Administration Guide

iPlanet BillerXpert 4.6

May 2002

Contents

About This Guide

This guide contains reference and operating procedures for administering a company's Internet Bill Presentment and Payment (IBPP) BillerXpert 4.6 from iPlanet e-commerce solutions.

The preface contains the following sections:

- Audience
- What's in This Document
- The Document Online
- Related Documentation

Audience

The *BillerXpert Administration Guide* is written specifically for an administrator, the person who manages the hardware and software for a billing company's bill presentment system. The administrator (Admin) manages the information related to online IBPP, including: data on its members, departments, payment methods, and profile records.

An administrator should have experience in working with and administering the following:

- Multi-hosted systems
- Web servers
- Unix Systems
- Internet browsers

What's in This Document

The following chapters and information are contained within this document:

- Chapter 1 - Introduction and Overview for the BSP, depicts a forward and outlines BillerXpert for the Billing Services Provider.
- Chapter 2 - Detailing the BSP Dashboard, gives an overview and introduction to the BSP dashboard
- Chapter 3 - Building Billers for the BSP, describes the procedure to profile billers.
- Chapter 4 - Looking at Loading for the BSP, details the schema necessary to manually load files into the system.
- Chapter 5 - Accessing Activities for the BSP, displays the billers and users invoking BillerXpert and details their system practices.
- Chapter 6 - Evoking Events for the BSP, generates events and handlers of the system, such as autopayments and posted payments.
- Chapter 7 - Managing Members for the BSP, illustrates how to search for and create members.
- Chapter 8 - Creating Customer Configuration for the BSP, coordinates the admin on the procedures for customizing BillerXpert to tailor user specifics.
- Chapter 9 - Preparing Payment Setup for the BSP, shows how to prepare payment types for the biller.
- Chapter 10 - Introduction and Overview for the Biller, is a foreword and outlines BillerXpert.
- Chapter 11 - Detailing the Dashboard, describes structure and use of the dashboard that includes the function buttons within the main menu tabs.
- Chapter 12 - Managing Members, tells the administrator how to direct members and their activities.
- Chapter 13 - Looking at Loading, details the viewing of loaded files in relation to BillerXpert.
- Chapter 14 - Accessing Activities, explains how the Admin can view activities by users in the BX system.
- Chapter 15 - Creating Customer Configuration, directs the admin on the procedures for customizing BillerXpert for specific user traits.
- Chapter 16 - Preparing Payment Setup, conducts the processes needed to complete payment types for the system.

- Appendix A - Error Messages, is a numerical listing of error messages for this application and how to correct these messages.

The Document Online

You can find this manual online in Portable Document Format (PDF) and Hypertext Markup Language (HTML) formats on the following Web site:
`http://docs.iplanet.com/docs/manuals`

Related Documentation

The documentation for iPlanet BillerXpert includes:

- *API and Schemas Reference Guide*, describes the interface to component business objects you can use and describes the database schemas that refer to them.
- *Customization Guide*, discusses the architecture and how to customize it through a collection of classes and templates building on the iPlanet Application Server (IAS).
- *Installation Guide*, provides planning information and guidelines for product deployment.
- *Integration Guide*, provides instructions for integration BillerXpert with other products.

Chapter 1

Introduction and Overview for the Billing Services Provider (BSP) Administrator

This chapter is an overview of the iPlanet BillerXpert, for the Billing Service Provider (BSP) Administrator including:

- Definition of Administrator (Admin)
- Navigating the Graphical User Interface (GUI)
- BSPAdmin Tasks
- Logging In and Out

Definition of Administrator (Admin)

An administrator, is a person that can administrate and manage company information and functions. This chapter provides an overview of the tasks that can be performed at the Administrator level by the BSP.

Billing Services Provider (BSP) Administrator

The BSP hosts the environment and data for the billing companies. A BSP is responsible for: monitoring load status for billers, loading data files, setting an archive directory, purging data, recovering data, monitoring events, adding a new event, monitoring a handler, adding a new handler, searching for a biller, adding new billers, updating a biller profiles, creating a new biller group, adding and /or updating BSP administrators, adding a new payment type, searching for a biller's payment vendor, adding a new payment vendor. The BSP's company is called the Hosting company.

Navigating the Graphical User Interface (GUI)

The Graphical User Interface (GUI) has a series of Main Menu tabs: including, as illustrated in Figure 1 - 1.

Figure 1 - 1 Main Menu tabs

Main Menu Tabs

Dashboard

The Dashboard tab gives you the ability to view and update a BSP profile.

Billers

The Billers tab provides the BSP with the capability of searching and adding a new biller client.

Loading

The Loading tab describes various procedures for loaded files, including status, archiving, and so forth.

Activities

The Activities tab provides a way of tracking activities on the system by its users.

Loading

The Loading tab gives you the ability to track loaded files and the respective status of each load.

Events

The Events tab defines a way to search for an event or an event handler, and add a new event or an event handler.

Members

The Members tab enables the BSP to search for and add a new member, or client, to the database.

Cust Config

The Cust Config tab gives the BSP the ability to select or add profile and service options to the client.

Payment Setup

The Payment Setup tab describes the way to search for or add a new payment type.

BSPAdmin Tasks

The BSPAdmin can perform various tasks. Some of these tasks are performed frequently, perhaps on a daily basis. Others are performed infrequently, or once after the system is installed and set up for production. Table 1 - 2 describes the tasks a BSP Admin can perform, and where these tasks are located.

Table 1 - 2 BSPAdmin Tasks

Task	**Tab**
Monitor status of biller client	Dashboard
Get statistics of biller	
View BSP profile	
Update BSP profile	
Search for a biller	Billers
Add a new biller	
Search for a biller group	
Add a new biller group	
Select a biller service options	
Add a new service options	
Check a file load status	Loading
Configure a manual load	
Set a file archive directory	

Table 1 - 2 BSPAdmin Tasks

Task	Tab
Purge file data	
Recover file data	
Monitor activities for all biller clients	Activities
Check status of event	Events
Create a new event	
Check status of handler	
Add a new handler	
Search for a member	Members
Add a new member	
Select a profile option	Cust Config
Add a new profile option	
Select a service option	
Add a new service option	
Search for a payment type	Payment Type
Add a new payment type	

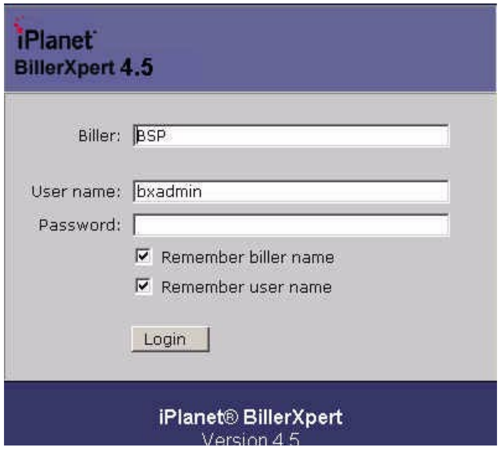
Logging In and Out

Logging in for all three admins takes place on the same screen. This screen is a portal to the entry point of a billing site. Depending upon your log in and admin access level, depends on the GUI that is displayed, after completing a successful log in.

Logging In

Figure 1 - 3 is the entry portal to BillerXpert.

Figure 1 - 3 Log In Screen



1. From the BillerXpert B2B Administrative Login, enter:

Biller: Billing Service Provider Name. For example **`BSP`**

User Name: **`bxadmin`** (default name)

Password: **`bxadmin`** (default password)

2. Click the Login button.

Logging Out

- Click the Logout button. The button is located on the top right hand corner of every page.

Chapter 2

Detailing the Dashboard for the BSP

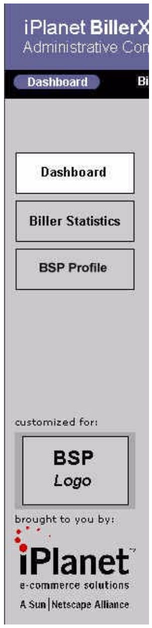
This chapter details the BSP dashboard of the BillerXpert system. It includes:

- Detailing the BSP Dashboard
- Viewing Biller Statistics
- Describing the BSP Profile
- Details of the BSP Profile Screen
- Updating a BSP Profile

Detailing the BSP Dashboard

The dashboard is the grey sidebar left-hand area of the screen, as well a tab of the same name, containing the iPlanet logo. The dashboard contains the functions for BillerXpert that are invoked when a user selects one of the tabs from the main menu. The first tab (Dashboard) of the main menu solicits the BSP Profile. Figure 2 - 1 is an illustration of the dashboard.

Figure 2 - 1 Dashboard



Viewing Biller Statistics

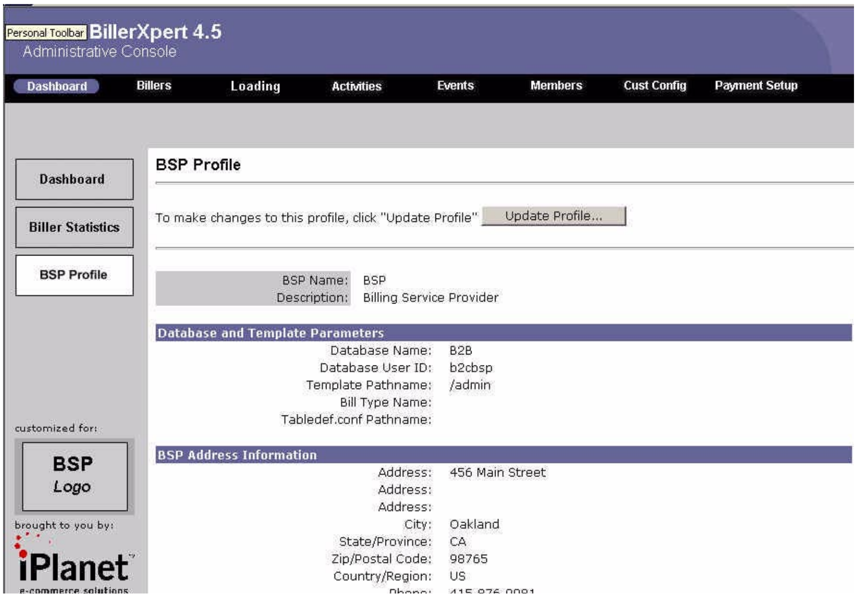
BillerXpert provides a tracking activity screen which provides some data of Biller activity. At this screen one can view user and administration actions of each Biller. It’s a simple tracking system that is not intended to be used for metering or statistics.

Describing the BSP Profile

The profile is a detailed listing of the location, contact information, and related data on the BSP organization. As the administrator, it is your responsibility to ensure that this information is kept up to date.

As the Admin you can update a BSP’s profile information. The profile screen is displayed in Figure 2 - 2:

Figure 2 - 2 BSP Profile



Details of the BSP Profile Screen

The details, data, operations, and procedures of the company profile screen are explained in this section.

- Database and Template Parameters
- BSP Address Information
- Contact Information

Database and Template Parameters

The database and template parameters include the database name, the database user ID, template pathname, bill type name, and the pathname for the bill type.

BSP Address Information

The second area of the screen contains address and other-related location information. The company address, postal code, country or region, phone and fax numbers are displayed.

Contact Information

This area of the screen shows the primary and secondary names of the people to contact. These names are the people who billers, and other related third parties, can contact for questions on invoices; and the opposite also remains true.

Contacts might be someone other than the Admin, such as a facilities manager, financial department head, or chief operating officer, etc. The phone numbers and email addresses of these contacts are also included.

Updating a BSP Profile

To update a BSP profile

1. Click the Update BSP Profile button.
2. Complete the information you want updated in the respective fields.
3. Click Update BSP Profile.
4. Click Add Service Options button.

Adding Billers for the BSP

BillerXpert ships with three sample billers reflecting different industries. These include the cable, telephone, and financial industry. A new biller could reflect one of the sample industries or an alternate industry.

This chapter details the procedures of adding and updating billers. It contains:

- Adding a Biller
- Searching for a Biller
- Searching for a Group
- Adding a Group
- Selecting Biller Service Options
- Adding a Biller Service Option
- Deleting a Biller Service Option

Adding a Biller

BillerXpert now includes a new and simple program to add new Billers. The program is called *ezPostinstall* and is located in `$BX_HOME/demo` directory. As part of the Biller creation, sample profile information and payment type are setup by default. This section will explain how to change this sample information.

Add Biller Script

Adding a Biller through ezPostinstall is a series of steps which are as follows:

- Invoke the ezPostInstall program.

This step populates the directory server, oracle database, and html templates for the new biller.

- Go to the `$BX_HOME/demo` directory. For example,

  `hostname% cd $BX_HOME/demo`

- Invoke the program as follows:

  `hostname% ./ezPostInstall.sh`

The program will ask for a Biller name and proceed as follows:

- `Enter the Biller Name you Want to Create [Q - to Quit] [Q].`

  For example, type `Telco`

  ```
  Select The Biller Template You want to Use
  [1] Telecom Template
  [2] Cable Template
  [3] Financial
  ```

- `Select One Template [ 1, 2, 3] [1]:  1`

  For example, Type 1 for Telecom Template

- `Please Enter the Biller Oracle User Name [myuser]:  telco`

  For example, type `telco`

- `Please Enter the Biller Oracle Password [password]:`

  For example, type `telco`

- `Please Re-Enter the Biller Oracle Password [password]:`

  For example, type `telco`

  `Configuring Oracle and LDAP schema...`

- `Do you want to load demo data [no]?  n`

  Type No.

