



Application Guide Communications Service Manager Business Edition

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1

Overview

1.1 Introduction to Service Manager

Service Manager enables customers of service providers to manage every aspect of their service relationship online. From a single convenient interface, customers can easily activate and manage subscriptions and order new products and services. Business customers are able to complete these activities for individual employees, as well as company departments and divisions or across their entire organization by navigating their billing or organizational structure hierarchies and selecting bulk operations.

1.1.1 Siebel's Customer Self-Service Solution

Customer self-service (CSS) gives customers direct control over the full range of account-related tasks, from finding information to executing transactions, all independent of the device used to engage with the payer. It empowers customers to perform functions that might otherwise go through a call center. CSS combines electronic presentment and payment (EPP), transaction processing, knowledge management, personalization and application integration technologies to create an integrated, natural and preferred starting point for all customer service issues.

Contact centers provide the key to unlocking potential benefits through self-service. Analyzing contact center statistics shows that the vast majority – often 60-90 percent – of customer service issues related to a customer's account. For this reason, Siebel's CSS product solutions provide direct access to detailed account information, and also interface with complementary front and back-office systems to provide access to a variety of account-related services.

1.2 Problem Statement

Communications business customers (B2B) manage from tens to tens of thousands of plans, activations, and profiles for the many services that they subscribe to. Similarly, individual consumers (B2C) and consumers with family plans also must be able to manage and change their services.

Communications customers typically change their service characteristics on a line-by-line basis, which makes the tasks difficult and time-consuming. Communications companies need to support hundreds of thousands to millions of registered users making changes to their accounts, services, and features.

The undesired result of these requirements is:

1. Increased call volume to customer care centers.
2. Poor end-customer satisfaction, which negatively impacts retention and new customer acquisition.

Siebel's online self-service solution is optimized for communications clients' business and consumer customers to provide an easy-to-use online self-service tools for managing rate plans, features, activations, and profiles.

1.3 Application Benefits

Service Manager provides the following benefits to the business:

1. Reduces Costs:
 - Reduced call volume to customer care centers.
 - Seamless integration with the client's legacy back-end systems.
2. Increase Customer Retention:
 - Increase customer satisfaction
 - Barrier to churn:
 - B2B hierarchies are loaded.
 - Historical usage patterns and costs are loaded.
 - Users are trained.
3. Increase Revenue
 - Attract new customers with competitive differentiator.
 - Single service management environment for B2C, B2E, and B2B customers.
 - Incentive to acquire greater percentage of customer communications service purchases because customer can use Service Manager as their preferred tool for consolidated management of their communications services.
 - Platform on which to up-sell new value-added services by offering stepped pricing to a customer based on how much of Service Manager's functionality is being used as well as related capability such as an integrated eCommerce catalog and shopping cart application, Rate Plan Advisor (RPA) and Customer Service Representative (CSR) Manager

The application provides the following benefits to customers:

1. Reduces Costs:

Decreases the time it takes to manage, add, remove, or modify one or more services simultaneously through a consolidated view.

2. Confirms Appropriateness of Services and Usage:

Simplifies understanding how customers are using communications services by viewing and managing services in a consolidated view. In addition to giving them comfort that they are reducing service errors, they can consolidate and manage their services to be the most appropriate for their usage.

1.4 Siebel Self-Service Suite

The Siebel Self-Service Suite is a set of packaged software solutions that enable service providers to realize the full benefits of customer self-service and e-Billing.

The suite includes a rich set of applications and functionality that give providers a complete multi-channel customer-self service capability. The suite includes packaged solutions for:

- e-Billing and Payment
- Service Management
- Reporting and Analytics
- Rate Plan Advice

Siebel solutions are packaged applications with sophisticated out-of-the-box capabilities. They can be tailored to meet specific customer requirements and business concerns, while establishing a solid platform for future business development.

The Siebel Self-Services Suite

Siebel Multi-Channel Customer Self-Service offerings include the following applications:



1.4.1 Billing Manager - Business and Consumer Editions

Siebel Billing Manager is a complete e-billing application for service providers that gives business and consumer customers valuable and convenient access to their bills along with the ability to easily make online payments.

1.4.2 Service Manager

Siebel Service Manager enables business and consumer customers of service providers to manage every aspect of their service relationship online. From a single convenient interface, customers can easily activate and manage subscriptions, order new products and services, and report and resolve problems. Business customers are able to complete these activities for individual employees, as well as company departments and divisions, across the entire organization.

1.4.3 Billing Analytics

Billing Analytics is a reporting solution for business customers that empowers both individual employees and business managers to analyze and understand their costs and usage by investigating and identifying trends and patterns across multiple views of their own unique organization.

1.4.4 Rate Plan Advisor

Siebel Rate Plan Advisor is a web-based application that recommends the ideal rate plan for service subscribers in real-time. Individual consumers as well as large businesses can analyze their actual historical voice/mobile/data usage, find the best-fit rate plans, and compare the features offered by those plans. With its intuitive wizard user interface, RPA quickly guides end-customers or customer service representatives through the entire analysis process. In addition, a service provider's customer care and marketing groups can also use RPA to identify pre-churn subscribers, simulate new rate plans, and run predictive analytics.

2

Business Processes and Application Logic

2.1 Overview

Service Manager is designed specifically for communication companies and has been optimized to quickly return summary information on large volumes of data. The user can easily change the scope of their service requests from a single line to all lines within a consolidated billing environment by graphically changing their position within their hierarchy, sort on any column displayed, and present a printer friendly transaction confirmation for the customers' records. Every service request is assigned a tracking number, which allows the customer to monitor the status online.

The objective of the Service Manager application is to provide the customer self-service infrastructure necessary to submit a change to a current account, manage telephone service, and manage subscriber profiles, as a stand-alone application or as a component within Siebel's Service Manager.

The main features of Service Manager are:

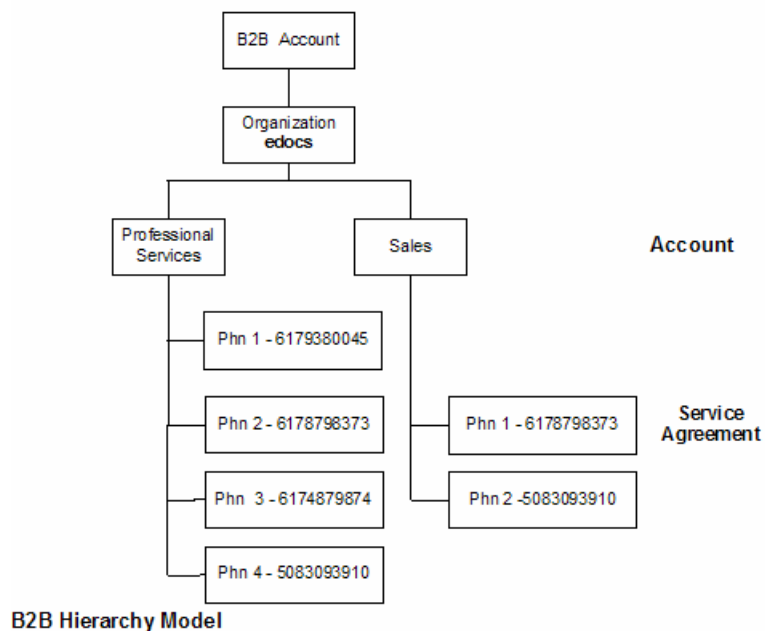
- **Manage Account** – Provides a customer with the ability to change rate plan, add or remove features, change device associated with a phone number (change DSN, device serial number), change telephone number, port a telephone number from another provider.
- **Manage Service** – Provides a customer with the ability to activate or deactivate a telephone number, suspend or resume service, change voice mail password, and change subscriber profile information.
- **Hierarchy Scope Selection** – A B2B customer may select one line, all the lines within a group or cost center from an organizational structure hierarchy, or all lines within an account from a billing hierarchy to determine the scope of the self-service action.
- **Individual and Bulk Operations** – A single line customer such as B2C consumer and B2E business single line customers are sent directly to take action on their individual service, plan, features, activation or profiles since there is only one telephone number associated with the account. B2C Family plan accounts or B2B customers may select between 1 and n services service agreements on which to perform the same service agreement.

2.1.1 Hierarchy Overview

The hierarchy navigation enables business users pick from different named hierarchy structures, navigate their tree structure, and select a node position in order to filter the service agreements displayed in the Service Manager service request screens.

There are two types of hierarchies:

- **Billing Hierarchy:** Billing hierarchies are created automatically at the time the bill is loaded and includes only information from within the bill. For instance, a simple billing hierarchy might include only two levels: account (an account defines the payment responsibility for service usage) and service agreement (defined by a phone number). A complex billing hierarchy could contain an unlimited number of accounts and sub-accounts.
- **Non-Billing Hierarchy:** A user can create an unlimited number of non-billing hierarchies in order to organize usage and charges to consolidate payments or manage usage and usage charges in their organization.



Enabled Hierarchy Functionality

The existence of these hierarchies enables the following Service Manager functionality (explained in more detail in the “Set Hierarchy Position” use case).

- **Navigate Hierarchy:** The business user expands tree nodes to navigate through the hierarchy structure to define the user’s scope. Depending on which hierarchy is selected and at what node the user’s hierarchy context position is, the system displays only service agreements associated with the user’s node and below in the tree structure.
- **Search Hierarchy:** Enables the user to search for folders, accounts, or phone numbers in an organizational hierarchy.
- **Set Position:** Users perform this action to set their context and limit the service agreements displayed in any of the Service Manager service transaction screens.

3 Site Web Flows

The site web flows describe the essential interaction between the user and the system. The system is based on Service Manager and a customizable set of screens. The User Interface (UI) consists of a set of screens and navigation elements with interfaces (APIs) to Service Manager platform functions. The user presentation is driven by a set of HTML templates (Tiles). The navigation and control is driven through a standard Java framework (Struts).

Each use case specifies a set of activities performed by a user, or other type of actor, to complete a task. Use cases describe the flow of contingent actions the user takes.

There may be many possible paths through a site web flow:

- **The Main Path** – This describes the successful completion of the use case without encountering any exceptional conditions.
- **Alternate Paths** – These describe one or more related paths through the use case (for example, add, edit and delete) that are considered not part of the common flow of the use-case.
- **Exception paths** – These describe exception conditions and how they are handled; [E1], [E2], [E3]...
- **Business Rules** – These describe logical decisions that determine behavior and are listed separately where appropriate; [B1], [B2], [B3]...

A use case may also interact with external systems, which are systems that are outside the boundary of the Service Manager implementation.

3.1 Actors

ACTOR	EXAMPLE ROLES	NOTES
Administrator	Corporate Communications Manager View, Pay, Order, Approve, Manage hierarchy & Modify company profile	A business customer responsible for determining if the company is receiving the proper service from the provider. Also responsible for managing and administrating their organization accounts, devices, rate plans and services.
B2B - Business User	View, Pay & Order	A business customer responsible for managing accounts and ordering devices, rate plans and services.

ACTOR	EXAMPLE ROLES	NOTES
B2B - Corporate Liable	View Only	A business customer uses the B2B application to view their accounts and/or devices.
B2B - Subscriber	View & Pay	A business customer uses the B2B application to view and pay their accounts.
B2E - Subscriber	View, Pay and Order	A business customer uses the B2B application to view their accounts and devices and provide payment when necessary.
User	CSR	Customer Service Representative

3.2 General Use Cases

There are functions that appear on many pages throughout the Service Manager application.

The following use cases detail common functionality applied to one or more pages:

- **Cancel** – Cancels the process on a series of one or more pages.
- **Back** – Button that enables the user to return to the previous screen to make changes and then proceed.
- **Display Error Message** – System re-displays page with an error message.
- **Page Through Data in a Table** – Buttons that enable the user to page through large amounts of data.
- **Sort Data in a Table** – Feature that lets a user sort data by a single column header.
- **Printer Friendly** – Prints a confirmation page.
- **Set Hierarchy Position** – Feature that lets a user navigate tree hierarchy structure and select a position to set the scope of service agreements that are displayed for selection at the beginning of each Service Manager transaction.
- **Search & Select Service Agreement** – Displays a list of service agreements for selection at the beginning of all Service Manager use cases and also lets the user filter this list and select one or more service agreements.

3.2.1 Cancel

Name:	Cancel
Brief Description:	Describes the navigational experience when a Cancel action is selected.

Main Path:	<ol style="list-style-type: none"> 1. User selects a Cancel action. 2. System returns User to first page of current sequence of pages. [E1] 3. System clears any data or selections made by the User. 4. Use Case Ends.
Alternate Paths:	None
Exception Paths:	[E1] User encounters a system error: <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	None
Notes:	Invoking the cancel action returns the first sequence of the use case.

3.2.2 Back

Name:	Back
Brief Description:	Describes the navigational experience when a back action is selected. Back buttons are only present on select screens. They enable the user to return to the previous screen to make changes and then proceed.
Main Path:	<ol style="list-style-type: none"> 1. User selects a back action. 2. System returns User to the previous page [E1] 3. Data previously displayed on the page is displayed. 4. User optionally performs any function available on the screen 5. Use Case Ends.
Alternate Paths:	None
Exception Paths:	[E1] User encounters a system error: <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	None
Notes:	None

3.2.3 Display Error Message

Name:	Display Error Message
Brief Description:	System redisplay page with an error message.
Main Path:	<ol style="list-style-type: none"> 1. User performs an action that cannot be completed. 2. System determines required error actions. 3. System reads error message text from a configuration file. 4. System updates information on page as necessary. 5. System re-displays page with error message (displayed in Red) below navigational bars. 6. Use Case Ends.
Alternate Paths:	None
Exception Paths:	None
Business Rules:	None
Notes:	None

System Error Screen:

The screenshot shows a Siebel web application interface for changing a subscriber profile. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main content area is titled 'Change Subscriber Profile' and includes a progress indicator (1, 2, 3, 4) where step 2 is active. The user's company is 'CellTec' and the user is 'Anne Green'. The hierarchy is 'Billing Accounts' and the position is 'Billing Accounts'. A message prompts the user to 'Enter the Subscriber Profile details and continue.' A red error message states 'Please enter a valid First Name'. Below this, a 'Subscriber Profile' tab is selected, showing a form with fields for First Name, Last Name, Address, City, State, Zip/Postal Code, Email, Home Phone, and Work Phone. The 'First Name' field is empty, while the other fields contain data. At the bottom right, there are 'BACK', 'CANCEL', and 'CONTINUE' buttons. The Siebel logo is on the left, and a copyright notice is at the bottom.

Change Subscriber Profile

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Enter the Subscriber Profile details and continue.

Please enter a valid First Name

Activate Suspend Resume Deactivate Voicemail **Subscriber Profile**

Subscriber Details

First Name:

Last Name: Timoshenko

Address: 0 Pineswamp

City: Ipswich

State: MA

Zip/Postal Code: 01938

Email: Tamara.Timoshenko@c

Home Phone: 938-444-1212

Work Phone: 978-521-5970

BACK CANCEL CONTINUE

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3.2.4 Paging


Name:	Page through data in a table
Brief Description:	Large amounts of data are divided into page sets and each page set is presented on a single view.
Main Path:	<ol style="list-style-type: none"> 1. User selects single forward arrow. [A1] 2. System returns the next page of data. [E1] 3. User selects single backward arrow. [A1] 4. System returns the previous page of data. [E1] 5. User selects double forward arrow. [A1] 6. System returns the last page of data. [E1] 7. User selects double backward arrow [A1] 8. System returns the first page of data. [E1] 9. Use case ends.
Alternate Paths:	<p>[A1] User enters a number in the input box.</p> <ol style="list-style-type: none"> a) System returns the data on the inputted page number.
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] For data set that is divided into two or more pages, page must display number of the current page and total number of pages, e.g., page 3 of 5. If the data set results to one page, page numbering is suppressed.</p> <p>[B2] Report Total line is always displayed at the bottom of the table on each page.</p> <p>[B3] The number of lines displayed on each page is configurable and will be set initially to 10.</p>
Notes:	None

3.2.5 Sort Data in a Table

Name:	Sort data in a table
Brief Description:	Enables user to sort the data in a specific table.
Main Path:	<ol style="list-style-type: none"> 1. User selects a sorting link (a column header that supports sorting) 2. System sorts the data in the table by the selected column in ascending order. 3. User selects the same sorting link. 4. System sorts the data in the table by the selected column in descending order. 5. User selects a different sorting link. 6. System sorts the data in the table in by the newly selected column in ascending order.
Alternate Paths:	None
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	None
Notes:	If there are enough line items displayed to cause paging to be enabled, the sort will occur over all data, not just the data currently displayed on the page.

3.2.6 Printer Friendly Version

Name:	Printer Friendly Version
Brief Description:	A printer friendly version of the page is generated.
Main Path:	<ol style="list-style-type: none"> 1. User selects Printer Friendly action. 2. System opens a new window and displays a printer friendly version of the current view. [A1] 3. User clicks the Print link. 4. System displays a print dialog box to the user. 5. User selects the print settings in the print dialog and submits the print request. [A2] 6. User closes the printer friendly version and returns to the application. 7. Use Case Ends.
Alternate Paths:	<p>[A1] User closes the printer friendly view and returns to the original view</p> <ol style="list-style-type: none"> 1. System does not send anything to the printer and leaves the user viewing the application. <p>[A2] User closes the print dialog</p> <ol style="list-style-type: none"> 1. System does not send anything to the printer and leaves the user viewing the printer friendly page.
Exception Paths:	None
Business Rules:	None
Notes:	<p>Uses standard browser printer function.</p> <p>Printer friendly functionality is available on all confirmation screens.</p> <p>Printer friendly pages should not have any of the navigation information.</p> <p>The information that is presently shown to the user will be printed.</p>

 **CLOSE WINDOW**

Your change has been processed. Your tracking number is:100020

Selected Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL600				\$50.99

Included Features

Plan Features	Amount
CALLWAITING	Included
CALLERID	Included
VM	Included
FREENIGHTSWEEKENDS1000	Included

Optional Features

Features	Amount
MULTIMEDIAMAIL	\$9.95
TEXTMESSAGING	\$5.95
THREWAYCALLING	\$3.45
CALLFORWARDING	\$6.45
Estimated Cost Per Plan	\$76.79

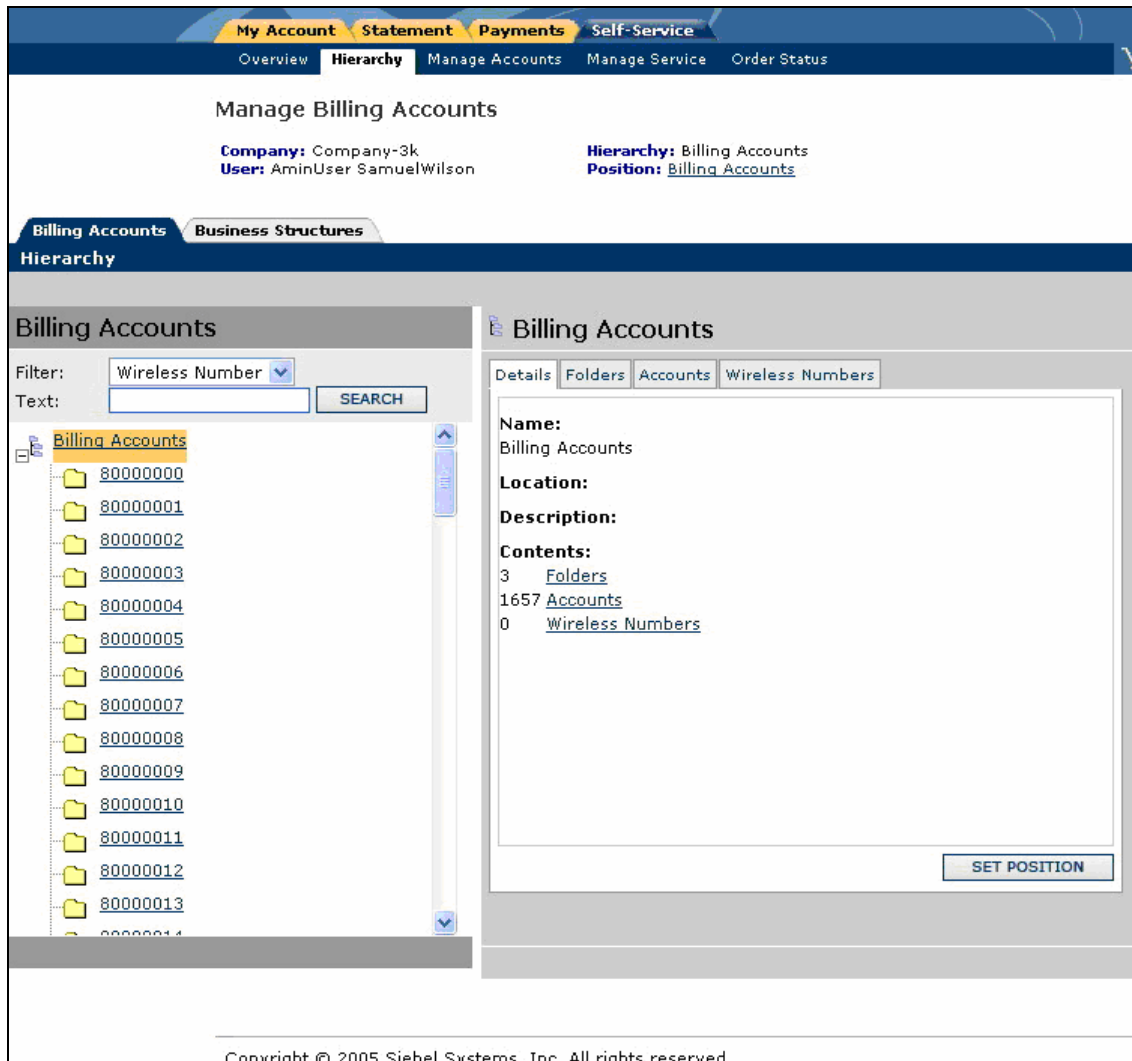
3.2.7 Set Hierarchy Position

The hierarchy use cases describe how to navigate and search the billing and non-billing hierarchies. The hierarchy functions described in this section are capabilities of the hierarchy module used in conjunction with Service Manager. All other hierarchy functions are described in the hierarchy application guide.

