Oracle® Communications Order and Service Management

Account Manager Online Help

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Contents

Preface

This Help describes how to use the Oracle Communications Order and Service Management (OSM) Account Manager to create and manage customer accounts.

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Getting Started with Account Manager

The Oracle Communications Order and Service Management (OSM) Account Manager enables you to create and manage customer accounts.

An account represents any organization or person and contains the information required to receive services and bills.

The Account Manager enables you to do the following:

- Create residential and business customer accounts.
- Find and update residential customer accounts.

Related Topics

Accounts Home Page

Creating Residential Accounts

Creating Business Accounts

Accounts Home Page

Use the Accounts Home page to do the following:

- Create and update customer account for an individual subscriber.
- Create a customer account for a commercial business.
- Search for and view the details of the accounts that you create, including a hierarchy of the accounts.

Related Topics

Creating Residential Accounts

Creating Business Accounts

Searching for Customer Accounts

To search for a customer account:

1. On the Accounts Home page, select **Search**.

   The Account Search page appears.

2. For **Account Type**, select the type of account.
3. Enter search criteria for the account that you want to find. See "Account Search Page and Dialog Box".

4. Click **Search**.

   Accounts that match your criteria appear. If more search results are available than can fit in the search results panel, click **Search More** to show additional results. By default, this list displays 5 results at a time. The number of results can be configured in OSM.

5. Click **View Details** for the account whose details you want to view.

   The Account Overview page appears.

Related Topics

Account Search Page and Dialog Box

Account Overview Page

Account Search Page and Dialog Box

Use the Account Search to find and view a customer account.

Account search fields can contain the asterisk (*) wildcard character, which matches a string of characters. For example, a value of 12* entered in the **Account Number** field returns all accounts whose numbers begin with the characters 12.

Field	Description
Account Type	(On the Account Search page only) Select the type of account.
Account Number	Enter the customer's account number.
Company Name or First Name/Last Name	Enter the account holder's name.
Street Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.
Country	Enter or select a country from the list.

Account Overview Page

Use the Account Overview page to view information about the account, for example the address or billing information.

You can open the Assets page and view the assets that are associated with the customer account. You can also view the payment hierarchy for the account.

Viewing Accounts in the Account Hierarchy

You can view the account's payment hierarchy and display information about any of the accounts in the hierarchy.

The account hierarchy represents the payment hierarchy, which means that a parent account is responsible for the payment of its child accounts.

To view accounts in the account hierarchy:

1. Click the **Account Hierarchy** icon.

The Account Hierarchy drawer opens and displays all the accounts in the hierarchy. If there is no payment hierarchy, a message appears that the hierarchy does not exist.

2. If you want to expand the hierarchy, click **Expand All**.
3. Click an account.

   The information about the account appears on the Account Overview page.

   > **Note:** You can close the drawer by clicking the **Account Hierarchy** icon again.

Viewing Assets

You can view the assets that are associated with the customer account. For more information about assets, see the online Help for the Assets page.

To view the assets associated with the customer account:

1. Click **Assets**.

   The Asset page appears.

2. Click an asset to view its details.

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Creating Residential Accounts

You create a residential customer account for an individual subscriber.

To create a residential customer account:

1. On the Accounts Home page, click **Residential Account**.

   The Create Residential Account: Customer Account page appears.

2. On the Customer Account page, enter the customer account information.

   To update an existing account, click **Search** to find and select an account to update.

3. (Optional) To create additional contacts for the account, click **Create Contact** and enter the contact information.

4. Click **Next**.

   The Payment page appears.

5. Specify the following:

   - Payment Responsibility
   - Billing Address
   - Billing Information

6. Click **Next**.

   The Summary page appears.

7. Review the information that you entered. You can return to a previous page if you want to make corrections.

8. Click **Done**.

   The account is created. You can view the payment hierarchy of the account, and assets that are associated with the account, on the Account Overview page. See "Account Overview Page".

Related Topics

Creating Business Accounts

Account Search Page and Dialog Box

Customer Page - Residential Account

Use the Customer page to create or update a residential account. You can enter new account information or search for and update an existing account.

For a description of the fields on this page, see the following:

- Contact Information Section
- Shipping Address Section
- Address Search Dialog Box
- Account Type and Currency Section
- Contacts Section

Contact Information Section

Use the Contact Information section to enter the customer's personal contact information.