You will see the following messages displayed:

```
*******************************************************************
>>>  Your Biller Template Will be vova
>>>  Your admin Login Id will be admin@telco and password bxadmin
******************************************************************
```

```
Loading Biller1: Telco in LDAP...(This may take 1-2 mins)

Creating Schema for Telco...

See /tmp/BillerXpertCreateBiller.telco.ldap.2001082911 for
details...

Adding Biller Info into BSP Tables

The newly created biller was initialized.

End of BillerXpert post-Installation ...
```

- `Please Enter the Biller Name you Want to Create[ Q - to quit [Q]:`

  `For instance, Type Q to quit.`

  `End of biller Creation`

For each additional Biller you may wish to add, repeat the above steps.

Updating Biller Profile Information

When creating a new biller through ezPostinstall, one needs to adjust the Biller Profile information to proper values. The steps are:

- Login as the BSP Admin using the Biller name, User name, and password. For example:

  `BSP: Telco`

  `User Name: admin@telco`

  `Password: bxadmin`

- Select the Biller Profile under Dashboard.

  It shows the Biller Profile with sample address and contact information. Correct the information by doing the following:

  - Click on the Update Profile link
  - Enter proper address and contact information
  - Click the Update Profile button.

For further information see Chapter 11, Describing the Biller Profile section.

Updating Payment Information

The Payment Type shows all the active credit cards. When creating a new biller through ezPostinstall, one needs to adjust the payment information to the proper values. The steps are:

- Ensure that all active credit cards are selected to have Active status
- Deselect the others that may be inactive. For example:
  Keep only VISA active.
- Click on the Update Payment Types button.

NOTE When you initially created the biller, all credit cards are set by default to active status. In this step, you have updated the status of the credit cards.

Updating Oracle Information

The previous steps, the Directory information was adjusted. The next set of steps describe adjusting the information on the Oracle systems. The files needed for this section are:

- `paymentinfo.sh`
- `paymentinfo.sql`
- `bspbillerinfo.sh`
- `bspbillerinfo.sql`

These files are located in

```
$BX_HOME/demo/schema/oracle/testdata/bspTestdata/
```

To begin this process, edit the `BSPBILLERINFO` with the proper information. For our example, the file is edited with the following tvalues:

```
('&1','&1', '&1','4210 Network Circle', null, null, 'Santa Clara',
'CA', '95054', 'USA','123', '408-908-4894', '999999999',
'NNNNNNNNN','Help me', 'Restrictions', 'Logo', 'ValidateURL',
'BillerInfoURL',null, null)
```

Invoke the `bspbillerinfo.sh` script as follows:

```
% bspbillerinfo.sh Username/Password@DBName BillerID
```

For example,

```
% bspbillerinfo.sh bxbsp/bxbsp@b2c Telco
```

This inserts biller information in the `BSPBILLERINFO` table for the Telco biller.

The next step is to adjust the Payment Information in the `PAYMENTINFO` table. To accomplish this, run the paymentinfo.sh script as follows:

```
% paymentinfo.sh Username/Password@DBName BillerID Method Type
Brand
```

For example,

```
% ./paymentinfo.sh bxbsp/bxbsp@b2c Telco CC CREDITCARD VISA
```

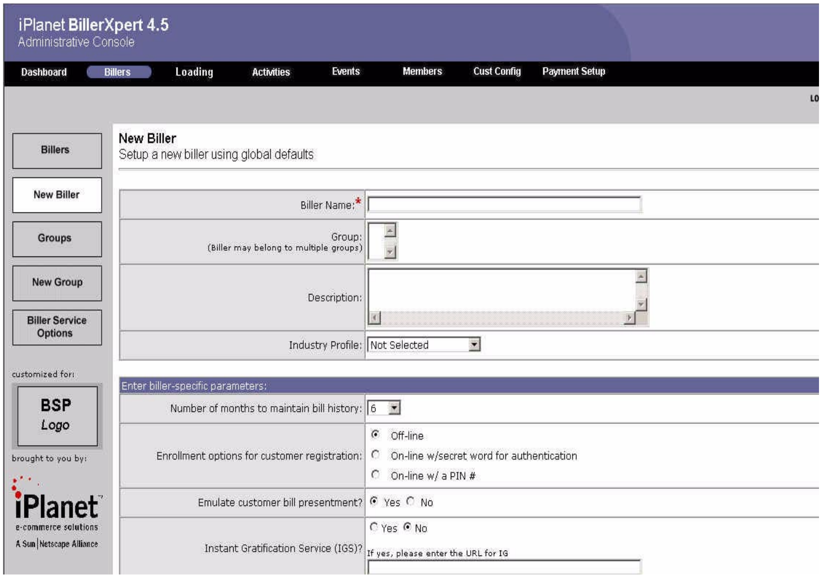
```
% ./paymentinfo.sh bxbsp/bxbsp@b2c Telco CA CHECKINGACCOUNT
CHECKING
```

This adds two payment methods in `PAYMENTINFO` table for the biller B1

New Biller Admin Screen

The feature adds only the minimum entries necessary for recognizing the new biller in the administration tool. Items such as table definitions, Oracle tables and Oracle synonyms are not created. This Administrator screen is to be used by sophisticated users who are doing heavy customization in User templates and Oracle schemas. This tool provides an easy tool for Directory (LDAP) entries. To create the LDAP entries for a new Biller the steps are:

1. At the Biller Tab, click the New Biller button on the Dashboard.
2. At the New Biller screen, enter the global defaults for the biller.
3. Complete all required fields (those containing asterisks *)
4. Click Create Biller.



The first section of the New Biller screen includes the new biller name, a group (or group) affiliation, a description of the group, and an industry profile. A group can be an additional delineation for your biller. A description could be any text to describe your biller. An industry profile could be a telecom organization or a financial institution.

The second section includes, biller specific parameters, such as month to maintain history, enrollment options for customer registration, bill presentment, and Instant Gratification parameters.

The next section describes the database and template parameters, such as name, ID, password, template and file pathnames, and bill type.

The biller address information is the fourth part of the new biller screen, including address, telephone, fax, and URL data, and so on.

The last part of the screen includes contact information for the biller, primary and secondary contact names and email addresses, and telephone numbers.

Searching for a Biller

To search for a Biller

1. Navigate to the Biller tab.
2. Click the Biller button on the Dashboard.
3. Enter the search parameters in the Search for Biller screen.
4. Click Retrieve Billers.

Searching for a Group

To search for a biller

1. From the Biller tab, click the Groups button on the Dashboard.
2. Enter the name of the group you want to search for.
3. Click Retrieve Groups.

Adding a Group

To add a group

1. Navigate to the Biller tab, click the New Group button on the Dashboard.
2. Enter the name of the new group and other pertinent data for that group.
3. Click Create Group.

Selecting Biller Service Options

To select biller service options

1. Navigate to the Biller Tab, and select the Biller Service Options button on the Dashboard.
2. Select a value for each service option from the drop down list.
3. Click the Default radio box if you want this service option to the the default choice for the biller.

Adding a Biller Service Option

To add a biller service option

1. From the Biller tab on the Dashboard, click the Biller Service Options button on the Dashboard.
2. Enter a value for each service option.
3. Click the Default radio box if you want this service option to the the default choice for the biller.

Deleting a Biller Service Option

To delete a biller service option

1. From the Biller tab on the Dashboard, click the Biller Service Options button on the Dashboard.
2. Click the Delete button on the option you want to delete for that biller.

Chapter 4

Looking at Loading

This chapter provides information about loading, archiving, purging, and restoring biller data. The topics in this chapter are:

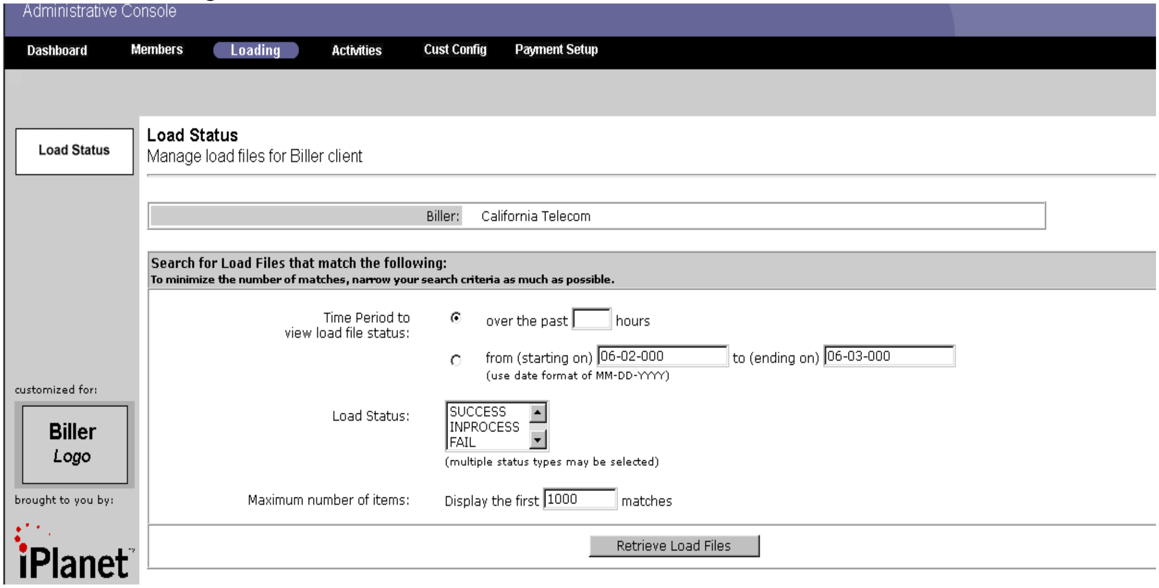
- Accessing Loading Activities
- Initiating a File Load
- Archiving a Directory
- Purging a Database
- Recovering Files in a Database

Accessing Loading Activities

Loading activities, directories, and database movement can be accessed through the Loading command button on the BSP main menu.

- Click the Loading command button from the main menu to display the Loading window, as displayed in Figure 4-1.

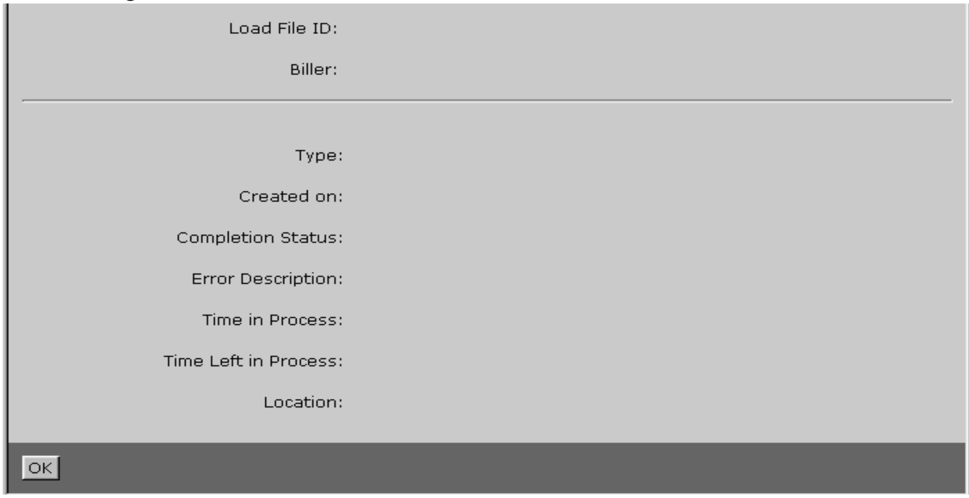
Figure 4-1 Load Status Window



There are several methods to view load file status. Below are some examples of search capabilities offered by BillerXpert.

- Select a Biller Status as being Active or Inactive, by clicking the corresponding selection button, next to the choice.
- Select the Group and its corresponding button, by clicking and choosing one or more of the selections from the dropdown listbox. To choose more than one selection, while holding down Shift, click and highlight each selection. OR
- Choose Select All Billers to elect every group listed.
- Select a Time Period to view the load file status
- Select a Load Status for your file from the choices in the dropdown listbox and Maximum number of items to be displayed.
- Click Retrieve Load Files to have your choices appear at the bottom of your page.
- To view specifics of a retrieved file, select the link of the file you want to view, as detailed in Figure 4-2.

Figure 4-2 Load File Details



Initiating a File Load

There are two methods that can be used to establish biller data:

- Via the Command Line
- Via the Administration Tool

Each of these methods are described in the following sections.

Via the Command Line

Before you begin, you must source the BillerXpert environment. For example:

- Source the `$BX_HOME/billxpert_env.[csh-sh]` to ensure the correct search and class paths.
- Load the template using the following command:

  ```
  $BX_HOME/loading/tools/BXLoad <template or file name>
  ```

  For example, `$BX_HOME/loading/tools/BXLoad Telco_bills`
- Press Enter.