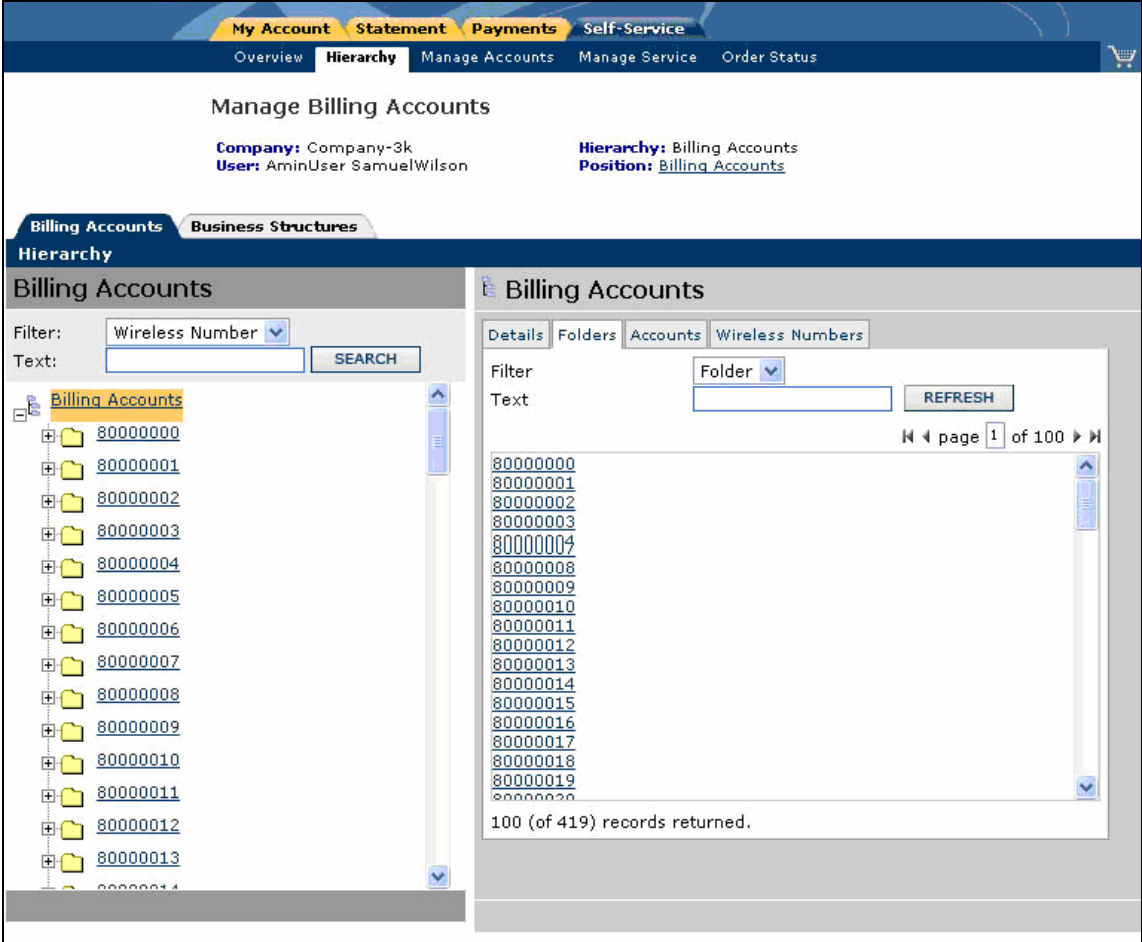
Name:	Set Hierarchy Position
Brief Description:	<p>This use case describes the requirements to navigate and search the billing hierarchy or business structure and ultimately select a folder, account or service agreement to be viewed in a statement or report screen.</p> <p><i>Rationale:</i> Selecting this position sets the scope of what accounts and/or service agreements are displayed for selection during electronic bill presentment and reporting. A user can also get to this screen if the display thresholds are exceeded for the number of accounts or service agreements that can be practically displayed in the CCM (change control module) drop-down fields.</p>
Actors:	Admin, Manager
Entry Points	<ol style="list-style-type: none"> 1. CCM (Context Changing Module) 2. Hierarchy and hierarchy position hyperlink on the top right of the any of the pages within the Self-Service application.
Main Path:	<ol style="list-style-type: none"> 1. Initial Display <p>The billing hierarchy is displayed (in accordance to the Left Pane Limit threshold as noted in the Large Hierarchy Configuration use case.). If the hierarchy position has been already selected within this session, that node is displayed as selected. If none has been selected, then the first level of the billing hierarchy is expanded.</p> 2. Expand Tree <ol style="list-style-type: none"> a. User expands nodes in order to navigate down into different branches of the tree. The hierarchy will be rendered with the Left Pane Limit business rule as noted in the Large Hierarchy Configuration use case. b. When expanding folders in left pane, subfolders, accounts and service agreements will be shown. c. User selects a new position in the hierarchy. [A2] d. System displays the selected node details in the node properties window. 3. Set Position <ol style="list-style-type: none"> a. User continues to navigate the tree, selects a folder, account, or service agreement and selects Set Position action. [B2] b. System persists this hierarchy name and position throughout the user's session, displaying the new selection at the top of every screen. <p>The implication of this persistence is that when the user views their billing data the same hierarchy filter will be applied to the invoice</p>

	<p>content.</p> <p>4. Return to Statement or Report Screen</p> <p>After setting the position, the user is returned to the screen the user was on before initiating this use case (likely a statement or report screen)</p>
<p>Alternate Paths:</p>	<p>[A1] User selects Cancel action:</p> <ol style="list-style-type: none"> 1. User is returned to the screen the user was on before initiating this use case. The hierarchy position context is not changed. <p>[A1] Search</p> <p>This functionality should be similar to what is deployed in the manage hierarchy screens.</p> <ol style="list-style-type: none"> 1. User selects search criteria (account, phone number), enters search value, and selects search action. 2. Search results are displayed 3. User selects a folder, an account, or a phone number and selects the “set position” action. 4. System performs remaining steps according to the main path <p>[A2] Right Pane Threshold Exceeded</p> <p>If the user selects a folder in the left pane and the {Display List Threshold} in the right pane is exceeded, only the threshold limit is displayed. To avoid confusion the following warning message is displayed in red at the bottom of the right pane at all times.</p> <p>“Threshold exceeded. X (of y) records displayed”</p> <p><i>Note:</i> This warning message is generic and the same business logic and message can be applied to all business structure right panes (folders, accounts, service agreements).</p>
<p>Exception Paths:</p>	<p>[E2] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
<p>Business Rules:</p>	<ol style="list-style-type: none"> 1. Any unassigned accounts or contracts are attached on the top of the hierarchy. 2. Hierarchy Access Control: Users can only view hierarchies to which they have been assigned and positions at or below the positions to which they have been assigned.
<p>Notes:</p>	<p>If an Admin User has not set a hierarchy position when they first view their statement data, the system presents them with the first account to which they have access. The CCM module provides the user with a link to Set Hierarchy Position for them to alter the account(s) they are viewing.</p>

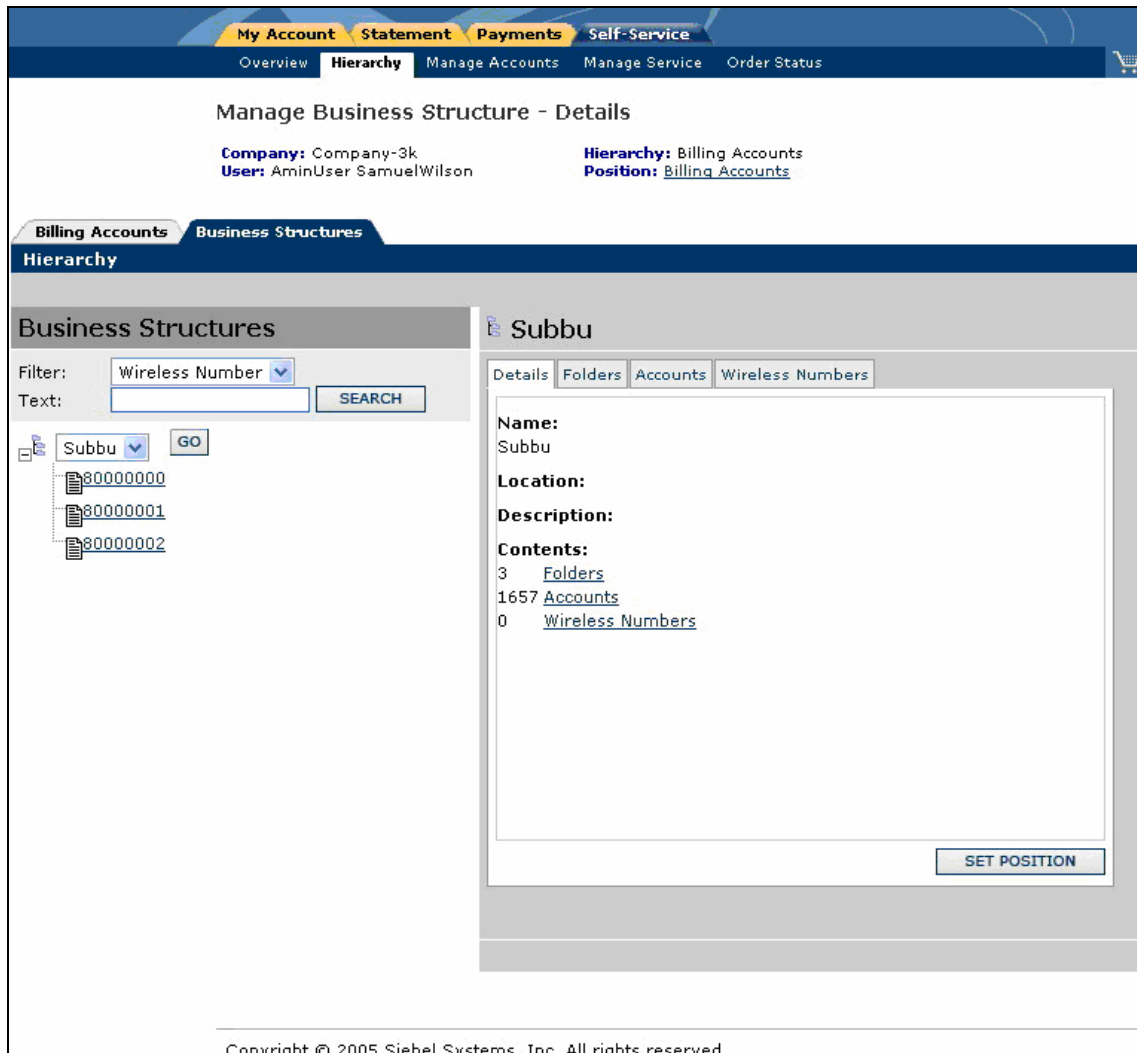
Manage Billing Accounts Screen:



Set Hierarchy Position Screen:



Hierarchy Search Result Screen:



Set Position Confirmation Screen:

The screenshot displays the 'Manage Business Structure - Details' page. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main content area shows the company name 'Company-3k' and user 'AminUser SamuelWilson'. The 'Hierarchy' is set to 'Billing Accounts' and the 'Position' is 'Billing Accounts'. A sub-navigation bar highlights 'Billing Accounts' and 'Business Structures'. The 'Business Structures' section includes a search filter for 'Wireless Number' and a 'SEARCH' button. A tree view on the left shows a folder 'Subbu' with three sub-items: '80000000', '80000001', and '80000002'. The 'Subbu' folder is selected, and a 'GO' button is next to it. The main content area for 'Subbu' has tabs for 'Details', 'Folders', 'Accounts', and 'Wireless Numbers'. The 'Wireless Numbers' tab is active, showing a list of account numbers from 80000003 to 80000022. The list is filtered by 'View: Unassigned' and 'Filter: Account Number'. A 'REFRESH' button is present. The list shows 100 records on page 1 of 100. The text '100 (of 419) records returned.' is displayed at the bottom of the list.

3.2.8 Search & Select Service Agreement

Name:	Search & Select Service Agreement
Brief Description:	This generalized use case describes how the list of service agreements are displayed for selection at the beginning of all CSM use case and how the user can filter this list and select one or more service agreements. For all SSM use cases that have a workflow, this is step/screen 1.
Actor:	Administrator, CSR
Main Path:	<ol style="list-style-type: none"> 1. Filtered service agreement's On the first screen of each use case, a list of service agreements appears to enable the user to select one or more service agreements on which to perform a service transaction. <ol style="list-style-type: none"> a. Hierarchy: If the user previously selected a hierarchy position from the hierarchy screen, then only service agreement's under that selected hierarchy position will be displayed. b. Each use case could utilize additional filters, such as only showing service agreements with Suspend status for the "Resume Service" use case. 2. Select Search By Category User optionally selects a search category from the "Search By" drop down field and selects the Go action. <ol style="list-style-type: none"> a. Phone Number b. Subscriber Last Name c. Rate Plan Group d. Device Type e. Status 3. Search Value Field Refreshed System refreshes the page and displays "search value" field. This field should appear as either a drop down or text field. 4. Enter Search Value User selects or enters "search value" and selects search action. <ol style="list-style-type: none"> a. Phone Number [text field] b. Subscriber Last Name [text field] c. Rate Plan Group [dropdown field] This dropdown works a little differently than the other dropdowns because there can be more than one value dropdown box to further narrow the search criteria. <ul style="list-style-type: none"> ▪ User selects a rate plan group from the dropdown field ▪ User either: <ul style="list-style-type: none"> ○ Accepts the default "Rate Plan Group" search by criteria option and selects search to display all service agreements of the selected rate plan group. ○ Selects the "Individual Rate Plan" search by criteria option and selects search to display a drop down box containing only the rate plan names from the previously selected rate plan group. User selects a specific rate plan name and search to display all service agreements of the selected rate plan name. d. Device Type [dropdown] e. Status [dropdown] 5. Display service agreement's

All service agreement's matching the previous filter criteria (main path step one) and service agreement's whose search value contains the text entered (or selected) in the "search by value" field are displayed.

Note: For text fields, the match logic is "starts with" or "exact match". Drop down fields use "exact match" logic.

Columns displayed include.

1. Subscriber Name [primary sort]
2. Phone Number
3. Rate Plan
4. Device
5. Status
6. User selects a service agreement and selects one (or more for bulk) service agreement(s) and the continue action.
7. Use case ends.

Alternate Paths:

[A1] Visually differentiate service agreement's with outstanding transactions

1. If any service agreements have any of the following service requests with an incomplete status (any status other than successfully completed or failed), the service agreements will be visually differentiated (grey) and will not have active check boxes to prevent the user from being able to select them.
 - Add/Delete Features
 - Change Device
 - Change Phone Number
 - Port Number
 - Activate service
 - Suspend service
 - Resume Service
 - Deactivate Service

[A4] Visually differentiated old service agreement's

If any of the service agreement's have been successfully changed to new service agreement's, these old service agreement records will be visually differentiated (grey) and will not have active check boxes to prevent the user from being able to select them.

[A5] Bulk selection from multiple pages

Rationale: The user needs to be able to select service agreements from multiple pages and at any time see a list of those service agreements selected.

The screen flow is identical to individual selection described in the main path except:

1. User selects more than one service agreement from more than one page.
2. At any point the user selects the continue button in step 2 to see the selected service agreements.
3. User can either
 - a. Select the remove action to remove any of the selected service agreements. This action should have the same impact as going back to the first screen, finding the service agreement on one of the pages, un-checking it, and selecting continue to return to step 2.
 - b. Choose the back action to return to step 1 and continue selecting/unselecting service agreements. When the user returns to step 1, all the previously selected service agreements should still be displayed.
 - c. Perform the actions required to complete step 2.

[A6] Remove one of multiple service agreements

Rationale: When viewing the list of selected service agreements from step 2, the user should be able to easily remove a record from the list without having to return the first selection screen and page through multiple screens to find the service agreement.

When viewing the list of selected service agreements on the second screen, the user selects the remove action and accepts the confirmation to remove the service agreement. If no service agreements remain selected, the user is returned to step 1 to selected service agreements.