Field	Description
Contact Name	Enter the first and last name.
Phone	Enter a phone number and select its type from the list. Add another phone number by clicking the **+** icon. You can add up to three phone numbers.
Email	Enter an email address.

Shipping Address Section

Use the Shipping Address section to enter the customer's shipping address. If the address exists in the system, you can click the **Search** icon and search for the address. See "Address Search Dialog Box" for more information.

Field	Description
Country	Enter a country or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.

Address Search Dialog Box

Use the Address Search dialog box to find an address.

Field	Description
Street Address	Enter a street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.
Country	Enter a country, or select a country from the list.

Account Type and Currency Section

Use the Account Type and Currency section to select the currency that the account will use.

Field	Description
Account Type	Displays the type of account that you are creating.
Currency	Select a currency from the list.

Contacts Section

Use the Contacts section to create a contact for a residential account by clicking **Create Contact**. If contacts already exist for the account, they are listed here. You can also remove and edit contacts.

Create Contact Dialog Box

Use the Create Contact dialog box to create a contact for an account. If the address exists in the system, you can click the **Search** icon and search for the address.

Field	Description
Contact Name	Enter the first and last name.
Contact Title	Enter the title.
Phone	Enter a phone number and select its type from the list. Add another phone number by clicking the **+** icon. You can add up to three phone numbers.
Email	Enter an email address.
Country	Enter a country or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.

Payment Page - Residential Account

Use the Payment page to specify payment details for the residential account. For a description of fields on this page, see the following:

- Payment Responsibility Section
- Billing Address Section
- Billing Information Section

Payment Responsibility Section

Use the Payment Responsibility section to assign payment responsibility to the residential account. If the address exists in the system, you can click the **Search** icon and search for the address.

Field	Description
The account pays for itself	Select if the account owner will be responsible for account payment. Deselect if another person will be responsible for account payments. Enter the contact information and shipping address of the responsible party or search for an existing account.
Contact Name	Enter the first and last name.
Phone	Enter a phone number and select its type from the list Add another phone number by clicking the **+** icon. You can add up to three phone numbers.
Email	Enter an email address.
Country	Enter a country or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.

Billing Address Section

Use the Billing Address section to specify the billing address. If the address exists in the system, you can click the **Search** icon and search for the address.

Field	Description
Same as Shipping Address	Select to make the billing address the same as the account's shipping address. Deselect to enter a billing address that is different from the shipping address.
Country	Enter a country or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.

Billing Information Section

Use the Billing Information section to enter billing details for the residential account.

Field	Description
Frequency	Select how frequently the account will be billed.
Day of the Month	Enter the day of the month (between 1 and 31) on which you want the account to be billed.
Payment Method	Select a payment method for the bill.
Delivery Method	Select the billing delivery method.
Bill Type	Select the type of bill to send.

Summary Page - Residential Account

Use the Summary page to review the account details that you entered. If any information is incorrect, you can go back to the relevant page, change the details, and then return to the summary page to review.

To complete creating the account, click **Done**.

3 Creating Business Accounts

Create a business customer account when you need to define service accounts for the main business account. Service accounts are useful when, for example, your company has several satellite offices and you want the main company to pay for the services for each satellite office. You create a business account for the company and a service account for each satellite office. You can create as many service accounts as you need.

To create a business account:

1. On the Accounts Home page, click **New Business Account**.

   The Create Business Account: Customer Account page appears.
2. Enter the customer account information.
3. Click **Next**.

   The Service Accounts page appears.
4. Create the service accounts that you want to associate with the customer account. Do the following for each service account to create:

   a. Click **Create Account**.

      The Create Account dialog box appears.

   b. Enter the details for the service account.

   c. Click **OK**.

      The service account appears in the list of service accounts.
5. Click **Next**.

   The Payment page appears.
6. In the Payment Responsibility section, select the option for how payment responsibility is assigned.
7. If you selected to have one account pay for all service accounts, do the following:

   a. From the **Select the payment account** list, select the account responsible for payment.

   b. If the account does not yet have billing information, enter the billing information in the Billing Information section.
8. If you selected to assign payment responsibility for each service account, you must specify the paying account for every service account. Do the following for each service account:

   a. In the Service Accounts table, select the service account whose payments will be another account's responsibility.

b. From the **Assign Payment Account** list, select the account that will be responsible for the selected service account's payments.

c. Click **Assign Payment Account**.

d. (Optional) To change the billing information for the account, click **Edit**.