You will receive a message indicating the progress of the job and finally that the loading has completed:

```
Load file id for biller: 'telco' is 2003
Logging Progress: 2003: 1
Updating the loadStatus for : 2003 To SUCCESS
Logging Progress: 2003: 1
End of the records for biller: telco
```

3. To verify that the bills have properly loaded:

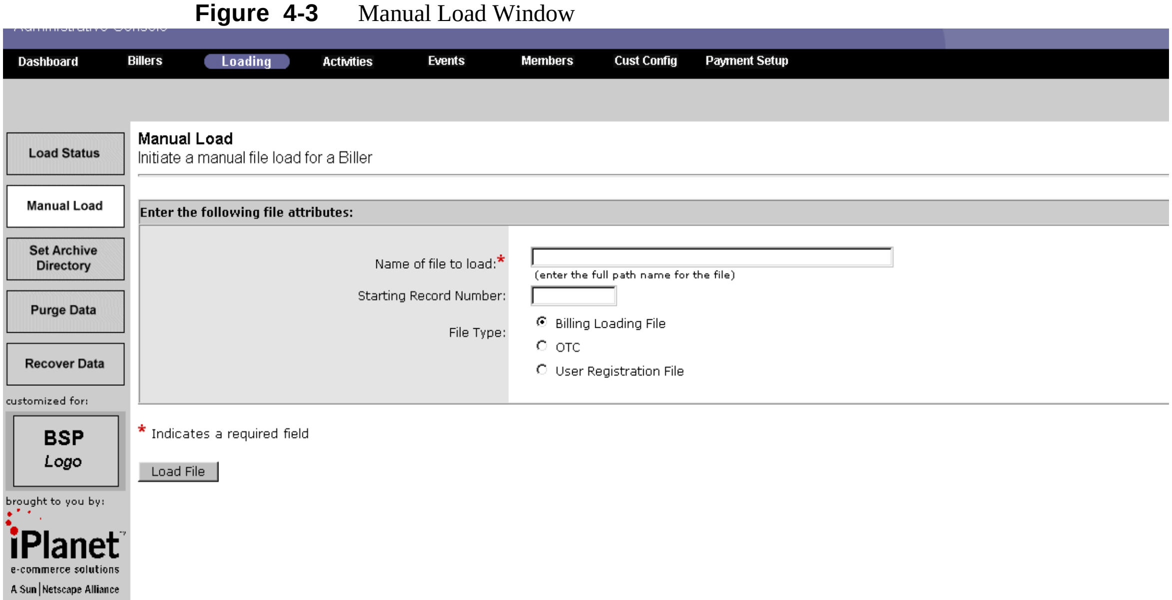
- Login to the front end as the user
- Go to the User Center

Verify that the bills appear in the Billing Center for your account.

Via the Administration Tool

From the Loading page of BillerXpert, select the Manual Load button from the Loading page, to display Figure 4-3.

Figure 4-3 Manual Load Window



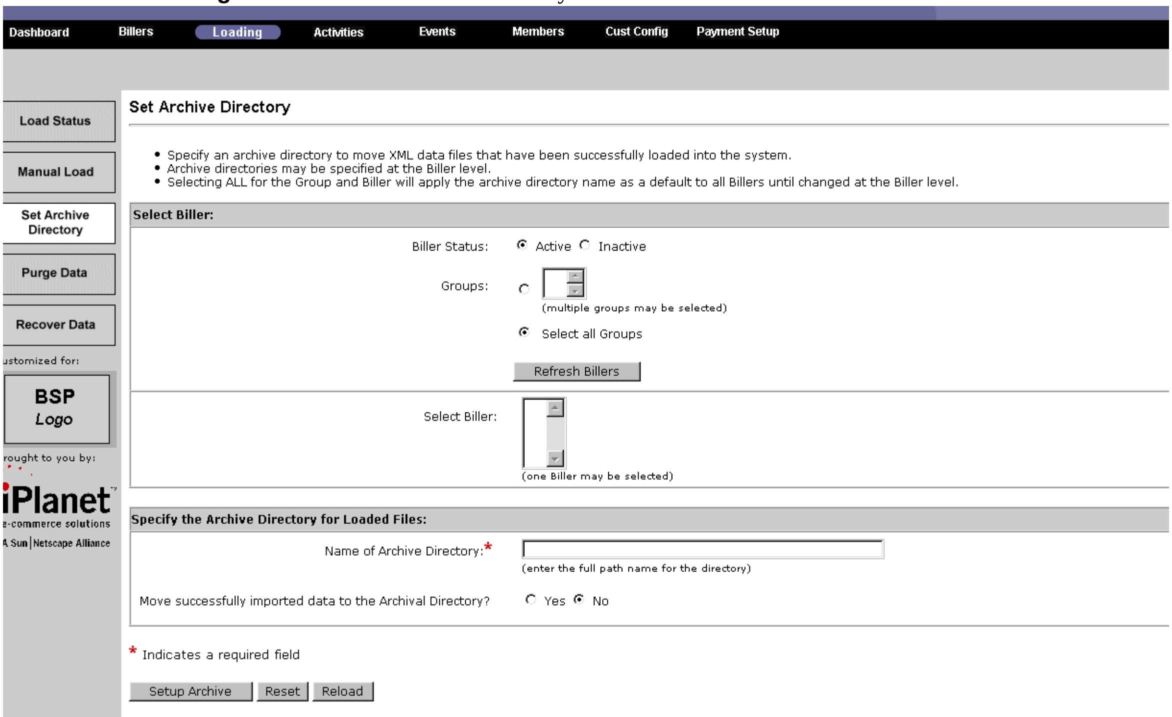
- Enter the exact name of the file you want to manually load. This is a required field. Press Tab to move to the next field.
- Enter the file type, selecting one of the choices listed, Billing Loading, OTC, or User Registration.
- Click Load File to begin the process.
- If you want to monitor load processing, click the appropriate button, OR click Return to Load Status to display that window.

Archiving a Directory

Archiving a directory allows the user to specify an archive directory to move files that were successfully loaded in the system. BillerXpert automatically moves files with a successful load status in to the specified archive directory for each client.

Click Set Archive Directory to display the archiving window. This window is illustrated in Figure 4-4.

Figure 4-4 Set Archive Directory



Purging a Database

Purging a database allows the user to delete historical data to an archival file. This file is specified by the user although the purged data can be recovered by the system, if needed.

The following details the procedure to purge a database.

- Click the Loading command button from the main menu to display the Load Status window.
- Click the Purge Data button
- To save the purged data in another location, enter the full path name for the file in the Specify...purged data...saved...field. Press Tab to move to the next field.
- Click Purge to purge the database.

Recovering Files in a Database

Recovering files in a database allows the user to recover data that was previously purged. Purged data is saved to a file for archive purposes. To recover files:

- Click the Loading command button from the main menu to display the Load Status window.
- Click the Recover Data button
- Specify the name of the database file to recover the purged data in another location, enter the full path name for the file in the Specify...purged data...recovered...field. Press Tab to move to the next field.
- Click Recover to recover the database.

Chapter 5

Activities

This chapter details the BSP Admin's ability to view and monitor all activities for any biller. The Admin is also able to filter the activities displayed in the browser window by: biller name, user ID, and time period, to limit the number of activities that are displayed on the screen.

The topics in this chapter are:

- Accessing Biller Activity Tracking
- Retrieving Biller Activities
- Filtering Biller Activities

Accessing Biller Activity Tracking

BillerXpert provides a sample and simple method of tracking a few Biller activities. The tracking is done at the Biller level and comprised of user logins. To view this feature, select the Activities command button on the BSP main menu and as follows:

- Click the Activities command button from the main menu to display the Activities application, as displayed in Figure 5-1.

Figure 5-1 Activities Screen

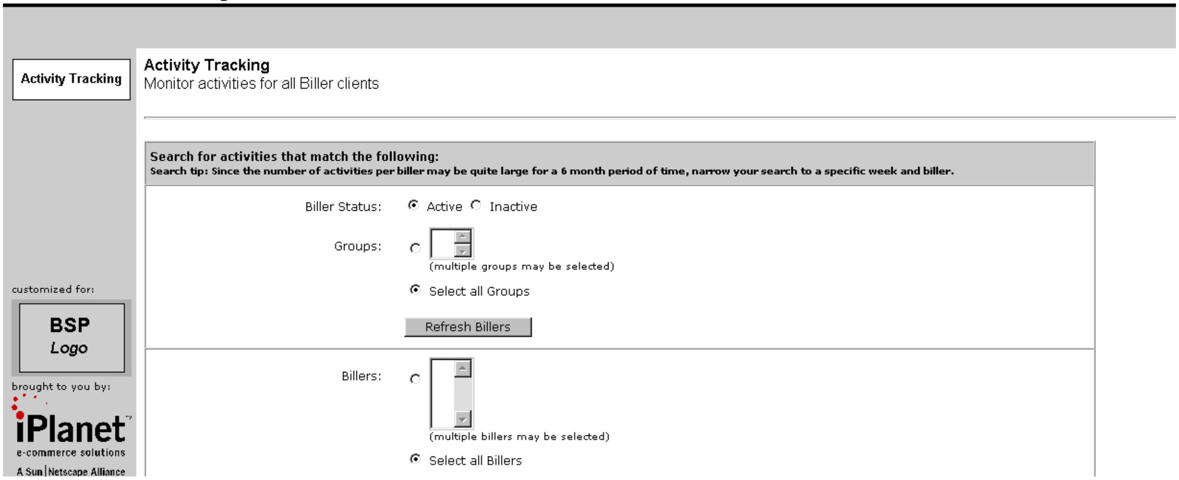
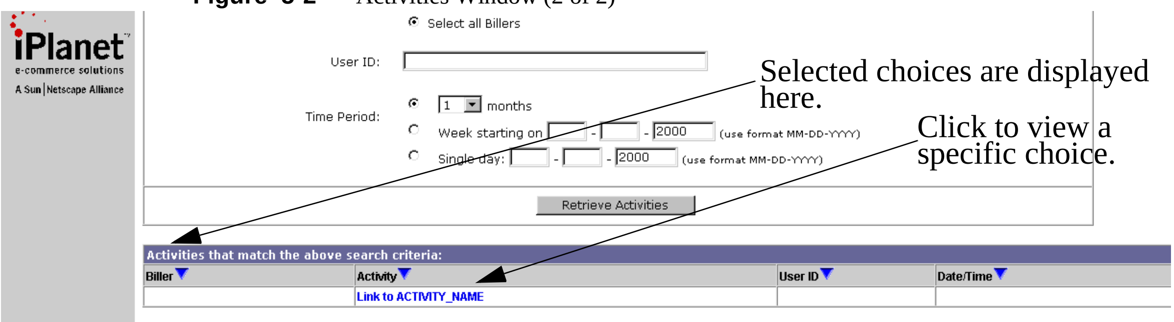


Figure 5-2 Activities Window (2 of 2)



Retrieving Biller Activities

Retrieving biller activities involves selecting the: name, or group, or user ID of the biller(s). It also can involve options such as date; day, week, or month(s) as follows:

- If you want to filters activities by biller status, click Biller Status:
- Select Active or Inactive. Press Tab to move to the next field.
- If you want to filter activities by group, click Group:
- Select Groups, or All Groups. Multiple groups can be selected. To choose more than one selection, while holding down Shift, click and highlight each selection.

- If you want to filter activities by biller names, click Biller Names:
- Select the name of the group from the dropdown listbox or, All Billers. Multiple groups can be selected. To choose more than one selection, while holding down Shift, click and highlight each selection.
- If you want to filter activities by user ID, click User ID:
- Enter User ID. Press Tab to move to the next field.
- After you have completed your choices, click Retrieve Activities to view them.

Filtering Biller Activities

Retrieving biller activities can often involve dozens or even hundreds of files, which means even larger numbers of Web pages to review. In order for you to have easier access to the data that you want to review, filter your choices. You can filter the amount of data displayed on the screen, depending on the choices you select on the Activities page.

As previously explained in Retrieving Biller Activities, you can filter your viewing choices by:

- Biller Status = active or inactive
- Group = industry of association
- Biller Name = company or biller name
- User ID = identification of biller
- Time Period = day, week, month

Chapter 6

Events

This chapter provides information about managing systems events and handlers. The topics in this chapter include:

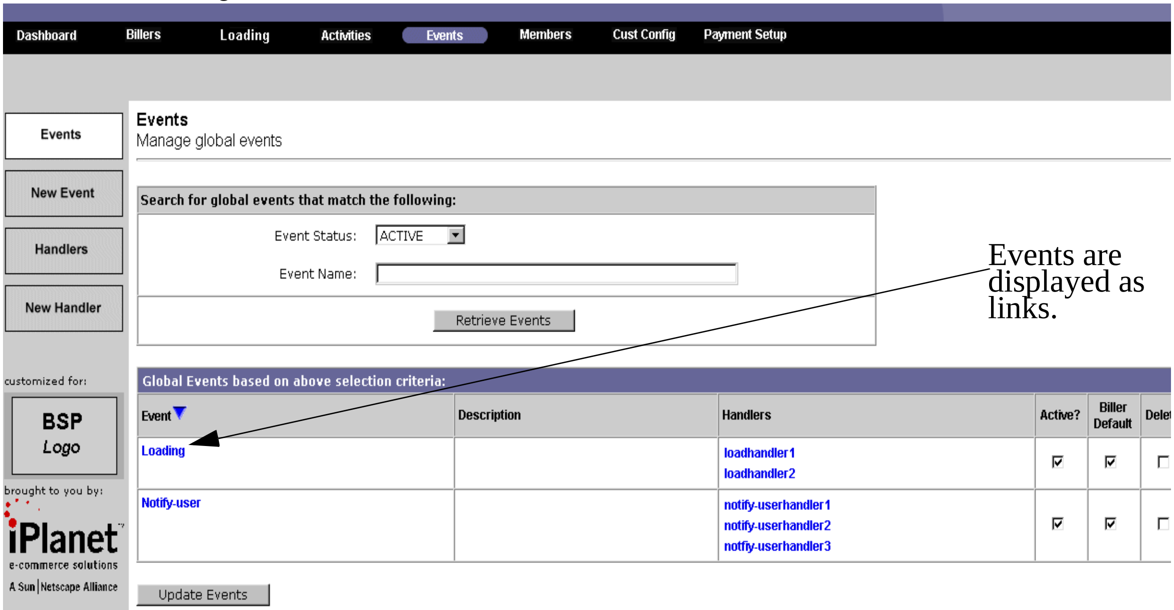
- Managing a Global Event
- Creating a New Event
- Managing Global Handlers
- Creating a New Global Handler

Managing a Global Event

Managing global events can be accessed through the Events command button on BSP's main menu.

