.
Workaround	None

10362250	UNABLE TO CHANGE THE DIVISION STATUS FROM ACTIVE TO RETIRED
Issue	When the approval workflow functionality is enabled, the status of a division will not get changed from Active to Retired .
Workaround	None

10377174	LOCALIZATION ISSUE WHEN MAKER AND CHECKER CHOOSE DIFFERENT LANGUAGES
Issue	When a maker and checker operate in different languages, a maker cannot see the approved transactions.
Workaround	Maker should login with a language that checker is using to see the approved transactions.

10635413	ADD TXN APPR CREATED FOR IG IF IG ADD INACTIVE BUT IG EDIT ACTIVE
Issue	If you want to deactivate the approval workflow process for invoicing group, you have to set the Active flag for both the groups (that is, C1IGADD and C1IGUPD) to N . If the Active flag for either of the groups is set to Y , the approval workflow process will be initiated while adding or updating an invoicing group.
Workaround	None

10623776	PRE-VALIDATION ERROR MSG FOR INVOICING GROUP EVEN IF PRE-VALIDATION IS OFF
Issue	If you set the Pre-validation flag for both the groups (that is, C1IGADD and C1IGUPD) to N , the validation will still be triggered before the approval workflow request is created.
Workaround	None

13423497	START DATE IN EFFECTIVE PRICING SCREEN IS INCORRECT
Issue	In case the account or customer avails the product pricing from the parent or grandparent price list, the start date displayed in the Effective Pricing screens is incorrect. Instead of showing the date when the product pricing is available to the account or customer, it shows the date when the product was assigned to the price list.
Workaround	None

13052225	ACCOUNT IDENTIFIER MANDATARY SWITCH NOT WORKING
Issue	If the Account Identifier Required option type of the C1_ACCTINFO feature configuration is set to Y , you will not be able to use the Add Account and Start Service feature available in the Person screen.
Workaround	None

13084901	BILLABLE CHARGE – PRICING INFO TAB, PRODUCT AND SUB-UOM DESCRIPTION IS NOT SHOWN
Issue	When you specify the product and TOU (issue currency) code in the Pricing Information tab of the Billable Charge screen, the description of the product and TOU does not appear corresponding to the respective fields.
Workaround	None

13435723	AGGREGATION BASED ON DO NOT AGGREGATE SWITCH ON TRANSACTION DETAIL
Issue	The Do Not Aggregation Switch field in the Transaction Details screen is non-functional.
Workaround	None

13441414	EXPORT TO EXCEL FUNCTIONALITY IS NOT EXPORTING THE PRICING PROPERLY
Issue	On clicking the Export to Excel link in the Effective Pricing screens, the data displayed in the Lower Limit , Upper Limit , PA Usage Flag , and the Parent Level columns in the Excel sheet is inaccurate.
Workaround	None

13389268	ISSUES IN DIVISION SPECIFIC PRODUCT CHAR TYPES
Issue	The UI maps do not support Foreign Key and Location characteristic types.
Workaround	None

Insurance

13430671	HANDLING TERMINATION AND UPDATION REASON CODES CORRECTLY FOR LEAD DAY ACCOUNTS
Issue	When you bill a customer in advance (i.e. use lead days) and specify the Update reason code during list bill reconciliation, bill segments created from billable charges having the recurring flag set to Frequency are not re-billed. In addition, when you bill a customer in advance (i.e. use lead days) and specify the Terminate reason code during list bill reconciliation, bill segments created from billable charges using SQL are not prorated during rebilling.
Workaround	None

13076957	INCLUDE BILL CORRECTIONS IN PAYMENT TRANSFER POST RECONCILIATION
Issue	During payment transfer via fiduciary contract, the bill correction (if any) is added to the fiduciary payment amount, but is not actually distributed to settle the receivable contract balance.
Workaround	None

13373245	CREATION OF TO-DO ENTRIES IN ABSENCE OF FIDUCIARY CONTRACT AND INSUFFICIENT PAYMENT AMOUNT
Issue	Once the status of the reconciliation object is changed to Ready To Pay , the system checks whether the group customer has a fiduciary contract associated with the account and whether there is sufficient balance in the fiduciary contract. In case, either of the validation fails, a To Do should be created to inform the user about the same. However, at present, a To Do is not created to handle the scenario.
Workaround	None

Collections

13395469	PAYPLAN TYPE: ALL ALGORITHM LINKS NAVIGATE TO THE BROKEN ALGORITHM
Issue	In the Promise To Pay Type screen, when you click the View icon corresponding to the Validation Algorithm , Generation Algorithm , Active Algorithm , and the Kept Algorithm columns, the Algorithm screen appears, but with the details of the broken algorithm.
Workaround	You can view the details of an algorithm by selecting A and then clicking Algorithm from the Admin menu.

13090650	CASE PORTAL DOESNT SHOW ALL ZONES WHEN A NEW MANUAL CASE IS CREATED
Issue	When you create a case manually and then navigate to the Case Portal tab, all the zones does not appear in the tab.
Workaround	You need to click the Refresh link in the Actions/Navigation area to view all the zones in the Case Portal tab.

13034287	INCORRECT CURRENCY SYMBOL DISPLAYED IN OVERDUE AMOUNT COLUMN/COLLECTION DETAILS
Issue	When the account's invoice currency and the currency defined in the Installation Options – Framework screen do not match, the currency symbol displayed in the Overdue Amount column of the Collection Control Central screen is incorrect.
Workaround	None

13374693	CHARACTERISTICS DATA RESET WHEN VALIDATION ERROR IS THROWN IN ACTION RESULT
Issue	While defining characteristics for an action result, when a validation error occurs, the values of all the characteristics (including the ones with valid values) are reset.
Workaround	None

Documentation

13446872	INDEX IN THE ONLINE HELP IS NOT WORKING
Issue	At present, you are not able to search for the content using the index entries in the online help.
Workaround	None

Technical Support

For any technical support, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.