[A7] Remove all Service Agreements

Rationale: Enable the user to remove all selected service

	<p>agreements with one action.</p> <p>This alternate path is implemented by selecting the cancel action which returns the user to step 1 with no service agreements selected.</p> <p>[A8] Sort Displayed Service Agreements Rationale: Enable the user to view service agreements with a common attribute different than the search by category.</p> <p>By clicking a column label, the user alternates between ascending and descending sorts.</p> <p>[A10] User continues without selecting a service agreement. System displays an error message and prompts to select a service agreement to perform any self-service action.</p> <p>[A11] Select all service agreements for the search. Rationale: Enables the user to select all service agreements with one action.</p>
<p>Exception Paths:</p>	<p>[E1] System displays “Search result not found” message.</p> <ol style="list-style-type: none"> 1. System prompts to select valid search criteria.
<p>Configuration Points:</p>	<p>Service agreements displayed in the selection screen is based on the users default hierarchy scope and the filter (configurable) for each self-service transaction.</p>
<p>Business Rules:</p>	<p>[B1] System makes an external call to the database, retrieves user details and displays ten records per page (or whatever number is configured for this use case). System also provides ability to sort the search results based column header labels.</p> <p>[B2] System persists the user's hierarchy scope throughout the session.</p>
<p>Notes:</p>	<p>System supports paging function. The number of user records displayed on each page is initially set to 10. System enables and displays paging icon if the search result has user records greater than 10.</p>

Select Service Agreement Screen:

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[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview | Hierarchy | **Manage Accounts** | [Manage Service](#) | [Order Status](#)

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements to change.

Rate Plan | **Features** | Change Number | Change Device | Port Number

Search Criteria

Search By:

[Multiple Selections](#)

Page of 7 ▶▶

Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input checked="" type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input checked="" type="radio"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

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Search for Service Agreements based on plan group:

The screenshot shows the Siebel Self-Service interface. At the top, there are navigation tabs: My Account, Statement, Payments, and Self-Service. Under Self-Service, there are sub-tabs: Overview, Hierarchy, Manage Accounts, Manage Service, and Order Status. The main heading is "Select Service Agreement".

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: Billing Accounts

Select Service Agreement

Rate Plan | Features | Change Number | Change Device | Port Number

Search Criteria

Plan Group: [Single Selection](#)

Page 1 of 7

Search Results (66 items)

Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input type="radio"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

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Search for Service Agreements based on rate plans:

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[My Account](#)
[Statement](#)
[Payments](#)
[Self-Service](#)

[Overview](#)
[Hierarchy](#)
[Manage Accounts](#)
[Manage Service](#)
[Order Status](#)

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** Billing Accounts

Select Service Agreement

[Rate Plan](#)
[Features](#)
[Change Number](#)
[Change Device](#)
[Port Number](#)

Search Criteria

Plan Group: **Plan Name:**

[Single Selection](#)

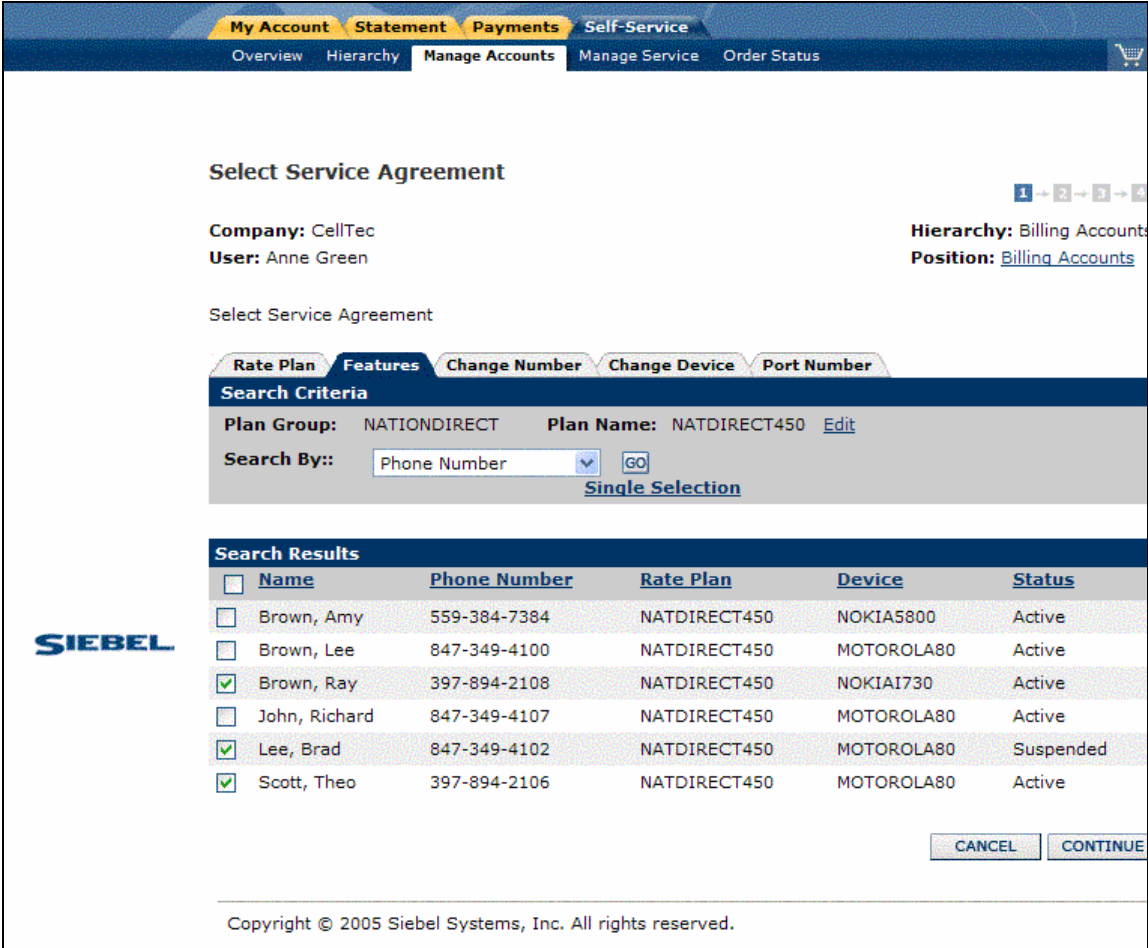
Page 1 of 7 >>>

Search Results (66 items)					
Name	Phone Number	Rate Plan	Device	Status	
<input type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active	
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active	
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active	
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active	
<input checked="" type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active	
<input checked="" type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active	
<input type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active	
<input type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active	
<input checked="" type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active	
<input checked="" type="radio"/> Brown, Amy	636-362-6232	REGION700	NOKIAI730	Active	

Page 1 of 7 >>>

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Select Service Agreement:



The screenshot shows the Siebel 'Select Service Agreement' interface. At the top, there are navigation tabs: 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below these are sub-tabs: 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main heading is 'Select Service Agreement'. On the right, there are breadcrumb-style links: '1 -> 2 -> 3 -> 4'. User information is displayed: 'Company: CellTec', 'User: Anne Green', 'Hierarchy: Billing Accounts', and 'Position: Billing Accounts'. A section titled 'Select Service Agreement' contains sub-tabs: 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. Below this is the 'Search Criteria' section, showing 'Plan Group: NATIONDIRECT' and 'Plan Name: NATDIRECT450' with an 'Edit' link. The 'Search By:' dropdown is set to 'Phone Number' with a 'GO' button and a 'Single Selection' link. The 'Search Results' section contains a table with columns: Name, Phone Number, Rate Plan, Device, and Status. The table lists six entries, with three checked. At the bottom right are 'CANCEL' and 'CONTINUE' buttons. The Siebel logo is on the left, and a copyright notice is at the bottom.

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Select Service Agreement

Company: CellTec
User: Anne Green
Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Select Service Agreement

Rate Plan Features Change Number Change Device Port Number

Search Criteria

Plan Group: NATIONDIRECT Plan Name: NATDIRECT450 [Edit](#)

Search By: Phone Number [Single Selection](#)

Search Results

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="checkbox"/>	Brown, Lee	847-349-4100	NATDIRECT450	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Brown, Ray	397-894-2108	NATDIRECT450	NOKIAI730	Active
<input type="checkbox"/>	John, Richard	847-349-4107	NATDIRECT450	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Lee, Brad	847-349-4102	NATDIRECT450	MOTOROLA80	Suspended
<input checked="" type="checkbox"/>	Scott, Theo	397-894-2106	NATDIRECT450	MOTOROLA80	Active

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View Service Agreements Selected in Bulk:

Select/DeSelect Features

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Edit features and continue.

Rate Plan | **Features** | Change Number | Change Device | Port Number

Optional Features				
Features	All	Some	None	Amount
TEXTMESSAGING 500	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$5.95
THREWAYCALLING	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	\$3.45
MULTIMEDIAMAIL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$9.95

Selected Service Agreements					
Name	Phone Number	Rate Plan	Device	Status	
Brown, Ray	397-894-2108	NATDIRECT450	Nokia i730	Active	Remove
Lee, Brad	847-349-4102	NATDIRECT450	Motorola 80	Suspended	Remove
Scott, Theo	397-894-2106	NATDIRECT450	Motorola 80	Active	Remove

BACK CANCEL CONTINUE

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3.3 Overview Use Case

3.3.1 Service Manager Overview

Name:	Service Manager
Brief Description:	The overview screen displays 'dashboard' metrics and provides quick links to self-service functions.
Actor	Admin User

<p>Name:</p>	<p>Service Manager</p>
<p>Main Path:</p>	<ol style="list-style-type: none"> 1. Admin user selects self-service tab. 2. System displays services overview page including: <ol style="list-style-type: none"> a) User name, company name, hierarchy name and the current position in the hierarchy. b) Displays new rate plans available. [A1] (Static image displayed to illustrate possible visions for how this screen could be used). c) Top 5 Service Agreements List of top service agreements with highest billings from most recent statement (from TBM overview screen) If the user clicks on any of the phone numbers, system invokes the "Change Rate Plan" use case with this service agreement selected. d) Link to rate plan advisor. [A2] (Until integrated in [A2] this should be just a static image displayed to illustrate possible visions for how this screen could be used). e) Search bar, to track service request status. [A3] f) Quick Links to the self-service actions. [A4] g) Recent Service Requests [A5] 3. Use case ends.

Name:	Service Manager
Alternate Paths:	<p>[A1] User clicks on new rate plans links.</p> <ol style="list-style-type: none"> 1. System invokes Manage Accounts > Change Rate Plan use case. <p>[A2] User enters tracking number and selects submit action.</p> <ol style="list-style-type: none"> 1. System invokes order status use case displaying the tracking number entered in the overview screen. <p>[A3] User selects a quick link.</p> <ol style="list-style-type: none"> 1. System invokes self-service actions and corresponding use case. <p>[A4] Recent Service Requests</p> <p>Count of submitted service transactions within the last month.</p> <p><u>Fields Displayed</u></p> <ul style="list-style-type: none"> ◆ Description See Service Transactions Displayed List below. If the user clicks on this hyperlink, the Order Status screen is launched with only the selected service requests displayed. ◆ Service Lines Count of service requests initiated within the last month (service provider configurable time period) matching the status and transaction type of the description <p><u>Service Transactions Displayed</u></p> <ul style="list-style-type: none"> ◆ Pending – All transactions (Count of any transaction requests [individual count, not bulk] submitted within a configurable time period (default 30 days) with a status of “pending”) ◆ Failed – All Transactions (Count of any transaction requests [individual count, not bulk] submitted within a configurable time period (default 30 days) with a status of “failed”) ◆ Success - Change Rate Plan Transactions (Count of any transaction requests [individual count, not bulk] with any status submitted within the last month (configurable time period) to change rate plan) ◆ Success - Change Features (Count of any transaction requests [individual count, not bulk] with any status submitted within the last month to change features)
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes the Error Message use case.
Business Rules:	<p>[B1] The scope of the content in the dashboard depends upon the user (Administrator, Business or Subscriber) login.</p>
Notes	<p>Self-service tab in the dashboard provides a quick link capability to B2B functionalities and other features of Service Manager.</p>

Overview Screen for Admin User:

My Account | **Statement** | **Payments** | **Self-Service**

Overview | Hierarchy | Manage Accounts | Manage Service | Order Status

Overview

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

New Rate Plan			Top 5 Service Agreements			Rate Plan Advisor	
Number	Last Bal	Rate Plan					
545-803-9028	364.12	RatePlan800			Run a Rate Plan Advisor & Save		
847-349-4100	245.90	RatePlan800					
447-483-9312	196.91	RatePlan800					
451-378-3743	159.82	RatePlan800					
397-894-2110	144.32	RatePlan800					

Order Status

Tracking Number

Recent Service Requests

Description	Service Lines
Add/Delete Features	1
Change Rate Plan	1

Quick Links

- [Add/Delete Features](#)
- [Activate Service](#)
- [Change Rate Plan](#)
- [Change Subscriber Profile](#)
- [Port Number](#)

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3.4 Manage Account Use Cases

The comprehensive self-service capabilities available to the user are addressed in the following use cases.

The self-service features include:

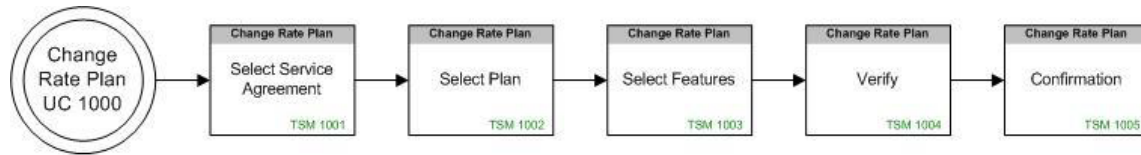
- **Change Rate Plan** – Lets the administrator change an individual rate plan (main path) or a bulk request for multiple service agreements (alternate path).
- **Add/Delete Features** – Lets the administrator change an individual's rate plan features (main path) or bulk request for multiple service agreements (alternate path).
- **Change Device** – Lets the business user change the device associated with an individual service agreement (main path) or in bulk. This transaction is performed by changing the device serial number associated with the service agreement.
- **Change Phone Number** – Lets a business user change the phone numbers associated with an individual service agreement.
- **Port Number** – Lets the user replace an existing number with a new number from a different service provider.

3.4.1 Change Rate Plan

Name:	Change Rate Plan
Brief Description:	Provides ability for the administrator to change an individual rate plan (main path) or a bulk request for multiple service agreements (alternate path).
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Account > Change Rate Plan option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case (uc0060) to filter displayed service agreements. 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Select Plan</u></p> <ol style="list-style-type: none"> 4. System displays the selected service agreement, its rate plan, and its selected features. 5. User selects a new plan group from the drop down and search action. [B1] <p>Plan Group dropdown field displays all plan groups available for the company to which the service agreement belongs.</p> <ol style="list-style-type: none"> 6. System displays list of plans with the following columns: <ol style="list-style-type: none"> a) Plan Name b) Peak Minutes c) Weekend Minutes d) Night minutes e) Amount 7. User selects plan and continue action [A2] <p><u>Step 3: Select Features</u></p> <ol style="list-style-type: none"> 8. System displays selected rate plan details with included and optional features. [B2] [A1] <p>System makes an external call and based on the selected rate plan displays the set of included and optional features.</p> <ol style="list-style-type: none"> 9. User selects optional features and selects continue action. <p>Features that are included with the plan at no charge cannot be modified.</p> <p><u>Step 4: Verify Selections</u></p> <ol style="list-style-type: none"> 10. System displays the summary of : <ol style="list-style-type: none"> a) Selected rate plan and included features. b) Selected optional features and the estimated total amount changes. c) System allows the user to go back to the previous screen to edit the selection.

	<p>11. User verifies and selects confirm action.</p> <p><u>Step 5: Confirmation</u></p> <p>12. System displays a confirmation message and tracking number with options to print the confirmation page for user records.</p> <p>13. Use case ends</p>
<p>Alternate Paths:</p>	<p>[A1] Bulk Change User selects more than one service agreement on which to perform a rate plan change. This alternate path is the same as the main path except that the Step 2, "Select Plan" screen</p> <ol style="list-style-type: none"> 1. Displays the multiple service agreements selected. 2. Does not display the current plan and plan features for the selected service agreements because it would not be clear which plan and features related to which service agreement. <p>[A2] User selects continue action without selecting a rate plan. System displays an error message and prompts to select a rate plan and continue.</p> <p>[A3] User clicks on a rate plan for details When this hyperlink is selected, another screen is displayed with more information about the plan and a single action to return to the previous screen.</p> <p>[A4] User clicks on feature for more detail When this hyperlink is selected, another screen is displayed with more information about the feature and a single action to return to the previous screen.</p>
<p>Standard Features</p>	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action (number of lines configurable by use case) 4. Track service request
<p>Exception Paths:</p>	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
	<p>[B1] Service agreements with device features that do not support the selected features are not modified.</p> <p>[B2] System makes an external call and based on the selected rate plan displays the set of included and optional features.</p> <ol style="list-style-type: none"> a) Features that are included with the plan at no charge cannot be modified. b) System allows the user to select optional features.
<p>Notes</p>	<ol style="list-style-type: none"> 1. Devices not compatible to the selected plan and features are not affected. 2. System displays a non-monetary value for all the optional features.

Individual User Flows for Change Rate Plan (vs. Bulk):



Search and Select Service Agreement Screen:

Select Service Agreement:

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[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)

[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) [Order Status](#)

Select Service Agreement

1 → 2 → 3 → 4 → 5

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements to change.

[Rate Plan](#) [Features](#) [Change Number](#) [Change Device](#) [Port Number](#)

Search Criteria

Search By: Rate Plan Group GO

Search By: Plan Type or Indiv Rate Plan: NATIONDIRECT SEARCH

Page 1 of 4 ▶▶

Search Results (32 items)

<input type="checkbox"/> Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="checkbox"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Suspended
<input type="checkbox"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input type="checkbox"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="checkbox"/> Brown, Charles	847-349-4112	NATDIRECT600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/> Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active
<input type="checkbox"/> Brown, Lee	847-349-4100	NATDIRECT450	MOTOROLA80	Active
<input type="checkbox"/> Brown, Ray	397-894-2108	NATDIRECT450	NOKIAI730	Active
<input type="checkbox"/> Brown, Samuel	474-737-9223	NATDIRECT600	BLACKBERRY7280	Active
<input type="checkbox"/> Buel, Christina	559-488-4373	NATDIRECT600	MOTOROLA80	Active

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CANCEL CONTINUE

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Shopping Cart
Self-Service
Payments
Statement
My Account

Order Status
Manage Service
Manage Accounts
Hierarchy
Overview

Select New Rate Plan

1 → 2 → 3 → 4 → 5

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select a rate plan.

Rate Plan
Features
Change Number
Change Device
Port Number

Selected Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
NATDIRECT250	250	250	500	\$45.95

Included Features

Plan Features	Amount
VM	Included
CALLERID	Included
TEXTMESSAGING100	Included
CALLWAITING	Included

Optional Features

Features	Amount
THREEWAYCALLING	\$3.45
TEXTMESSAGING 500	\$5.95
CALLFORWARDING	\$6.45
TEXTMESSAGING 500	\$5.95
THREEWAYCALLING	\$3.45
MULTIMEDIAMAIL	\$9.95
TEXTMESSAGING 200	\$3.95
Estimated Cost Per Plan	\$85.10

Search Criteria

Plan Type: INTERNATIONAL ▼ SEARCH

Rate Plans

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
<input checked="" type="radio"/> INTERNATIONAL600	600	500	500	50.95
<input type="radio"/> INTERNATIONAL500				45.95
<input type="radio"/> INTERNATIONAL700				55.95
<input type="radio"/> INTERNATIONAL800				60.95
<input type="radio"/> INTERNATIONAL900				65.95
<input type="radio"/> INTERNATIONAL400				39.95

BACK
CANCEL
CONTINUE

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Displays user's current plan and available rate plans and lets user select optional features:

The screenshot shows the Siebel Self-Service interface for managing account features. The navigation bar includes 'My Account', 'Statement', 'Payments', and 'Self-Service'. The 'Manage Accounts' sub-tab is active, with options for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. A shopping cart icon is visible in the top right.