- Click the Events command button from the main menu to display the Events window, as displayed in Figure 6-1.

Figure 6-1 Events Window



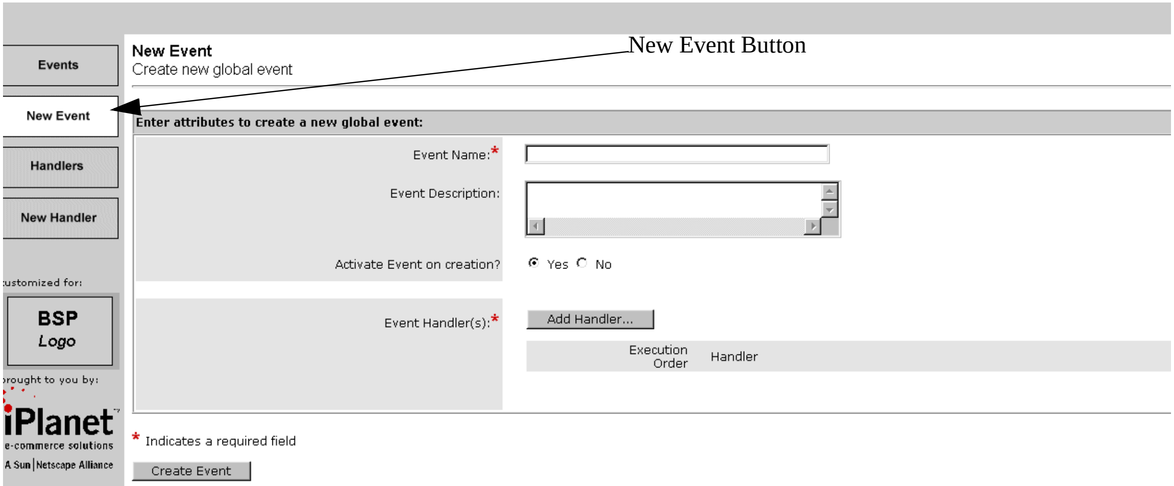
- Select event status, using the dropdown list box. Click Tab to move to the next field.
- Enter the event name in the Event Name field and click Tab to move to the next field.
- Click Retrieve Events to display your selections for management.

Creating a New Event

Creating a new event can be accessed through the Events command button on BSP's main menu.

- Click the New Event button to display the following window, as illustrated in Figure 6-2.

Figure 6-2 New Event Window



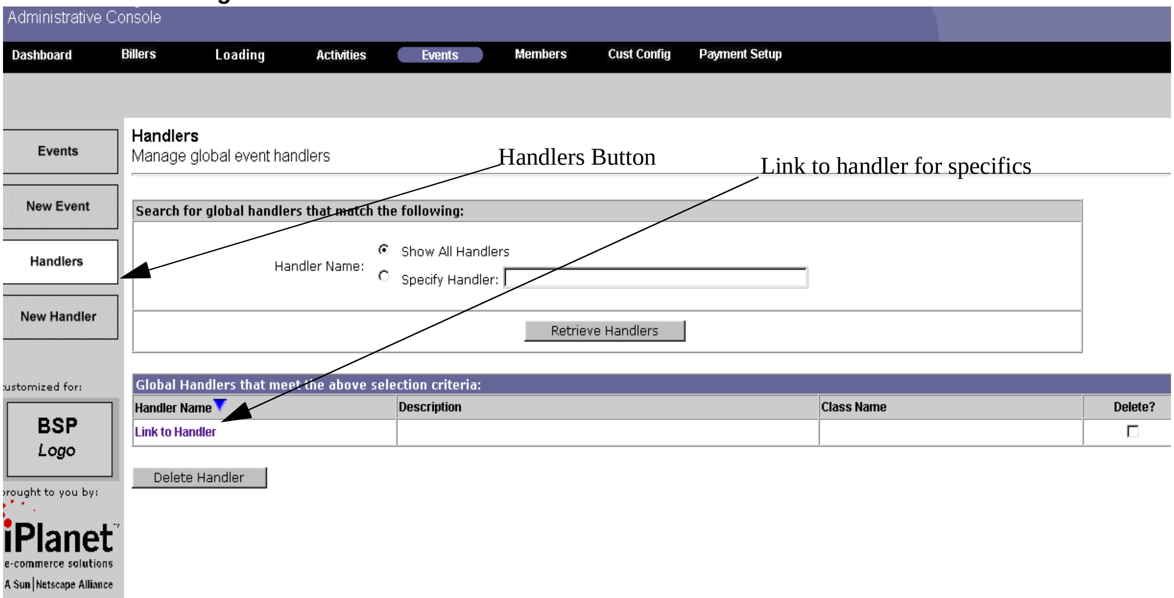
- Enter the name of the event you want to create. This is a required field. Press Tab to move to the next field.
- You can select an event description from the dropdown list box. Press Tab to move to the next field.
- You can select to activate or inactivate (yes or no) the event upon its creation. Press Tab to move to the next field.
- Select Add Handler, if you want to add a handler to the new event.

Managing Global Handlers

Managing global handlers can be accessed through the Events command button on BSP’s main menu.

- Click the Events command button from the BillerXpert main menu.
- Select the Handlers button to display its function window, as shown in Figure 6-3.

Figure 6-3 Handlers Window



- Select handlers, either all or a specific handler, by clicking on the appropriate button.
- If you choose a specific handler, enter the handler's name in the related field.
- Click Retrieve Handlers to view your choices.

To update the events, you must either enter a class name, package, and application logic name for the new handler (these are required fields).

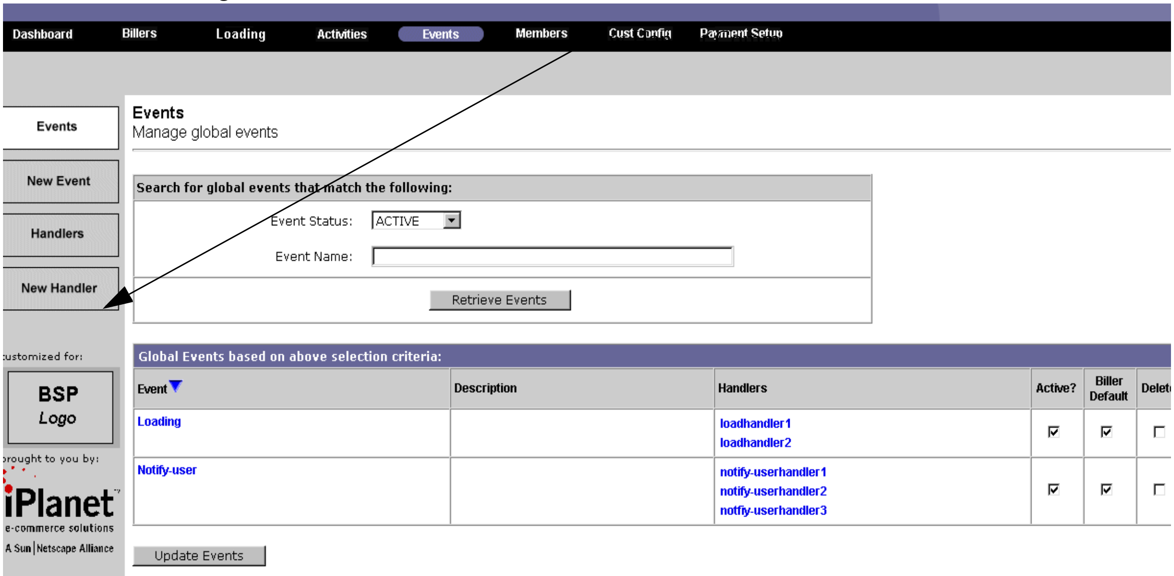
- After completing the required fields, click the command button Update.

Creating a New Global Handler

Creating a new global handler can be accessed through the Events command button on BSP's main menu.

- Click Events from the BSP main menu.
- Select New Handler from the Events window, as displayed in the following in Figure 6-4.

Figure 6-4 Events Window



- Enter a name for the new handler in the Handler Name field. Press Tab to move to the next field.
- If you want, select a handler description from the dropdown listbox. Press Tab to move to the next field.
- Enter a GUID for the new handler OR...
- Enter a Class Name and Package. Press Tab to move to the next field.
- Click Create Handler to create a new handler.

Chapter 7

Members

This chapter provides information about managing members, including updating, and editing member management. The topics in this chapter are:

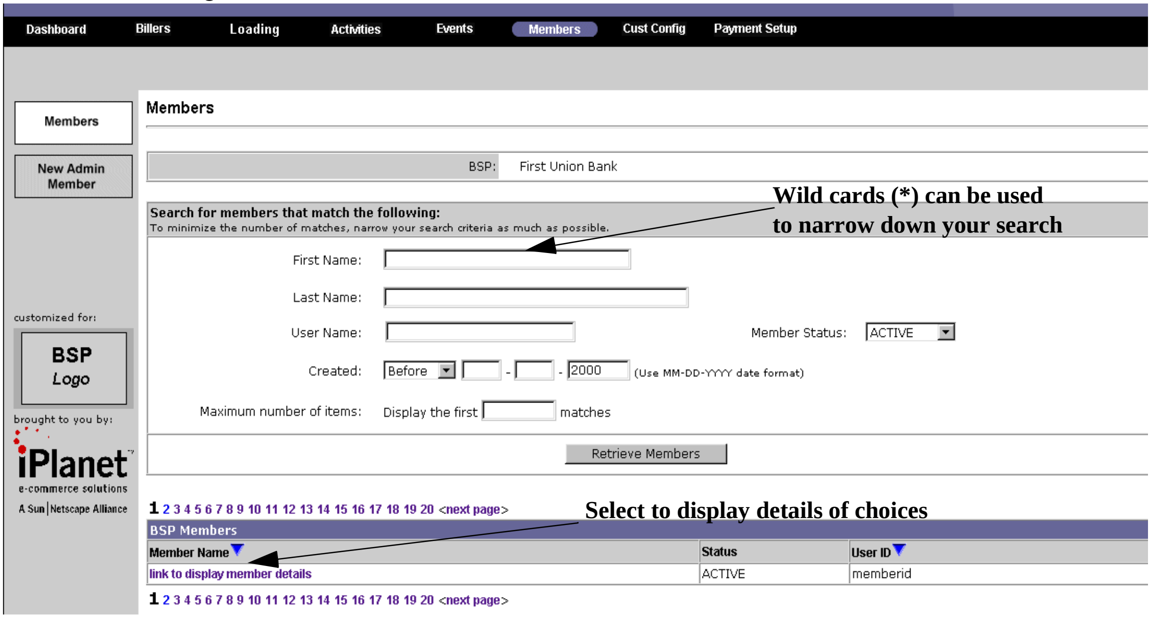
- Searching for Members
- Updating a Member
- Creating a New Member

Searching for Members

Searching for members can involve trying to sort through hundreds of files. This activity is not only time consuming but also can be counter productive. To resolve this, it is recommended that you minimize the number of matches, narrowing your search criteria as much as possible.

- Click the Member command button from the main menu to display the Member application.
- The Search for Members window is displayed, as illustrated in Figure 7-1.

Figure 7-1 Search for Members Window



- Enter the name of the member you want to search for, in the Name field. Wild cards (*) can be applied in your search parameters, using as few characters as a single letter and a wildcard. Press Tab to move to the next field.
- Select the Member Status to search for, from the dropdown listbox, in the Member Status field. Press Tab to move to the next field.
- Enter the maximum number of items you want displayed on your screen, in the Display the first matches field.
- Click the Retrieve Members command button to begin your search and display its results on your screen.

Updating a Member

Updating a member’s information takes a few easy steps from the Update BSP Administrative Member window as follows:

- Enter the name of the member you want to update. This is a required field. Press Tab to move to the next field.

- If you want, select a status for the member from the choices in the Status dropdown listbox. Press Tab to move to the next field.

NOTE You can not delete a member but you can give the member an inactive status. The Created, Last Modified, and User ID fields are read-only and generated by the system. Created is the date the member file was established and Last Modified is the date the member file was last altered. The User ID is the system ID that is given to the user.

