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Preface

Billing Care Help is designed to assist in using the Billing Care user interface to perform tasks.

Documentation Accessibility

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Document Revision History

The following table lists the revision history for this book.

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<td>December 2017</td>
<td>Initial release.</td>
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<td>• Added information about creating wholesale accounts.</td>
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Getting Started with Billing Care

You use Oracle Communications Billing Care to manage billing, payments, and accounts receivable for customer accounts. Billing Care provides an account view containing the functionality described below for performing account transactions. An interface for viewing and allocating suspended payments is also included.

For an introduction to Billing Care, see the following topics:

- About the Billing Care User Interface
- About Authorization
- About the Account Bar
- About the Actions Menu
- About the Home Section
- About the Bills Graph
- About the Bills Section
- About Exporting Grid Contents
- Using Keyboard Shortcuts

For more information about suspended payments, see "Working with Suspended Payments".

About the Billing Care User Interface

The Billing Care user interface works in a web browser. When using Billing Care:

- To avoid losing data, do not use browser commands, such as Back, Forward, and Refresh. If you do accidentally use a browser command, navigate to the main link, and, if required, sign in to Billing Care again.
- Do not open multiple instances of Billing Care in different browser windows or tabs of the same browser.
- Ensure that cookies are enabled in your browser.

About Authorization

Depending on your job and company policies, you might not be able to access all areas of Billing Care. For example:

- You might not be able to see all the menus and dialog screens described in the Help.
- You might be able to view the results of actions, such as adjustments, but not be able to perform them yourself.

Additionally, you might have limits on how much and how little you can write off, adjust, and so on.
About the User Menu

The user menu located at the top right corner of the Billing Care user interface contains links to Billing Care Online Help, application version information, and sign-out functionality.

To access the user menu:

1. From the Billing Care user interface, click the list in the top right containing the signed-in user's name.
2. Do one of the following:
   • To view Billing Care Online Help, click **Help**.
   • To view release version and build version information, click **About**.
   • To sign out of Billing Care, click **Sign Out**.

About the Account Bar

When you open a customer account, the account bar appears at the top of the page. This area displays the following account information:

• Contact.
• Account number.
• Security hint and answer.
• Account status if an account is closed or inactive.
• Billing cycle for the account, or if the account has multiple bill units, the selected bill unit.
• If the account is in collections, the number of days past due, the minimum payment required, the last action performed, and the next action scheduled for the account.
• If the account is a member of an organization hierarchy, the hierarchy type.
• If the account is a wholesale parent or a wholesale child, the account details appear with corresponding icons.
• (Optional) The three-letter abbreviation of the currency used with the account, or if the account has multiple bill units, with the bill unit.

Related Tasks

**Finding an Account**

About the Actions Menu

The **Actions** menu lists the actions that can be performed on the viewed account. Using this menu, you perform actions such as updating account information, creating payments, refunds and reversing account write offs, viewing accounts receivable, and setting up financial information such as taxation configuration.
About the Home Section

The Home section provides a high-level overview of an account's assets, account history, current balances, and News Feed of account and status change activity. You initiate new payments from the Home section by using the Make Payment button.

### Action | Description
--- | ---
**Account** | Click to update an account's profile or status. See "Account Information".
**Payments** | Click to make a new payment or allocate existing payments. See "Payments".
**Accounts Receivables** | Click to perform currency adjustments, distribute existing adjustments, or write off an account. See "Accounts Receivable".
**Organizational Hierarchy** | Click to create or modify the relationship among accounts in the same company or organization. See "Account Hierarchies".
**Financial Setup** | Click to create or update payment methods, configure bill units, or set up taxation. See "Financial Setup".
**Sharing Groups** | Click to create or modify sharing groups. See "Sharing Groups".
**Close** | Click to return to the landing page. See "Returning to the Landing Page".

**Field** | **Description**
--- | ---
**Assets** | Lists the services, including charge offers and discounts, purchased for this account. Select this section to view the details of each service in the center of the account page. Services can also be inactivated or terminated in each asset's card.
See "About Account Assets" for more information.
If the account has multiple bill units, a menu appears in the center of the account page:
- Select **Bill Unit (All)** to view details of the assets of all bill units.
- Select the name of the bill unit whose asset details you want to view.

**Account History, All Bill Units, Bill Unit** | Displays service, payment, and billing information for an account or for a bill unit, if the account has multiple bill units. The Account History area or an individual Bill Unit area must be selected to make the Bills Graph area, the Balance area, and Balance and News Feed links appear.
Depending on the age of the account and payment history, information about past due amounts, current amounts, and the bill in progress is shown here:
- **Past Due**. Click to view past due items.
- **Unallocated A/R**. Click to allocate. See "Allocating Currency Adjustments".
- **Unallocated Payments**. Click to allocate. See "Allocating a Payment".

**Note**: The bill in progress is not shown for wholesale parent accounts.
### Field Description

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<thead>
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<th>Field</th>
<th>Description</th>
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<tr>
<td>Make Payment</td>
<td>Click to make a payment on the account or bill unit. If the account has multiple bill units, select a bill unit to make this button appear. See &quot;Making a Payment&quot;.</td>
</tr>
<tr>
<td>Show Bill Units</td>
<td>Click to see information about each bill unit if the account has multiple bill units. If an account has multiple bill units, you must select a bill unit to see the billing cycle, the Bills graph, and the Balances section.</td>
</tr>
<tr>
<td>Balances</td>
<td>Click to see an graphic overview of the account or the bill unit information and balances. The Bills graph displays information about bills, purchases, payments, A/R transactions, and customer interactions. See &quot;About the Bills Graph&quot; and &quot;About Balances&quot;.</td>
</tr>
<tr>
<td>News Feed</td>
<td>Click to see a listing of account information. You can view a listing of all events, or you can view only A/R transactions, payments, charges, or account changes. See &quot;Working with the News Feed&quot;.</td>
</tr>
</tbody>
</table>

### Related Tasks
- Making a Payment
- Viewing Balances

### Related Topics
- About the Bills Graph
- About Balances

### About the Bills Graph

The Bills graph is a visual overview of account activity, including billing and customer interactions.

- The horizontal axis shows information about the last 12 bills and the bill in progress.
- The vertical axis shows account information regarding customer communication and A/R.

### Bill and Payment Indicators

This table describes the indicators for bills and payments.

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<td></td>
<td>Bill paid on time (including any overage from the last cycle).</td>
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</table>
### Account Information Indicators

The following table describes indicators for account information that are not related to bills. Account information indicators are for adjustments, disputes, and comments from CSRs. The indicators appear above the Bills graph. You can click an indicator to read further information about the interaction and to enter comments.
If multiple instances of the same type of interaction occur in a brief time span, Billing Care displays a single indicator with the number of occurrences.

Tip:
To close the details information, click inside the Bills graph.

<table>
<thead>
<tr>
<th>Indicator</th>
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<td></td>
<td>General customer inquiry.</td>
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<td></td>
<td>Payment, account adjustment, bill adjustment, item adjustment, event adjustment, open dispute, closed dispute, write-offs. For payments, disputes, and adjustments, you can drill down to see further details, such as effective dates, transaction IDs, payment methods, and comments depending on the type of A/R.</td>
</tr>
<tr>
<td></td>
<td>Unresolved status for inquiries and A/R changes. This indicator is shown in combination with customer inquiries and A/R changes.</td>
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<td></td>
<td>Award.</td>
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You can click an indicator to read more information about the transaction or interaction it represents. You can also enter a comment.

About the Bills Section

The Bills section provides information about specific bills. The upper area is an overview of the selected bill. The initial view is of the bill in progress. If there are multiple bill units, the bill in progress for the default bill unit is shown.

For wholesale parent accounts, the Bills section displays the consolidated charges and A/R actions of all the child accounts. The A/R actions that are generated after the billing cycle and the consolidated amount of these A/R actions are shown in this section. However, the individual A/R actions of the wholesale child accounts are not shown in this section.

The information shown depends on the bill and bill history. The information may include:

- The payment method. If there is no payment method, the Assign link appears. Click to add a payment method. See "Adding a Payment Method" for more information.
- The account's service charges.
- Charges from other accounts. If there are charges from other accounts, click the link to see the charge details.
- A/R actions. If there are A/R actions, click the link to see the adjustment or dispute details.
- Payment applied. If there is a payment, click the link to see the payment details.
- Total due for this period.

Charges and other billing-related items of the wholesale child accounts in the hierarchy are shown in the respective accounts until the billing is in progress. Once the billing cycle is completed, charges and other billing-related items of the wholesale child accounts in the hierarchy are rolled up to the wholesale parent account and the Total due for this period in the wholesale child accounts shows 0.

- Number of days overdue.

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Switch Bills</strong></td>
<td>Click to access other bills. If there is more than one bill unit, select the one you want to work with. The list displayed includes the bill in progress and the bills for the 12 past billing cycles. For child accounts in a hierarchy, the list includes the bills that are generated before and after moving the account into the hierarchy. Click the <strong>Bill Search</strong> link to search for an older bill that may not be available in the list. <strong>Note:</strong> The <strong>Bill Search</strong> link does not appear if the account contains less than 12 bills.</td>
</tr>
</tbody>
</table>
| **Actions** | Use this menu for these bill-related activities:  
  - Make Payment  
  - Adjust Bill  
  - Dispute Bill  
  - Write Off Bill  
  - Refund Bill  
  - Produce Corrective Bill  
  - Settle Bill Dispute  
  The **Actions** menu does not appear until a bill is selected. |
| **Bill Details** | Use this field to find specific charges. Enter all or part of the service type, service ID, or device ID. |
| **My Charges** | Shows the charges for the selected bill that are generated by the account. Click the charges in the following areas to view more information:  
  - Account Charges  
  - Account and Sharing Charges  
  - Service Charges  
  You can view an invoice from the details window.  
  **Note:** For wholesale parent accounts, **Charge Sharing** link is shown under **My Charges**. By clicking the **Charge Sharing** link, you can view the consolidated amount that is due for the wholesale parent account. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Charges from Other Accounts   | Shows the charges for the selected bill that are generated by other accounts. Click the charges in the following areas to view more information: | Account Charges  
|                               | Account and Sharing Charges  
|                               | Service Charges  
You can view an invoice from the details window.  
**Note:** For wholesale parent accounts. **Charges from Other Accounts** is not displayed. |

### Related Tasks

- Making a Payment
- Adjusting a Bill
- Disputing a Bill

### Related Topics

- Account Profile Dialog Box

### About Exporting Grid Contents

The following Billing Care account information grids contain data that can be exported to comma separated values (CSV):

- All Unallocated Payments
- All Unallocated Adjustments
- Allocate Payments - Simple
- Allocate Payments - Advanced
- Allocate Adjustments - Simple
- Allocate Adjustments - Advanced
- Payment Details
- Adjustment Details
- Payment Details Item Affected
- Adjustment Details Item Affected
- AR Actions
- All Open Disputes
- Bill Adjustments Details
- Bill Adjustments Details Item Affected
- Payment Applied
- Past Due

To export grid data to CSV:
1. View the grid in Billing Care.
2. Click **Export**.
3. Save the file.

### Using Keyboard Shortcuts

You can use keyboard shortcuts for many actions in Billing Care.

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move focus to the next field or element from top to bottom and left to right.</td>
<td>Tab</td>
</tr>
<tr>
<td>Move focus to the previous field or element, from bottom to top and right to left.</td>
<td>Shift + Tab</td>
</tr>
<tr>
<td>Click a link, a button, or a command on a menu.</td>
<td>Enter or Spacebar</td>
</tr>
<tr>
<td>In a table, move to the next row.</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>In a table, move to the previous row.</td>
<td>Up Arrow</td>
</tr>
<tr>
<td>Move from a menu item to its parent menu in the Actions menu, right to left.</td>
<td>Left Arrow</td>
</tr>
<tr>
<td>Open a submenu from a menu item in the Actions menu, left to right.</td>
<td>Right Arrow</td>
</tr>
<tr>
<td>Select the Allocate column in a table for allocating payments or adjustments.</td>
<td>Ctrl + Enter</td>
</tr>
</tbody>
</table>
Creating and Finding Accounts

Find existing accounts using the Oracle Communications Billing Care's search function to view and manage existing account information such as contact details, payment methods, account notes, and hierarchial account relationships. Create new customer accounts using the new account function. See "Creating an Account" for more information.

To find an existing account and to view hierarchial account relationships, see "Finding an Account". See "Viewing and Changing Account Information" for more information on updating an account's information after finding it.

Finding an Account

To find an account:

1. Click Search.
   The Search dialog box appears. See "Search Dialog Box" for more information.
2. From the Search list, keep the default Accounts.
3. Enter search criteria.

   **Tip:**
   Use an asterisk (*) as a wildcard to match one or more characters at the start or end of words or numbers.

4. Click Search.
   Billing Care displays search results at the right side of the Search dialog box. If there are many results, you can enter more criteria to refine the search, and you can sort the search results. See "Sorting Search Results".
5. Select an account, and click Open.

   **Tip:**
   You can also open an account by double clicking the account in the results list.

Billing Care displays the selected account.
Search Dialog Box

Use the Search dialog box to search for accounts. Narrow your search results by using the filters provided under **Account Information**. You can also select the relevant schema to filter the account. By default, the primary schema is selected.

**Note:**

For multi-schema setup, search criteria is used to search accounts in all schemas and results are sorted according to the sort conditions for each schema.

Search is not case sensitive.

**Tips:**

- You must use an asterisk (*) as a wildcard to match any missing characters at the start, middle, or end of words or numbers when entering search criteria.
- You can scroll down to view recently accessed accounts.