Select Rate Plan Features

Company: CellTec
 User: Anne Green
 Hierarchy: Billing Accounts
 Position: Billing Accounts

Select optional features.

Navigation tabs: Rate Plan (selected), Features, Change Number, Change Device, Port Number.

Selected Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active

Current Plan				
Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL600	600	500	500	\$50.99

Included Features	
Plan Features	Amount
CALLWAITING	Included
CALLERID	Included
VM	Included
FREENIGHTSWEEKENDS1000	Included

Optional Features	
Features	Amount
<input checked="" type="checkbox"/> MULTIMEDIAMAIL	\$9.95
<input checked="" type="checkbox"/> TEXTMESSAGING	\$5.95
<input checked="" type="checkbox"/> THREEWAYCALLING	\$3.45
<input checked="" type="checkbox"/> CALLFORWARDING	\$6.45

Buttons: BACK, CANCEL, CONTINUE

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Verify selected plan and features:

Confirm Selections

Company: CellTec Hierarchy: Billing Accounts
 User: Anne Green Position: [Billing Accounts](#)

Please verify changes. Devices that are not compatible with the selected plan and features will not be affected.

Rate Plan **Features** **Change Number** **Change Device** **Port Number**

Selected Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL600	600	500	500	\$50.99

Included Features

Plan Features	Amount
CALLWAITING	Included
CALLERID	Included
VM	Included
FREENIGHTSWEEKENDS1000	Included

Optional Features

Features	Amount
MULTIMEDIAMAIL	\$9.95
TEXTMESSAGING	\$5.95
THREWAYCALLING	\$3.45
CALLFORWARDING	\$6.45
Estimated Cost Per Plan	\$76.79

BACK CANCEL CONFIRM

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Confirmation screen:

🛒

[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)

[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) [Order Status](#)

Confirmation Summary

1 → 2 → 3 → 4 → **5**

Company: CellTec

User: Anne Green

Hierarchy: Billing Accounts

Position: [Billing Accounts](#)

Your change has been processed. Your tracking number is: [100020](#)

Rate Plan
Features
Change Number
Change Device
Port Number

Selected Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL600	600	500	500	\$50.99

Included Features

Plan Features	Amount
CALLWAITING	Included
CALLERID	Included
VM	Included
FREENIGHTSWEEKENDS1000	Included

Optional Features

Features	Amount
MULTIMEDIAMAIL	\$9.95
TEXTMESSAGING	\$5.95
THREEWAYCALLING	\$3.45
CALLFORWARDING	\$6.45

Estimated Cost Per Plan

\$76.79

[Print Friendly](#)

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Change Rate Plan in Bulk:

🛒

[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)

[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) [Order Status](#)

Select Service Agreement

1 → 2 → 3 → 4 → 5

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements to change.

[Rate Plan](#) [Features](#) [Change Number](#) [Change Device](#) [Port Number](#)

Search Criteria

Search By: Rate Plan Group GO

Search By: Plan Type or Indiv Rate Plan: INTERNATIONAL SEARCH

Page 1 of 4 ▶▶

Search Results (31 items)	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="checkbox"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="checkbox"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Brown, John	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Brown, Judy	397-894-2110	INTERNATIONAL600	NOKIA5800	Active
<input type="checkbox"/>	Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Cooney, John	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active

Page 1 of 4 ▶▶

CANCEL CONTINUE

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User filters service agreements based on plan type:

The screenshot shows the Siebel Self-Service interface. At the top, there are navigation tabs: My Account, Statement, Payments, and Self-Service. Under Self-Service, there are sub-tabs: Overview, Hierarchy, Manage Accounts (selected), Manage Service, and Order Status. The main content area is titled "Select Service Agreement". It shows the user's company as CellTec and the user as Anne Green. There are links for Hierarchy (Billing Accounts) and Position (Billing Accounts). A search instruction says "Search for and select service agreements to change." Below this are tabs for Rate Plan (selected), Features, Change Number, Change Device, and Port Number. The "Search Criteria" section has a "Search By:" dropdown set to "Rate Plan Group" with a "GO" button and a "Hide Rate Plans" link. The "Rate Plan Name" dropdown is set to "INTERNATIONAL600" with a "SEARCH" button. The search results are displayed in a table with 31 items. The table has columns for Name, Phone Number, Rate Plan, Device, and Status. The results list various users and their associated phone numbers, rate plans, and devices. The "SIEBEL" logo is visible on the left side of the page. At the bottom, there is a copyright notice: "Copyright © 2005 Siebel Systems, Inc. All rights reserved." and buttons for "CANCEL" and "CONTINUE".

Select Service Agreement

Company: CellTec
User: Anne Green

Hierarchy: [Billing Accounts](#)
Position: [Billing Accounts](#)

Search for and select service agreements to change.

Rate Plan | Features | Change Number | Change Device | Port Number

Search Criteria

Search By: Rate Plan Group [Hide Rate Plans](#)

Rate Plan Name: INTERNATIONAL600

Page 1 of 4

Search Results (31 items)

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="checkbox"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="checkbox"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Brown, John	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Brown, Judy	397-894-2110	INTERNATIONAL600	NOKIA5800	Active
<input checked="" type="checkbox"/>	Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Cooney, John	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active

Page 1 of 4

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User filters the list based on plan type and rate plan and selects multiple service agreements:

The screenshot shows the Siebel 'Select Service Agreement' interface. At the top, there are navigation tabs: 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below these are sub-tabs: 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main heading is 'Select Service Agreement'. On the right, there is a breadcrumb trail: '1 → 2 → 3 → 4 → 5'. Below the heading, the user information is displayed: 'Company: CellTec', 'User: Anne Green', 'Hierarchy: Billing Accounts', and 'Position: Billing Accounts'. A search instruction reads: 'Search for and select service agreements to change.' Below this is a search filter section with tabs: 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Rate Plan' tab is active. The search criteria are: 'Search By: Rate Plan Group', 'GO', 'Hide Rate Plans', 'Rate Plan Name: INTERNATIONAL600', and a 'SEARCH' button. Below the search criteria, there is a pagination indicator: 'Page 1 of 2 >>'. The search results are displayed in a table with 20 items. The table has columns: 'Name', 'Phone Number', 'Rate Plan', 'Device', and 'Status'. The results are as follows:

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Brown, John	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Brown, Judy	397-894-2110	INTERNATIONAL600	NOKIA5800	Active
<input type="checkbox"/>	Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Cooney, John	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Jones, Barbara	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Jones, Bernard	636-973-7954	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Jones, Brad	937-963-9743	INTERNATIONAL600	BLACKBERRY7280	Active

At the bottom right of the results table, there is a pagination indicator: 'Page 1 of 2 >>'. Below the table are two buttons: 'CANCEL' and 'CONTINUE'.

Displays available rate plans:

Select New Rate Plan

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Search for and select a rate plan.

Rate Plan | Features | Change Number | Change Device | Port Number

Search Criteria

Plan Type: INTERNATIONAL

Rate Plans				
Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
<input type="radio"/> INTERNATIONAL900				65.95
<input type="radio"/> INTERNATIONAL400	400	500	500	39.99
<input type="radio"/> INTERNATIONAL500				45.99
<input checked="" type="radio"/> INTERNATIONAL800	800	500	500	60.95
<input type="radio"/> INTERNATIONAL700				55.99
<input type="radio"/> INTERNATIONAL600	600	500	500	50.99

Selected Service Agreements

Name	Phone Number	Rate Plan	Device	Status
Baker, Ted,	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Baker, William,	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active Remove
Brown, John,	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Cooney, John,	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Jones, Barbara,	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active Remove

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Displays selected plan with included and optional features:

Select Rate Plan Features

Company: CellTec Hierarchy: Billing Accounts
 User: Anne Green Position: [Billing Accounts](#)

Select optional features.

Rate Plan **Features** **Change Number** **Change Device** **Port Number**

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL800	800	500	500	\$60.95

Included Features

Plan Features	Amount
CALLERID	Included
CALLWAITING	Included
VM	Included
FREENIGHTSWEEKENDS	Included

Optional Features

Features	Amount
<input checked="" type="checkbox"/> MULTIMEDIAMAIL	\$9.95
<input checked="" type="checkbox"/> CALLFORWARDING	\$6.45
<input checked="" type="checkbox"/> THREWAYCALLING	\$3.45
<input checked="" type="checkbox"/> TEXTMESSAGING	\$5.95

Selected Service Agreements

Name	Phone Number	Rate Plan	Device	Status
Baker, Ted,	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Baker, William,	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active Remove
Brown, John,	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Cooney, John,	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active Remove
Jones, Barbara,	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active Remove

BACK CANCEL CONTINUE

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Displays the summary of plan package:

Confirm Selections

Company: CellTec Hierarchy: Billing Account
 User: Anne Green Position: [Billing Accounts](#)

Please verify changes. Devices that are not compatible with the selected plan and features will not be affected.

Current Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL800	800	500	500	\$60.9

Included Features

Plan Features	Amount
CALLERID	Include
CALLWAITING	Include
VM	Include
FREENIGHTSWEEKENDS	Include

Optional Features

Features	Amount
MULTIMEDIAMAIL	\$9.9
CALLFORWARDING	\$6.4
THREEWAYCALLING	\$3.4
TEXTMESSAGING	\$5.9
Estimated Cost Per Plan	\$86.7

Selected Service Agreements

Name	Phone Number	Rate Plan	Device	Status	
Baker, Ted,	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active	Remove
Baker, William,	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active	Remove
Brown, John,	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active	Remove
Cooney, John,	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active	Remove
Jones, Barbara,	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active	Remove

BACK CANCEL CONFIRM

Confirmation screen displays rate plan change:

The screenshot shows a Siebel web application interface. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. A shopping cart icon is visible in the top right corner.

The main content area is titled 'Confirmation Summary'. It includes a progress indicator with steps 1 through 5, where step 5 is highlighted. The summary provides the following information:

- Company:** CellTec
- User:** Anne Green
- Hierarchy:** Billing Accounts
- Position:** [Billing Accounts](#)

A message states: 'Your change has been processed. Your tracking number is: [100021](#)'.

Below this, there are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Rate Plan' tab is active, showing a table for the 'Current Plan' and a list of 'Included Features' and 'Optional Features'.

Current Plan				
Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
INTERNATIONAL800	800	500	500	\$60.95

Included Features	
Plan Features	Amount
CALLERID	Included
CALLWAITING	Included
VM	Included
FREENIGHTSWEEKENDS	Included

Optional Features	
Features	Amount
MULTIMEDIAMAIL	\$9.95
CALLFORWARDING	\$6.45
THREEWAYCALLING	\$3.45
TEXTMESSAGING	\$5.95
Estimated Cost Per Plan	\$86.75

Selected Service Agreements				
Name	Phone Number	Rate Plan	Device	Status
Baker, Ted,	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
Baker, William,	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
Brown, John,	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
Cooney, John,	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active
Jones, Barbara,	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active

The Siebel logo is visible on the left side of the page. A 'Print Friendly' link is located at the bottom right of the content area.

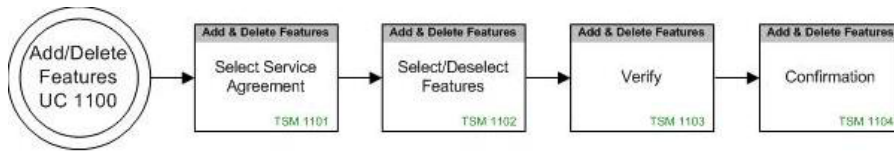
3.4.2 Add/Delete Features

Name:	Add and delete features to the existing plan.
Brief Description:	Provides ability for the administrator to change an individuals rate plan features (main path) or bulk request for multiple service agreements (alternate path).
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Account > Add/Delete features option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Select/Deselect Features</u></p> <ol style="list-style-type: none"> 4. System displays the selected service agreement, its rate plan, included and optional features list with price details and the current selections checked. 5. User selects and deselects features and selects continue action.[B1] <p><u>Step 3: Verify selections</u></p> <ol style="list-style-type: none"> 6. System displays the summary of rate plan and its included and optional features selected and the price details (if available for bulk selection from service provider). 7. System also displays the estimated total amount changes for the plan based on the current selection. 8. User verifies and selects confirm action. <p><u>Step 4: Confirmation</u></p> <ol style="list-style-type: none"> 9. System displays confirmation message and tracking number with options to print the confirmation page for user records. 10. Use case ends
Alternate Paths:	<p>[A1] Bulk Change</p> <p>User selects more than one service agreement to add/delete features in bulk.</p> <p>This alternate path is the same as the main path except for the following steps.</p> <ol style="list-style-type: none"> 1. Step 1 : “Select Service Agreements” User selects the “Multiple Selections” action. (Note: This action changes to “Individual Selection” so if selected again returns the screen to the individual non-bulk mode). <p>The search criteria changes to include only Rate Plan Group and Rate Plan Name fields. (It guarantees that all selected service agreements have the same optional features.)</p> <ol style="list-style-type: none"> a. User selects a plan group and ‘Go’ action. System displays the rate plan names in dropdown with ‘Search’ option.

<p>Name:</p>	<p>Add and delete features to the existing plan.</p>
	<ul style="list-style-type: none"> b. User selects a rate plan name and 'continue' and is presented with the same selection criteria as for individual selection except selected the rate plan group and names are displayed at the top of the screen with an edit action next to them. c. User selects a search value criteria from the Search By field (which excludes rate plan since it was already selected), selects 'Go', enters the search value, and selects search. <p>The search includes both the search by value as well as the previously selected rate plan name and displays the matching service agreements with checkboxes rather than radio buttons.</p> <ul style="list-style-type: none"> d. User selects multiple service agreements. <p>2. Step 2 : "Select Features" screen displays the following</p> <p><i>Instructional text:</i> "Edit whether feature is included in all, some, or none of the selected service agreements"</p> <p>Service provider returns a list of features for which it will allow changes based on the selected service agreements. Note: If the service agreements have different plans, the service provider may need to apply logic to determine what features it will allow the user to change.</p> <ul style="list-style-type: none"> a. Feature prices may or may not be displayed. b. Feature radio buttons will be: <ul style="list-style-type: none"> i. All: if all selected service agreements have this feature ii. Some: If only some service agreements have this feature. iii. None: If no service agreements have this feature <p>3. Step 3: "Confirm Selections" screen only displays features and price details (if available for bulk selection from the service provider.</p> <p>[A2] User clicks on the rate plan for details</p> <p>When this hyperlink is selected, another screen is displayed with more information about the plan and a single action to return to the previous screen.</p> <p>[A3] User clicks on feature for more detail</p> <p>When this hyperlink is selected, another screen is displayed with more information about the feature and a single action to return to the previous screen.</p> <p>[A5] Partial Success</p> <p>If a user selects multiple features to be added to a service agreement and the service provider only adds some of these service agreements than the service provider can return any value they wish for the transactions status (such as "Partial Success). The Service Agreement rate plan feature instance will only be updated with the features the service provider activates. If this individual transaction is part of a bulk transaction, the bulk status should be "Closed-Success".</p> <p>Note that the service provider will need to add this new status value to a configuration file (sm.xma.xml) so that it appears as one of the order line status choices in the Order Status Screen.</p> <p><i>Rationale:</i> If the service agreement device type does not support a requested feature and the service provider does not filter the service agreements displayed to the user, than this alternate path would</p>

Name:	Add and delete features to the existing plan.
	exist.
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action 4. Track service request
Exception Paths:	<p>[E1] User encounters a system error.</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System makes an external call and displays those optional features available for change for the selection (bulk) of service agreements.</p> <ol style="list-style-type: none"> 1. Optional features already selected are marked with solid (all selections) or grey (some of selections) check in the checkbox. 2. System allows to either select all(add) or none(delete) option
Notes:	<ol style="list-style-type: none"> 1. Service agreements with device that do not support the selected features are not modified. 2. System displays a non-monetary value for all the optional features.

Individual User Flows for Add/Delete Features (vs. Bulk)



Search for a service agreement:

🛒

[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview | Hierarchy | Manage Accounts | Manage Service | Order Status

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements to change.

Rate Plan
Features
Change Number
Change Device
Port Number

Search Criteria

Search By:

[Multiple Selections](#)

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Search Results (66 items)					
Name	Phone Number	Rate Plan	Device	Status	
<input type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active	
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active	
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active	
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active	
<input checked="" type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active	
<input checked="" type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active	
<input checked="" type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active	
<input checked="" type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active	
<input type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active	
<input type="radio"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active	

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Select a service agreement:

The screenshot shows the Siebel Self-Service interface for selecting a service agreement. The navigation bar includes 'My Account', 'Statement', 'Payments', and 'Self-Service'. Under 'Self-Service', there are tabs for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The 'Manage Accounts' tab is active.

Select Service Agreement

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Search for and select service agreements to change.

Rate Plan | **Features** | Change Number | Change Device | Port Number

Search Criteria

Search By: Rate Plan Group [v] [GO]

Search By: Plan Type or Indiv Rate Plan: LOCALPLANS [v] [SEARCH]

[Multiple Selections](#)

Search Results

	Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/>	Brown, Amy	636-362-6232	REGION700	NOKIAI730	Active
<input checked="" type="radio"/>	Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active
<input type="radio"/>	Carnier, Jim	474-432-6342	BASICPLAN	NOKIA5800	Active

[CANCEL] [CONTINUE]

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Displays selected plan and features:

My Account | **Statement** | **Payments** | **Self-Service**

Overview | Hierarchy | **Manage Accounts** | Manage Service | Order Status

Select/Deselect Features 1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Edit features and continue.

Rate Plan | **Features** | **Change Number** | **Change Device** | **Port Number**

Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active

Selected Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
REGION700	700	500	500	\$39.99

Included Features

Plan Features	Amount
CALLERID	Included
VM	Included
CALLWAITING	Included
FREENIGHTSWEEKENDS1000	Included
CALLWAITING	Included

Optional Features

Features	Amount
<input checked="" type="checkbox"/> THREEWAYCALLING	\$3.45
<input checked="" type="checkbox"/> MULTIMEDIAMAIL	\$9.95
<input checked="" type="checkbox"/> TEXTMESSAGING	\$5.95
<input type="checkbox"/> CALLFORWARDING	\$6.45

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Confirm Selections Screen:

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[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

[Overview](#) | [Hierarchy](#) | [Manage Accounts](#) | [Manage Service](#) | [Order Status](#)

Confirm Selections

1 → 2 → **3** → 4

Company: CellTec

User: Anne Green

Hierarchy: Billing Accounts

Position: [Billing Accounts](#)

Please confirm changes. Devices that are not compatible with the selected features will not be affected.