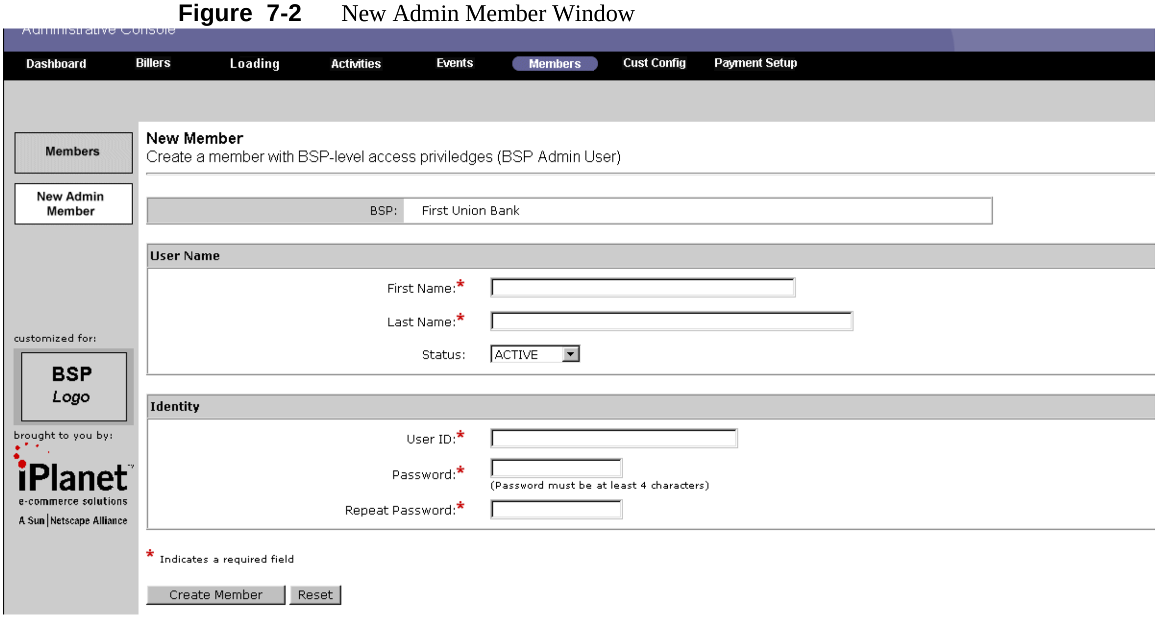
- Click Update Member to accept your changes, update the file, and add it to the database.

Creating a New Member

Creating a new member file uses similar functionality and displays a GUI appearance like the Search window. In order to create a new member, proceed as follows:

- On the Members window, click New Admin Member to display the New Member window, as illustrated in Figure 7-2.

Figure 7-2 New Admin Member Window



- Enter the first name of the member you want to create in the First Name field. This is a required. Press Tab to move to the next field.
- Enter the last name of the member you want to create in the Last Name field. This is required. Press Tab to move to the next field.
- Enter the user name of the member you want to create in the User Name field. This is a required. Press Tab to move to the next field.
- If you want, elect a Member Status from the dropdown listbox, in the Member Status field. Press Tab to move to the next field.
- Enter the User ID of the member you want to create in the User ID field. This is a required. Press Tab to move to the next field.
- At the Password field, all rules for establishing passwords apply, and you must create a password with at least four characters. Press Tab to move to the next field. This is a required field.
- In keeping with the established security and password rules, you must reenter the password. This is a required field.
- Click Create Member to complete the process.

Chapter 8

Creating Customer Configuration

This chapter describes creating customer configuration. It discusses profile and service options. This chapter also describes the tasks including:

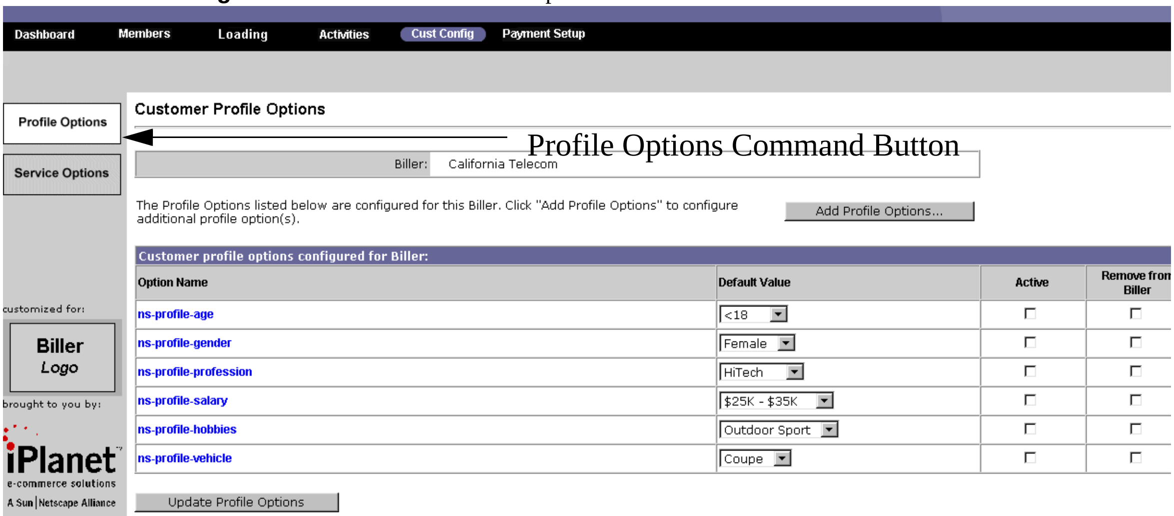
- Accessing Custom Configuration
- Adding Profile Options
- Accessing Service Options

Accessing Custom Configuration

Accessing custom configuration functions are done from the Cust Config command button on the main menu. The steps are:

- Click the Cust Config command button to access customer configuration functions.
- The Customer Profile Options screen is displayed as illustrated in Figure 8-1.

Figure 8-1 Customer Profile Options Window



- If you want to change an age group of the profile, select an age group from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.
- If you want to change gender of the profile, select a gender from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.
- If you want to change profession of the profile, select a profession from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.
- If you want to change a vehicle to the profile, select a vehicle style from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.
- If you want to change a hobby to the profile, select a hobby from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.

- If you want to change a salary level to the profile, select a salary level from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Profile Options to ensure these changes take effect.

Adding Profile Options

There will be an occasion that you will want to add to your previously created profile options. Adding profile options makes good business sense to keep up with your growing customer/biller base.

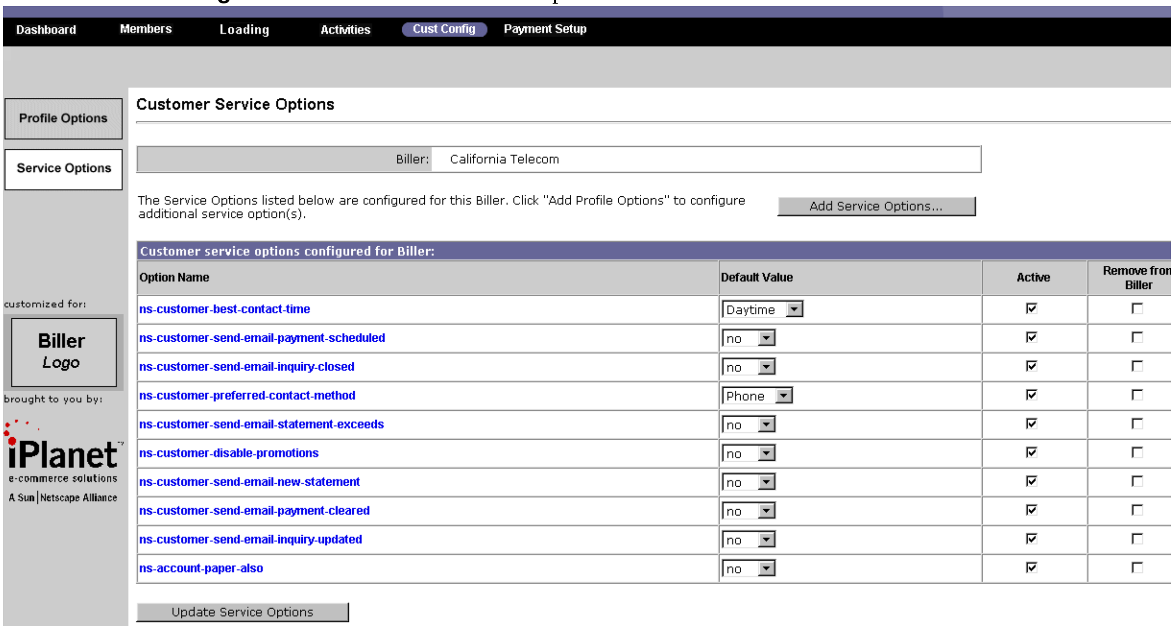
- Click Add Profile Options to display the Add Profile Options window.
- Enter the option name, default value, and biller list choice.
- Click Add Option to add this option to your biller or Cancel to cancel this and return to the previous screen.

Accessing Service Options

Accessing Service Options functions are done from the Cust Config command button on the main menu. The steps are as follows:

- Click the Service Options command button to display the following Figure, illustrated in Figure 8-2.

Figure 8-2 Customer Service Options



- If you want to change a contact time of the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change an email payment schedule of the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Service Profile Options to ensure these changes take effect.
- If you want to change an email inquiry of the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change a preferred contact method to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Service Profile Options to ensure these changes take effect.

- If you want to change an email statement exceeds to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change disable promotion to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change email new statement to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change email payment cleared to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to email inquiry updated to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.
- If you want to change account paper to the profile, select another from the dropdown listbox. If you want to change the status of the profile option or delete the option from the profile, select the respective checkbox. Click Update Service Options to ensure these changes take effect.

Chapter 9

Payment Setup

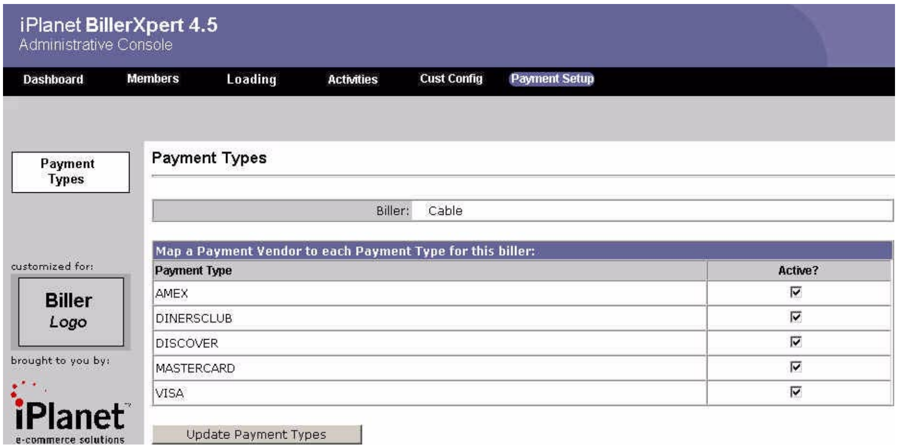
This chapter provides information on setting up biller payments. Most of the payment procedure is done externally to the system by the customer/biller. The topics in this chapter are:

- Describing the Payment Setup
- Setting Up a Payment Type
- Updating a Payment Type
- Deleting a Payment Type

Describing the Payment Setup

This section describes the payment setup screen. A payment is the manner of selecting a payment type. Figure 9-1 is an example of the Payment Setup screen.

Figure 9-1 Payment Setup



NOTE The payment types are listed so that only the Admin can map a payment type to the biller.

Setting Up a Payment Type

To set up a payment type

1. Navigate to the Payment Type tab.
2. Select Active status to map the payment type to the biller.
3. Click Update Payment Types.

Updating a Payment Type

To update a payment type

1. Navigate to the Payment Type tab.
2. Select or deselect the Active status for that type.
3. Click Update Payment Type.

Deleting a Payment Type

To delete a payment type

1. At the Payment Type screen, deselect the Active status for any payment type.
2. Click Update Payment Type.

Chapter 10

Introduction and Overview for the Billing Administrator (BillerAdmin)

This chapter is an overview of the iPlanet BillerXpert, Biller Administrator (BillerAdmin) including:

- Definition of Administrator (Admin)
- Navigating the Graphical User Interface (GUI)
- BillerAdmin Tasks
- Logging In and Out

Definition of Administrator (Admin)

An administrator, is a person that can administrate and manage company information and functions. This manual provides an overview of the tasks that can be performed at the Biller level, by a Biller Administrator.

Biller Administrator (BillerAdmin)

A BillerAdmin is responsible for: monitoring load status, tracking biller specific activities, setting up a payment and/or vendor types, and so on.

Navigating the Graphical User Interface (GUI)

The Graphical User Interface (GUI) has a series of Main Menu tabs: including Dashboard, Members, Loading, Activities, Cust Config Payment Setup, as illustrated in Figure 10-1.

Figure 10-1 Main Menu tabs

Main Menu Tabs

Dashboard

The Dashboard tab gives the Admin the ability to manage billers, their service options, and profiles. Service options include time to contact for payment, method of contact, and so forth.

Members

The Members tab provides the capacity to search for members, update a member, and administer membership.

Loading

The Loading tab allows the Admin to track loaded files and the respective status of each load.

Activities

The Activities tab can display user activities within the system by date and user name.

Cust Config

The Cust Config tab allows the facility to configure the system by user traits, such as age, profession, and so forth.

Payment Setup

The Payment Setup tab enables the capability to invoke types of payments, such as by credit card, check, and so forth.

NOTE Screens are first displayed as a summary of details with clickable links; that when selected, display detail screens.

More information on links is explained in the following section.

Summary and Detail Screens

The GUI displays information on two different types of screens. The first is displayed is a summary screen. The data on that screen is displayed in a “screenshot” or an overview manner. The successive ones are accessed via an interactive link on the summary screen. Successive screens are presented as details, of the summaries.

BillerAdmin Tasks

The BillerAdmin can perform various tasks. Some of these tasks are performed frequently, perhaps on a daily basis. Others are performed infrequently, or once after the system is installed and set up for production. Table 10-1 describes the tasks a BillerAdmin can perform, and where these tasks are located.