<table>
<thead>
<tr>
<th>Search list</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Information</td>
<td>Enter search criteria in one or more fields in the Account Information area.</td>
</tr>
<tr>
<td>Results</td>
<td>Lists the items that meet your criteria.</td>
</tr>
<tr>
<td></td>
<td>If an account has more than one match for a Service ID, &lt;multiple&gt; appears.</td>
</tr>
<tr>
<td></td>
<td>You can see the service IDs and service types in the tooltip.</td>
</tr>
<tr>
<td></td>
<td>You can do the following:</td>
</tr>
<tr>
<td></td>
<td>• Sort the results by a given column in either ascending or descending order.</td>
</tr>
<tr>
<td></td>
<td>• Select a result and open it.</td>
</tr>
<tr>
<td></td>
<td>When you search by a particular service ID, the asset associated with that</td>
</tr>
<tr>
<td></td>
<td>service ID is automatically displayed when you open the account from the</td>
</tr>
<tr>
<td></td>
<td>search results.</td>
</tr>
<tr>
<td></td>
<td>Search returns a maximum of 50 results.</td>
</tr>
<tr>
<td></td>
<td>Refine your search criteria if the account you are searching for is not</td>
</tr>
<tr>
<td></td>
<td>initially found.</td>
</tr>
</tbody>
</table>

**Sorting Search Results**

Initially, search results are sorted by last name. You can change how the results are sorted by clicking on a different column heading. Click the heading again to change from ascending to descending sort.
Creating an Account

To create a new account:

1. Click **New Account**.
   
The **Profile** screen appears.

2. Enter the following information for the new account:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts</td>
<td>Account contact information. Provide one or more contacts for the new account.</td>
</tr>
<tr>
<td>Security</td>
<td>Security question and response. Provide a secure question to verify the new account's owner during future interactions.</td>
</tr>
<tr>
<td>Customer Type</td>
<td>Select the customer type for the new account.</td>
</tr>
<tr>
<td>Language</td>
<td>Select the default language for the new account. Billing Care sets the default language based on your browser locale.</td>
</tr>
<tr>
<td>Organization Hierarchy Type</td>
<td>(Optional) Select the organization hierarchy type. Billing Care creates organizational hierarchy relationships for accounts with the same company name value specified. See &quot;About Organization Hierarchies&quot; for more information.</td>
</tr>
</tbody>
</table>

3. Click **Continue**.
   
The **Select** screen appears with the list of available plans that include service groups.

4. Select a service from the **Filter the list** area.

5. Select a plan for the new account. For example, select a plan with the GSM telephony services to create an account for the GSM service.
6. Click **Continue**.

   The **Configure** screen appears.

7. To configure the services in the selected plan, click on each service listed under **Service Configuration** and enter the required information.

   If you select a non-telco service, the Service Identifier field appears in the **Configure** screen.

   If you select a Telco service plan, the associated SIM card and number details are displayed. You can search and associate SIM card and primary number with a service.

8. To select a SIM card, click **Search**.

   A search dialog box appears.

9. Do the following:
   
   a. (Optional) Enter a **Description**.
   
   b. (Optional) To search for a specific SIM card, enter a search criteria. You can search by SIM number, IMSI number, network element, or status.
   
   c. Click **Search**.

      The search returns a maximum of 50 results by default. Refine your search criteria if the SIM Card you are searching for is not initially found.

   d. Select a SIM card and click **Associate**.

      The selected SIM number is associated with the service.

10. To select and associate a number, click **Search**.
A search dialog box appears.

11. Do the following:
   a. (Optional) Select **Primary number** if the number to be associated is a primary number.
   b. (Optional) Enter a **Description**.
   c. (Optional) To search for a specific number, enter a search criteria. You can search by number, number category, network element, vanity, or status.
   d. Click **Search**.
      The search returns a maximum of 50 results by default. Refine your search criteria if the number you are searching for is not initially found.
   e. Select a number and click **Associate**.
      The selected number is associated with the service.

12. To backdate account creation to a date earlier than the current date, select **Backdate account creation to** and click the calendar icon to set the date. By default, the current date is selected.

   **Note:**
   When you backdate the account creation, the start date for purchase, cycle, and usage fees is also changed to the earlier date. You cannot select a different start date.

13. (Optional) To customize purchase, recurring, and usage fees, click on a charge and discount offering listed under **Configure Purchase**.

14. Select a reason for purchase and enter notes if required.

15. Click **Continue**.
   The **Pay** screen appears. In this screen, configure a bill unit and payment method for the new account.

16. Click **Add Bill Unit** to add Bill Units.
   The details of the default bill unit appears on the page. You can add new bill units from this page. The bill units that are added are available in the **Pay** screen.
   This page also displays the services from the selected plan. The services are grouped by the balance group and are identified by the service type. You can drag and drop the balance groups from one bill unit to another.

17. Click the edit icon in the bill unit to create and assign a new payment method for the bill unit.

18. Enter a **Bill Unit name**.

19. Select a payment type.
   If the payment method is not defined, select **No Payment Method** and proceed to the step 21.

20. Do one of the following:
   - For **New Credit Card** (credit card), enter card number, CVV2/CID details, card expiration details, name, address, and billing details.
• For New Direct Debit (debit card), enter bank number, account number, account type, name, address, and billing details.

• For New Invoice, enter the invoice payment method ID, delivery method, email, name, address, and billing details.

• For New SEPA, enter SEPA-related information, such as the International Bank Account Number (IBAN), Bank Identifier Code (BIC), Unique Mandate Reference information, type of payment, date of signing, mandate signed place, creditor's ID and other details, debtor's ID and reference details, mandate contract description, address, and billing details.

21. Click All Bill Units to go back to the Pay screen.

Note:
You can add multiple bill units.

See "Moving Services between Bill Units" for more information on how to move balance groups to the new bill unit.

See "Financial Setup" for more information on configuring payment methods and bill units.

22. Click Finish to create the new account.

For multi-schema environment, BRM controls the schema selection for creating a new account.

Billing Care displays the newly created account. See "Financial Setup" for additional information on managing account financial information.

Related Topics
Working with Subscription Groups

Working with Subscription Groups

You can group services by subscription and allow sharing of resources among them. You can also perform collective administrative operations for the entire group, such as activate, inactivate, or cancel services.

Customers can have several subscriptions, such as a wireless phone and Internet access, or two wireless phones with different numbers. Grouping services by subscription allows you to rate and bill for services according to the customer's subscription rather than by account. For more information about subscription-level services, see BRM Managing Customers.

To associate multiple services to a subscription group, you must create an account and associate the account with a plan that contains a group of subscriptions. See "Creating an Account" for more information on creating accounts.

Billing Care allows you to purchase services that are grouped in a plan. See "Purchasing Additional Products and Services" for more information on purchasing products and services.
Related Tasks

Creating an Account
Purchasing Additional Products and Services
Working with Assets

Terminating or Inactivating Account Services

Use Billing Care's asset management functionality to terminate or inactivate an account's services. See "Working with Assets" for more information on managing account assets, including how to terminate, inactivate, or reactivate account services.
Account Information

Use Oracle Communications Billing Care to view and change customer account information.

For information on working with accounts and performing some basic tasks, see:

- Viewing and Changing Account Information
- Changing the Account Status
- Working with Deferred Actions
- Working with the News Feed
- About Balances
- Viewing Balances
- Working with Credit Limits, Credit Floors, and Thresholds
- Purchasing New Products and Services
- Purchasing Additional Products and Services
- About Account Assets
- Viewing Assets
- Working with Assets
- Finding a Bill
- Finding a Specific Bill
- Finding Bills by Date Range
- Viewing Bill Details
- Viewing Refunded Bills
- Viewing an Invoice
- Working with Events
- Working with an Account in Collections
- Returning to the Landing Page

Viewing and Changing Account Information

An account can have multiple contacts and each contact can have multiple phone numbers.

The first account contact appears in the account bar. You can see any additional contact information and add, change, or delete contact information on the Account Profile dialog box.
To view or change account information, do any of the following:

1. From the **Actions** menu, select **Account**, and then select **Account Profile**. The Account Profile dialog box appears.

2. To add a new contact, click **New Contact**, and enter the customer information.

   **Note:** Enter a pre-existing email address, not one associated with a service the customer is purchasing now.

3. To change existing contact information, update the information in any of the contact fields.

   **Note:** If you enter a company name, that name is displayed.
   If the company name is blank, the first name and last name of the first contact in the account profile are displayed.

4. To change the phone number information, select the type, and enter the new number.

   **Note:** Each phone type can be used by only one phone number.

5. In **Security**, enter new text to change the hint or answer.
   For more information, see “Changing Customer Security Hints and Answers”.

6. For **Customer Type**, select a new value.

7. For **Language**, select a new value.

8. For **Organization Hierarchy Type**, select a new value.

9. Click **Save**.
   See “Financial Setup” for information on updating payment, bill unit, or tax information.
Related Tasks
Viewing and Changing Account Information
Changing Customer Security Hints and Answers
Working with Payment Methods

Changing Customer Security Hints and Answers

To change customer security hints and answers:

1. From the Actions menu, select Accounts, and then select Account Profile. The Account Profile dialog box appears.
2. In the Security section, enter new text to change the hint or answer.
3. To delete a hint and answer pair, click the minus icon.
4. Click Save.

Related Tasks
Viewing and Changing Account Information

Account Profile Dialog Box

Use the Account Profile dialog box to view and change information for the active account. You can:

- Add new contacts.
- Add, change, or remove phone numbers.
- Add, change, or remove security hints.
- Set or change the customer type.
- Set or change the customer's preferred language.

Related Tasks
Viewing and Changing Account Information
Changing Customer Security Hints and Answers

Changing the Account Status

If an account is inactive or closed, that information appears in the account bar.

Changing the status of an account affects services, products, and hierarchical groups. For more information, see:

- Products and Account Status
- Hierarchical Groups and Account Status

To change the account status:

1. From the Actions menu, click Account status.
The Account Status dialog box appears.

2. From the **Status** list, select an account status.

3. Do one of the following:
   - Keep the default **Effective immediately**.
   - Select **Defer the action until**, and enter the date.
   - Select **Backdate the action to**, and enter the date.

4. From the **Account Status Change** list, select the reason.

5. (Optional) Enter a note.

6. Click **Save**.

### Products and Account Status

Inactivating an account inactivates all active products in the account. Reactivating an inactive account reactivates all products that were active when the account was active. Products that were inactive when the account was active remain inactive.

Closing an account cancels all the account's products and services. Reactivating a closed account does not reinstate the canceled products. To regain the canceled products, the account must repurchase the deals that contain them.

Individual products and services can be inactivated or terminated without affecting an account's other products and services. See "Working with Assets" for more information on how to inactivate or remove products from a customer's account.

### Hierarchical Groups and Account Status

By default, changing the status of the parent account's services in a hierarchical account group changes the status of all child accounts' services in the group, independent of their type of bill unit (paying or nonpaying).

See "Account Hierarchies" for more information on managing organizational hierarchies.

### Account Status Dialog Box

Use the Account Status dialog box to change an account's status.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Select the new status.</td>
</tr>
<tr>
<td>Status change effective date</td>
<td>If you select Inactive or Closed for the new status, you can make the change take effect immediately, schedule the change in the future, or backdate the change.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

### Related Tasks

- **Making a Payment**
Allocating Payments

Working with Deferred Actions

The Deferred Actions list the account, service, and collections related scheduled actions. For example, activation or deactivation of a service or closure of an account at a later date. You can edit, execute, and delete the deferred actions.

To work with the deferred actions:

1. From the Actions menu, click Deferred Actions.
   The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:
   - The Deferred Actions link in the Account banner tile.
     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
   - The Assets cards. See "Service Specific Deferred Actions".

2. (Optional) From the Type list, select the type of a deferred action you want to perform an action. By default, All is selected.

3. (Optional) From the Status list, select one of the options. By default, Pending is selected.

4. Select the deferred action to perform any of the following actions. These actions are available based on the user privileges:
   - Edit: Allows you to reschedule the deferred action.
   - Execute: Allows you to execute the action. When you execute, if the execution is successful, the status of the action changes to Done. If the execution fails, the status of the action changes to Error.
   - Delete: Allows you to remove the deferred action.

   **Note:**
   For collections related deferred actions, you can only execute or delete an action.

Editing Deferred Actions

To edit deferred actions:

1. From the Actions menu, click Deferred Actions.
The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

- The **Deferred Actions** link in the Account banner tile.
  
  This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.

- The Assets cards. See “Service Specific Deferred Actions”.

2. Select the account or service level deferred action.

3. Click the pencil icon.

4. In the **Scheduled** field, enter a date or select a date from the calendar.

5. Click **Save**.

**Executing Deferred Actions**

To execute deferred actions:

1. From the **Actions** menu, click **Deferred Actions**.

   The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

   - The **Deferred Actions** link in the Account banner tile.
     
     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.

   - The Assets cards. See “Service Specific Deferred Actions”.

2. Select the account or service level deferred action.

3. Click the execute icon.

**Note:**

You can edit only the deferred actions that are in the **Pending** status.

After the execution, the Pending status changes to:

- **Done**, if the action successfully executes.
- **Error**, if the action does not execute successfully.

**Deleting Deferred Actions**

To delete deferred actions:

1. From the **Actions** menu, click **Deferred Actions**.

   The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:

   - The **Deferred Actions** link in the Account banner tile.
     
     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
• The Assets cards. See "Service Specific Deferred Actions".