9. Click **Next**.

   The Summary page appears.

10. Review the information that you entered. You can return to a previous page if you want to make corrections.

11. Click **Done**.

    The account is created. You can view the payment hierarchy of the account, and assets that are associated with the account, on the Account Overview page. See "Account Overview Page".

Related Topics

Creating Residential Accounts

Customer Page - Business Account

Use the Customer page to create a business account. For a description of the fields on this page, see the following:

- Company Name and Contact Information Section
- Address Section
- Legal Entity Section
- Account Type and Currency Section

Company Name and Contact Information Section

Use the Company Name and Contact Information section to enter the business customer’s company name and contact information.

Field	Description
Company Name	Enter a company name.
Contact Name	Enter the first and last name.
Contact Title	Enter the title.
Phone	Enter a phone number and select its type from the list. Add another phone number by clicking the **+** icon. You can add up to three phone numbers.
Email	Enter an email address.

Address Section

Use the Address section to enter the business customer’s address. If the address exists in the system, you can click the **Search** icon and search for the address. See "Address Search Dialog Box" for more information.

Field	Description
Country	Enter a country or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.

Legal Entity Section

Use the Legal Entity section to designate a legal entity for the account.

Field	Description
Legal Entity	Select if the business customer is also the legal entity. Deselect if the business customer is not the legal entity, and do one of the following: ▪ Search for an existing account to designate as the legal entity for this account. See "Account Search Page and Dialog Box" for more information. ▪ Enter the legal entity's information. In this case, an account for the legal entity is also created.

Account Type and Currency Section

Use the Account Type and Currency section to select the currency that the account will use.

Field	Description
Account Type	Displays the type of account that you are creating.
Currency	Select a currency from the list.

Service Accounts Page

Use the Service Accounts page to create service accounts that are associated to the business account that you are creating.

On this page, you can do the following:

- Create a service account
- Remove service accounts
- Edit service accounts

See "Create Account Dialog Box" for information about the fields on this page.

Create Account Dialog Box

Use the Create Account dialog box to enter details about the new account. If the address exists in the system, you can click the **Search** icon and search for the address. See "Address Search Dialog Box" for more information.

Field	Description
Contact Name	Enter the first and last name.
Contact Title	Enter the title.
Phone	Enter a phone number and select its type from the list. Add another phone number for the contact by clicking the **+** icon. You can add up to three phone numbers.
Email	Enter an email address.
Country	Enter a country, or select a country from the list.
Address	Enter the street address.
City/Town	Enter a city or town.
State/Province	Enter a state or province.
Zip/Postal Code	Enter a zip code or postal code.
Use this as my shipping address	Select if the shipping address is the same as the account address. Deselect to enter a shipping address that is different from the account address.

Payment Page - Business Account

Use the Payment page to specify payment details for the account. You can assign payment responsibility to the main customer account (the default) or to one or more of the service accounts associated with the customer account.

For information about the fields on this page, see the following:

- Payment Responsibility Section
- Billing Information Section

Payment Responsibility Section

Use the Payment Responsibility section to assign payment responsibility for the business account.

Field	Description
How would you like to assign payment responsibility?	Select **One account pays for all service accounts** to specify that one business account is responsible for payment. Select **Assign payment responsibility for each service account** to specify service accounts that are responsible for payment. See "Creating Business Accounts" for more information.
Select the payment account	If you selected **One account pays for all service accounts**, select the account from the list.

Billing Information Section

Use the Billing Information section to specify billing information for the account.

Field	Description
Frequency	Select how frequently the account will be billed.

Field	Description
Day of the Month	Enter the day of the month (between 1 and 31) on which you want the account to be billed.
Payment Method	Select a payment method for the bill.
Delivery Method	Select the billing delivery method.
Bill Type	Select the type of bill to send.

Edit Billing Profile Dialog Box

Use the Edit Billing Profile dialog box to edit the billing information for an account. See "Billing Information Section" for information about the fields in this dialog box.

Summary Page - Business Account

Use the Summary page to review the account details that you entered. If any information is incorrect, you can go back to the relevant page, change the details, and then return to the summary page to review.

To complete creating the account, click **Done**.