Table 10-1 BillerAdmin Tasks

Task	Tab
Update a biller profile	Dashboard
Select service options	
Update service options	
Add service options	
Delete service options	
Search for members	Members
Add a new member	
Add a new Admin	
Manage loaded files	Loading
Search for user activities	Activities
Configure biller via user attributes	Custom Configuration
Update biller attributes	
Map a payment vender per payment type	Payment Setup

Prerequisites to Managing a Biller

The Billing Service Provider (BSP) administrator is responsible for creating all Billers in the system. During the Biller creation process, the Biller Admin is created. The biller needs a profile, detailing location, and contact information.To successfully perform BillerAdmin tasks, it is imperative to understand a high level outline of the BillerX system.

- BillerAdmin is created when BSPAdmin creates a new biller.
- Biller name, admin ID, and password is communicated to appropriate person
- BillerAdmin should be aware of:
    - Payment vendor to use for receipt of payments
    - Currency used to receive payments
    - Any other users acting as administrators

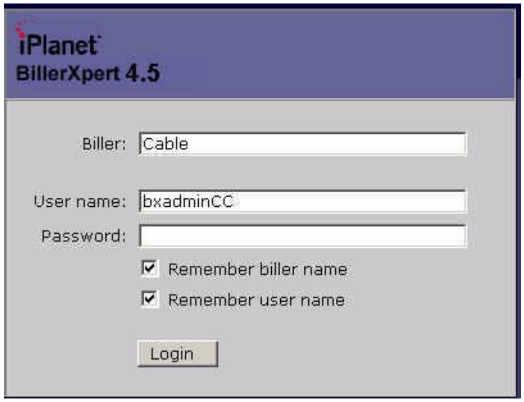
Logging In and Out

Logging in for all admins takes place on the same screen. This screen is a portal to the entry point of a billing site. Depending upon your log in and admin access level, depends on the GUI that is displayed, after completing a successful log in.

Logging In

Figure 10-2 is the entry portal to BillerXpert.

Figure 10-2 Log In Screen



1. From the BillerXpert Administrative Login, enter:

   admin@<biller name>

   For example, **`admin@Cable`**, as shown above.

2. Enter your password, the default password is *bxadmin*.

3. Click the Login button.

Logging Out

- Click the Logout button.

  The button is located on the top right hand corner of every page.

Chapter 11

Detailing the Dashboard

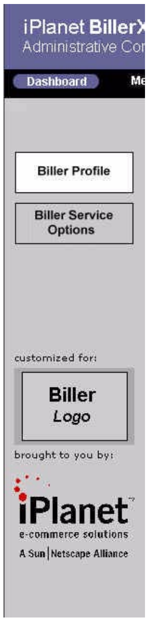
This chapter details the dashboard of the BillerXpert system. It includes:

- Detailing the Dashboard
- Detailing Service Options
- Describing the Biller Profile
- Details of the Biller Profile Screen
- Updating a Biller Profile
- Configuring Biller Service Options
- Adding Biller Service Options
- Deleting Biller Service Options

Detailing the Dashboard

The dashboard is the grey sidebar left-hand area of the screen, as well a tab of the same name. The dashboard contains the functions for BillerXpert that are invoked when a user selects one of the tabs from the main menu. The first tab (Dashboard) of the main menu solicits the Biller Profile. Figure 11-1 is an illustration of the dashboard.

Figure 11-1 Dashboard



Detailing Service Options

Service options are preconfigured by BillerXpert and made accessible by the Billing Service Provider (BSP). These options are comprised of a list of preferences that can be selected for the customer. Figure 11-2 displays these service options, which are described in Table 11-1.

Figure 11-2 Service Options

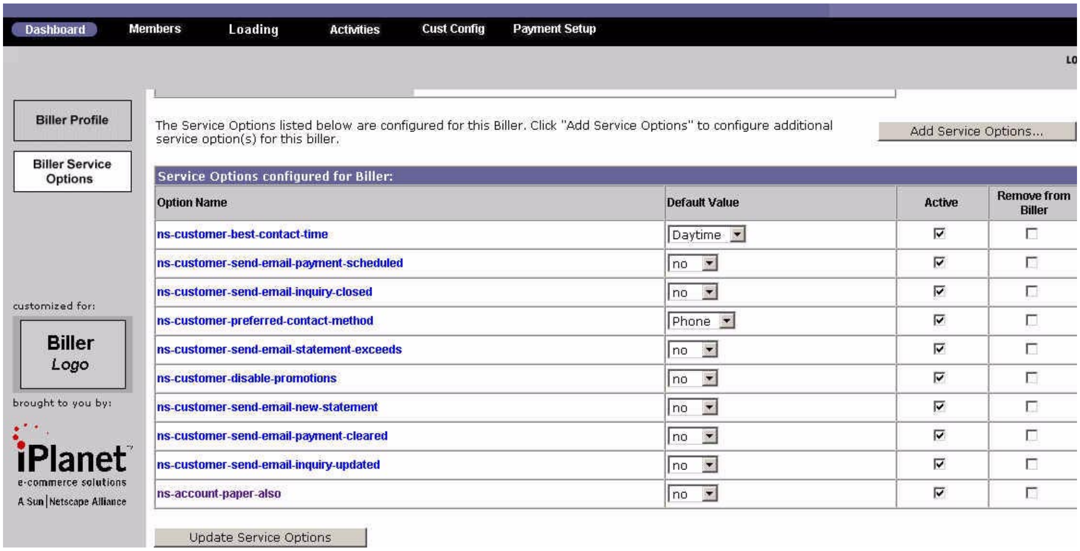


Table 11-1 Preconfigured Service Options

Option	Description
customer-best-contact time	Best time to contact customer, day or evening
customer-send-email-payment-scheduled	Customer can send email scheduled payment, yes/no
customer-send-email-inquiry-closed	Customer can send email inquiry when (payment made), yes/no
customer-preferred-contact-method	Customer preferred method of contact, phone/email
customer-send-email-statement-exceeds	Customer can be send an email or phone call if account exceeds a specific amount, yes/no
customer-disable-promotion	Customer can disable receiving email/snailmail promotions, yes/no
customer-send-email-new-statement	Customer can send email for a new statement/ yes/no
Customer send-email-payment-cleared	Customer can be sent email when payment clears, yes/no
customer-send email inquiry-updated	Customer can send email inquiry for an updated account balance, yes/no
account-paper-also	Customer can receive hardcopy invoice as well as email, yes/no

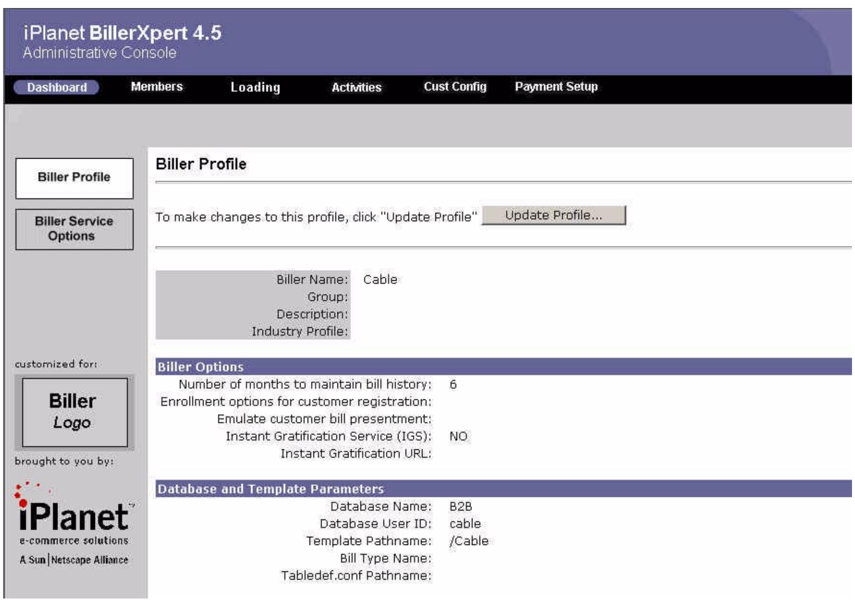
NOTE	From this screen you can select these options by clicking Active or deselect them, by clicking Remove from Biller.

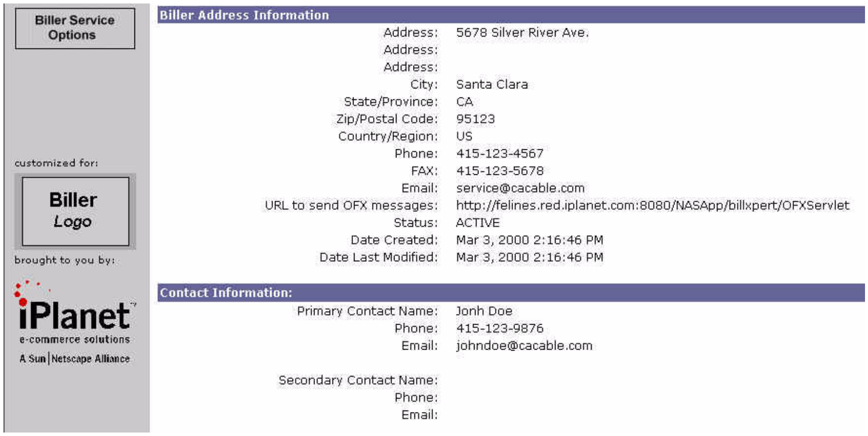
Describing the Biller Profile

The profile is a detailed listing of the company’s location, contact information, and related data on the biller organization. As the administrator, it is your responsibility to ensure that this information is kept up to date.

As the Admin you can update a company’s profile information. The profile screen is displayed in Figure 11-3:

Figure 11-3 Biller Profile





Details of the Biller Profile Screen

The details, data, operations, and procedures of the company profile screen are explained in this section.

- Biller Options
- Database and Template Parameters
- Biller Address Information
- Contact Information

Biller Options

The first area of the screen is the biller options that include the number of months to maintain biller history, enrollment options for customer registration, bill presentment emulation, whether the biller has Instant Gratification (IG), and the URL for IG.

Database and Template Parameters

The database and template parameters include the database name, the database user ID, template pathname, bill type name, and the pathname for the bill type.

NOTE Some Payment Vendors have specific parameters for their passwords. Please consult the respective user guides if your payment vendor requires these parameters.

Biller Address Information

The second area of the screen contains address and other-related location information. The company address, postal code, country or region, phone and fax numbers are displayed.

Contact Information

This area of the screen shows the primary and secondary names of the people to contact. These names are the people who billers, and other related third parties, can contact for questions on invoices; and the opposite also remains true.

Contacts might be someone other than the Admin, such as a facilities manager, financial department head, or chief operating officer, etc. The phone numbers and email addresses of these contacts are also included.

Updating a Biller Profile

To update a biller profile

1. Click the Update Biller Profile button.
2. Complete the information you want updated in the respective fields.
3. Click Update Biller Profile.

Configuring Biller Service Options

To configure biller service options

1. Click the Biller Service Options button.
2. Select the Default Values from the dropdown box.
3. Select Active, if the values are to be active, by clicking the respective box next to the value.
4. Click Update Service Options.

Adding Biller Service Options

To add biller service options

1. Click the Add Service Options button.
2. Enter the service options you want to add.
3. Click Add Service Options button.

Deleting Biller Service Options

To delete biller service options

1. At the Biller Service Options page, select Remove from Biller, from the options you want to delete.
2. Click Update Service Options.

Chapter 12

Managing Members

This chapter provides information about managing members including the following:

- Describing a Member
- Details of the Member Screen
- Adding a Member
- Searching for a Member
- Deleting a Member

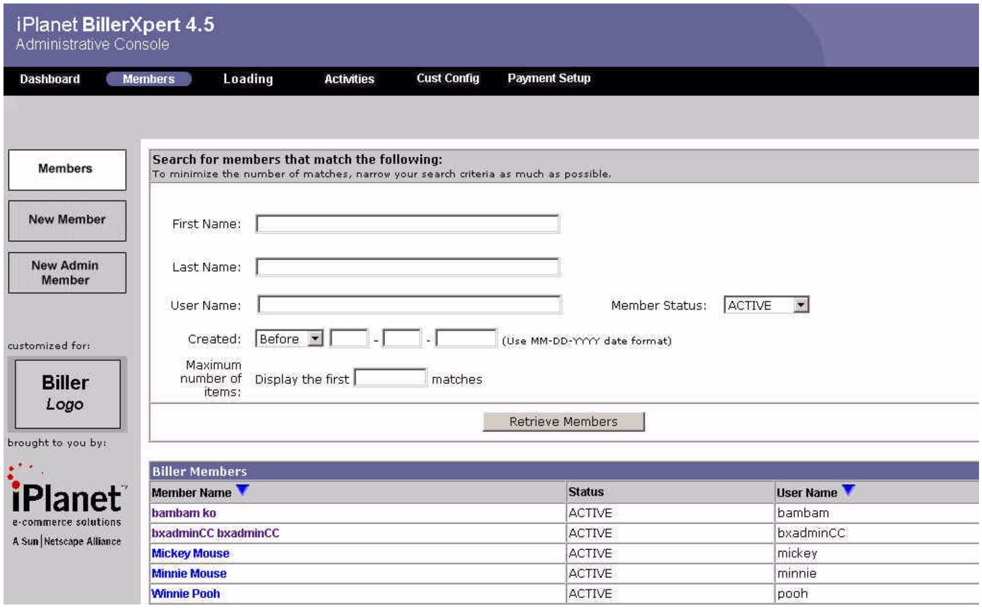
Describing a Member

A member is a customer of a biller. They can be from any industry and BillerXpert ships three sample billers reflecting different industries; cable, telecom, and financial.

Details of the Member Screen

The details and procedures for members are displayed in Figure 12 - 1:

Figure 12 - 1 Member Screen



NOTE The member's first, last, and user names are search parameters that can be invoked. The biller members appear as a list of clickable links.