2. Select the account or service level deferred action.

3. Click the delete icon.

After the deletion is successful, the deleted action is removed and you cannot view the deleted action and its status. If you cannot delete the pending action, Pending Undeletable appears in the Status list.

Deferred Actions Dialog Box

Use the Deferred Actions dialog box to perform account, service, and collections related actions.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Type  | Select one of the types of deferred actions that you want to view. By default, All is selected:  
• All  
• Account  
• Service |
| Status| Select one of the statuses. By default, the Pending action is selected:  
• All  
• Pending  
• Done  
• Error  
• Pending Undeletable |

Working with the News Feed

The News Feed provides a history of the bill unit in list form. If an account has one bill unit, the list appears to be for the account.

You can select any entry to open a dialog box or section with more information about the entry. Depending on the type of entry, you can add a comment or perform a related action.

To work with the News Feed:

1. Select the Home section.

2. Do one of the following:
   • Select Account History, and click the News Feed link.
   • Select All Bill Units, click the Show Bill Units link, select the bill unit, and click the News Feed link.

   The News Feed appears.

3. Do any of the following:
   • To view the complete list, click All.
   • To view the list for a specific category, click A/R, Collections Payments, Charges, or Account.

4. Click an entry for details.
News Feed

The News Feed provides a history of the bill unit in list form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categories</td>
<td>The top row lists the main categories. Click a category link to view only that category:</td>
</tr>
<tr>
<td></td>
<td>• <strong>All</strong>, which includes all entries.</td>
</tr>
<tr>
<td></td>
<td>• <strong>A/R</strong>, which includes currency adjustments, adjustment allocations, noncurrency adjustments, open disputes, closed disputes, refunds, write-offs, and collections.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Payments</strong>, which includes payments, payment allocations, payment method changes, payment reversals, when a payment for the account is moved to suspense, and when a suspended payment is allocated to the account.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Charges</strong>, which includes bill issued, bill became overdue, one time charges, recurring charges, purchase, purchase cancelled, corrective bill issued, and bill issued mid-cycle.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Account</strong>, which includes name or contact information changes, service status changes, and services attached (for example, a SIM card) or detached from the account. Also, bill unit created, bill unit deleted, billing frequency changed, billing day change, billing type change are included.</td>
</tr>
<tr>
<td></td>
<td>When an account status change or service status change is scheduled in the future, it is listed as a deferred action.</td>
</tr>
<tr>
<td></td>
<td>When a product, discount, or custom service status changes, the News Feed is also updated and reflects the changes.</td>
</tr>
<tr>
<td>Date</td>
<td>The date the entry occurred.</td>
</tr>
<tr>
<td>Type</td>
<td>For the category, the particular types of entries. Click a link to access details about the entry, and depending on the type, comment or perform a related action.</td>
</tr>
<tr>
<td>Amount</td>
<td>If the type involves currency, the amount appears.</td>
</tr>
<tr>
<td>Details</td>
<td>Summary of the entry.</td>
</tr>
<tr>
<td>Show More</td>
<td>If there are more than 50 records, this link appears.</td>
</tr>
</tbody>
</table>

About Balances

The Balances area shows what the customer owes and what credits the customers has. There are two main types of balances:

- Currency balances, which are shown in green and have a currency symbol. The balance represents money owed for the services associated with the balance. If there is a credit limit for the amount owed, that is shown with the balance.
- Noncurrency balances, which are shown in blue and do not have a currency symbol. Noncurrency balances represent tokens, minutes, loyalty points, and so on, that are associated with the service.

Viewing Balances

To view balances:
1. On the account page, click the **Home** tab, and then select the Account History section or the section for the bill unit whose balances you want to view.
   If the account or bill unit has multiple balances, the **Balance** list appears; otherwise, the single balance appears.

2. In the **Balances** list, select the services whose balances you want to view.
   The name of the services and the related balances appear below the list.

3. (Optional) Click a noncurrency balance to view further details.

**Related Tasks**

Making a Noncurrency Adjustment

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**Working with Credit Limits, Credit Floors, and Thresholds**

The currency and noncurrency credit limits are displayed in the **Balances** section in the **Home** tab.

You set a credit limit to control the amount of charges or noncurrency resources that a customer can accumulate.

After customers reach a noncurrency credit limit, the resource stops accumulating in the customer's account.

After customers reach a currency credit limit, they cannot use the service.

If you set a credit floor, a notification event is generated when the credit limit threshold is reached. If you do not set a credit floor, no notification event is generated. For currency resources, the credit floor is 0.

The thresholds represent a percentage of the credit limit amount or a percentage of the difference between the credit limit and the credit floor (if you selected a credit floor) amounts. Each selected threshold triggers an alert. You set the credit thresholds to notify customers when the resource usage reaches the specified amount or limit. You can specify the threshold either:

- As a fixed threshold value, such as $100 or 30 minutes.
- As a percentage value of the credit limit, such as 90%. For example, if the credit limit is $100 and the threshold is 90%, the threshold amount is reached when the customer has a balance of $90; that is, when the customer has used 90% of the resource.

**Setting up Credit Limit, Floor, and Thresholds**

To set credit limit, floor, and thresholds for currency or noncurrency resources:

1. On the account page, click the **Home** tab.

2. In the Account History Section, click **Balances**.
   If the account or bill unit has multiple balances for multiple services, the **Balance** list appears; otherwise, the single balance appears.

3. Select the resource for which you want to set the credit limit, credit floor, and credit thresholds.

4. Enter or select the values for the following:
• **Limit allowed.** (Optional) To set a credit limit, enter a value. To keep the credit limit as unlimited, leave it empty.

• **Floor.** (Optional) Enter a lower credit limit amount for the balance. This value cannot be greater than the Fixed value. If you do not enter a value, the text box displays the value as Not Set.

• **Fixed Thresholds.** (Optional) Enter the fixed threshold value at which you want the notification to be sent to the customers. This value must be between the floor and credit limit.

• **Thresholds.** (Optional) Select the desired percentage value. This value must be between the floor and credit limit.

**Note:**

You can change validity dates for noncurrency resources.

When spending reaches the selected percentage or the fixed threshold value, a notification event is generated.

5. Click **OK**.

**Related Topics**

- **Working with Credit Limits, Credit Floors, and Thresholds**
- **About Balances**
- **Viewing Balances**

**Credit Limit, Floor, and Thresholds Dialog Box**

Use this dialog box to set the required values for credit limit, floor, and thresholds for currency or noncurrency resources.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit allowed</td>
<td>Enter the credit limit amount to control the amount of charges or noncurrency resources a customer can accumulate. This value can be a negative value.</td>
</tr>
<tr>
<td>Floor</td>
<td>Enter the lower credit limit amount for the balance. This value can be a negative value, but it cannot be greater than the fixed value.</td>
</tr>
<tr>
<td>Fixed Thresholds</td>
<td>Enter the value at which you want the notification event to be generated.</td>
</tr>
<tr>
<td>Thresholds</td>
<td>Select a percentage at which you want the notification event to be generated.</td>
</tr>
</tbody>
</table>

**Purchasing New Products and Services**

To purchase new products and services for an account:

1. Find the account. See "Finding an Account" for more information.
2. Click **Purchase**.
   The Purchase Catalogue screen appears.

3. To view packages available and to add a new service or service group to the account, click **New Service**. By default, the Select page appears.

4. Select a plan. Click **Continue**.
   The Configure page appears.

5. Enter the Service Identifier details for the new service.

6. (Optional) To schedule the package purchase to a date earlier than the current date, select **Backdate package purchase to** and click the calendar icon to set the date. By default, the current date is selected.

   **Note:**
   - If you purchase a service, you cannot select the backdate if the date selected is prior to the effective date of the account and last status change of the account.
   - If you purchase a bundle, you cannot select the backdate if the date selected is prior to the effective date of the account, last status change of the account or service, and effective date of the service.

7. Click **Continue**.
   The **Pay** screen appears. The existing bill units, with the purchased services, are displayed in this screen. The services are grouped by the balance group.

8. Click **Add Bill Unit** to add Bill Units.
   The details of the existing bill units appear on the page. You can add new bill units from this page. The bill units that are added are available in the Pay screen.

   This page also displays the services from the selected plan. The services are grouped by the balance group and are identified by the service type.

   The newly selected services can be added to the bill unit that has a balance group for the account. You can drag and drop the balance groups, purchased for a new service, from one bill unit to another. For more information, see “Creating an Account”.

   During account creation, you can add new bill units and configure payment methods. However, you can only configure the existing bill units or payment methods during purchasing new products and services.

9. Click **Finish**.

**Related Tasks**

**Purchasing Additional Products and Services**

**Transferring Bundles and Packages**

---

**Purchasing Additional Products and Services**

To purchase additional products and services for an account:
1. Find the account. See “Finding an Account” for more information.

2. Click **Purchase**.
   The Purchase Catalogue screen appears.

3. To view packages available for adding to an existing account service, click **Add to a service**. By default, the Select page appears.

4. Select a Bundle. Click **Continue**.
   Configure screen appears.

   **Note:**
   If you select a telco service, perform the following steps.

5. (Optional) Use **Search** to search and associate SIM card and primary number with a service.

6. To select a SIM card, click **Search**.
   A search dialog box appears.

7. Do the following:
   a. (Optional) Enter a **Description**.
   b. (Optional) To search for a specific SIM card, enter a search criteria. You can search by SIM number, IMSI number, network element, or status.
   c. Click **Search**.
   The search returns a maximum of 50 results by default. Refine your search criteria if the SIM Card you are searching for is not initially found.
   d. Select a SIM card and click **Associate**.
   The selected SIM number is associated with the service.

8. To select and associate a number, click **Search**.
   A search dialog box appears.

9. Do the following:
   a. (Optional) Select **Primary number** if the number to be associated is a primary number.
   b. (Optional) Enter a **Description**.
   c. (Optional) To search for a specific number, enter a search criteria. You can search by number, number category, network element, vanity, or status.
   d. Click **Search**.
   The search returns a maximum of 50 results by default. Refine your search criteria if the number you are searching for is not initially found.
   e. Select a number and click **Associate**.
   The selected number is associated with the service.

10. (Optional) Use filters to help you find a specific package.

11. Select the new package to purchase.
12. Select the required service identifier.

13. (Optional) Click the charge and discount offers, listed under **Configure Purchase**, to customize purchase options including activation, recurring fees, and usage dates.

14. Select a purchase reason from the list.

15. To schedule the package purchase to a date earlier than the current date, select **Backdate bundle purchase to** and click the calendar icon to set the date. By default, the current date is selected.

16. Click **Continue**.

17. Click the **Configure** option to configure your purchase.

18. Click **Finish**.

**Related Tasks**

- **Purchasing New Products and Services**
- **Transitioning Bundles and Packages**

## Transitioning Bundles and Packages

The transitioning between bundles and packages can be done for accounts.

Transitions enable you to limit the packages that customers can switch to while remaining fully provisioned. When transitioning to a designated package, your customers can retain their devices, such as phone numbers.

Few transition types appear by default. For example, Upgrade and Downgrade. There could be more based on your system configuration.

- **Upgrade** to a package that is typically more expensive and has more features. For example, a customer might transition from a package that provides Internet and cable TV services to a package that provides Internet, cable TV, and VOIP services. That transition adds a service and a bundle and changes the bundles for the existing services.

- **Downgrade** to a package that is typically less expensive and has fewer features.

You can perform the following tasks:

- **Transitioning a Bundle for an Account**
- **Transitioning and Configuring a Package for an Account**
- **Mapping Services for an Account**

---

**Note:**

You cannot select the backdate if the date selected is prior to the effective date of the account, last status change date of the account or service, and effective date of the service.
Transitioning a Bundle for an Account

To transition a bundle for an account:

1. Select an account. See “Finding an Account” for more information.
2. Click **Purchase**.
   The Purchase Catalogue screen appears.
3. Click **Transitions**.
4. Click **Bundle**.
5. Select a bundle from the **From Bundle** list.
6. Select a type of transition from the **Transition Type** list.
7. Select a **Deal** to transition to.
8. Select a reason for purchase.
9. (Optional) Enter a note.
10. Click **Finish**

Related Tasks

Transitioning Bundles and Packages
Transitioning and Configuring a Package for an Account
Mapping Services for an Account
Purchasing New Products and Services
Purchasing Additional Products and Services

Transitioning and Configuring a Package for an Account

To transition and configure a package for an account:

1. Find the account. See “Finding an Account” for more information.
2. Click **Purchase**.
   The Purchase Catalogue screen appears.
3. Click **Transitions**.
4. Click **Package**.
5. Select a package from the **From Package** list.
6. Select a type of transition from the **Transition Type** list.
7. Select a package to transition to.
   The information about the package and any available options appears.
8. Click **Continue**.
   Based on the selected package The Map Services page of the Purchase Catalogue page appears. To map existing services to new services, see “Mapping Services for an Account”.

9. To configure a service, in the Purchase Catalogue screen, click **Configure**

   The Service Configuration page of the Purchase Catalogue appears.

10. Configure the required fields in the **Purchase, Recurring (cycle),** and **Usage** sections.

11. Select a reason for purchase.

12. (Optional) Enter a note.

13. Click **Finish**.

**Related Tasks**

**Transitioning Bundles and Packages**

**Transitioning a Bundle for an Account**

**Mapping Services for an Account**

**Purchasing New Products and Services**

**Purchasing Additional Products and Services**

---

**Mapping Services for an Account**

The Map Services page displays existing bundles and services in the selected package. You can map existing services in a package, to new services. All existing services appear in one column and the new services appear in another column.