Rate Plan
Features
Change Number
Change Device
Port Number

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active

Selected Plan				
Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
REGION700	700	500	500	\$39.99

Included Features	
Plan Features	Amount
CALLERID	Included
VM	Included
CALLWAITING	Included
FREENIGHTSWEEKENDS1000	Included
CALLWAITING	Included

Optional Features	
Features	Amount
THREWAYCALLING	\$3.45
MULTIMEDIAMAIL	\$9.95
TEXTMESSAGING	\$5.95
TEXTMESSAGING	\$5.95
MULTIMEDIAMAIL	\$9.95
Estimated Cost Per Plan	\$75.24

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Communications Service Manager Application Guide | 61

Confirmation Summary Screen:

Confirmation Summary

Company: CellTec Hierarchy: Billing Accounts
 User: Anne Green Position: [Billing Accounts](#)

Your change has been processed. Your tracking number is: [100018](#)

Service Agreement

Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active

Selected Plan

Name	Peak Minutes	Weekend Minutes	Nights Minutes	Amount
REGION700	700	500	500	\$39.99

Included Features

Plan Features	Amount
CALLERID	Included
VM	Included
CALLWAITING	Included
FREENIGHTSWEEKENDS1000	Included
CALLWAITING	Included

Optional Features

Features	Amount
TEXTMESSAGING	\$5.95
TEXTMESSAGING	\$5.95
MULTIMEDIAMAIL	\$9.95
MULTIMEDIAMAIL	\$9.95
THREWAYCALLING	\$3.45
Estimated Cost Per Plan	\$75.24

[Print Friendly](#)

Adding/Deleting Use Case in Bulk:

Self-Service
My Account
Statement
Payments

Overview
Hierarchy
Manage Accounts
Manage Service
Order Status

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Select Service Agreement

Port Number
Change Device
Change Number
Features
Rate Plan

Search Criteria

Plan Group: [Single Selection](#)

Page of 7 ▶▶

Search Results (66 items)					
	Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/>	Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="radio"/>	Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/>	Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input checked="" type="radio"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

Page of 7 ▶▶

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User selects multiple selections mode and first filters by Rate Plan Name before further filtering and selecting service agreements:

The screenshot shows the Siebel Self-Service interface. At the top, there are navigation tabs: My Account, Statement, Payments, and Self-Service. Below these are sub-tabs: Overview, Hierarchy, Manage Accounts, Manage Service, and Order Status. The main heading is "Select Service Agreement".

On the right side, there is a breadcrumb trail: 1 → 2 → 3 → 4. Below it, the user information is displayed: Company: CellTec, User: Anne Green, Hierarchy: Billing Accounts, and Position: Billing Accounts.

The "Select Service Agreement" section has several tabs: Rate Plan, Features, Change Number, Change Device, and Port Number. The "Rate Plan" tab is active. Below the tabs is a "Search Criteria" section with a "Plan Group" dropdown set to "NATIONDIRECT" and a "Plan Name" dropdown set to "NATDIRECT600". There is a "GO" button and a "CONTINUE" button.

Below the search criteria is a "Single Selection" link. On the right, there is a pagination indicator: Page 1 of 7.

The "Search Results (66 items)" section contains a table with the following columns: Name, Phone Number, Rate Plan, Device, and Status. The table lists 10 items, with the first item, "Baker, John", selected (indicated by a blue circle).

Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input checked="" type="radio"/> Brown, Amy	636-362-6232	REGION700	NOKIAI730	Active

At the bottom right of the results section, there is a pagination indicator: Page 1 of 7, and two buttons: "CANCEL" and "CONTINUE".

At the bottom of the page, there is a copyright notice: Copyright © 2005 Siebel Systems, Inc. All rights reserved.

User selects multiple service agreements:

Select Service Agreement

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Select Service Agreement

Rate Plan | Features | Change Number | Change Device | Port Number

Search Criteria

Plan Group: NATIONDIRECT Plan Name: NATDIRECT450 [Edit](#)

Search By:: [Single Selection](#)

Search Results

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="checkbox"/>	Brown, Lee	847-349-4100	NATDIRECT450	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Brown, Ray	397-894-2108	NATDIRECT450	NOKIA1730	Active
<input type="checkbox"/>	John, Richard	847-349-4107	NATDIRECT450	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Lee, Brad	847-349-4102	NATDIRECT450	MOTOROLA80	Suspended
<input checked="" type="checkbox"/>	Scott, Theo	397-894-2106	NATDIRECT450	MOTOROLA80	Active

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Displays current selections:

Select/Deselect Features

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Edit features and continue.

Rate Plan | **Features** | Change Number | Change Device | Port Number

Optional Features	Features	All	Some	None	Amount
TEXTMESSAGING 500	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	\$5.95
THREEWAYCALLING	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$3.45
MULTIMEDIAMAIL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$9.95

Selected Service Agreements					
Name	Phone Number	Rate Plan	Device	Status	
Brown, Ray	397-894-2108	NATDIRECT450	Nokia i730	Active	Remove
Lee, Brad	847-349-4102	NATDIRECT450	Motorola 80	Suspended	Remove
Scott, Theo	397-894-2106	NATDIRECT450	Motorola 80	Active	Remove

BACK CANCEL CONTINUE

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Confirm Selections screen displays current plan features and amount changes:

Confirm Selections

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Please confirm changes. Devices that are not compatible with the selected features will not be affected.

Optional Features

Features	All	Some	None	Amount
TEXTMESSAGING 500	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$5.95
THREEWAYCALLING	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	\$3.45
MULTIMEDIAMAIL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$9.95

Selected Service Agreements

Name	Phone Number	Rate Plan	Device	Status	
Brown, Ray	397-894-2108	NATDIRECT450	Nokia i730	Active	Remove
Lee, Brad	847-349-4102	NATDIRECT450	Motorola 80	Suspended	Remove
Scott, Theo	397-894-2106	NATDIRECT450	Motorola 80	Active	Remove

BACK CANCEL CONFIRM

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Confirmation Summary displays selected features:

The screenshot shows a Siebel web interface for a Confirmation Summary. At the top, there are navigation tabs: My Account, Statement, Payments, and Self-Service. Below these are sub-tabs: Overview, Hierarchy, Manage Accounts, Manage Service, and Order Status. The main content area is titled 'Confirmation Summary' and includes a progress indicator (1-2-3-4) with '4' highlighted. Account details are listed: Company: CellTec, User: Anne Green, Hierarchy: Billing Accounts, and Position: Billing Accounts. A message states: 'Your change has been processed. Your tracking number is: 100027'. Below this are tabs for Rate Plan, Features, Change Number, Change Device, and Port Number. The 'Optional Features' table is as follows:

Features	All	Some	None	Amount
TEXTMESSAGING 500	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	\$5.95
THREEWAYCALLING	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	\$3.45
MULTIMEDIAMAIL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	\$9.95

Below the features table is the 'Selected Service Agreements' table:

Name	Phone Number	Rate Plan	Device	Status
Brown, Ray	397-894-2108	NATDIRECT450	Nokia i730	Active
Lee, Brad	847-349-4102	NATDIRECT450	Motorola 80	Suspended
Scott, Theo	397-894-2106	NATDIRECT450	Motorola 80	Active

The Siebel logo is visible on the left side of the page. At the bottom right, there is a 'Print Friendly' link. The footer contains the copyright notice: 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.'

3.4.3 Change Device

Name:	Change Device
Brief Description:	Enables the business user to change the device associated with an individual service agreement (main path) or in bulk. This transaction is performed by changing the device serial number associated with the service agreement.
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Account > Change Device option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Enter New DSN</u></p> <ol style="list-style-type: none"> 4. System displays details for the selected service agreement including the current DSN and prompts the user to enter a new device ID.

	<p>DSN (Required)</p> <p>5. User enters the DSN and selects continue action. [A2]</p> <p><u>DSN Step 3: Verify</u></p> <p>6. User verifies and selects confirm action.</p> <p><u>Step 4: Confirmation</u></p> <p>7. System displays a tracking number and confirmation message for DSN change with an option to print the page for user records.</p> <p>8. Use case ends.</p>
<p>Alternate Paths:</p>	<p>[A1] Bulk Change</p> <ol style="list-style-type: none"> 1. User selects more than one service agreement to change DSN. 2. This alternate path is the same as the main path expect that the Step 2 displays multiple service agreements selected. <p>[A2] Invalid DSN</p> <p>If one or more DSNs are invalid</p> <ol style="list-style-type: none"> 1. A warning message is displayed “The following DSNs are not recognized. Please enter new ones. 3. The system highlights invalid device Ids. 4. User either: <ol style="list-style-type: none"> a. Enters new device IDs. b. Selects the remove action for the service agreement(s) with the invalid Ids. 5. Selects continue
<p>Standard Features:</p>	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action 4. Track service request
<p>Exception Paths:</p>	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case. <p>[E2] System prompts to re-enter DSN.</p> <ol style="list-style-type: none"> 1. System populates the DSN entry from the user session for the error screen. 2. System displays an error message stating that the DSN is not valid for the network and to contact the service provider.
<p>Business Rules:</p>	<p>[B1] System does a basic validation for DSN (checks for empty string) field. Service provider should check the network compatibility based on DSN entered.</p> <p>[B2] DSN validation – combination of Hex and Decimal characters</p> <p>[B3] System checks the current plan and support features of the device based on DSN.</p>
<p>Notes:</p>	<p>None</p>

Change Device Use Cases



Select service agreements:

Select Service Agreement

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Search for and select service agreements.

Rate Plan | Features | Change Number | **Change Device** | Port Number

Search Criteria

Search By: Phone Number

Page 3 of 7

Search Results (66 items)

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Carnier, Jim	474-432-6342	BASICPLAN	NOKIA5800	Active
<input type="checkbox"/>	Cooney, John	474-075-4035	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Cooney, Liam	397-894-2109	NATDIRECT600	MOTOROLA80	Active
<input type="checkbox"/>	Howard, Byron	397-894-2102	NATDIRECT700	BLACKBERRY7280	Active
<input type="checkbox"/>	John, Peter	972-850-0081	INTERNATIONAL900	BLACKBERRY7280	Active
<input type="checkbox"/>	John, Richard	847-349-4107	NATDIRECT450	MOTOROLA80	Active
<input type="checkbox"/>	Jones, Barbara	971-304-3404	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Jones, Bernard	636-973-7954	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Jones, Brad	937-963-9743	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Jones, Brenda	447-483-9312	INTERNATIONAL600	BLACKBERRY7280	Active

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User enters new device serial numbers:

Change Device Serial Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Please enter a device serial number(s) you wish to change and click submit.

Rate Plan Features Change Number **Change Device** Port Number

Selected Service Agreement					
Name	Phone Number	Old DSN	New DSN	Rate Plan	
Jones, Brenda	447-483-9312	DSN77	78e4780	INTERNATIONAL600	Remove

BACK CANCEL CONTINUE

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User enters new device serial numbers:

Change Device Serial Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Please enter a device serial number(s) you wish to change and click submit.

Please enter New DSN values for all the selected service agreements.

Rate Plan Features Change Number **Change Device** Port Number

Selected Service Agreement					
Name	Phone Number	Old DSN	New DSN	Rate Plan	
Jones, Brenda	447-483-9312	DSN77		INTERNATIONAL600	Remove

BACK CANCEL CONTINUE

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Verify DSN change:

The screenshot shows the 'Confirm Device Serial Number' page in the Siebel Self-Service portal. The navigation bar includes 'My Account', 'Statement', 'Payments', and 'Self-Service'. Under 'Self-Service', there are links for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The page title is 'Confirm Device Serial Number'. On the right, there is a progress indicator '1 -> 2 -> 3 -> 4' with '3' highlighted. Below this, the user information is displayed: 'Company: CellTec', 'User: Anne Green', 'Hierarchy: Billing Accounts', and 'Position: Billing Accounts'. A message states 'Please confirm changes.' Below the message are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device' (which is selected), and 'Port Number'. A table titled 'Selected Service Agreement' contains the following data:

Name	Phone Number	Old DSN	New DSN	Rate Plan	
Jones, Brenda	447-483-9312	DSN77	78e478002	INTERNATIONAL600	Remove

At the bottom of the table area are three buttons: 'BACK', 'CANCEL', and 'CONFIRM'. The Siebel logo is in the bottom left, and the copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' is at the bottom center.

Confirmation Summary for DSN change

The screenshot shows the 'Confirmation Summary' page in the Siebel Self-Service portal. The navigation bar is identical to the previous screenshot. The page title is 'Confirmation Summary'. On the right, there is a progress indicator '1 -> 2 -> 3 -> 4' with '3' highlighted. Below this, the user information is displayed: 'Company: CellTec', 'User: Anne Green', 'Hierarchy: Billing Accounts', and 'Position: Billing Accounts'. A message states 'The following DSN(s) have been changed. Your tracking number is: 100015'. Below the message are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device' (which is selected), and 'Port Number'. A table titled 'Selected Service Agreement' contains the following data:

Name	Phone Number	Old DSN	New DSN	Rate Plan
Jones, Brenda	447-483-9312	DSN77	78e478002	INTERNATIONAL600

At the bottom right of the table area is a 'Print Friendly' link with a printer icon. The Siebel logo is in the bottom left, and the copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' is at the bottom center.

3.4.4 Change Phone Number

Name:	Change Phone Number.
Brief Description:	Enable a business user to change the phone numbers associated with an individual service agreement.
Actor(s):	Administrator, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Account > Change PHONE NUMBER option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. 3. User selects an individual service agreement from the list and selects continue action. <p><u>Step 2: Enter Zip Code</u></p> <ol style="list-style-type: none"> 4. System displays selected service agreement details and prompts to enter zip code. 5. User enters billing or primary point of usage zip code and selects continue action. <p><u>Step 3: Select Area Code</u></p> <ol style="list-style-type: none"> 6. System displays list of area codes in a dropdown. 7. User selects an area code and selects continue action. <p><u>Step 4: Select Exchange Code</u></p> <ol style="list-style-type: none"> 8. System displays list of exchange codes in a dropdown. 9. User selects an exchange code and selects continue action. <p><u>Step 4: Select New Phone Number</u></p> <ol style="list-style-type: none"> 10. System displays a list of new numbers. [B1] 11. User selects a number and selects continue action. <p><u>Step 5: Verify Phone Number</u></p> <ol style="list-style-type: none"> 12. System displays selected number for verification. 13. User verifies and selects confirm action. [A4] <p><u>Step 6: Confirmation</u></p> <ol style="list-style-type: none"> 14. System displays confirmation message with tracking number and an option to print the page for user records. 15. Use case ends.
Alternate Paths:	<p>[A1] Update hierarchy upon successful completion</p> <p>When the change phone number transaction completes successfully, the new phone number is added to the list of phone numbers displayed in the hierarchy module.</p> <p>As noted in the “Search & Select Service Agreement” use case, old numbers selected in the “Set Hierarchy Position” use case will be visually differentiated in Service Manager so that they can not be</p>

	<p>selected.</p> <p>[A2] User selects continue action without selecting a new phone number from the list.</p> <ol style="list-style-type: none"> 1. System displays error message and prompts to select a new number and continue
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action 4. Track service request
Exception Paths:	<p>[E1] User encounters a validation error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System makes an external call to the TNI. The generated number is based on primary point of usage or billing address zip code, area code, and exchange code.</p>
Notes:	<ol style="list-style-type: none"> 1. System displays 5 new phone numbers to the user. (Display list is configurable). 2. System supports paging function. The number of user records displayed on each page is initially set to 10. System enables and displays paging icon if the search result has user records greater than 10. 3. Required Fields: <ol style="list-style-type: none"> a. Zip Code. Uses 9 digit (XXXXX-XXXX) format. b. Area Code and Exchange Code

Screen Flows to Change Phone Number



Choose Change Number Tab:

Shopping Cart

[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview | Hierarchy | Manage Accounts | Manage Service | Order Status

Select Service Agreement

1 → 2 → 3 → 4 → 5 → 6 → 7

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreement to change.

Rate Plan
Features
Change Number
Change Device
Port Number

Search Criteria

Search By: Phone Number GO **Search Value** SEARCH

Page 1 of 7 >>

Search Results (66 items)					
	Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/>	Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input checked="" type="radio"/>	Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input checked="" type="radio"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="radio"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input checked="" type="radio"/>	Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input checked="" type="radio"/>	Brown, Amy	636-362-6232	REGION700	NOKIAI730	Active

Page 1 of 7 >>

CANCEL
CONTINUE

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Search and Select Service Agreement:

The screenshot shows the 'Select Service Agreement' page in the Siebel Self-Service application. The navigation bar includes 'My Account', 'Statement', 'Payments', and 'Self-Service'. The 'Manage Accounts' sub-tab is active, with options for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The page title is 'Select Service Agreement' with a breadcrumb trail '1 → 2 → 3 → 4 → 5 → 6 → 7'. User information shows 'Company: CellTec' and 'User: Anne Green'. The hierarchy is 'Billing Accounts' and the position is 'Billing Accounts'. A search instruction reads: 'Search for and select service agreement to change.' Below this are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Search Criteria' section has a dropdown set to 'Phone Number', a 'GO' button, a 'Search Value' field containing '318', and a 'SEARCH' button. The 'Search Results' table lists two entries:

Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/> Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input checked="" type="radio"/> Jones, Barbara	318-743-4734	INTERNATIONAL600	BLACKBERRY7280	Active

Buttons for 'CANCEL' and 'CONTINUE' are at the bottom right. The Siebel logo and copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' are at the bottom left.

Enter Zip Code:

The screenshot shows the 'Change Phone Number - Enter Zip Code' page in the Siebel Self-Service application. The navigation bar and sub-tabs are the same as in the previous screenshot. The page title is 'Change Phone Number - Enter Zip Code' with the same breadcrumb trail. User information remains 'Company: CellTec' and 'User: Anne Green'. The hierarchy is 'Billing Accounts' and the position is 'Billing Accounts'. An instruction reads: 'Please enter Zip code for the new phone number.' Below this are the same tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Selected Service Agreement' table shows the selected entry:

Name	Phone Number	Rate Plan	Device	Status
Jones, Barbara	318-743-4734	INTERNATIONAL600	BLACKBERRY7280	Active

Below the table, there is a label 'Please enter Zip Code:' followed by a text input field containing '01760'. 'CANCEL' and 'CONTINUE' buttons are at the bottom right. The Siebel logo and copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' are at the bottom left.

Select Area Code:

The screenshot shows the Siebel Self-Service interface for changing a phone number. The navigation bar includes 'My Account', 'Statement', 'Payments', and 'Self-Service'. Under 'Self-Service', there are links for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main heading is 'Change Phone Number - Select Area Code'. A progress indicator shows steps 1 through 7, with step 3 highlighted. User information includes 'Company: CellTec' and 'User: Anne Green'. Hierarchy and Position are both listed as 'Billing Accounts'. A message asks the user to select an area code for the new phone number. Below this, there are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Change Number' tab is active, showing a table for 'Selected Service Agreement' with columns for Name, Phone Number, Rate Plan, Device, and Status. The table contains one entry for 'Jones, Barbara' with phone number '318-743-4734', rate plan 'INTERNATIONAL600', device 'BLACKBERRY7280', and status 'Active'. Below the table, the zip code is '01760'. A dropdown menu for 'Please select Area Code:' shows '971' selected. There are 'BACK', 'CANCEL', and 'CONTINUE' buttons at the bottom right. The Siebel logo and copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' are at the bottom left.

Select Exchange Code:

The screenshot shows the Siebel Self-Service interface for selecting an exchange code. The navigation bar and user information are identical to the previous screenshot. The main heading is 'Change Phone Number - Select Exchange Code'. The progress indicator shows step 4 highlighted. A message asks the user to select an exchange code for their new phone number. Below this, there are tabs for 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. The 'Change Number' tab is active, showing the same 'Selected Service Agreement' table as before. Below the table, the zip code is '01760' and the area code is '971'. A dropdown menu for 'Please select Exchange Code:' shows '304' selected. There are 'BACK', 'CANCEL', and 'CONTINUE' buttons at the bottom right. The Siebel logo and copyright notice 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.' are at the bottom left.

Select New Phone Number:

Select New Phone Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Please select a new phone number.

Rate Plan Features **Change Number** Change Device Port Number

Available Phone Numbers

- 971-304-3400
- 971-304-3401
- 971-304-7162
- 971-304-5603
- 971-304-3404

SIEBEL CANCEL CONTINUE

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Confirm New Phone Number:

Confirm Phone Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Please confirm the new phone number.