Adding a Member

To add a member

1. Click the New Member button.
2. Enter the new member's data into the respective fields. Make sure to include all required fields.
3. Click Create Member.

Searching for a Member

To search for a member

1. At the Members screen, enter the member's name you want to search for.
2. If you want to hone your search, enter the date the member's file was created and/or the status of that member.
3. If you want, select the number of matches you would like to be displayed in your search.
4. Click Retrieve Members.

Deleting a Member

To delete a member

1. If you do not know the exact member name, use the search procedure to select the member. OR
2. Select the member link to be deleted, from the search screen.
3. Select Inactive status for that member.
4. Click Update Profile.

Chapter 13

Looking at Loading

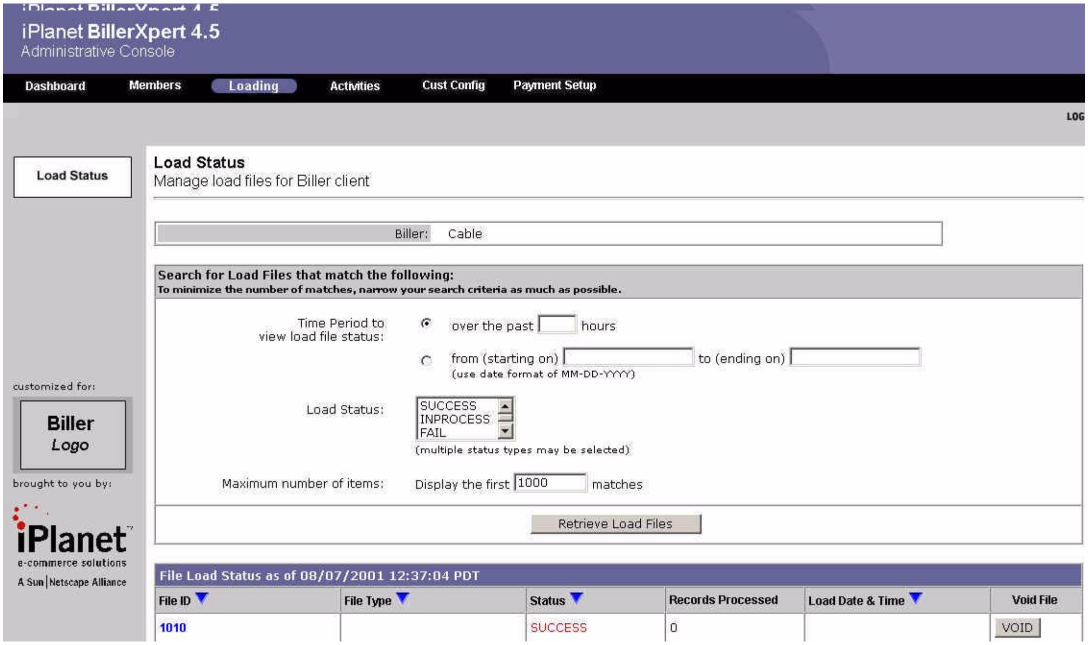
This chapter provides information about searching for loaded files. The chapter includes:

- Details of the Loading Screen
- Searching for Loaded Files

Details of the Loading Screen

The details of the loading screen are discussed in this section. The loading screen is displayed Figure 13 - 1.

Figure 13 - 1 Loading Screen



There are five different statuses for the loaded files. They are described in Table 13 - 2.

Table 13 - 2 Load Status Table

Load Status	Definition
Success	File loading completed.
In Progress	Loading procedures currently being done.
Fail	File loading unsuccessful.
Partial	Loading incomplete, fractionally complete.
Void	Files removed from the system

NOTE Upon completion of the search parameters, a list of loaded files are displayed, as clickable links. Depending upon these parameters, the files retrieved can be contingent on time, via hours, and/or specific dates, load status. The number of selections to be retrieved can also be user-selected.

Searching for Loaded Files

To search for loaded files

1. Navigate to the Loading tab.
2. Enter the search parameters to display your loaded files selections.
3. Click Retrieve Files.

Chapter 14

Accessing Activities

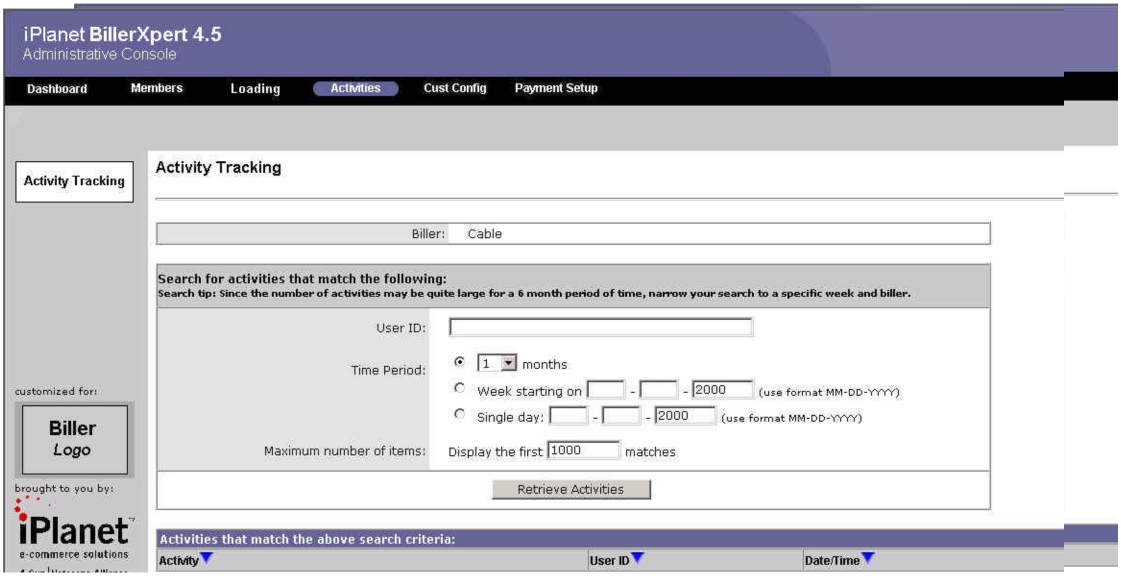
This chapter provides information about searching for loaded files. The chapter includes:

- Details of the Activities Screen
- Searching for Activities

Details of the Activities Screen

The details of the activities screen are discussed in this section. The activities screen is displayed in Figure 14 - 1.

Figure 14 - 1 Activities Screen



NOTE Upon completion of the search parameters, a list of activities are displayed, as clickable links. Depending upon these parameters, the files retrieved can be contingent on time, via hours, and/or specific dates, load status. The number of selections to be retrieved can also be user-selected.

Searching for Activities

To search for activities

1. Navigate to the Activities tab.
2. Enter the search parameters to display your loaded files selections.
3. Click Retrieve Files.

Chapter 15

Creating Custom Configuration

This chapter describes customer profile options that BillerXpert can configure. These options are presented to the End User during enrollment to the system. The topics include:

- Details of the Profile Options Screen
- Details of the Service Options Screen
- Creating Profile Options
- Updating Profile Options
- Adding a Profile Option
- Deleting a Profile Option

Details of the Profile Options Screen

The details, options, and procedures of the Profile Options screen are displayed in the following. Figure 15 - 1 illustrates the Customer Profile Options screen, which is described in Table 15 - 2.

Figure 15 - 1 Customer Profile Options

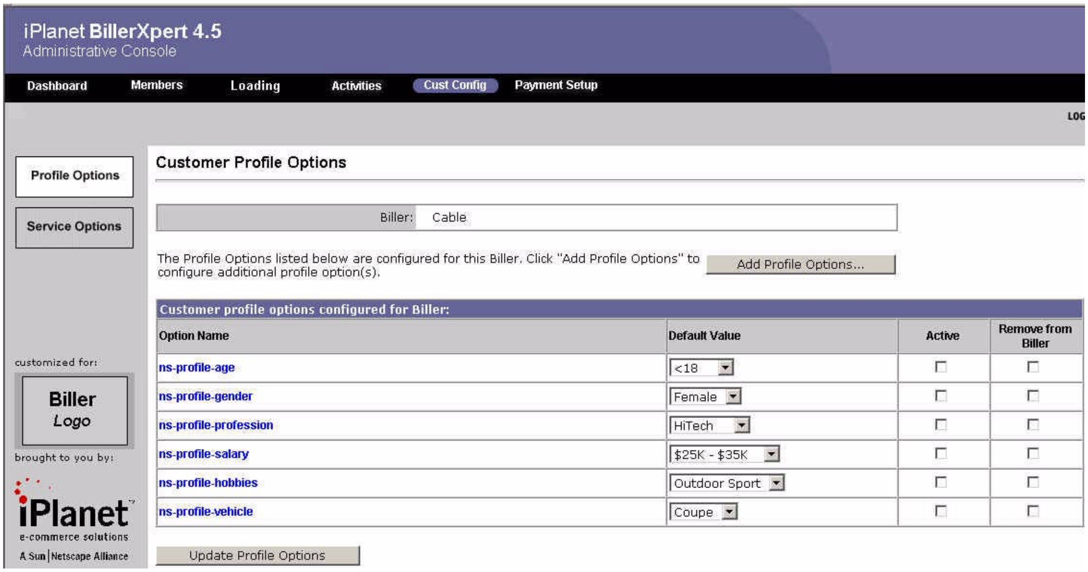


Table 15 - 2 Preconfigured Profile Options

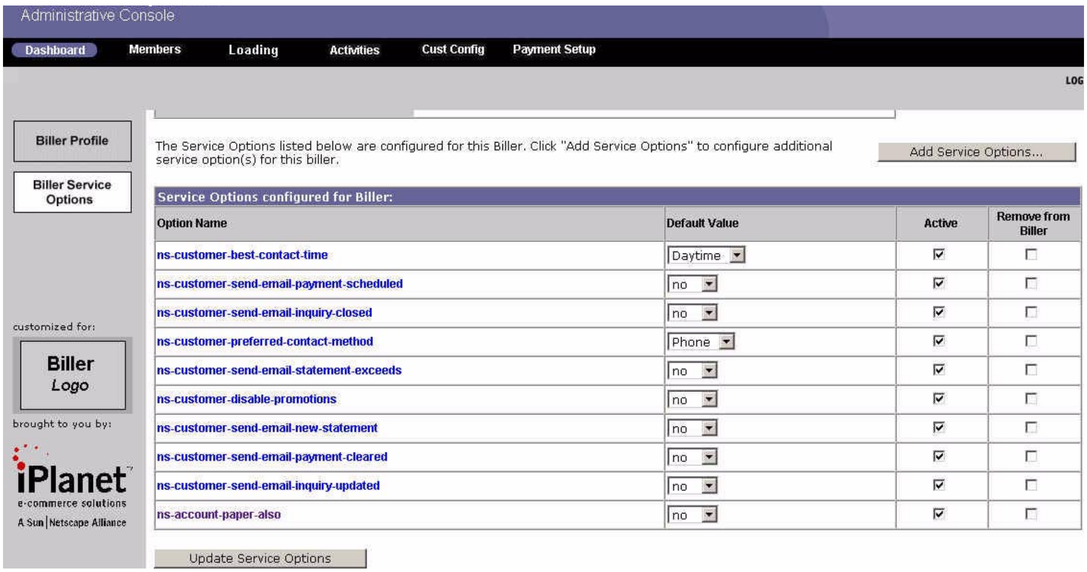
Option	Definition
profile-age	Age of customer, from 18 through 65+
profile-gender	Gender of customer, male/female
profile-profession	Profession of customer, high tech/legal/financial
profile-salary	Salary of customer, $25 through $100K +‘‘
profile-hobbies	Hobby of customer, outdoor/indoor sports/reading/music
profile-vehicle	Automobile of customer, SUV, coupe, pickup, sedan

NOTE From this screen you can select these options by clicking Active or deselect them, by clicking Remove from Biller.

Details of the Service Options Screen

The details, options, and procedures of the Service Options screen are displayed in the following. Figure 15 - 3 illustrates the Customer Service Options screen.

Figure 15 - 3 Service Options Screen



NOTE From this screen you can select these options by clicking Active or deselect them, by clicking Remove from Biller.

Creating Profile Options

To create a profile option

1. Navigate to Cust Conf to display the Profile Options screen.
2. Select the options for the biller by selecting Active status, next to that option.

3. Click Update Profile Option.

Updating Profile Options

To update a profile option

1. At the Cust Conf tab, select the option(s) you want to update by selecting the opposite status previously selected.
2. Click Update Profile Option.

Adding a Profile Option

To add a profile option

1. Navigate to the Cust Conf tab.
2. Select the Add Profile Option button.
3. Complete the Add the profile name, Value, and Add to Biller Profile fields.
4. Click Add Profile Option.

Deleting a Profile Option

To delete a profile option

1. At the Cust Conf tab, select the option(s) you want to delete by selecting the Remove from Biller field, next to the option.
2. Click Update Profile Option.