To map the existing services of an account to new services, do the following:

1. In the Map Services page of the Purchase Catalogue page, select **Map Services**.

2. The first column lists all the existing services. Select a service.

3. The second column lists new services. Select a service to which the existing service needs to be mapped to.

4. Select a reason for purchase.

5. (Optional) Enter a note.

6. Click **Finish**.

---

**Note:**

If the mapping service is a new service, the service must be purchased before mapping and must have a service identifier (ID).

**Related Tasks**

**Transitioning Bundles and Packages**

**Transitioning a Bundle for an Account**

**Transitioning and Configuring a Package for an Account**

**Purchasing New Products and Services**
Purchasing Additional Products and Services

About Account Assets

The Assets area shows the services and related charge offers and discount offers a customer owns. Each service is displayed in an asset card. The cards are organized by purchase date with the most recent on top.

See "Viewing Assets" for information on how to view assets and "Working with Assets" for information on how to perform actions on assets.

Viewing Assets

To view assets:

1. On the account page, click the Home tab, and then select the Assets section.

A list of asset cards appears. Each card contains information about one service and the related charge offers and discount offers owned by the customer.

If a service is active, its status is not displayed on the asset card. All other standard or custom service statuses are displayed under the service ID.

This screen displays any existing service groups.

In case of service groups, the asset cards for all the member services in the group are displayed under the parent service irrespective of their status. You can use the parent service to sort the services in the group. You cannot sort the services in the group individually.

2. Expand the card for the asset on which an action is to be performed.

   ![Note:](image)

   In the detail view, customized charge offers are displayed with an asterisk.

3. (Optional) Click an asset card's Action Menu and select Show Asset Details to view more information about the asset.

   The asset details are displayed. For example, for GSM services, the associated SIM card and number details are displayed.

4. (Optional) For GSM services, to change the SIM card and number associated with the service, click Edit.

5. (Optional) Use Search to search and associate SIM card and primary number with a service.

6. To select a SIM card, click Search.

   A search dialog box appears.

7. Do the following:

   a. (Optional) Enter a Description.

   b. (Optional) To search for a specific SIM card, enter a search criteria. You can search by SIM number, IMSI number, network element, or status.
c. Click **Search**.
   The search returns a maximum of 50 results by default. Refine your search criteria if the SIM Card you are searching for is not initially found.

d. Select a SIM card and click **Associate**.
   The selected SIM number is associated with the service.

8. To select and associate a number, click **Search**.
   A search dialog box appears.

9. Do the following:
   a. (Optional) Select **Primary number** if the number to be associated is a primary number.
   b. (Optional) Enter a **Description**.
   c. (Optional) To search for a specific number, enter a search criteria. You can search by number, number category, network element, vanity, or status.
   d. Click **Search**.
      The search returns a maximum of 50 results by default. Refine your search criteria if the number you are searching for is not initially found.
   e. Select a number and click **Associate**.
      The selected number is associated with the service.

---

**Working with Assets**

To perform an action on an asset, such as inactivating, reactivating, or terminating a service:

1. View the customer's assets. See "Viewing Assets".
2. Expand the card for the asset on which an action is to be performed.
3. Click the asset card's action menu.
4. Select the action to complete.

---

**Note:**
For account assets, the action menu service options are not applicable.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terminate Products/Discounts</td>
<td>Displays a list of service charge offers and discounts which can be individually selected for termination.</td>
</tr>
<tr>
<td>Inactivate Products/Discounts</td>
<td>Displays a list of service charge offers and discounts which can be individually selected for inactivation.</td>
</tr>
<tr>
<td>Reactivate Products/Discounts</td>
<td>Displays a list of inactivated charge offers and discounts which can be individually selected for reactivation.</td>
</tr>
</tbody>
</table>
### Action | Description
--- | ---
**Terminate Service** | Terminates a service and applies any early termination fees if applicable. Terminating a parent service also terminates any child services.

**Inactivate Service** | Temporarily inactivates a service. Inactivating a parent service also inactivates any child services.

**Reactivate Service** | Reactivates a previously inactivated service. Reactivating a parent service also reactivates any child services.

**Custom Service Life Cycle State** | Transitions the service to the selected custom service life cycle state.

Custom service life cycle states are available on the action menu only if Service Lifecycle Management (SLM) is enabled in your BRM system and a custom service life cycle is configured for the service type.

When those conditions are met, the action menu does not display the Terminate Service, Inactivate Service, and Reactivate Service options. Instead, it lists all the states in the specified service's custom life cycle to which the service can transition from its current state.

For more information, see the discussion about SLM in *BRM Managing Customers*.

**Rate Customizations** | You can modify product and discount related information after creating an account or purchasing a service.

Click **Edit** in the Rate Customizations dialog box to modify the information.

The expired products or services appear in the Cancelled or Expired section in an Asset card.

**Show Asset Details** | Displays additional details about an asset including information on recurring monthly charges, rate customizations, and expired promotions. Click **Edit** to make changes to the asset.

5. (Optional) Do one of the following:
   - Click **Backdate** to set a past date for the Terminate Products and Discounts and Inactivate Products and Discounts actions.

   **Note:**
   You cannot backdate a custom life cycle state transition.

   - To set the termination date, click **Terminate Service** and **Termination Date**.
   - To set the inactivation date, click **Inactivate Service** and **Inactivation Date**.

### Service Specific Deferred Actions

You can schedule a service-specific action to take place in the future. For example, you can schedule a subscriber’s service to be terminated in one week.

To defer a service specific action:

1. On the account page, click the **Home** tab, and then select the **Assets** section.
A list of asset cards appears. If deferred actions are associated with services, they appear as a Deferred Actions link.

2. Click the **Deferred Actions** link.
   A deferred action specific to the service appears. For example, a deferred action for the Telco/GPRS.

3. Select the deferred action to perform any of the following actions:
   - **Edit**: Allows you to modify the deferred action.
   - **Execute**: Allows you to execute the action. Once you execute, the status of the action changes to **Done**.
   - **Delete**: Allows you to remove the deferred action.

   See "Editing Deferred Actions", "Executing Deferred Actions", and "Deleting Deferred Actions" for more information.

## Finding a Bill

To find a bill (including refunded bills):

1. On the account page, click the **Bills** tab.
   The bill in progress appears by default.
   Once the billing cycle is completed, charges and other billing-related items of the wholesale child accounts in the hierarchy are rolled up to the wholesale parent account and the Total due for this period in the wholesale child accounts shows 0.
   Bills tab of the wholesale parent account shows the last generated bill. If it is a first billing cycle and wholesale child bills are in progress, No bills to display message appears in the Bills tab of the wholesale parent account.

2. To select another bill by its date, click **Switch Bills**.
   The bill in progress and up to 12 billing cycles are listed. You can view the bills that are generated before and after moving the account to the hierarchy.

3. If the account has multiple bill units, select the bill unit.

   **Tip:**
   You can also find a bill by clicking its indicator in the Bills graph, and in the dialog box that appears, clicking **Details**.

## Related Tasks
- Making a Payment
- Adjusting a Bill
- Refunding a Bill

## Finding a Specific Bill

To find a specific bill:
1. Click **Search**.
The Search dialog box appears.

2. From the **Search** list, select **Bills**.
Bill Information dialog box appears. See "Search Dialog Box" for more information.

3. Enter the bill number that you want to search.

   **Tip:**
   Use an asterisk (*) as a wildcard to match one or more characters at the start or end of words or numbers.

4. Click **Search**.

5. Billing Care displays search results at the right side of the Search dialog box.

6. Select a bill, and click **Open Bill**.

   **Tip:**
   You can also open a bill by double clicking the bill in the results list.

    Billing Care displays the selected bill.

---

**Finding Bills by Date Range**

To find bills by date range:

1. Click **Search**.
The Search dialog box appears.

2. From the **Search** list, select **Bills**.
Bill Information dialog box appears. See "Search Dialog Box" for more information.

3. In the date range, select the **From** and **To** date range in which you want to view bills.
   - Select the number of bills in a billing cycle.
   - Select the from and to date range in which you want to view bills.

   **Note:**
   Select the **Bills with zero balance** option if you want to view bills without any balance.

4. Click **Search**.
Finding Last Generated Bills

To find the last generated bills:

1. **Click Search.**
   The Search dialog box appears.

2. **From the Search list, select Bills.**
   Bill Information dialog box appears. See "Search Dialog Box" for more information.

3. **In the Last field, enter the number of last generated bills that you want to search.**
   By default, 1 appears. You can search maximum 25 last generated bills.

   **Note:**
   Select the **Bills with zero balance** option if you want to view bills without any balance.

4. **Click Search.**

Search Dialog Box

Use the Search dialog box to search for bills. Narrow your search results by using the filters provided under **Bill Information.**

Search is not case sensitive.

**Tip:**

- You must use an asterisk (*) as a wildcard to match any missing characters at the start, middle, or end of words or numbers when entering search criteria.
- By default **Any** option is selected.
- You can scroll down to view recently accessed bills.

<table>
<thead>
<tr>
<th>Search list</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Information</td>
<td>Enter search criteria in one or more fields in the Bill Information area.</td>
</tr>
</tbody>
</table>
| Results | Lists the items that meet your criteria.  
If an account contains more than one bill, multiple bills appear.  
You can do the following:  
- Sort the results by a given column in either ascending or descending order. See "Sorting Search Results".  
- Select a result and click **Open Account** to open the account associated to the bill or click **Open Bill** to open the bill.  
Search returns a maximum of 25 results. Refine your search criteria if the bill you are searching for is not initially found. |
Sorting Search Results

You can change how the results are sorted by clicking on a different column heading. Click the heading again to change from ascending to descending sort.

You can sort the following columns:

- Bill Number
- Cycle Start Date
- Days Overdue
- Billed Amount
- Balance Due

Viewing Bill Details

View detailed information for a selected bill using the My Charges area in the Bills tab. This area provides information on both bill item account level charges and service level charges, allows adjustment to individual bill items, and provides access to a bill’s invoice.

After the billing cycle is completed, if you make any event adjustments in the wholesale child account, the adjusted amount is rolled up to the wholesale parent account and shows the total adjusted amount including the tax amount in the wholesale parent account. For example, if you make an event adjustment of $1.00, 10% is added as the tax amount and shows $1.10 as the total A/R actions amount in the wholesale parent account.

Note:

Charges in bills containing unsettled disputes are shown in the bill detail.

To view detailed account or service level charge information on a bill in My Charges:

1. Find the bill. See "Finding a Bill" for more information.
2. In the My Charges area, do one of the following:
   - To view account level charges, click Charges not related to services.
   - To view service level charges, click the service listed under Service Charges.
Note:

Once the bill is generated for a wholesale child account, you cannot perform the following actions:

- Bill adjustment
- Bill write-off
- Item adjustment
- Item dispute
- Item write-off

You cannot perform these actions for a wholesale child account irrespective of billing:

- Account adjustment
- Account write-off
- Bill information write-off
- Payments
- Refunds

3. View events related to a charge by clicking on the charge amount link. Clicking a charge amount displays all of the events that are included in the charge.

4. Click Show Charge Changes to view individual charge change detail, such as one-time discounts.

5. To view a bill's invoice, click View Invoice.

6. (Optional) To adjust a bill item charge, click the charge's action menu and select New Adjustment.

Related Tasks

Finding a Bill
Adjusting an Item
Refunding a Bill

Viewing Refunded Bills

To view previously refunded bills, use one of the following options:

- In the Bills tab, select the refunded bill.
- In the A/R News Feed, click the action with a type of Refund.
- In the Home tab, Bills chart, click the red dot for the refunded bill.

Related Tasks

Refunding a Bill
Viewing an Invoice

To view an invoice:

1. Select a bill.
   For more information, see "Finding a Bill".

2. In the Bills section with a bill open, do one of the following:
   • From the Actions menu, select View Invoice PDF.
   • Under My Charges or under Charges from Other Accounts, select the charges to view, and click View Invoice.

Working with Events

You can view the charges for usage events included in the bill.

To view events:

1. On the account page, click the Bills tab.

2. Select the bill you want to work with.
   To locate a bill, see "Finding a Bill".

3. In the Service Charges area of the Bills section, select a service for the selected bill.
   The Charges by service page appears.

4. Select a charge by clicking on the amount.
   The Events screen appears containing a list of events included in the charge.

5. (Optional) Change the events shown by doing any of the following:
   • Sort by Date.
   • Sort by Destination Network.
   • Limit by date:
     – Click Search.
     – Enter dates for From and To.
     – Click Search.
   • Limit by phone number:
     – Click Search.
     – Enter a Phone number.
     – Click Search.
   • Limit the displayed:
     – Select the relevant events.
     – Change Show all to Show Selected.
   • Select the events to hide:
     – Select the non-relevant events.
6. Do one of the following:
   • Select an event and click Adjust selected.
   • Click Close.

Tip:
You can view event adjustment details by clicking its indicator in the AIR actions graph, and in the dialog box that appears, clicking Details.

Related Tasks
Adjusting an Event

Events Dialog Box

Use the Events dialog box to see information for the type of event selected. If the event has a noncurrency impact, tabs describing the impact are also display. If the selected event, for example, telephony, has an impact on seconds or SMS, tabs for Seconds or SMS are displayed. Depending on the plan, the impact can be a grant or consumption.

You can reduce the list of events, by selecting events, and then select an option from the Show all menu.