Rate Plan Features **Change Number** Change Device Port Number

Name	Old Number	New Number
Jones, Barbara	318-743-4734	971-304-3404

SIEBEL CANCEL CONFIRM

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Confirmation Summary:

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[My Account](#)
[Statement](#)
[Payments](#)
[Self-Service](#)

[Overview](#)
[Hierarchy](#)
[Manage Accounts](#)
[Manage Service](#)
[Order Status](#)

Confirmation Summary

1 → 2 → 3 → 4 → 5 → 6 → 7

Company: CellTec **Hierarchy:** [Billing Accounts](#)
User: Anne Green **Position:** [Billing Accounts](#)

Your request has been successfully processed. Your tracking number is: [100014](#)

[Rate Plan](#)
[Features](#)
Change Number
[Change Device](#)
[Port Number](#)

Name	Old Number	New Number
Jones, Barbara	318-743-4734	971-304-3404

[Print Friendly](#)

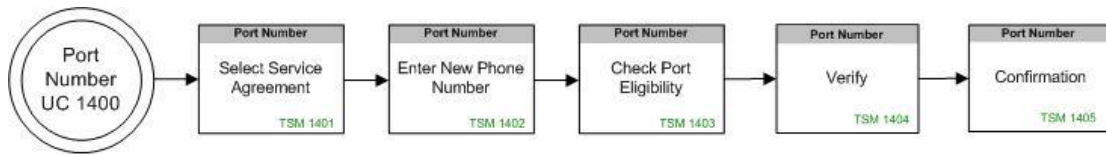
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3.4.5 Port Number

Name:	Port Telephone Number
Brief Description:	<p>Provides the ability for a business user to port numbers in bulk (alternate path) and individually (main path).</p> <p><i>Rationale:</i> Port number enables the user to replace an existing number with a new number from a different service provider.</p>
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Account > Port Number option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreement's 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Enter New Phone Number</u></p> <ol style="list-style-type: none"> 4. System displays the details for the selected service agreement including the current phone number and prompts the user to enter the following: <ol style="list-style-type: none"> 1. New Phone Number [Required] [Ten digit number with optional separator characters] <ol style="list-style-type: none"> (i) Account Number [optional] (ii) Address, State, City and Zip Code [optional] 5. User enters new number to port for the selected service agreement and selects the continue action. [E2 - E4] <p><u>Step 3: Check Port eligibility</u></p> <ol style="list-style-type: none"> 6. System validates and displays the number to port. [A2] <p><u>Step 4: Verify</u></p> <ol style="list-style-type: none"> 7. User verifies and selects confirm action. <p><u>Step 5: Confirmation</u></p> <ol style="list-style-type: none"> 8. System displays confirmation page with tracking number to check port status and an option to print the page for user records.
Alternate Paths:	<p>[A1] Number ineligible to port</p> <p>If the service provider can respond to an interim request and identifies that one or more numbers are ineligible to port</p> <ol style="list-style-type: none"> 1. A warning message is displayed "The following numbers are not eligible to be ported. Please enter a new one or remove the service agreements. <ol style="list-style-type: none"> a) The system highlights ineligible numbers. b) User either: <ol style="list-style-type: none"> a. Enters new number. b. Selects the remove action for the service agreement(s)

	with the invalid Ids. c) Selects continue
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action 4. Track service request
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case. <p>[E2] System displays error message for 'Invalid Phone number' entries.</p> <p>[E3] System displays error message – "Phone number is not eligible to port."</p> <p>[E4] System displays error message if the port number is repeated by the user and prompts to re-enter</p>
Business Rules:	[B1] System validates phone number and checks the network compatibility for these numbers to port from different service provider.
Notes:	<ol style="list-style-type: none"> 1. System does not support to change to another existing number that they own within the same service provider.

Port Telephone Number Use Flows:



Select Port Number Tab; Search and select service agreements:

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[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview
Hierarchy
Manage Accounts
Manage Service
Order Status

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements.

Rate Plan
Features
Change Number
Change Device
Port Number

Search Criteria

Search By: Subscriber Last Name ▼ GO **Search Value** SEARCH

Page 1 of 7 ▶▶

Search Results (66 items)					
	Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/>	Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input type="radio"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input type="radio"/>	Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input type="radio"/>	Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input type="radio"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

Page 1 of 7 ▶▶

CANCEL
CONTINUE

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Input numbers to port in bulk:

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[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview
Hierarchy
Manage Accounts
Manage Service
Order Status

Enter New Phone Number

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** [Billing Accounts](#)
User: Anne Green **Position:** [Billing Accounts](#)

Please enter the number you wish to port.

Rate Plan
Features
Change Number
Change Device
Port Number

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Carnier, Jim	474-432-6342	BASICPLAN	NOKIA5800	Active

Edit Details

New Number:

Account Number:

Address:

City:

State: AK

Zip/Postal Code:

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System error screen:

The screenshot shows a web application interface for Siebel. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main content area is titled 'Enter New Phone Number'. It displays user information: 'Company: CellTec' and 'User: Anne Green'. On the right, it shows 'Hierarchy: Billing Accounts' and 'Position: Billing Accounts'. A message states 'Please enter the number you wish to port.' followed by a red error message: 'Please enter a valid Phone Number'. Below this is a sub-navigation bar with tabs: 'Rate Plan', 'Features', 'Change Number', 'Change Device', and 'Port Number'. A table titled 'Service Agreement' lists details for 'Carnier, Jim' with phone number '474-432-6342', rate plan 'BASICPLAN', device 'NOKIA5800', and status 'Active'. An 'Edit Details' section contains input fields for 'New Number', 'Account Number', 'Address', 'City', 'State' (set to 'AK'), and 'Zip/Postal Code'. At the bottom right of this section are buttons for 'BACK', 'CANCEL', and 'CONTINUE'. The Siebel logo is on the left. The footer contains the copyright notice: 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.'

Enter New Phone Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Please enter the number you wish to port.

Please enter a valid Phone Number

Rate Plan Features Change Number Change Device **Port Number**

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Carnier, Jim	474-432-6342	BASICPLAN	NOKIA5800	Active

Edit Details

New Number:

Account Number:

Address:

City:

State: AK

Zip/Postal Code:

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Verify Phone Number:

Shopping Cart

[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview | Hierarchy | **Manage Accounts** | [Manage Service](#) | [Order Status](#)

Enter New Phone Number

1 → **2** → 3 → 4

Company: CellTec **Hierarchy:** [Billing Accounts](#)
User: Anne Green **Position:** [Billing Accounts](#)

Please enter the number you wish to port.

[Rate Plan](#)
[Features](#)
[Change Number](#)
[Change Device](#)
Port Number

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Carnier, Jim	474-432-6342	BASICPLAN	NOKIA5800	Active

Edit Details

New Number:

Account Number:

Address:

City:

State: MA

Zip/Postal Code:

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Confirmation Summary:

The screenshot shows a Siebel Self-Service interface. At the top, there are navigation tabs: My Account, Statement, Payments, and Self-Service. Under Self-Service, there are sub-tabs: Overview, Hierarchy, Manage Accounts, Manage Service, and Order Status. The main content area is titled "Confirmation Summary" and includes a progress indicator (1-2-3-4) with step 2 highlighted. It displays user information: Company: CellTec, User: Anne Green, Hierarchy: Billing Accounts, and Position: Billing Accounts. A message states: "The following number has been ported. Your tracking number is: [100016](#)". Below this is a table with tabs for Rate Plan, Features, Change Number, Change Device, and Port Number. The table has columns for Name, Phone Number, Rate Plan, Device, and Status. A single row is shown for "Carnier, Jim" with phone number 474-432-6342, rate plan BASICPLAN, device NOKIA5800, and status Active. Below the table is a "Confirmation" section with the following details: New Number: 508-212-4535, Account Number, Address, City, State: MA, and Zip/Postal Code: 01702. The Siebel logo is on the left, and a "Print Friendly" link is on the right. The footer contains the copyright notice: Copyright © 2005 Siebel Systems, Inc. All rights reserved.

3.5 Manage Service Use Cases

The following use cases cover the business requirements for enabling the existing business customer and CSR to manage services. The administrator can also perform these functions.

- **Activate Service** – Lets business users activate service agreements individually or in bulk.
- **Suspend Service** – Lets business users suspend an individual service agreement.
- **Resume Service** – Lets business users resume service for an individual service agreement or bulk request for multiple service agreements.
- **Deactivate Service** – Lets customer service representatives to deactivate service.
- **Change Voicemail Password** – Lets business users to change voicemail password for an individual service agreement.
- **Change Subscriber Profile** – Lets the Admin user edit an individual service agreement's attributes such as subscriber's name and the primary point of usage (PPU) address.

3.5.1 Activate Service

Name:	Activate service
Brief Description:	Enables the business user to activate an individual service agreement (main path) or in bulk (alternate path).
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Activate option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. [B2] 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Enter DSN and reason for activation</u></p> <ol style="list-style-type: none"> 4. System displays the selected service agreement details. 5. System prompts to enter DSN and reason for activation from the list below. [E2-E3] [B1] <ol style="list-style-type: none"> a. Received phone from service provider b. Received phone from another source. 6. User enters DSN , selects a reason and selects continue action.[A3] <p><u>Step 3: Verify</u></p> <ol style="list-style-type: none"> 7. System displays the phone number and reason selected for verification. 8. User verifies and selects confirm action. <p><u>Step 4: Confirmation</u></p> <ol style="list-style-type: none"> 9. System displays confirmation page with tracking number and an option to print the page for user records. 10. Use Case Ends.
Alternate Paths:	<p>[A1] Bulk Change</p> <ol style="list-style-type: none"> 1. User selects more than one service agreement to activate in bulk <p>This alternate path is the same as the main path except that the Step 2 displays the multiple service agreements selected.</p> <p>[A2] DSN Default</p> <ol style="list-style-type: none"> 1. If the service agreement has a DSN stored in Service Manager or if the service provider returns one with an interim request, this value is displayed in the DSN field. The user can accept or edit this value and follow the main path. <p>[A3] Invalid DSN entry.</p> <ol style="list-style-type: none"> 1. System displays an error message for invalid DSN entry. [E3] 2. System prompts to reenter ESN. [E2]
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action

	<ol style="list-style-type: none"> 3. Paging action (number of lines configurable by use case) 4. Track service request
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case. <p>[E2] System prompts to re-enter ESN.</p> <ol style="list-style-type: none"> 1. System populates the DSN from the user session. 2. System displays error message not valid for network.
Business Rules:	<p>[B1] System does a basic validation on DSN (checks for empty string). The service provider should validate DSN and check device compatibility to activate online.</p> <p>[B2] System filters service agreement's using an additional filter and displays only service agreement's that are "INACTIVE".</p>
Notes:	<ol style="list-style-type: none"> 1. System uses an additional filter 'Status Type – Inactive' to display service agreements that are Inactive and enable the user to further filter service agreements using the following search by values: <ol style="list-style-type: none"> a. Phone Number b. Subscriber Last Name c. Rate Plan Group d. Device Type 2. The reasons displayed are configurable by the service provider. 3. Required Fields: <ol style="list-style-type: none"> a. DSN b. Reason for activation

Use Cases for Activate Service in Bulk:



Selection screen for bulk changes:

The screenshot displays the Siebel Manage Service interface. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main content area is titled 'Select Service Agreement' and includes a breadcrumb trail '1 → 2 → 3 → 4'. User information is shown as 'Company: CellTec' and 'User: Anne Green'. Hierarchy and position are listed as 'Hierarchy: Billing Accounts' and 'Position: Billing Accounts'. A search instruction reads 'Search for and select service agreements.' Below this are tabs for 'Activate', 'Suspend', 'Resume', 'Deactivate', 'Voicemail', and 'Subscriber Profile'. The 'Search Criteria' section has a dropdown set to 'Phone Number', a 'GO' button, a 'Search Value' field containing '847', and a 'SEARCH' button. The 'Search Results' table lists five entries with checkboxes, names, phone numbers, rate plans, devices, and statuses. The 'SIEBEL' logo is on the left, and 'CANCEL' and 'CONTINUE' buttons are at the bottom right. A copyright notice is at the very bottom.

Select Service Agreement

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** Billing Accounts

Search for and select service agreements.

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Search Criteria

Search By: Phone Number GO Search Value: 847 SEARCH

Search Results

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Baker, Lee	847-349-4105	NATDIRECT600	BLACKBERRY7280	Inactive
<input type="checkbox"/>	Carnier, Joe	847-349-4103	INTERNATIONAL500	NOKIA5800	Inactive
<input type="checkbox"/>	John, Peter	847-349-4108	INTERNATIONAL900	BLACKBERRY7280	Inactive
<input checked="" type="checkbox"/>	John, Richard	847-349-4107	NATDIRECT450	MOTOROLA80	Inactive
<input checked="" type="checkbox"/>	Lee, Amy	847-349-4106	NATDIRECT600	BLACKBERRY7280	Inactive

CANCEL CONTINUE

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Input ESN:

Enter New Device Serial Number

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: Billing Accounts

To activate a phone number please enter the electronic serial numbers.

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Name	Phone Number	DSN	Reason Code	
John, Richard	847-349-4107	<input type="text"/>	Received phone from service provider	Remove
Lee, Amy	847-349-4106	<input type="text"/>	Received phone from service provider	Remove

BACK CANCEL CONTINUE

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Verify Service Agreement Screen:

Confirm DSN

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: Billing Accounts

Do you wish to activate the following service agreements?

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Name	Phone Number	DSN	Reason Code	
John, Richard	847-349-4107	DSN03123	Received phone from service provider	Remove
Lee, Amy	847-349-4106	DSN07321	Received phone from service provider	Remove

BACK CANCEL CONFIRM

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Confirmation Summary:

Confirmation Summary

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

The following service agreements have been activated. Your tracking number is: [100006](#)

Name	Phone Number	DSN	Reason Code
John, Richard	847-349-4107	DSN03123	Received phone from service provider
Lee, Amy	847-349-4106	DSN07321	Received phone from service provider

[Print Friendly](#)

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3.5.2 Suspend Service

Name:	Suspend service
Brief Description:	Enables the business user to suspend an individual service agreement and specify an effective date.
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Suspend option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. [B2] 3. User selects a service agreement and selects continue action. <p><u>Step 2: Select reason and date</u></p> <ol style="list-style-type: none"> 4. System displays selected service agreement details and prompts to: <ol style="list-style-type: none"> 1. Enter reason for suspension [Required] [B1] <ol style="list-style-type: none"> i) Equipment trouble ii) Missing or Stolen Equipment iii) Sold the Unit iv) Vacation a) Enter an effective date [Required]. 5. User selects a reason, enters an effective date and selects continue action. <p><u>Step 4: Verify</u></p> <ol style="list-style-type: none"> 6. System displays the effective date to confirm. 7. User verifies and selects confirm action. <p><u>Step 5: Confirmation</u></p> <ol style="list-style-type: none"> 8. System displays confirmation page with tracking number and an option to print the page for user records. 9. Use case ends.
Alternate Paths:	<p>[A1] Bulk Change</p> <p>User selects more than one service agreement</p> <p>Alternate path is the same as the main path, except that multiple rows are displayed for each selected service agreement</p>
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action (number of lines configurable by use case) 4. Track service request

Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System populates reason based on reason codes based on the user login. User needs to provide reason to suspend each phone.</p> <p>[B2] System uses an additional filter and displays only service agreement's that are "ACTIVE".</p>
Notes:	<ol style="list-style-type: none"> 1. System uses an additional filter 'Status Type – Active' to display service agreements that are Active and enable the user to further filter service agreements using the following search criteria: <ol style="list-style-type: none"> a. Phone Number b. Subscriber Last Name c. Rate Plan Group d. Device Type 2. The reasons displayed are configurable by service provider

Screens for Suspend Service in Bulk:



Choose Suspend Tab; Search for Service Agreement:

The screenshot shows the Siebel CRM interface for managing service agreements. The top navigation bar includes tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Under 'Self-Service', there are sub-tabs for 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The 'Manage Service' tab is active.

The main content area is titled 'Select Service Agreement'. It displays the user's current context: 'Company: CellTec' and 'User: Anne Green'. On the right, it shows 'Hierarchy: Billing Accounts' and 'Position: Billing Accounts'. Below this, there is a search instruction: 'Search for and select service agreements.'

A set of tabs allows the user to filter the search results: 'Activate', 'Suspend', 'Resume', 'Deactivate', 'Voicemail', and 'Subscriber Profile'. The 'Suspend' tab is currently selected.

The 'Search Criteria' section shows 'Search By:' set to 'Phone Number' with a 'GO' button.

The search results are displayed in a table with the following columns: Name, Phone Number, Rate Plan, Device, and Status. There are 66 items in total, and the current view shows the first 10 items on page 1 of 7.

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="checkbox"/>	Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="checkbox"/>	Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="checkbox"/>	Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input type="checkbox"/>	Baker, Jim	683-327-3947	INTERNATIONAL700	BLACKBERRY7280	Active
<input type="checkbox"/>	Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/>	Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input type="checkbox"/>	Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input type="checkbox"/>	Brown, Amy	636-362-6232	REGION700	NOKIAI730	Active
<input type="checkbox"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

At the bottom of the results area, there are 'CANCEL' and 'CONTINUE' buttons. The Siebel logo is visible on the left side of the page.

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Select Service Agreement and Suspend Service Screen:

Select Service Agreement

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Search for and select service agreements.

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Search Criteria

Search By: Subscriber Last Name Search Value: Lee

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Lee, Amy	847-349-4106	NATDIRECT600	BLACKBERRY7280	Active
<input checked="" type="checkbox"/>	Lee, Brad	847-349-4102	NATDIRECT450	MOTOROLA80	Active
<input type="checkbox"/>	Lee, Cooney	847-349-4114	INTERNATIONAL400	MOTOROLA80	Active

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Enter Reason to Suspend Service:

Enter Reason to Suspend Service

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Please select the reason for the suspension and specify the effective date.

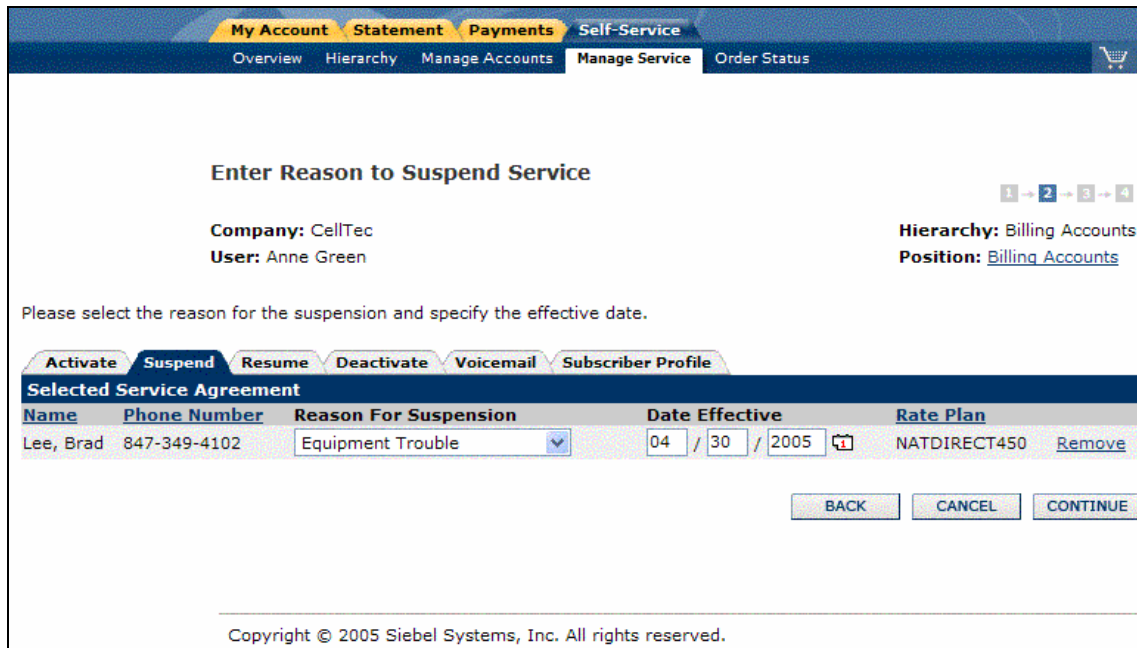
Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Selected Service Agreement

Name	Phone Number	Reason For Suspension	Date Effective	Rate Plan
Lee, Brad	847-349-4102	Equipment Trouble	<input type="text"/> / <input type="text"/> / <input type="text"/>	NATDIRECT450 Remove

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Enter Effective Date:



Enter Reason to Suspend Service

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Please select the reason for the suspension and specify the effective date.