Chapter 16

Payment Setup

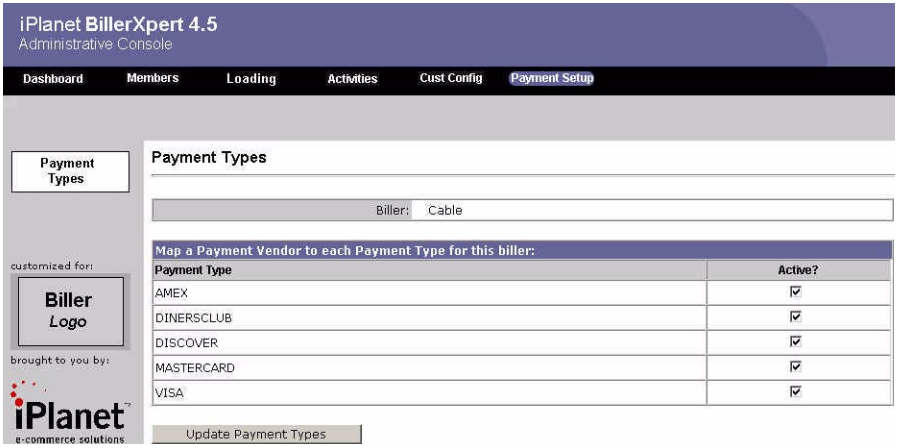
This chapter provides information on setting up biller payments. Most of the payment procedure is done externally to the system by the customer/biller. The topics in this chapter are:

- Describing the Payment Setup
- Setting Up a Payment Type
- Updating a Payment Type
- Deleting a Payment Type

Describing the Payment Setup

This section describes the payment setup screen. A payment is the manner of selecting a payment type for the biller. Figure 16 - 1 is an example of the Payment Setup screen.

Figure 16 - 1 Payment Setup



NOTE The payment types are listed so that only the Admin can map a payment type to the biller.

Setting Up a Payment Type

To set up a payment type

1. Navigate to the Payment Type tab.
2. Select Active status to map the payment type to the biller.
3. Click Update Payment Types.

Updating a Payment Type

To update a payment type

1. Navigate to the Payment Type tab.

2. Select or deselect the Active status for that type.
3. Click Update Payment Type.

Deleting a Payment Type

To delete a payment type

1. At the Payment Type screen, deselect the Active status for any payment type.
2. Click Update Payment Type.

Error Messages

Table A-1 lists error messages (contents) and the procedures used to correct them (description).

Table A-1 Error Messages

Error	Error
004000 Validation failed:	Passwords don't match. Re-enter passwords again.
004001 Validation failed:	Admin User ID is missing. Enter user ID.
004002 Validation failed:	Admin Password is missing. Enter admin password.
005011 Validation failed:	Invalid Credit Card Nickname. Enter valid credit card nickname.
005012 Validation failed:	First name is missing. Enter first name.
005013 Validation failed:	Last name is missing. Enter last name.
005014 Validation failed:	Invalid first name. Enter valid first name.
005015 Validation failed:	Invalid last name. Enter valid last name.
005016 Validation failed:	Invalid middle name. Enter valid middle name.
005017 Validation failed:	Invalid Prefix. Enter valid prefix.
005018 Validation failed:	Invalid Suffix. Enter valid suffix.
005020 Validation failed:	Bad Visa Card Number. Enter correct card number.
005021 Validation failed:	Bad Master Card Number. Enter correct card number.
005022 Validation failed:	Bad American Express Card Number. Enter correct card number.
005023 Validation failed:	Bad Discover Card Number. Enter correct card number.
005024 Validation failed:	Bad Diners Club Card Number. Enter correct card number
005025 Validation failed:	Expiration date is set before current date.Enter correct date.

Table A-1 Error Messages

Error	Error
005026 Validation failed:	Bad Credit Card Number. Enter correct number.
005027 Validation failed:	Credit Card Brand is missing. Enter correct brand.
005028 Validation failed:	Credit Card Number is missing. Enter correct number.
005029 Validation failed:	OnlineName is missing. Enter name.
005030 Validation failed:	Password is missing. Enter password.
005031 Validation failed:	Invalid User Name. Enter correct name.
005032 Validation failed:	Invalid Password. Enter correct password.
005033 Validation failed:	Invalid Nickname. Enter correct nickname.
005034 Validation failed:	Invalid Email address. Enter correct address.
005035 Validation failed:	Card holder name is missing. Enter correct name.
005036 Validation failed:	Card holder address is missing. Enter correct address.
005037 Validation failed:	City is missing. Enter city.
005038 Validation failed:	Postal code is missing. Enter postal code.
005039 Validation failed:	Card holder name is invalid. Enter valid name.
005041 Validation failed:	Card holder address is invalid. Enter valid address.
005042 Validation failed	City is invalid. Enter valid city.
005043 Validation failed:	State is invalid Enter valid state.
005044 Validation failed:	Postal code is invalid. Enter valid postal code.
005045 Validation failed:	Bank Routing Number is missing. Enter bank routing number.
005046 Validation failed:	Bank Account Number is missing. Enter bank account number.
005047 Validation failed:	Bank Routing Number is invalid. Enter valid number.
005048 Validation failed:	Bank Account Number is invalid. Enter valid number
005049 Validation failed:	Check Nickname is invalid. Enter valid name.
005050 Validation failed:	Bank Routing Number failed. Reenter routing number.
005100 Validation failed:	Invalid Address Line 1. Reenter valid address.
005101 Validation failed:	Invalid Address Line 2. Reenter valid address.
005102 Validation failed:	Invalid Address Line 3. Reenter valid address.
005103 Validation failed:	Invalid City. Reenter valid city.
005104 Validation failed:	Invalid State. Reenter valid state.

Table A-1 Error Messages

Error	Error
005105 Validation failed:	Invalid Postal Code. Reenter valid code.
005106 Validation failed:	Address 1 is missing. Reenter Line 1 - Address.
005108 Validation failed:	State is missing. Reenter state.
006011	From Date should be before To Date. Reenter correct dates.
006012	Incorrect date format. Reenter dates using correct format.
006041	Card holder address is invalid. Enter valid address.
006083	Failed to load Payment Type information. Reenter payment type data.
006085	Failed to save Payment Type information. Reenter and save data.
006086	Failed to create payment type. Create payment type.
006087	The payment type is successful.
006088	Failed to create payment type...duplicate card brand. Redo and correct.
006089	Failed to create payment type...card brand is missing. Reenter card brand.
006090	Payment Types not found in server for biller. Enter payment type for biller.
007000	Failed to retrieve archival data. Redo procedure and rearchive again.
007001	Failed to save archival data. Redo procedure and save again.
007002	Search failed. Data not found. Redo procedure and search again.
007003	File not found. Check for correct file number and redo procedure.
007004	Failed to verify specified directory. Check for correct directory and redo.
007005	Save failed. You don’t have write permission...Ask Admin for help.
100001	Internal error. Cannot create billing object. Redo and recreate object.
100002	Internal error. Cannot create membership object. Redo and recreate object.
100003	AppLogic Error: Invalid Request. Redo request.
100005	Internal Error. Cannot create payment object. Redo and recreate object.
100006	Internal Error. Cannot create config object. Redo and recreate object.
100007	Connection failed. NAS Server may be down. Call System Admin.
100008	Failed to login to NAS Server. Redo procedure and resubmit.
100009	Internal Error: Calling Applog failed. See log for details.
100011	User session not found. See log for details.
100016	Failed to create user session. See log for details.

Table A-1 Error Messages

Error	Error
100017	User not found. Check with System Admin.
100018	Authentication failed. User statis is not ACTIVE. See System Admin.
100019	Authentication failed:User don’t belong to Admin_Group. See System Admin
100110	Access not allowed. See System Admin.
100111	Unknown biller type. Check biller type and reenter.
100112	Authentication failed: Biller statis is not ACTIVE. See System Admin.
100113	Validation failed: Biller name is missing. Enter biller name.
100114	Validation failed: Invalid Biller name. Reenter biller name.
100500	Failed to retrieve users. Reenter request and resubmit.
100501	Failed to delete users. Reenter request and resubmit.
100502	No users matching....Reenter request and resubmit.
100600	User added successfully.
100601	User is updated successfully.
100602	User is removed successfully.
101001	Specified biller not found. Reenter biller and resubmit.
101102	You have entered a duplicate name. Delete duplicate.
101103	You need to enter a value first. Enter a value.
101104	Failed to delete interface. See log for details.
101105	Failed to retrieve objects. See log for details.
102000	You can not delete default Account type. Reenter type and resubmit.
103000	Option name is required. Reenter name and resubmit.
103001	You have entered a duplicate option name. Reenter name and resubmit.
103100	Biller Name Missing. Reenter biller name.
103101	Biller Name Invalid. Reenter biller name.
103102	Phone missing. Reenter phone number.
103103	Phone invalid. Reenter valid number.
103104	URLmsg. Enter correct URL.
103105	URLmsg invalid. Enter correct URL.
103106	Faxnumber missing. Enter correct number.

Table A-1 Error Messages

Error	Error
103107	Faxnumber invalid. Enter correct number.
103108	Dayphone missing. Enter phone number.
103109	Dayphone invalid. Enter phone number.
103110	Evephone missing. Enter phone number.
103111	Evephone invalid. Enter phone number.
103112	Email missing. Enter email address.
103113	Email invalid. Enter email address.
103114	Billerid missing. Enter biller ID.
103115	Billerid invalid. Enter biller ID.
103116	Language missing. Enter correct language.
103117	Language invalid. Enter correct language.
103118	Templatepath missing. Enter templatepath.
103119	Templatepath invalid. Enter templatepath.
103120	Database missing. Enter correct database.
103121	Database invalid. Enter correct database.
103122	Userid missing. Enter user ID.
103123	Userid invalid. Enter user ID.
103124	Billtype missing. Enter correct bill type.
103125	Billtype invalid. Enter correct bill type.
103126	Tabledef missing. Enter correct table definition.
103127	Tabledef invalid. Enter correct table definition.
103128	Category missing. Enter correct category.
103129	Category invalid. Enter correct category.
103130	Description missing. Enter correct description.
103131	Description invalid. Enter correct description.
103132	Industryprofile missing. Enter industry profile.
103133	Industryprofile invalid. Enter industry profile.
103134	Cycledate missing. Enter correct date.
103135	Cycledate invalid. Enter correct date.

Table A-1 Error Messages

Error	Error
103136	Billingmonth missing. Enter correct month.
103137	Billingmonth invalid. Enter correct month.
103138	Primary contact name missing. Enter correct name.
103139	Primary contact name invalid. Enter correct name.
103140	Primary phone number missing. Enter number.
103141	Primary phone number invalid. Enter number.
103142	Primary email missing. Enter email address.
103143	Primary email invalid. Enter email address.
103144	Secondary contact name missing. Enter correct name.
103145	Secondary contact name invalid. Enter correct name.
103146	Secondary phone number missing. Enter correct number.
103147	Secondary phone number invalid. Enter correct number.
103148	Secondary contact email missing. Enter correct email address.
103149	Secondary contact email invalid. Enter correct email address.
103150	Address 1 missing. Enter correct address.
103151	Address 1 invalid. Enter correct address.
103152	Address 2 missing. Enter correct address
103153	Address 2 invalid. Enter correct address.
103154	Address 3 missing. Enter correct address.
103155	Address 3 invalid. Enter correct address.
103162	Country missing. Enter country.
103163	Country invalid. Enter country.
103164	Charset missing. Enter character set.
103165	Charset invalid. Enter character set.
103169	Event biller missing. Enter correct biller.
103170	Event name missing. Enter correct event name.
103171	Event description missing. Enter correct description.
103172	Event status missing. Enter correct status.
103173	Handler name missing. Enter correct name.

Table A-1 Error Messages

Error	Error
103174	Handler description missing. Enter correct description.
103175	Handler class name missing. Enter correct name.
103176	Handler package missing. Enter correct pacakage.
103177	Handler application logic name missing. Enter correct one.
103178	Schedule dates appear invalid. Enter correct dates.
103179	Please select schedule mode. Enter correct schedule mode.
120000	Purge execution failed. Redo procedure and resubmit.
120001	Recovery execution failed. Redo procedure and resubmit.
009000	Limit has exceeded default. See Admin.
103200	Loaded file name missing. Enter file name.
103201	Loaded file type missing. Enter file type.
103202	Invalid date input. Enter correct date.
103203	Date input missing, Enter input date.
103204	Invalid date range input. Enter valid date.
103205	Date range input missing. Enter correct date.
103206	Invalid number input. Enter correct number.
103207	Input number missing. Enter correct number.
103208	Please enter a schedule name. Enter a schedule name.
010001	Invalid date input. Enter correct date.
011000	Failed to create dept ID. Duplicate date entered. Delete duplication.
011200	The department was successfully created.
011300	Failed to update department. Redo procedure and resubmit.
011400	The department was successfully updated.
011500	Please select a department from the list. Select a department.
011700	Failed to delete the department. Redo procedure and resubmit.
011800	The department was successfully deleted.
011900	Failed to move the department. Redo procedure and resubmit.
012000	The entered department does not exist. Redo procedure and resubmit.
012200	The current parent and new parent department are the same. Redo/submit

Table A-1 Error Messages

Error	Error
109000	Company name missing. Enter company name.
009001	Company name invalid. Enter company name.
200000	Your request was successfully completed.
004000 Validation failed:	Passwords don’t match. Re-enter passwords again.
004001 Validation failed:	Admin User ID is missing. Enter user ID.
004002 Validation failed:	Admin Password is missing. Enter admin password.
005011 Validation failed:	Invalid Credit Card Nickname. Enter valid credit card nickname.
005012 Validation failed:	First name is missing. Enter first name.
005013 Validation failed:	Last name is missing. Enter last name.
005014 Validation failed:	Invalid first name. Enter valid first name.
005015 Validation failed:	Invalid last name. Enter valid last name.
005016 Validation failed:	Invalid middle name. Enter valid middle name.
005017 Validation failed:	Invalid Prefix. Enter valid prefix.