You can sort by date or destination network.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabs area</td>
<td>Shows a tab for the selected event and a tab for each noncurrency impact. Click a tab for more information. You can also click the link under Non Currency Impact.</td>
</tr>
<tr>
<td>Adjust selected</td>
<td>Click to adjust the selected items.</td>
</tr>
<tr>
<td>Search</td>
<td>Click to search with criteria relevant to the event.</td>
</tr>
<tr>
<td>Show More</td>
<td>Click to add five more events. Show More appears until all events are visible.</td>
</tr>
</tbody>
</table>

Related Tasks
Working with Events
Adjusting an Event
Adjusting an Item

Working with an Account in Collections

If an account is in collections, collections information appears in the account bar. If the account has multiple bill units, the name of the bill unit in collections appears. You can:

• View the two next scheduled actions.
• View the number of days the account is past due and the amount that is owed.
  Click to see the details of all past due items.
• View the minimum payment required to stop the collections process.
  Click to make a payment.
• View all collections actions and bill units in collections.
  Click the View in collections link to view the bill units in collections.
  If more than two actions are scheduled, the All Collections Actions link appears.
  Click this link to view all scheduled actions, notes and history for each action.

Related Tasks
Making a Payment

Collections Section

The Collections section of the account bar appears if an account is in collections. Your company's policies determine the schedule of actions and the repercussions of the actions. Common scheduled actions are:

• When services are inactivated.
• When an account is referred to an outside agency.

Other information includes:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days past due</td>
<td>The number of days that payment is past due. Click the link view the details of all unpaid items.</td>
</tr>
<tr>
<td>Minimum Payment</td>
<td>The minimum amount the customer must pay to stop the collections process. Click to make a payment.</td>
</tr>
<tr>
<td>View in collections</td>
<td>The link to view the Collections Details page, which displays the details of all the bill units in collections. See “Viewing a Bill Unit in Collections” for more information.</td>
</tr>
<tr>
<td>All Collections Actions</td>
<td>This link appears if there are more than two scheduled actions. Click to see all scheduled collections actions and the action history for each of these actions. You can also add notes if needed. To add a note, enter the note and click Post.</td>
</tr>
</tbody>
</table>

Related Tasks
Working with an Account in Collections
Making a Payment

Returning to the Landing Page

To close the account view and return to the landing page:

1. On the account page, select Actions.
2. Select Close.
The landing page is displayed.
Payments

To work with payments in Oracle Communications Billing Care, see the following topics:

- Making a Payment
- Viewing Payment Details
- Allocating Payments
- Finding a Suspended Payment
- Reversing a Payment
- Working with Suspended Payments
- About Batch Payments

Making a Payment

You can initiate a payment from any of the following locations:

- From the Actions menu above the account bar, select Payments, and then select Make a Payment.
- From the Home section or the Bills section, click Make Payment.
- From the Account details page of the account for which you want to make the payment.

Note:
A payment amount does not need to match a bill amount. You determine where a payment is applied when you allocate the payment.

Billing Care supports the following payment methods:

- Credit Card
- Debit Card
- Cash
- Check
- Wire-Transfer
- Inter Bank Payment Order
- Postal Order

To make a payment:

1. From the Actions menu, select Payments, and then select Make a Payment.
The Make a Payment dialog box appears.

Note:
You cannot make payments to wholesale child accounts.

2. Enter the amount.

3. (Optional) To use a payment method other than the one displayed, select **Use a different payment method** and select a method from the **Payment Method** list.
   a. Enter the account information for the new payment method.
   b. Select **Use name and billing address from primary contact**, or enter the name and address for the card holder.
   c. (Optional) Select **Save to Payment Methods on file** for credit card and debit payment methods.

If you are making a payment for an account, the payment method applies to the account. If you are making a payment for a bill unit, the payment method applies to the bill unit.

4. For **Select a reason**, select the reason that matches the situation.

5. (Optional) Enter notes.

6. Do one of the following:
   - Click **Continue to manually allocate** to make the payment and to allocate the payment.
   - Click **Save** to make the payment without allocating.

See "Allocating Payments" for information about allocating payments.

Related Tasks
Allocating a Payment
Adding a Payment Method

Make a Payment Dialog Box

Use the Make a Payment dialog box to enter a customer's payment and to add new payment methods.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Unit</td>
<td>For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the term does not appear.</td>
</tr>
<tr>
<td>Use a different payment method</td>
<td>Select if you want to change the payment method.</td>
</tr>
<tr>
<td>Payment method</td>
<td>If multiple payment methods are available, select a payment method. If you selected <strong>Use a different payment method</strong>, select a new payment method option. For a new payment method, new fields appear for you to enter the details.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Amount</td>
<td>Enter the payment amount.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>Continue to manually allocate</td>
<td>Click to save and allocate the payment.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to make the payment without allocating the payment. You can allocate the payment later.</td>
</tr>
</tbody>
</table>

Related Tasks

Making a Payment
Allocating Payments

Viewing Payment Details

You can view details of a payment, including an audit trail of related payment actions, and enter notes from several places in Billing Care.

To view payment details:

1. Click the Bills tab, and select a bill that has a payment.
2. Click Payment Applied.
   
   One of the following happens:
   
   - If only one payment has been made, the Payment Details dialog box appears.
   - If more than one payment has been made, the All Payments dialog box appears first. See "All Payments Dialog Box" for more information. Click Payment Details to go to the Payment Details dialog box.
3. View payment allocations in the Allocation tab.
4. View the payment’s audit trail in the Audit Trail tab.
5. (Optional) If all or part of the payment has been allocated, to see details about the allocated items, do any of the following:
   
   - Click the Show all items affected link.
   - Under Items Affected, click the item links.
   
   The Items Affected dialog box appears.
6. (Optional) Click Comment and enter a comment.
7. Click Close.

Related Tasks

Allocating a Payment
Making a Payment
Payment Details Dialog Box

Use the Payment Details dialog box to identify payments.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective</td>
<td>The payment's effective date.</td>
</tr>
<tr>
<td>Payment ID</td>
<td>An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.</td>
</tr>
<tr>
<td>Receipt</td>
<td>The payment receipt date.</td>
</tr>
<tr>
<td>Receipt ID</td>
<td>An automatically generated ID for a receipt.</td>
</tr>
<tr>
<td>Transaction ID</td>
<td>Similar to a payment ID, a transaction ID is automatically generated for each payment, payment reversal, and refund. Additionally, the transaction ID identifies transactions involving third parties, such as transactions with credit card processing companies.</td>
</tr>
<tr>
<td>Original Payment</td>
<td>The original payment amount and method.</td>
</tr>
<tr>
<td>Show all items affected</td>
<td>If any part of the payment has been allocated, click for details on the items.</td>
</tr>
<tr>
<td>Items Affected</td>
<td>If any part of the payment has been allocated, click the links under Items Affected for details on the items.</td>
</tr>
<tr>
<td>Effective (reversal)</td>
<td>The payment reversal date (if a payment has been reversed).</td>
</tr>
<tr>
<td>Reverse Payment</td>
<td>The payment reversal amount and method.</td>
</tr>
<tr>
<td>Audit Trail</td>
<td>The audit trail information for any payment reversal or suspense actions.</td>
</tr>
<tr>
<td>Payment Details</td>
<td>The amount (with payment method), time, reason, and notes (if notes are available) for the payment. Billing Care also lists any reversed payment amounts or amounts that have been moved into suspense.</td>
</tr>
<tr>
<td>Comment</td>
<td>Click to add a note to the payment.</td>
</tr>
</tbody>
</table>

All Payments Dialog Box

Use the All Payments dialog box to view detailed payments information for a bill's payments.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>The effective date of the applied payment.</td>
</tr>
<tr>
<td>ID</td>
<td>An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.</td>
</tr>
<tr>
<td>Payment Amount</td>
<td>The payment amount.</td>
</tr>
<tr>
<td>Payment Actions</td>
<td>A description of reversed and suspended payment amounts.</td>
</tr>
</tbody>
</table>
Allocating Payments

You allocate payments to distribute the payments among the bills of an account. If the account has multiple bill units, you can allocate payments to specific bill units. You can also allocate payments to specific items.

Customers are credited for all payments. The company needs payments to be allocated for accounting purposes.

You can allocate to bills or to specific items or bill units. For information, see:

- Allocating a Payment
- Allocating a Payment to a Bill Unit or an Item

Allocating a Payment

To allocate a payment:

1. From the Actions menu, select Payments, and then select Allocate.
   
   If there is only one unallocated payment, the Allocate Payment dialog box appears, and you can skip the next step. If there is more than one unallocated payment, the All Unallocated Payments dialog box appears.

2. In the All Unallocated Payments dialog box, select the payment you want to work with, and click Next.
   
   The Allocate Payment dialog box appears.

   **Note:**

   To see more details about a bill or to allocate to a specific bill unit, or item, click the Advanced View icon. See "Allocating a Payment to a Bill Unit or an Item".

3. Click a bill.

   The amount available for allocation is automatically applied to the balance.

   **Tip:**

   Press Shift+select to contiguously select Allocate cells.

4. (Optional) Select an allocation cell, and enter a specific amount to allocate.

5. (Optional) Continue allocating funds to other bills.

6. (Optional) Click Payment Details for more information about a payment.

7. Click Save to complete allocating the payment, or Save, select another payment to allocate more payments.
Allocating a Payment to a Bill Unit or an Item

You allocate payments to distribute the payment amount among multiple bills or bill units of an account. If the account has multiple bill units, you can allocate payments to specific bill units. You can also allocate to specific items.

To allocate a payment to specific bill units or items:

1. From the Actions menu, select Payments, and then select Allocate.
   You can also allocate a payment while making the payment.
2. In the Allocate Payment dialog box, click the Advanced View icon.
3. (Optional) In Search, enter text to find bills, bill units, services, or items.
4. Click the bill, bill unit, or item that you want to allocate a payment to.
   The amount available for allocation is automatically applied to the balances.

   **Tip:**
   Press Shift+click to contiguously select and enter amounts in Allocate cells.

5. (Optional) Click an allocation cell, and enter a specific amount to allocate.
6. (Optional) Continue allocating funds to other bills.
7. (Optional) Click Payment Details for more information about a payment.
8. Click Save.

**Related Tasks**
Making a Payment

### Allocate Payment Dialog Box

Use the Allocate Payment dialog box to allocate a payment to one or more bills. There are two views for allocating payments:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple view</td>
<td>Includes the headings Bill ID, Due Date, Balance, and Allocate. In this view, you can sort the columns.</td>
</tr>
<tr>
<td>Advanced view</td>
<td>Includes the above headings and Name, Bill Unit, Service, and Item. In this view, you can:</td>
</tr>
<tr>
<td></td>
<td>• Filter the list of bills using any value that appears in the table.</td>
</tr>
<tr>
<td></td>
<td>• Allocate payments to specific items.</td>
</tr>
</tbody>
</table>

### Reversing a Payment

Payment reversals are necessary when a payment is recorded in Billing Care, but the payment is not deposited. For example, you could record a check payment for a check
that does not clear. To reopen the bill so the payment can be made again, you reverse
the payment. Reversing the payment enables Billing Care to treat the payment as if it
never happened

To permanently reverse a previously applied payment:

**Note:**

You can also reverse payments from the Payments Details dialog box (see
"Payment Details Dialog Box" for more information) or from the Suspended
Payments Details dialog box (see "Suspended Payment Details" for more
information).

1. Click the Bills tab.
2. Click Switch Bills and select the bill containing the payment to reverse.
3. Click Actions, and then select Reverse Payment.

   The Reverse Payment dialog box appears.
4. Set the effective date for the payment reversal. The effective date cannot be set in
   the future.
5. Select a reason for the payment reversal.
6. (Optional) Enter notes for the payment reversal.
7. Click Reverse Payment.

**Working with Suspended Payments**

Oracle Billing and Revenue Management automatically suspends payments that
cannot be posted immediately to customer accounts due to insufficient information,
account closure, or other criteria.

You manage suspended payments in Billing Care by viewing and allocating
suspended payments to customer accounts when the payment error is resolved. You
also use Billing Care to identify any incorrectly posted payments and move them into
suspend for future resolution.

**Finding a Suspended Payment**

To find a suspended payment:

1. From the landing page, click Payment Suspense.

   The Payment filter appears along with a list of suspended payments that meet the
   filter criteria. The Payment filter assists you in narrowing the suspended payments
   shown and helps you find a suspended payment for allocation. Billing Care sets a
default 30 day search criteria for suspended payments. See "Payment Filter" for
   more information on using filters to set search criteria.
2. Click Add Filter to add additional filters to the suspended payments shown.
3. To enable or disable a filter, click the filter button.
4. Click Update.
The filtered suspended payments are shown.

**Tip:**

- In the Payment filter, click X to remove a filter or click **Reset** to return to the default filter of less than 30 days.

5. Select a suspended payment to view it.

Billing Care displays the selected suspended payment details. See "Suspended Payment Details" for more information.

**Tip:**

Click **Close** to return to the Billing Care home page.

### Payment Filter

Narrow your suspended payment search results by using the filters provided under Payment, Suspense, and Account.

**Tips:**

- You can sort filtered results by date, amount, reason, and currency code using the **Sort** menu.
- Scroll down to view additional suspended payments.
- Search for payments using the information from the original suspended payment entry. Search criteria will not filter payments with changes made after the original payment.