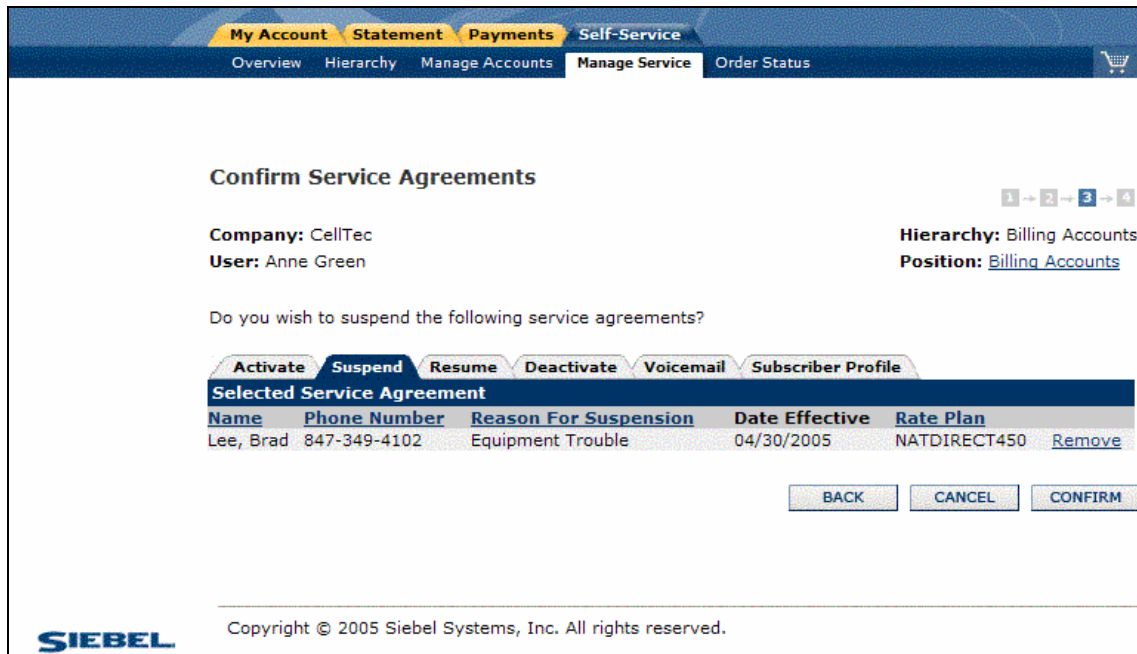
Selected Service Agreement

Name	Phone Number	Reason For Suspension	Date Effective	Rate Plan
Lee, Brad	847-349-4102	Equipment Trouble	04 / 30 / 2005	NATDIRECT450 Remove

BACK CANCEL CONTINUE

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Confirm Suspension:



Confirm Service Agreements

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Do you wish to suspend the following service agreements?

Selected Service Agreement

Name	Phone Number	Reason For Suspension	Date Effective	Rate Plan
Lee, Brad	847-349-4102	Equipment Trouble	04/30/2005	NATDIRECT450 Remove

BACK CANCEL CONFIRM

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Confirmation Summary:

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[My Account](#)
[Statement](#)
[Payments](#)
[Self-Service](#)

[Overview](#)
[Hierarchy](#)
[Manage Accounts](#)
[Manage Service](#)
[Order Status](#)

Confirmation Summary

1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** [Billing Accounts](#)
User: Anne Green **Position:** [Billing Accounts](#)

Your status change has been completed. Your tracking number is: [100009](#)

[Activate](#)
[Suspend](#)
[Resume](#)
[Deactivate](#)
[Voicemail](#)
[Subscriber Profile](#)

Selected Service Agreement				
Name	Phone Number	Reason For Suspension	Date Effective	Rate Plan
Lee, Brad	847-349-4102	Equipment Trouble	04/30/2005	NATDIRECT450

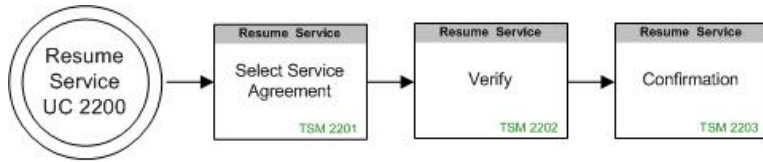
[Print Friendly](#)

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3.5.3 Resume Service

Name:	Resume Service.
Brief Description:	Enables the business user to resume service for an individual service agreement (main path) or bulk request for multiple service agreements (alternate path).
Actors:	Admin, Manager
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Resume option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. [B1] 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Verify</u></p> <ol style="list-style-type: none"> 4. System displays service agreement details to confirm. 5. User verifies and selects confirm action. <p><u>Step 3: Confirmation</u></p> <ol style="list-style-type: none"> 6. System displays confirmation page with tracking number and an option to print the page for user records. 7. Use case ends.
Alternate Paths:	<p>[A1] Bulk Change</p> <ol style="list-style-type: none"> 1. User selects more than one service agreement 2. Alternate path is the same as the main path, except that multiple rows are displayed for each selected service agreement
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Paging action (number of lines configurable by use case) 3. Track service request
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System filters service agreement's using an additional filter and displays only service agreement's that are "SUSPENDED".</p>
Notes:	<ol style="list-style-type: none"> 1. System uses an additional filter 'Status Type –Suspended' and display service agreements that are Suspended and enable the user to further filter service agreements using the following search criteria: <ol style="list-style-type: none"> a. Phone Number b. Subscriber Last Name c. Rate Plan Group d. Device Type 2. The reasons displayed are configurable by the service provider.

Screens to Resume Service in Bulk:



Select Resume Service Tab; Select Service Agreement:

Select Service Agreement

Company: CellTec Hierarchy: Billing Accounts
 User: Anne Green Position: [Billing Accounts](#)

Search for and select service agreements.

Search Criteria

Search By:

Search Results

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input checked="" type="checkbox"/>	Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Suspended
<input type="checkbox"/>	Lee, Brad	847-349-4102	NATDIRECT450	MOTOROLA80	Suspended

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Verify Status:

Confirm Service Agreements

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Do you wish to resume the following service agreements?

Activate Suspend **Resume** Deactivate Voicemail Subscriber Profile

Name	Phone Number	Rate Plan	
Baker, John	847-349-4113	NATDIRECT600	Remove

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Confirmation Summary Screen:

Confirmation Summary

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Your status change has been completed. Your tracking number is: [100010](#)

Activate Suspend **Resume** Deactivate Voicemail Subscriber Profile

Name	Phone Number	Rate Plan
Baker, John	847-349-4113	NATDIRECT600

[Print Friendly](#)

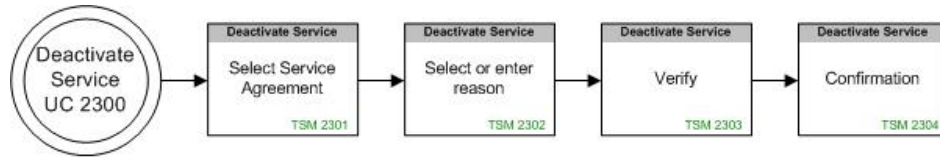
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3.5.4 Deactivate Service

Name:	Deactivate Service
Brief Description:	Enables customer service representatives to deactivate service.
Actor:	CSR only
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Deactivate option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally selects the Search & Select use case to filter displayed service agreement's 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Select or enter reason</u></p> <ol style="list-style-type: none"> 4. System displays selected service agreement details and prompts to enter a reason for deactivation. [E1] <ol style="list-style-type: none"> a. Original DSN incorrect b. Phone being repaired c. Phone was stolen d. Account closed 5. User selects a reason and selects continue action. [A1] <p><u>Step 3: Verify</u></p> <ol style="list-style-type: none"> 6. System displays the service agreement to verify. 7. User verifies and selects confirm action. <p><u>Step 4: Confirmation</u></p> <ol style="list-style-type: none"> 8. System deactivates number displays confirmation page with tracking number and an option to print the page for user records. 9. Use case ends.
Alternate Paths:	<p>[A1] Bulk Change</p> <ol style="list-style-type: none"> 1. User selects more than one service agreement 2. Alternate path is the same as the main path, except that multiple rows are displayed for each selected service agreement
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action (number of lines configurable by use case) 4. Track service request
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System filters service agreement's using an additional filter and displays only service agreement's that are "ACTIVE".</p>

Notes: 1. The reasons displayed are configurable by service provider

Screens to Deactivate Service Agreement in Bulk:



Select Deactivate Tab:

Select Service Agreement

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: Billing Accounts

Search for and select service agreements.

Activate Suspend Resume **Deactivate** Voicemail Subscriber Profile

Search Criteria

Search By: Phone Number GO Search Value SEARCH

Page 2 of 7

Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="checkbox"/> Brown, Charles	847-349-4112	NATDIRECT600	BLACKBERRY7280	Active
<input type="checkbox"/> Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active
<input type="checkbox"/> Brown, John	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/> Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active
<input type="checkbox"/> Brown, Lee	847-349-4100	NATDIRECT450	MOTOROLA80	Active
<input type="checkbox"/> Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="checkbox"/> Brown, Ray	397-894-2108	NATDIRECT450	NOKIAI730	Active
<input type="checkbox"/> Brown, Samuel	474-737-9223	NATDIRECT600	BLACKBERRY7280	Active
<input type="checkbox"/> Buel, Christina	559-488-4373	NATDIRECT600	MOTOROLA80	Active

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CANCEL CONTINUE

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Select Agreement to Deactivate:

My Account **Statement** **Payments** **Self-Service**

Overview Hierarchy Manage Accounts **Manage Service** Order Status

Select Service Agreement 1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select service agreements.

Activate **Suspend** **Resume** **Deactivate** **Voicemail** **Subscriber Profile**

Search Criteria

Search By: Phone Number **Search Value:** 559

Search Results

<input type="checkbox"/>	Name	Phone Number	Rate Plan	Device	Status
<input type="checkbox"/>	Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="checkbox"/>	Buel, Christina	559-488-4373	NATDIRECT600	MOTOROLA80	Active
<input checked="" type="checkbox"/>	Jones, Angel	559-303-7453	NATDIRECT600	MOTOROLA80	Active

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Enter a Reason to Deactivate:

My Account **Statement** **Payments** **Self-Service**

Overview Hierarchy Manage Accounts **Manage Service** Order Status

Select Reason to Deactivate 1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Please select the reason for deactivation.

Activate **Suspend** **Resume** **Deactivate** **Voicemail** **Subscriber Profile**

Selected Service Agreement

Name	Phone Number	DSN	Reason for Deactivation	
Jones, Angel	559-303-7453	DSN32	Original DSN incorrect	Remove

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Verify Service Agreement Deactivation:

Confirm Service Agreements

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Do you wish to deactivate the following service agreements?

Activate Suspend Resume **Deactivate** Voicemail Subscriber Profile

Selected Service Agreement			
Name	Phone Number	DSN	Reason for Deactivation
Jones, Angel	559-303-7453	DSN32	Account closed

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Confirmation Summary:

Confirmation Summary

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Your phone number deactivations have been completed. Your tracking number is: [100011](#)

Activate Suspend Resume **Deactivate** Voicemail Subscriber Profile

Selected Service Agreement			
Name	Phone Number	DSN	Reason for Deactivation
Jones, Angel	559-303-7453	DSN32	Account closed

[Print Friendly](#)

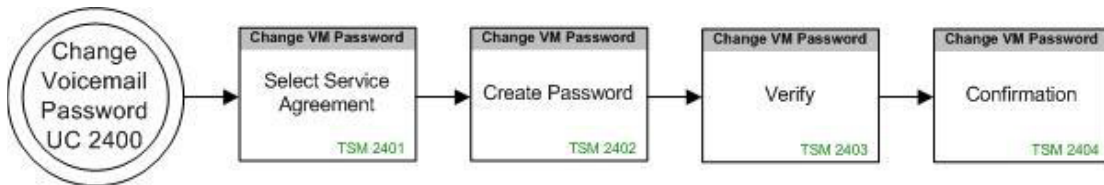
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3.5.5 Change Voicemail Password

Name:	Change Voicemail Password
Brief Description:	Provides the ability for a business user to change voicemail password for an individual service agreement. User can enter new password or have the system generate one.
Actor(s):	Business User, Administrator, CSR
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Change Voicemail password option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreement's 3. User selects a service agreement from the list and selects continue action. <p><u>Step 2: Create Password</u></p> <ol style="list-style-type: none"> 4. System displays selected service agreement details along with following options: <ol style="list-style-type: none"> a. Please choose a password for me b. I wish to create my own password <ol style="list-style-type: none"> i) Password [Required] ii) Re-enter password [Required] 5. User selects "I wish to create my own password" option <ol style="list-style-type: none"> a. User enters and re-enters password b. Selects continue action. [A1] <p><u>Step 3: Verify Password</u></p> <ol style="list-style-type: none"> 6. System displays entered password for confirm. 7. User verifies and selects confirm action. <p><u>Step 4: Confirmation</u></p> <ol style="list-style-type: none"> 8. System displays confirmation message and tracking number with options to print the page for user records. 9. Use case ends.
Alternate Paths:	<p>[A1] Automatically generate password</p> <ol style="list-style-type: none"> 1. User selects: "Please choose a password for me" option and continue 2. System displays automatically generated password on confirmation screen. <p>[A2] User selects continue action without selecting an option to create password.</p> <ol style="list-style-type: none"> 1. System displays an error message and prompts to select an option and continue.

Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Back action 3. Paging action (number of lines configurable by use case) 4. Track service request
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] Password Validation (configurable, default 4 digit number)</p>
Notes:	

Screens for Changing Voice Mail Password:



Select Voicemail Tab; Select Service Agreement:

Select Service Agreement

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: [Billing Accounts](#)

Search for and select service agreement to change voicemail password.

Activate Suspend Resume Deactivate **Voicemail** Subscriber Profile

Search Criteria

Search By: Phone Number

Page 2 of 7

Search Results (66 items)

Name	Phone Number	Rate Plan	Device	Status
<input type="radio"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active
<input type="radio"/> Brown, Charles	847-349-4112	NATDIRECT600	BLACKBERRY7280	Active
<input checked="" type="radio"/> Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active
<input type="radio"/> Brown, John	847-349-4117	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Brown, Judy	397-894-2110	NATDIRECT250	NOKIA5800	Active
<input type="radio"/> Brown, Lee	847-349-4100	NATDIRECT450	MOTOROLA80	Active
<input type="radio"/> Brown, Pam	318-473-2174	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Brown, Ray	397-894-2108	NATDIRECT450	NOKIAI730	Active
<input type="radio"/> Brown, Samuel	474-737-9223	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/> Buel, Christina	559-488-4373	NATDIRECT600	MOTOROLA80	Active

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Select Password:

Create Password

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Enter new password or request one to be automatically created.

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active

Password

Please choose a password for me.
 I wish to create my own password.

Password
 Re-enter Password

BACK CANCEL CONTINUE

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Confirm Password

Company: CellTec
User: Anne Green

Hierarchy: Billing Accounts
Position: [Billing Accounts](#)

Do you wish to accept the following password?

Activate Suspend Resume Deactivate Voicemail Subscriber Profile

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIAI730	Active

Password

New Password 3848

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Confirmation Summary Displays System Generated Password

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[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)

[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) [Order Status](#)

Confirmation Summary 1 → 2 → 3 → 4

Company: CellTec **Hierarchy:** [Billing Accounts](#)
User: Anne Green **Position:** [Billing Accounts](#)

The following voice mail password has been changed. Your confirmation number is: [100012](#)

[Activate](#) [Suspend](#) [Resume](#) [Deactivate](#) [Voicemail](#) [Subscriber Profile](#)

Service Agreement				
Name	Phone Number	Rate Plan	Device	Status
Brown, Ed	636-345-2902	REGION700	NOKIA1730	Active

Password

New Password	3848
---------------------	------

[Print Friendly](#)

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3.5.6 Change Subscriber Profile

Name:	Change Subscriber Profile
Brief Description:	Provides the ability to the admin user to edit an individual service agreement's attributes such as subscriber's name and the primary point of usage (PPU) address.
Actor:	Administrator.
Main Path:	<ol style="list-style-type: none"> 1. User selects Manage Service > Subscriber Profile option. <p><u>Step 1: Select service agreement</u></p> <ol style="list-style-type: none"> 2. User optionally invokes the Search & Select use case to filter displayed service agreements. 3. Admin user selects a service agreement and selects continue action. <p><u>Step 2: Edit Subscriber details</u></p> <ol style="list-style-type: none"> 4. System displays edit subscriber profile screen including: <ol style="list-style-type: none"> a) First Name [Required] b) Last Name [Required] c) Subscriber Address (point of primary usage) <ol style="list-style-type: none"> iii) Street Address iv) City v) State vi) Zip code (9 characters) d) E-mail e) Home Phone no f) Work Phone no - ext 5. User enters details and selects continue action [A1] [E2] <p><u>Step 3: Verify Changes</u></p> <ol style="list-style-type: none"> 6. System displays the changes to verify. 7. User verifies and selects confirm action. <p><u>Step 4: Confirmation</u></p> <ol style="list-style-type: none"> 8. System updates and displays confirmation message along with an option to print the page for user records. 9. Use case ends.
Alternate Paths:	<p>[A1] Invalid data entry</p> <p>System displays invalid warning message and prompts to re-enter the details.</p>
Standard Features:	<ol style="list-style-type: none"> 1. Cancel action 2. Paging action (number of lines configurable by use case) 3. Track service request

Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> System invokes Error Message use case. <p>[E2] System displays invalid data entry error message.</p>
Business Rules:	<p>[B1] Form validation</p> <p>[B2] System updates and caches the primary usage address to perform other bulk transactions based on this zip code (change rate plan).</p>
Notes:	The PPU zip code uses XXXXX – XXXX format. A valid 10 digit phone number uses NNN-NNN-NNNN format.

Change Subscriber Profile Screens:



Choose Subscriber Profile:

Select Service Agreement

Company Name: CellTec Hierarchy Name: [Billing Accounts](#)
 User Name: Anne Green Position Name: [Billing Accounts](#)

To change the Subscriber Profile, please select the Subscriber below.