<table>
<thead>
<tr>
<th>Payment Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment</td>
<td>Contains the following payment attributes used for filtering suspended payments:</td>
</tr>
<tr>
<td></td>
<td>• Amount: The amount of the suspended payment</td>
</tr>
<tr>
<td></td>
<td>• Date: The date the payment was made</td>
</tr>
<tr>
<td></td>
<td>• Method: The payment method (Cash, Check, Wire-Transfer, Inter Bank Payment Order, Postal Order, or Failed)</td>
</tr>
<tr>
<td></td>
<td>• Currency: The payment currency</td>
</tr>
<tr>
<td></td>
<td>• Channel: The payment channel</td>
</tr>
</tbody>
</table>
## Payment Filter

<table>
<thead>
<tr>
<th>Payment Filter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Suspense**   | Contains the following suspense attributes for filtering the suspended payments:  
|                | Schema: For multi-schema, you can select the secondary schema for which you want to see the suspended payments. By default, the primary schema is selected.  
|                | Reason:  
|                | • Unclassified  
|                | Detailed Reasons:  
|                | • Account No not found  
|                | • Account status is closed  
|                | • Bill not found  
|                | • Invalid Transaction Id  
|                | • Missing Transaction Id  
|                | • Multiple Account Distribution  
|                | • Payment due to recycling  
|                | • MBI Distributed Payment  
|                | • MBI Distribution Required  
|                | • Default Reason Id  
|                | Handler (see "Assigning Suspended Payments to Billing Care Users" for more information):  
|                | • Assigned to me  
|                | • Unassigned |

### Account

Contains the following filters for account information:

- Account Number
- Bill Number
- Payment Transaction ID

## Suspended Payment Details

The suspended payment detail includes the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Payment ID**  | Contains the following suspended payment information:  
|                 | • Payment ID  
|                 | • Suspense reason  
|                 | • Suspense Date  
|                 | • Payment amount, currency, and method  
|                 | • Allocated and Unallocated payment amounts |

| Account Distribution | Contains the eligible accounts for which a suspended payment can be allocated. See "Allocating a Suspended Payment" for more information. |

---

**Chapter 4**

Working with Suspended Payments
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Details</strong></td>
<td>Contains the following suspended payment information (if available):</td>
</tr>
<tr>
<td></td>
<td>• Bank Code</td>
</tr>
<tr>
<td></td>
<td>• Bank Account Number</td>
</tr>
<tr>
<td></td>
<td>• Effective Date</td>
</tr>
<tr>
<td></td>
<td>• Bill Number</td>
</tr>
<tr>
<td></td>
<td>• Check Number</td>
</tr>
<tr>
<td></td>
<td>• Pay Order Id</td>
</tr>
<tr>
<td></td>
<td>• Postal Order Id</td>
</tr>
<tr>
<td></td>
<td>• Transfer ID</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Contains a text field for adding notes to the suspended payment. See &quot;Adding Notes to a Suspended Payment&quot; for more information.</td>
</tr>
<tr>
<td><strong>Audit Trail</strong></td>
<td>Contains the audit trail for the suspended payment. The audit trail records the following activities:</td>
</tr>
<tr>
<td></td>
<td>• Payment Made</td>
</tr>
<tr>
<td></td>
<td>• Allocation</td>
</tr>
<tr>
<td></td>
<td>• Moved Into Suspense</td>
</tr>
</tbody>
</table>

Allocating a Suspended Payment

Billing and Revenue Management stores suspended payments in a system account until allocation to a customer account's open balances and billable items. Use Billing Care to allocate suspended payments to one or more customer accounts after resolving the issues that caused the initial payment suspension.

To allocate a suspended payment to an account:

1. Find the suspended payment to allocate. See “Finding a Suspended Payment” for more information.
2. Click on the suspended payment to allocate to view the payment details. A list of accounts eligible to receive the suspended payment allocation is shown in Account Distribution. Each account contains associated allocation details including the account owner's name.
3. If no distribution accounts are configured for the suspended payment, click Add Account in Account Distribution to add one or more accounts.
4. Use the search dialog box to add an account for allocating a suspended payment to. The search dialog box supports the following search parameters:
   • Account number
   • First name
   • Last name
   • Company

Billing Care searches for the account and adds the account to Account Distribution. Billing Care supports allocating a suspended payment to multiple accounts. However, you must complete the initial distribution account's allocation before adding an additional distribution account.
5. Enter an amount in Add Allocation to allocate to each distribution account. This amount must be less than or equal to the suspended payment amount. Multiple separate allocations to the same distribution account can be made if the payment still contains funds awaiting allocation. Billing Care groups and displays such allocations by account in Account Distribution.

6. Select a required reason from the list. The Auto Allocate and Allocate buttons are enabled.

7. Do one of the following:
   - Click Auto Allocate for Billing Care to automatically select the account's bill items to which to allocate a suspended payment. If an allocation amount is greater than all of the account's bills, or if allocation amounts are made to accounts with no balance due, the remaining balance is assigned a status of Awaiting Allocation and available when a future payment is due.
   - Click Allocate to perform manual allocation.
   - Click Cancel to reset the allocation amount to zero, remove the reason code, and disable the allocation buttons.

8. Do one of the following:
   - To allocate a payment to one or more Bill IDs, click the simple view button (☐) and enter in the amount to allocate for each Bill ID row.
   - To allocate a payment to one or more Bill Units, click the advanced view button (≡) and enter in the amount to allocate for each Bill Unit row.

9. Click Save.

If a suspended payment has been fully allocated, the payment suspense search screen is shown.
Related Tasks

Finding a Suspended Payment

Allocating a Suspended Payment across Multiple Accounts

A suspended payment can be allocated across multiple accounts. For example, a customer may make one large payment that they want allocated to multiple accounts.

To allocate a payment across multiple accounts:

1. Make a new payment in Billing Care. See "Manually Creating a Suspended Payment" for more information.
2. Under Account Distribution, click Add Account.
3. Search for and add an account to allocate the payment to.
4. Repeat the search to add additional accounts to the payment.
5. (Optional) Select a new payment administrator from the Assigned to list.
6. (Optional) Enter notes and click Post for the payment.
7. Do one of the following:
   a. Manually enter the amounts to allocate for each account and click Allocate.
   b. Click Auto Allocate for Billing Care to automatically allocate payment amounts to the selected accounts until the full payment amount is allocated.

Adding Notes to a Suspended Payment

To add a note to a suspended payment:

1. Open the suspended payment details. See “Finding a Suspended Payment” for more information.
2. Enter your notes in Notes.
3. Click Post.

Note:
Additional comments can be made to existing notes in a suspended payment. To add a comment to an existing notes thread, click Comment.

Related Tasks
Finding a Suspended Payment

Assigning Suspended Payments to Billing Care Users
Production Billing Care installations configured securely with Oracle Identity and Access Management (IAM) allow suspended payments to be assigned to users with a suspense payment management role and permissions. See Oracle Communications Billing Care Installation Guide for more information on production installations and securing Billing Care with IAM.

By default, suspended payments are not assigned to any Billing Care user. Users with access to suspended payments functionality can assign an authorized handler to manage the payment.

To assign a suspended payment to an authorized user:
1. Find the suspended payment. See "Finding a Suspended Payment" for more information.
2. From the search results, select and open the suspended payment.
3. In the Assigned to list, select a Billing Care user with permissions to manage suspended payments.

Reversing a Suspended Payment
Suspended payments that cannot be allocated can be reversed for accounting purposes. See "Reversing a Payment" for more information on reversing a suspended payment.

Withdrawing a Posted Payment into Suspense
Posted payments may contain errors requiring manual resolution. You can withdraw incorrectly posted payments into suspense for resolving errors and correcting payment allocations using Billing Care.

Note:
You can also withdraw posted payments from the Payments Details dialog box (see "Payment Details Dialog Box" for more information) or from the Suspended Payments Details dialog box (See "Suspended Payment Details" for more information).
To withdraw a posted payment into suspense from the Bills tab:

1. Open the account containing the payment to suspend.
2. In the Bills tab, select the bill with the posted payment to suspend using the Switch Bills menu. See “Viewing Payment Details” for more information.

   **Note:**
   If a bill contains more than one applied payment, click Payments applied to view the All Payments dialog box to select the payment to move into suspense.

3. Confirm that the correct amount is shown in Payment applied.
4. Click Actions, and then select Move Payment to Suspense. The Move to Suspended Payments dialog box is displayed.
5. In the Effective field, enter a date.
6. Select a reason for suspending the payment.
7. Do one of the following:
   - Click Move to move the payment into suspense.
   - Click Move and view into Payment Suspense to move the payment into suspense and return to the suspended payments detail screen.

Payments withdrawn into suspense remain viewable in the customer's account.

**Related Tasks**

- Viewing Payment Details
- Allocating a Suspended Payment

**Manually Creating a Suspended Payment**

To manually create a suspended payment in the Payment Suspense interface for allocation:

1. From the landing page, click Payment Suspense.
2. In the filters section, click Make Payment. The Make payment screen appears.
3. Select a Payment method from the list.
4. Enter a payment amount and select a currency.
5. Enter the additional payment detail required for the selected payment method.
6. Select a reason for the payment from the list.
7. (Optional) Enter notes.
8. Click Continue.
The payment allocation screen is displayed. Use this screen to allocate the new payment to one or more accounts. See “Allocating a Suspended Payment” for more information.

### About Batch Payments

Process customer payments collected by banks and payment processors by providing batch payment (lockbox) files to Billing Care for allocation to customer accounts. Batch payment files are text files containing payment information, such as account number, payment amount, and payment date, in delimiter-separated rows.

Transfer batch payments files to Billing Care for processing and allocation using one of the following methods:

- **Uploading Batch Payment Files to the Billing Care Server**
- **Importing Batch Payment Files Manually Using Billing Care**

Uploaded and imported files are displayed with a summary and status in the Batch Payment interface.

### About Batch Payment File Directories

Billing Care stores uploaded and imported batch payment files in the following directories on the Billing Care server:

- **Middleware_home/BatchPaymentFiles/unprocessed** contains unprocessed files
- **Middleware_home/BatchPaymentFiles/processed** contains processed files
- **Middleware_home/BatchPaymentFiles/processing** contains processing files
- **Middleware_home/BatchPaymentFiles/error** contains files with processing failures

where **Middleware_home** is the home directory of the Oracle WebLogic Server installation where Billing Care is installed.

### Configuring Auto Processing of Batch Payment Files

Configure Billing Care to either automatically process transferred batch payment files, or require manual processing in the Batch Payment interface. This setting applies to batch files uploaded to the Billing Care server or imported in the Batch Payment interface.

**Note:**

When auto processing is enabled, Billing Care continues to automatically process files uploaded or imported even when Batch Payment interface browser sessions are closed.

To configure Billing Care auto processing behavior:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **Auto Process** to enable or disable auto processing of batch files immediate after upload.

### About Batch Payment Template Files

Batch files must conform to one of the following supported template formats:

- Cash payment
- Check payment
- Failed payment
- Interbank pay order
- Postal order
- Wire-transfer payment
- Custom payment (configured with the Billing Care SDK)

Batch payment templates are installed during Billing Care installation. See your administrator for more information on ensuring your batch payment files are formatted according to a supported template or creating a custom template to support custom payment types. Billing Care will not process batch files that are not properly formatted.

See "Enabling Custom Payment Types in Batch Processing" in [Oracle Communications Billing Care SDK Guide](#) for more information on batch payment templates.

### Uploading Batch Payment Files to the Billing Care Server

Upload batch payment files in supported formats to the following directory on your Billing Care server:

```
Middleware_home/BatchPaymentFiles/unprocessed
```

where `Middleware_home` is the home directory of the Oracle WebLogic Server installation where Billing Care is installed. This is the default location for unprocessed batch payment files. The Billing Care installation allows specifying an alternative location. Confirm with your administrator to determine where your unprocessed folder is located.

Batch payment files placed into the unprocessed folder are uploaded into Billing Care and viewable in the Batch Payment interface.

To view uploaded files:

1. Log into Billing Care
2. Click **Batch Payment**.

---

**Note:**

If Auto Process is enabled, uploaded batch payment files are automatically processed by Billing Care.
Importing Batch Payment Files Manually Using Billing Care

To manually import and process batch payment files:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **Import** to upload a batch payment file.
4. Select the batch payment file.
5. Click **Open**.
   The payment file is imported and listed as **Unprocessed**.
6. (Optional) Click **File Details** to view general information about the payment file.
7. Click **View File** to confirm the contents of your payment file.
   The payment file is rendered in a separate tab or window.
8. Click **Process** to process the batch payment.
   Billing Care processes the batch payment file.

Viewing Imported File Status and Errors

Uploaded and imported batch payment files are displayed as summary cards, each containing a status, in the **Active** tab of the Batch Payment interface. The displayed status indicates which Billing Care server batch payment folder a file is currently located in. See "About Batch Payment File Directories" for more information of file locations.

Billing Care displays each payment batch in either the Unprocessed or Processed areas of the Batch Payment interface.

The Unprocessed area includes:

- Files that transferred but not been manually processed
- Files currently being processed by Billing Care
- Files placed into error status

The Processed area includes:

- All successfully processed batch payment files from the past 24 hours

Select the **Stay on This Page if Suspended Payments Remain** check box to retain processed payments containing outstanding suspended payments until all suspended payments in the batch have been resolved. See "Viewing Suspended Batch Payments" for more information on suspended batch payments.

About Batch Processing Errors

Unprocessed failed batch payment files result from one of the following errors.
### Error Description

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Older Version Found</td>
<td>An older version of the same batch payment file has been previously loaded and not processed. Click <strong>Continue</strong> to overwrite the older file version with the newly imported version.</td>
</tr>
<tr>
<td>Processing Error</td>
<td>Billing Care system error or connection failure has occurred. Clear the error and retry processing. Contact your administrator if the problem persists.</td>
</tr>
<tr>
<td>Threshold Exceeded</td>
<td>The number of suspended payments in a batch has exceeded a pre-configured threshold. Successful allocations in the payment batch are rolled back. Check the batch payment file for errors before reattempting processing.</td>
</tr>
<tr>
<td>Unknown Bank</td>
<td>The batch payment file is readable but cannot be processed due to an unknown/unidentifiable bank. This error occurs when a valid template for the batch payment file cannot be determined. A list of valid templates is shown. If the file complies with an existing template select the template and click <strong>Retry</strong>.</td>
</tr>
<tr>
<td>Unrecognizable File Type</td>
<td>The file uploaded or imported is not a recognizable batch payment file.</td>
</tr>
</tbody>
</table>

### Processing Payments in Foreign Currencies

Billing Care can process batch payment files in a currency different from an account's primary currency if the connected Oracle Communications Billing and Revenue Management system has been configured with currency conversion rates. An error is displayed if a batch payment file contains payments for accounts in a currency different from the accounts' profile currency.

See "Changing Currency Conversion Rates" in *Oracle Communications Billing and Revenue Management Managing Customers* for more information about configuring currency conversion rates.

### Viewing Batch Payment Processing History

The batch payments **History** tab includes information on:

- Currency totals
- Number of records
- Process completion date
- Processing duration
- Queue duration
- Source

To view batch payments history:

1. Click **Batch Payment**.
2. Select **History**.
3. Sort batch payment processing history using the **Sort** list.
Viewing Suspended Batch Payments

Payments within a batch that Billing Care cannot apply to a customer account are automatically placed into suspense. Payments can be suspended due to improper information, such as account number, in the batch payment file.

To view suspended payments in a processed payment batch:

1. Navigate to the Processed section in the Batch Payment interface.
2. In the payment's card summary, click **Suspended**.

The Payment Suspense interface with the suspended payments from the processed batch is displayed.

**Note:**

The Suspended link is also available in the History tab of the Batch Payment interface for payment batches containing suspended payments.

See "Working with Suspended Payments" for more information on managing suspended payments.

Reversing Failed Batch Payments

Use Billing Care’s batch payment functionality to reverse multiple failed payments within a batch processing file. Failed batch processing files contain a list of payments and amounts by payment ID instead of account number.

To reverse a batch of failed payments, upload a batch processing file that complies with the Failed payment template and follow the same procedures for either "Importing Batch Payment Files Manually Using Billing Care" or "Configuring Auto Processing of Batch Payment Files" for uploading reversal batch payment files. Billing Care identifies the payment IDs listed in the batch processing file and reverses the listed amount.

Individual payments can be reversed when viewing an account. See "Reversing a Payment" for more information on reversing payments when viewing an account.
You can use Oracle Communications Billing Care to manage accounts receivable. Accounts receivable (or A/R) tracks the money that customers owe to your company for services performed or merchandise sold.

To work with accounts receivable information, see the following topics:

- Working with Adjustments
- Creating a Bill on Demand
- Working with Disputes
- Working with Refunds
- Working with Write-Offs

**Working with Adjustments**

An adjustment is a transaction that credits or debits a customer's account by changing:

- The amount due for a bill, which is currency.
- The minutes, tokens, loyalty points, and so on, which are noncurrency.

If you want to work with multiple customer bills or items, you may want to make adjustments on the account level. If you need to adjust one bill or an item on one or two bills, it may be easier to make an adjustment on the bill level.

**Note:**

You cannot perform account adjustment to wholesale child accounts.

For more information on Adjustments, see:

- Making Currency Adjustment
- Making a Noncurrency Adjustment
- Allocating Currency Adjustments
- Allocating an Adjustment to a Specific Bill Unit or Specific Items
- Adjusting a Bill
- Adjusting an Item
- Adjusting an Event
- Viewing Account Adjustment Details
- Viewing Event Adjustment Details
To review and manage A/R information in Billing Care, you need the appropriate permissions.

Making Currency Adjustment

To make a currency adjustment:

1. From the Actions menu above the account bar, select Account Receivables, and then select Adjust Currency Balance.
   The Account Adjustment dialog box appears.
2. Enter the amount or percentage you want to adjust.
   To increase the amount due, enter a negative number.
3. For Effective, select a date.
4. (Optional) Select Exclude taxes from the adjustment.
5. From the list, select a reason.
6. (Optional) Enter a note.
7. Do one of the following:
   • Click Continue to manually allocate to make the adjustment and to allocate the adjustment.
   • Click Save to make the adjustment without allocating.

See "Allocating Currency Adjustments" for information about allocating adjustments.

Related Tasks

Allocating Currency Adjustments
Adjusting a Bill
Making a Noncurrency Adjustment

Account Adjustment Dialog Box

Use the Account Adjustment dialog box to make an adjustment on the account level.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Unit</td>
<td>For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the selection does not appear.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>Enter an amount or a percentage.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Exclude taxes from the adjustment</td>
<td>(Optional) Select if appropriate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>Continue to manually allocate</td>
<td>Click to save and continue allocating the adjustment.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to save the information you entered without allocating the adjustment. You can allocate the adjustment later.</td>
</tr>
</tbody>
</table>
Account Adjustment Details Dialog Box

Use the Account Adjustment dialog box to view or comment on an account adjustment.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unallocated</td>
<td>If listed, click the link to allocate the amount.</td>
</tr>
<tr>
<td>Comment</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>Allocated to</td>
<td>Lists information about allocated amounts. For more information, click Show all items affected or the individual items.</td>
</tr>
</tbody>
</table>

Related Tasks

Making Currency Adjustment

Allocating Currency Adjustments

Allocating Currency Adjustments

To allocate currency adjustments:

1. From the Actions menu above the account bar, select Account Receivables, and then select Allocate Currency Adjustments.

   You can also allocate an adjustment while making the adjustment.

   If more than one unallocated adjustment exists, the All Unallocated Adjustments dialog box appears first. Otherwise, the Allocate Adjustment dialog box appears.

2. In the All Unallocated Adjustments dialog box, select the adjustments you want to work with.

3. Click Next.

   The Allocate Adjustment dialog box appears.

   Tip:

   To see more details about the bill or to allocate to a specific bill unit, item, or service, click the Advanced View icon. See “Allocating an Adjustment to a Specific Bill Unit or Specific Items”.

4. Select a bill.

   The amount available for allocation is automatically applied to the balance.

   Tip:

   Press Shift+select to contiguously select Allocate cells.

5. (Optional) Select an allocation cell, and enter a specific amount to allocate.

6. (Optional) Continue allocating funds to other bills.
7. Enter the amount to allocate for each bill. To increase the unallocated amount in a bill, enter a negative number preceded by a minus symbol (-).

8. (Optional) Click Adjustment Details for more information about an adjustment.

9. Click Save to complete the adjustment allocation, or click Save, select another adjustment to allocate more unallocated adjustments.

Related Tasks
Making Currency Adjustment

Allocating an Adjustment to a Specific Bill Unit or Specific Items

You allocate adjustments to distribute the adjustment amount among multiple bills or bill units of an account. If the account has multiple bill units, you can allocate adjustments to specific items.

To allocate an adjustment to a specific bill units or items:

1. From the Actions menu above the account bar, select Account Receivables, and select Allocate Currency Adjustments.

   If there is only one unallocated adjustment, the Allocate Adjustment dialog box appears, and you can skip the next step. If there is more than one unallocated adjustment, the All Unallocated Adjustments dialog box appears.

2. In the All Unallocated Adjustments dialog box, select the adjustment you want to work with, and click Next.

   The Allocate Adjustment dialog box appears.

3. In the Allocate Adjustment dialog box, click the Advanced View icon.

4. (Optional) In Search, enter text to view the items of interest.

5. Click the item row that you want to allocate the adjustment to.

   Click in the allocation cell to automatically apply the available amount to the balance.

   **Tip:**
   Press Shift+click to contiguously select Allocate cells.

6. (Optional) Click an allocation cell, and enter a specific amount to allocate.

7. (Optional) Click Adjustment Details for more information about an adjustment.

8. Click Save to complete the adjustment allocation, or click Save, select another adjustment to allocate more unallocated adjustments.

Related Tasks
Making Currency Adjustment
Allocate Adjustment Dialog Box

Use the Allocate Adjustment dialog box to allocate an adjustment to one or more bills. There are two views for allocating adjustments:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple view</td>
<td>Includes the headings Bill ID, Due Date, Balance, and Allocate. In this view, you can sort the columns.</td>
</tr>
<tr>
<td>Advanced view</td>
<td>Includes the above headings and additionally, Name, Bill Unit, Service, and Item.</td>
</tr>
<tr>
<td></td>
<td>In this view, you can:</td>
</tr>
<tr>
<td></td>
<td>• Filter the list of bills using any value that appears in the table.</td>
</tr>
<tr>
<td></td>
<td>• Allocate payments to specific items.</td>
</tr>
</tbody>
</table>

Related Tasks

Allocating Currency Adjustments

Adjusting a Bill

From the Bills section, you can adjust and allocate the bill you are working with.

**Note:**

The Actions menu is disabled for written off bills. No adjustments can be made to written off bills.

To adjust a bill from the Bills tab:

1. On the account page, click the Bills section.
   In the Bills section, select the bill you want to work with.
2. From the Actions menu in the Bills section, select Adjust Bill.
   Bill Adjustment dialog box appears.
3. For Adjustment, enter the amount or percentage you want to adjust.
   To increase the amount due, enter a negative number.
4. For Effective, select a date.
5. (Optional) Select Exclude taxes from the adjustment.
6. From the list, select a reason.
7. (Optional) Enter a note.
8. Do one of the following:
   • To have the allocation distributed automatically, click Auto Allocate.
   • To specify allocation amounts, click Continue to manually allocate, and enter the amounts to allocate in the Allocate Adjustment dialog box.
Related Tasks

Adjusting a Bill
Making Currency Adjustment

Bill Adjustment Dialog Box

Use the Bill Adjustment dialog box to adjust a bill.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment</td>
<td>Enter an amount or a percentage.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Exclude taxes from the adjustment</td>
<td>(Optional) Select if appropriate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>Continue to manually allocate</td>
<td>Click to specifically allocate items.</td>
</tr>
<tr>
<td>Auto Allocate</td>
<td>Click to save adjustment and to allocate the adjustment evenly to all items.</td>
</tr>
</tbody>
</table>

Allocate Adjustment Dialog Box

Use the Allocate Adjustment dialog box to allocate an adjustment to specific items in a bill. Information about the adjustment includes: Name, Bill Unit, Bill ID, Due Date, Service, Item, and Balance. You can filter the list of adjustments using any value that appears in the table.

Related Tasks

Adjusting a Bill

Adjusting an Item

You can adjust account or bill unit charges on the item level. You can adjust service charges on the item level or on the event level.

To adjust an item:

1. On the account page, click the Bills tab.
2. In the Bills section, select the bill you want to work with.
3. Select the charge.
   The Charges dialog box appears.
4. Click a charge description.
   A dialog box opens.
5. Click New Adjustment.
   The Item Adjustment dialog box opens.
6. For **Adjustment**, enter the amount or percent to adjust.
7. For **Effective**, select a date.
8. (Optional) Select **Exclude taxes from the adjustment**.
9. Select a reason.
10. (Optional) Enter notes.
11. Click **OK**.

**Related Tasks**
- **Adjusting a Bill**
- **Adjusting an Event**

**Item Adjustment Dialog Box**

Use the Item Adjustment dialog box to adjust an item.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment</td>
<td>Enter an amount or a percentage.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Exclude taxes from the adjustment</td>
<td>(Optional) Select if appropriate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>OK</td>
<td>Click to save and close.</td>
</tr>
</tbody>
</table>

**Adjusting an Event**

To adjust an event:

1. In the Events dialog box, select events and click **Adjust**.
   
   The Event Adjustment dialog box appears.

2. Select one of the following:
   - **Adjust amount and tax**
   - **Adjust amount only**
   - **Adjust tax only**

3. For **Adjustment**, enter the amount or percentage you want to adjust.

   To increase the amount due, enter a negative number.

4. For **Effective**, select a date.

5. From the list, select a reason.

6. (Optional) Enter a note.

7. Click **OK**.
Related Tasks

Adjusting a Bill

Making Currency Adjustment

Event Adjustment Dialog Box

Use the Event Adjustment dialog box to adjust events. You can adjust the amount and tax.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Click to return to the Events dialog box.</td>
</tr>
<tr>
<td>Adjust amount and tax</td>
<td>Select to adjust both the amount for the events and the tax levied on the amount.</td>
</tr>
<tr>
<td>Adjust amount only</td>
<td>Select to adjust the amount on the events.</td>
</tr>
<tr>
<td>Adjust tax only</td>
<td>Select to limit the adjustment to the tax levied on the events.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>Enter an amount or a percentage.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date. You can backdate the adjustment.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>OK or Cancel</td>
<td>Click to close dialog box.</td>
</tr>
</tbody>
</table>

Making a Noncurrency Adjustment

To make a noncurrency adjustment:

1. On the account page, click the Home tab, and then select the Account History section or the section for a bill unit.
   By default, in the Balances section, the balances for all services appear.
2. In the Balances list, select the service that has the noncurrency balance you want to adjust.
   The name of the services and the related balances appear below the menu.
3. Click the noncurrency balance.
   The details for the noncurrency balance appear.
4. Click New Adjustment.
   The noncurrency Adjustment dialog box appears.
5. For Adjustment, enter the amount to adjust.
6. (Optional) For Valid from, enter a date.
7. (Optional) For Valid to, enter a date or leave as never ends.
8. Select a reason.
9. (Optional) Enter notes.
10. Click OK.
Noncurrency Adjustment Dialog Box

Use the noncurrency Adjustment dialog box to make a noncurrency adjustment.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment</td>
<td>Enter an amount.</td>
</tr>
<tr>
<td>Valid from</td>
<td>Enter a date.</td>
</tr>
<tr>
<td>Valid to</td>
<td>Enter a date.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
<tr>
<td>OK</td>
<td>Click to save and close.</td>
</tr>
</tbody>
</table>

Viewing Account Adjustment Details

To view account adjustment details:

1. In the account page, from the Bills graph, click an adjustment icon, and click View Adjustment.

   Tip:
   You can also access adjustment details through the News Feed, **Unallocated A/R** in the Home section, or **A/R actions** in the Bills section.