Activate Suspend Resume Deactivate Voicemail **Subscriber Profile**

Search Criteria
 Search By:

Page 1 of 7

Name	Phone Number	Rate Plan	Device	Status
<input checked="" type="radio"/> Ashcroft, Mary	847-349-4115	NATDIRECT700	BLACKBERRY7280	Active
<input type="radio"/> Baker, Amy	847-349-4101	INTERNATIONAL400	MOTOROLA80	Active
<input type="radio"/> Baker, Amy	847-349-4118	INTERNATIONAL500	NOKIA5800	Active
<input type="radio"/> Baker, Carren	397-894-2101	INTERNATIONAL600	MOTOROLA80	Active
<input type="radio"/> Baker, Jim	683-327-3947	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Baker, John	847-349-4113	NATDIRECT600	BLACKBERRY7280	Active
<input type="radio"/> Baker, Ted	474-847-4733	INTERNATIONAL600	BLACKBERRY7280	Active
<input type="radio"/> Baker, William	397-894-2107	INTERNATIONAL600	MOTOROLA80	Active
<input type="radio"/> Banks, Tyron	397-894-2114	NATDIRECT250	MOTOROLA80	Active
<input type="radio"/> Brown, Amy	559-384-7384	NATDIRECT450	NOKIA5800	Active

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Edit Subscriber Details:

My Account **Statements** **Payments** **Self-Service**

Overview **Manage Accounts** **Manage Service** Order Status

Change Subscriber Profile

1 → **2** → 3 → 4

Company Name: CellTec **Hierarchy Name:** [Billing Accounts](#)
User Name: Anne Green **Position Name:** [Billing Accounts](#)

Enter the Subscriber Profile details and continue.

Activate **Suspend** **Resume** **Deactivate** **Voicemail** **Subscriber Profile**

Subscriber Details

* **First Name:**

* **Last Name:**

Address:

City:

State:

Zip/Postal Code:

Email:

Home Phone:

Work Phone:

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Verify Changes:

Change Subscriber Profile

Company Name: CellTec Hierarchy Name: [Billing Accounts](#)
 User Name: Anne Green Position Name: [Billing Accounts](#)

Enter the Subscriber Profile details and continue.

Activate Suspend Resume Deactivate Voicemail **Subscriber Profile**

Subscriber Details

* First Name:

* Last Name:

Address:

City:

State:

Zip/Postal Code:

Email:

Home Phone:

Work Phone:

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Confirmation Summary:

Confirm Changes

Company Name: CellTec Hierarchy Name: [Billing Accounts](#)
 User Name: Anne Green Position Name: [Billing Accounts](#)

Please confirm the changes.

Activate Suspend Resume Deactivate Voicemail **Subscriber Profile**

Subscriber Details

First Name: Mary

Last Name: Ashcroft

Address: 172 Swanton St.

City: Boston

State: MA

Zip/Postal Code: 01890

Email: MAshcroft@isp.com

Home Phone: 508-450-4500

Work Phone:

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3.6 Order Status Use Cases

The following use case lets the user track service requests.

- **Order Status** – Lets the user view transaction details of all service requests.
- **Trouble Reports** – Lets the customer submit trouble reports for any service related issues.

3.6.1 Order Status

Name:	Order Status
Brief Description:	Enables the user to view transaction details of all service requests.
Actors:	CSR, Admin, Manager, Corporate/Subscriber User
Main Path:	<ol style="list-style-type: none"> 1. User selects Order Status tab from the menu or a hyperlink from the overview page. 2. Display Tracking Number [A1] [A2] <ol style="list-style-type: none"> 1. System displays all service requests initiated within the last three months with the following attributes: [B1-B2] <ol style="list-style-type: none"> i) A separate column with “ * ” to identify group transactions ii) Tracking Number iii) Phone Number (aka MTN) iv) Date/Time v) Status (Service Request Status) vi) Description 3. User selects tracking number 4. System displays transaction details page, with a summary of <ol style="list-style-type: none"> a) Tracking Number b) Phone Number c) Date/Time d) Status (Service Request Status) e) Description <p style="margin-left: 20px;">Including one or more lines of state change history:</p> <ol style="list-style-type: none"> i) Date/Time (of state change) ii) Source (whether event was initiated by the system or a user) iii) Status (Service Request Status) iv) Description/Comments
Alternate Paths:	[A1] Search – Common Filters

User optionally uses the search facility to search for and filter tracking numbers.

1. Enters values for one or more of the following search criteria
 - i) Tracking Number (text box)
 - ii) Status (Service Request Status - dropdown)

Service request status for individual transactions are as follows (note, this is not the status of a group transaction ID, but rather the status of any individual transaction within the group):

- (1) Pending
- (2) Success
- (3) Failed

- a) System displays all matching tracking numbers
System uses match logic for text box fields (as "starts with" or "exact match" logic)
- b) User selects a tracking number and follows the main path.

[A2] Search – More Filters

This is identical to [A2] "Search – Common Filters" except the user selects the "Show More Filters" action to display these additional search filters.

1. Phone Number (text box)
2. User (text box) - Online user ID of the person who initiated the service request.
3. Date range (from / to fields for calendar selection or direct entry)
4. Transaction Type (dropdown)
Use case service request name

These filters can also be suppressed by selecting "Hide Filters".

[A3] Bulk order transaction tracking

Same as main path except

1. Tracking numbers for bulk orders are visually differentiated (such as a separate column with a "**"). Tracking status for group transactions are as follows:
 - i. Open-Pending (Request submitted , no transaction failed)
 - ii. Open-Mixed (Transactions Failed > = 1)
 - iii. Closed-Success (All Success)
 - iv. Closed-Mixed (Transactions Failed >=1)
 - v. Closed-Failed (All Transactions Failed)
- a) Bulk numbers are returned in searches if any of their associated individual tracking numbers match the search criteria.
- b) Clicking on a bulk tracking order displays a screen of individual tracking numbers.
- c) Individual tracking number screen behaves the same as the main path except that the screen displays the bulk tracking number as a

	header to the individual tracking numbers and the ability to navigate back to the page where the bulk tracking number was an individual line.
Exception Paths:	<p>[E1] User encounters a system error:</p> <ol style="list-style-type: none"> 1. System invokes Error Message use case.
Business Rules:	<p>[B1] System displays all service transactions for service agreements to which the user has access in the hierarchy.</p> <p>Also setting the hierarchy position, it narrows the scope to track service request for service agreements under the “set position” node in the hierarchy.</p> <p>[B2] System provides ability to sort the transactions displayed based on column header labels</p> <p>[B3] List of self-service transaction includes:</p> <ol style="list-style-type: none"> a. Change Rate Plan b. Add/Delete features c. Change DSN d. Change phone number e. Port Number f. Activate service g. Suspend service h. Resume service i. Deactivate service j. Change Voicemail password k. Change Subscriber profile
Notes:	<ol style="list-style-type: none"> 1. System displays all service requests initiated within the last three months (service provider configurable time period).

Order Status – Service Requests:

The screenshot displays the Siebel Order Status interface. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, a secondary navigation bar includes 'Overview', 'Hierarchy', 'Manage Accounts', 'Manage Service', and 'Order Status'. The main content area is titled 'Transaction List' and shows details for 'Company: CellTec' and 'User: Anne Green'. It also indicates the 'Hierarchy: Billing Accounts' and 'Position: Billing Accounts'. A search prompt asks the user to 'Search for and select a tracking number.' Below this is a 'Search Criteria' section with a text input for 'Enter Tracking Number', a dropdown for 'Status', and a 'SEARCH' button. A 'Show More Filters' link is also present. The search results are displayed in a table with columns for 'Tracking Number', 'Phone Number', 'Date/Time', 'Status', and 'Description'. The results show 12 items, with the first page displaying 14 rows. The Siebel logo is visible on the left side of the page. At the bottom, there is a copyright notice: 'Copyright © 2005 Siebel Systems, Inc. All rights reserved.'

Transaction List

Company: CellTec
 User: Anne Green

Hierarchy: Billing Accounts
 Position: Billing Accounts

Search for and select a tracking number.

Search Criteria

Enter Tracking Number Status [Show More Filters](#)

Page 1 of 2

Search Results (12 items)

Tracking Number	Phone Number	Date/Time	Status	Description
100001	847-349-4116	04/13/2005 - 13:06	Success	Port Number
* 100002		04/13/2005 - 13:14	Closed-Success	De-Activate Service
100005	474-737-9223	04/13/2005 - 13:26	Failed	Port Number
* 100006		04/13/2005 - 14:37	Closed-Success	Activate Service
100009	847-349-4102	04/13/2005 - 14:56	Success	Suspend Service
* 100010	847-349-4113	04/13/2005 - 15:04	Success	Resume Service
100011	559-303-7453	04/13/2005 - 15:15	Success	De-Activate Service
100012	636-345-2902	04/13/2005 - 15:34	Success	Change Voicemail Password
100013	397-894-2110	04/13/2005 - 15:38	Success	Change Subscriber Profile
100014	318-743-4734	04/13/2005 - 16:10	Success	Change Phone Number

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Order Status – Additional Filters:

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[My Account](#) | [Statement](#) | [Payments](#) | [Self-Service](#)

Overview | Hierarchy | Manage Accounts | Manage Service
Order Status

Transaction List

Company: CellTec **Hierarchy:** Billing Account
User: Anne Green **Position:** [Billing Accounts](#)

Search for and select a tracking number.

Search Criteria

Enter Tracking Number	<input type="text"/>	Status	<input type="text"/>	
Phone Number	<input type="text"/>	User	<input type="text"/>	
Date Range	From <input type="text"/> / <input type="text"/> / <input type="text"/>	To	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Transaction Type	<input type="text"/>			<input type="button" value="RESET"/> <input type="button" value="SEARCH"/>

[Hide Filters](#)

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SIEBEL **Search Results (18 items)**

Tracking Number	Phone Number	Date/Time	Status	Description
100001	847-349-4116	04/13/2005 - 13:06	Success	Port Number
* 100002		04/13/2005 - 13:14	Closed-Success	De-Activate Service
100005	474-737-9223	04/13/2005 - 13:26	Failed	Port Number
* 100006		04/13/2005 - 14:37	Closed-Success	Activate Service
100009	847-349-4102	04/13/2005 - 14:56	Success	Suspend Service
* 100010	847-349-4113	04/13/2005 - 15:04	Success	Resume Service
100011	559-303-7453	04/13/2005 - 15:15	Success	De-Activate Service
100012	636-345-2902	04/13/2005 - 15:34	Success	Change Voicemail Password
100013	397-894-2110	04/13/2005 - 15:38	Success	Change Subscriber Profile
100014	318-743-4734	04/13/2005 - 16:10	Success	Change Phone Number

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[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)
[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) **Order Status**

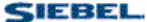
Transaction Details

Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Group Tracking Number			
Tracking Number	Date/Time	Status	Action
100006	04/13/2005 - 14:37	Closed-Success	Back to order status

Transactions				
Tracking Number	Phone Number	Date/Time	Status	Description
100008	847-349-4106	04/13/2005 - 14:37	Success	Activate Service
100007	847-349-4107	04/13/2005 - 14:37	Success	Activate Service

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Change history details page for group transaction:

[My Account](#) [Statement](#) [Payments](#) [Self-Service](#)
[Overview](#) [Hierarchy](#) [Manage Accounts](#) [Manage Service](#) **Order Status**

View Transaction Status


Company: CellTec **Hierarchy:** Billing Accounts
User: Anne Green **Position:** [Billing Accounts](#)

Transaction				
Tracking Number	Phone Number	Date/Time	Status	Description
100008	847-349-4106	04/13/2005 - 14:37	Success	Activate Service

Transaction History			
Date/Time	Source	Status	Description
04/13/2005 - 14:38	Data Importer	Success	Successful Completion
04/13/2005 - 14:37	Anne Green	Pending	Service Request Created

[BACK TO ORDER STATUS](#) [Print Friendly](#)

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Individual Transaction status history page:

View Transaction Status

Company: CellTec Hierarchy: Billing Accounts
 User: Anne Green Position: [Billing Accounts](#)

Transaction				
Tracking Number	Phone Number	Date/Time	Status	Description
100005	474-737-9223	04/13/2005 - 13:26	Failed	Port Number

Transaction History			
Date/Time	Source	Status	Description
04/13/2005 - 13:26	Data Importer	Failed	Operation Failed
04/13/2005 - 13:26	Anne Green	Pending	Pending
04/13/2005 - 13:26	Anne Green	Pending	Service Request Created

[BACK TO ORDER STATUS](#) [Print Friendly](#)

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3.6.2 Trouble Reports

Name:	Trouble Reports
Brief Description:	Enables customer to submit trouble reports for any service related issues.
Actors:	CSR, Admin
Main Path:	<ol style="list-style-type: none"> Select Trouble Reports User accesses this screen from a link on the "Overview" page or from the message center option under the "Contact Us" or "Service Manager" menu options. System displays <i>Trouble Reports</i> page containing: <ol style="list-style-type: none"> Drop down list containing Message Categories Message name Message description User selects a Message Category from dropdown list [E1] [A1] [A2] User enters Message Name in text box [E2] User enters Description (full question) in text box [E3] User selects submit action. [A3] Order Status: Record written to the order status table System displays confirmation screen explaining that the message

	has been sent and references a tracking number.
Alternate Path:	<p>[A1] User selects Message Category that is covered by an online service</p> <ol style="list-style-type: none"> 1. System displays pop-up box informing user that service can be ordered online with link to service page <p>[A2] User selects link to online service</p> <ol style="list-style-type: none"> 1. System redirects user to service page.
Exception Paths:	<p>[E1] User does not select a category:</p> <ol style="list-style-type: none"> 1. System redisplay s page with an error messages asking the user to select a category. <p>[E2] User does not enter text for message name:</p> <ol style="list-style-type: none"> 1. System redisplay s page with an error messages asking the user to enter a message name <p>[E3] User does not enter text for message:</p> <ol style="list-style-type: none"> 1. System redisplay s page with an error messages asking the user to enter a message
Notes	<p>The categories displayed in the pull-down menu are: Select Category; List of Self-Service Transactions (from above use cases); Suggestions. These appear in alphabetic order. The default is Select Category.</p> <p>The category list displayed is configurable by the service provider.</p>
Configuration Options	<p>If the client purchases CSR Manager, the Trouble Reports functionality referenced here could be enhanced by interfacing it to the service provider's CSR Manager system and adding end user functionality to review message response and case history as well as reply, close, and reopen cases.</p>

Trouble Report Screen:

The screenshot shows the Siebel web interface for submitting a trouble report. At the top, there is a navigation bar with tabs for 'My Account', 'Statement', 'Payments', and 'Self-Service'. Below this, the page title is 'Trouble Reports'. User information is displayed: 'Company Name: CellTec', 'User Name: Anne Green', 'Hierarchy Name: N/A', and 'Position Name: N/A'. A secondary navigation bar contains tabs for 'FAQ', 'Terms and Conditions', 'Contact Us', and 'Trouble Reports'. A message prompt reads: 'Please enter a message and submit a trouble report.' The main form area is titled 'Message' and includes a 'Category' dropdown menu set to 'Activate service', a 'Message Name' text input field, and a 'Description' text area. At the bottom right of the form are 'SUBMIT' and 'CANCEL' buttons. The Siebel logo is visible in the bottom left corner.

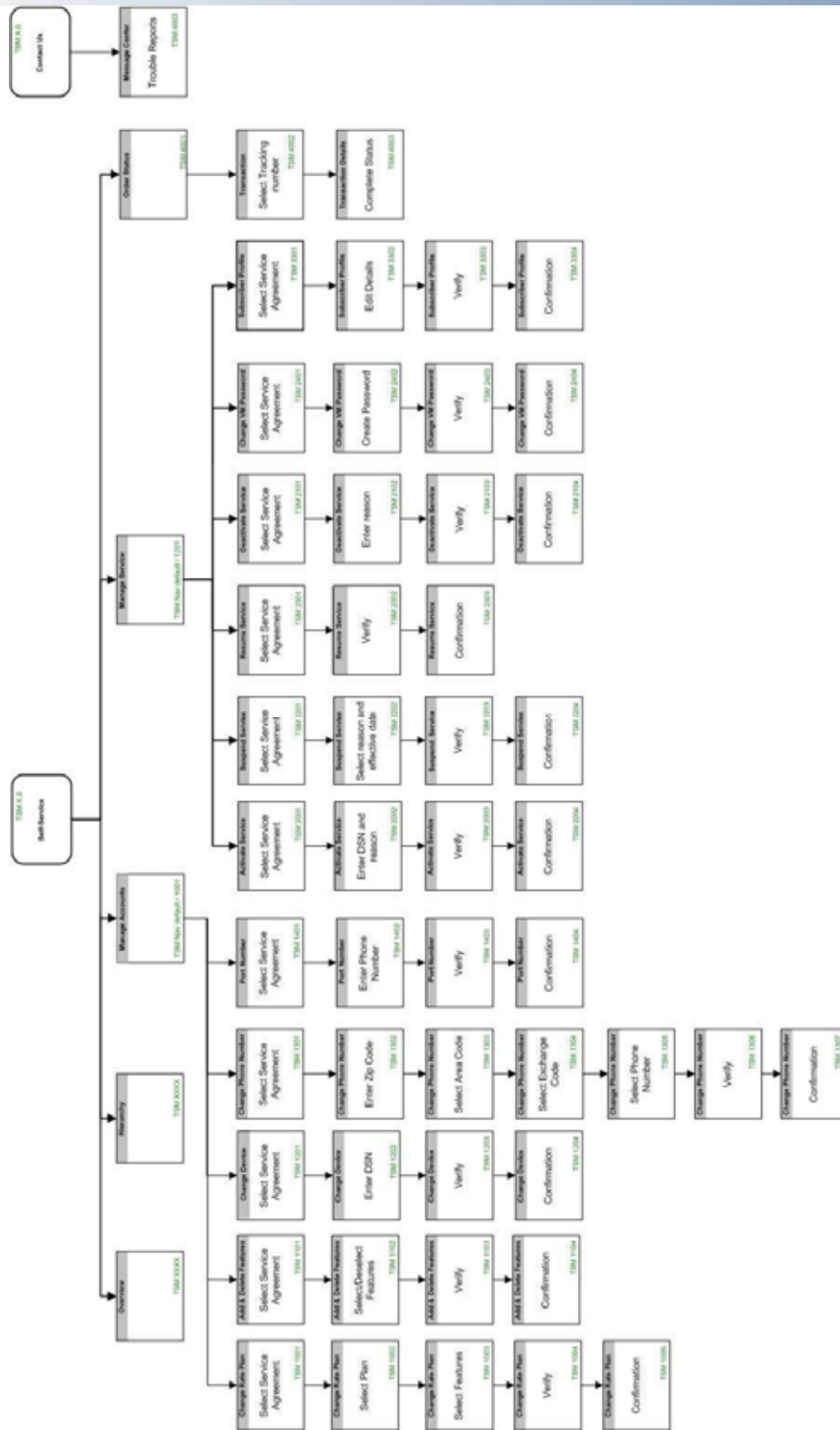
Confirmation screen:

The screenshot shows the Siebel web interface for the confirmation of a trouble report. It features the same navigation and user information as the submission screen. The secondary navigation bar is the same. A message reads: 'You have just submitted a trouble report for the following reason outlined below.' Below this is a 'Confirmation' section with the following details: 'Description: Change Rate Plan', 'Posting Date: 10/09/04', and 'Tracking Number: 345AGS'. A 'PRINT FOR YOUR RECORDS' button is located at the bottom right. The Siebel logo is in the bottom left corner.

4 User Interface

4.1 Service Manager Site Map

The following page shows the site map for Service Manager.



Service Manager Site Map

4.2 Compatibility Requirements

This section outlines requirements for the User Interface (UI) of the system. The solution will be compatible for the following browsers:

- IE 6 and above
- FireFox 1.0
- Netscape 7.2