   The Adjustment Details dialog box appears.

2. (Optional) To allocate any unallocated funds, click **Unallocated**.

   The Allocate Adjustment dialog box appears. See "Allocating an Adjustment to a Specific Bill Unit or Specific Items".

3. (Optional) To see all items affected by an adjustment, click **Show all items affected**.

   The Items Affected dialog box appears.

4. (Optional) To see specific items affected by an adjustment, click the item or items link.

   The Items Affected dialog box appears.

5. (Optional) Click **Comment** and enter a comment.

6. Click **Close**.
Related Tasks
Making Currency Adjustment
Allocating Currency Adjustments
Viewing Event Adjustment Details

Viewing Event Adjustment Details
To view event adjustment details:
1. On the account page, click the Bills tab.
2. Select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected bill.
   The Charges by service page appears.
4. Select a charge.
   A details box appears.
5. Click the charge description.
   The Events dialog box appears.
6. View event adjustments in the Event Adjustment column.

Related Tasks
Adjusting an Event

Creating a Bill on Demand
Use Bill Now to create a bill on demand for a customer's unbilled items.
To create a bill using Bill Now:
1. On the account page, click the Bills section.
2. Click Bill Now.
3. Click OK.

Generating Corrective Bills
You generate corrective bills when you need to make corrections to a bill or a billing address. For more information about corrective billing and enabling corrective billing in BRM, see "About Corrective Billing" in BRM Configuring and Running Billing.

You can generate and view corrective bills for a selected bill from the Bills section.
To generate a corrective bill:
1. On the account page, click the Bills tab.
   The Bill in progress appears by default.
2. (Optional) To select another bill, click **Switch Bills**.

   The bill in progress and any other bills, up to 12 billing cycles, are listed.

3. Select the required bill.

4. From the **Actions** menu in the Bills section, select **Produce Corrective Bill**.

   The Produce Corrective Bill dialog box appears.

5. From the **Invoice Format** list, select an invoice format. By default, the **Detail** format is selected.

6. From the **Invoice Type** list, select an invoice type. By default, the **Invoice Correction Letter** type is selected.

7. From the reason list, select a reason.

8. (Optional) Enter a note.

9. Click **OK**.

   The information in the **Bills** tab is refreshed with the modified data and shows the new corrective bill.

```
Note:

Once a corrective bill is generated, the News Feed displays the Corrective Bill Issued.
```

**Related Tasks**

- Viewing Corrective Bills
- Corrective Bill Dialog Box

### Viewing Corrective Bills

To view corrective bills:

1. On the account page, click the **Bills** tab.

   The Bill in progress appears by default.

2. (Optional) To select another bill, click **Switch Bills**.

   The bill in progress and any other bills, up to 12 billing cycles, are listed.

3. Select the required corrected bill.

4. Click **Corrective Bill Trail**.
Tip:
You can also view the corrective bills from the Bills chart in the Home tab or from the A/R News Feed.

The Corrective Bill Trail dialog box appears. This dialog box displays a series of corrective bills for the selected bill with the details, such as my charges, A/R actions (Billed and Unbilled), payment applied, and total due. The notes panel displays all the notes that are entered for the bill.

5. (Optional) To view the invoice for the bill, click View Invoice.

6. (Optional) Click comment and enter a comment.

Corrective Bill Dialog Box

Use the Corrective Bill dialog box to produce corrective bills.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Format</td>
<td>Select one of the following invoice formats:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Detail</strong>. The Detail format for a corrective invoice includes all the detail on the adjustment for the corrected item along with all the events.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Summary</strong>. The Summary format for a corrective invoice includes all the detail on the adjustment for the corrected item.</td>
</tr>
<tr>
<td>Invoice Type</td>
<td>Select one of the following type of invoices:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Invoice Correction Letter</strong>. An Invoice Correction Letter contains only the changes from the original bill, that is, the corrected items and corrected events. Select <strong>Invoice Correction Letter</strong> when you wish to create a Credit Note.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Replacement Invoice</strong>. A Replacement Invoice includes all the items or events from the original bill along with the corrected amounts. Select <strong>Replacement Invoice</strong> when you wish to create a duplicate invoice or regenerate an invoice.</td>
</tr>
</tbody>
</table>

Select a reason: Select a reason.

Notes: (Optional) Enter notes.

Comment: (Optional) Click and enter a comment.

Corrective Bill Trail Dialog Box

Use the Corrective Bill Trail dialog box for viewing the corrective bill trail details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My charges</td>
<td>The charges for the bill.</td>
</tr>
<tr>
<td>A/R actions</td>
<td>The A/R actions (including Billed and Unbilled) for the bill.</td>
</tr>
<tr>
<td>Payment applied</td>
<td>The payment applied for a specific bill.</td>
</tr>
</tbody>
</table>
Working with Disputes

You create a dispute when a customer disagrees with the amount they are asked to pay. These issues require investigation before they can be resolved. Until the dispute is resolved by a settlement, the disputed amount is removed from the balance of the customer's bill.

Note:
You can open and resolve disputes for bills, items, and events.

For disputes and settlements, see:
- Disputing a Bill
- Settling a Bill Dispute
- Disputing an Item
- Settling an Item Dispute
- Viewing Item Dispute Details
- Disputing an Event
- Settling an Event Dispute
- Viewing Event Dispute Details

Disputing a Bill

From the Bills section, you can open a dispute on the bill you are working with.

Note:
You can open disputes only on bills that have money due and that do not already have another open dispute.
You cannot open or settle a dispute on a child account.

To dispute a bill:

1. On the account page, click the Bills tab.
   In the Bills section, select the bill you want to work with.
2. From the Actions menu in the Bills section, select Dispute Bill.
The Dispute Bill dialog box appears.

3. In the **Dispute** field, enter the amount you want to dispute. The due amount, the disputed amount, and the amount available for disputing are calculated and displayed on the screen.

4. For **Effective**, select a date.

5. (Optional) Select **Exclude taxes from the dispute**.

6. Select a reason for disputing from the list.

7. (Optional) Enter a note.

8. Click **OK**.

**Related Tasks**

- Disputing a Bill
- Disputing an Item
- Disputing an Event

**Dispute Bill Dialog Box**

Use the Dispute Bill dialog box to dispute at the bill level.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dispute</strong></td>
<td>Enter an amount.</td>
</tr>
<tr>
<td><strong>Effective</strong></td>
<td>Select a date.</td>
</tr>
<tr>
<td><strong>Exclude taxes from the dispute</strong></td>
<td>(Optional) Select if appropriate.</td>
</tr>
<tr>
<td><strong>Select a reason</strong></td>
<td>Select a reason.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

**Settling a Bill Dispute**

You can settle disputes on bills that have an open dispute.

To settle a dispute on a bill:

1. On the account page, click the **Bills** tab. In the Bills section of the account page, select the bill you want to work with.

2. From the **Actions** menu in the Bills section, select **Settle Bill Dispute**. The Settle Bill Dispute dialog box appears.

3. Select one of the following:
   - **Grant in full**
   - **Grant partial amount**
   - **Deny**

4. If you select **Grant partial amount**, enter the amount.
5. For **Effective**, select a date.
6. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
7. (Optional) Click **Comment** and enter a comment.
8. Click **OK**.

**Related Tasks**
- Disputing a Bill
- Disputing an Item
- Disputing an Event

**Settle Bill Dispute Dialog Box**

Use the Settle Bill Dispute dialog box to settle a dispute at the bill level.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant in full</td>
<td>Select to allow full amount of dispute.</td>
</tr>
<tr>
<td>Grant partial amount</td>
<td>Select to allow a partial amount. Enter the amount.</td>
</tr>
<tr>
<td>Deny</td>
<td>Do not allow dispute. Return disputed amount to bill.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Other open disputes</td>
<td>(Optional) Click to view other open disputes. Your company may have policies regarding how many disputes can be granted.</td>
</tr>
<tr>
<td>Comment</td>
<td>(Optional) Click and enter a comment.</td>
</tr>
</tbody>
</table>

**Disputing an Item**

To dispute an item:

1. On the account page, click the **Bills** tab.
2. Click **Switch Bills** and select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected item.

   The Charges by service page appears for the selected service.
4. Click the charge's action menu and select **Open Item Dispute**.

   The Dispute Item dialog box appears.
5. Enter the amount to be disputed in the **Dispute** field.
6. For **Effective**, select a date. By default, the current date is selected.
7. (Optional) Select **Exclude taxes from the dispute**.
8. Select a reason for the dispute.
9. (Optional) Enter any notes about the dispute.
10. Click **OK**.
Related Tasks
Disputing a Bill
Settling a Bill Dispute
Settling an Item Dispute
Disputing an Event
Settling an Event Dispute

Dispute Item Dialog Box

Use the Dispute Item dialog box to dispute items. You can dispute the amount and tax.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispute</td>
<td>Enter an amount.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Exclude taxes from the dispute</td>
<td>(Optional) Select if appropriate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

Settling an Item Dispute

You can settle disputes on items that have an open dispute.

To settle an item dispute:

1. On the account page, click the **Bills** tab.

   **Tip:**
   You can also access the settled item dispute details through **News Feed** in the Home Section or **A/R Actions** in the Bills section.

2. In the Bills section of the account page, select the bill you want to work with.

3. In the Service Charges area of the Bills section, select a service for the selected bill.

   The Charges by service page appears.

4. Click **Show Charge Changes**. This option appears if there are any open settled or unsettled item disputes.

   The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.

5. Click a **Unsettled Item Dispute**.

   The Settle Item Dispute dialog box appears.

6. Select one of the following:
Settle Item Dispute Dialog Box

Use the Settle Item dialog box to settle item disputes.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant in full</td>
<td>Select to allow full amount of dispute.</td>
</tr>
<tr>
<td>Grant partial amount</td>
<td>Select to allow a partial amount. Enter the amount.</td>
</tr>
<tr>
<td>Deny</td>
<td>Do not allow dispute. Return disputed amount to bill.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Other open disputes</td>
<td>(Optional) Click to view other open disputes.</td>
</tr>
<tr>
<td>Comment</td>
<td>(Optional) Click and enter a comment.</td>
</tr>
</tbody>
</table>

Viewing Item Dispute Details

To view item dispute details:

1. On the account page, click the Bills tab.

   **Tip:**

   You can access settled or unsettled item dispute details through News Feed in the Home section, Notes pop up on top of the chart, A/R Actions in the Bills section, or from within the graph.

2. Select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected bill.
The Charges by service page appears.

4. Click **Show Charge Changes**. This option appears only if there are any open settled or unsettled item disputes.

The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.

5. Do one of the following:
   a. To view a settled item dispute, click the appropriate settled item dispute.
      The Settle Item Dispute dialog box appears and displays the item dispute that is settled.
   b. To view an unsettled item dispute, click the appropriate unsettled item dispute.
      The Settle Item Dispute dialog box appears and displays the item dispute that is not settled.

**Related Tasks**
- Disputing an Item
- Settling an Item Dispute

**Disputing an Event**

To dispute an event:

1. On the account page, click the **Bills** tab.
2. In the Bills section, select the bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected item.
   The Charges by service page appears for the selected service.
4. Select a charge by clicking on the amount.
   The Events screen appears.
5. Select the required event(s) and click **Dispute Selected**.
   The Dispute Event dialog box appears.

**Note:**

You cannot open multiple disputes on the same event.

6. Select one of the following:
   - **Adjust amount and tax**
   - **Adjust amount only**
   - **Adjust tax only**
7. For **Dispute**, enter the amount or percentage.
8. For **Effective**, select a date. By default, this is set to the current date.
   The Dispute Event dialog box appears.
9. Select a reason for the dispute.
10. Enter any notes about the dispute.
11. Click OK.

Related Tasks
Disputing a Bill
Settling a Bill Dispute
Disputing an Item
Settling an Item Dispute
Settling an Event Dispute

Dispute Event Dialog Box

Use the Dispute Event dialog box to dispute events. You can dispute the amount and tax.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispute</td>
<td>Enter an amount or percentage.</td>
</tr>
<tr>
<td>Adjust amount and tax</td>
<td>Select to adjust both the amount for the events and the tax levied on the amount.</td>
</tr>
<tr>
<td>Adjust amount only</td>
<td>Select to adjust the amount on the events.</td>
</tr>
<tr>
<td>Adjust tax only</td>
<td>Select to limit the adjustment to the tax levied on the events.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

Settling an Event Dispute

You can settle disputes on events that have an open dispute.

To settle an event dispute:

1. On the account page, click the Bills tab.

   **Tip:**
   You can access settled or unsettled item dispute details through News Feed in the Home section, Notes pop up on top of the chart, A/R Actions in the Bills section, or from within the graph.

2. In the Bills section of the account page, select the bill you want to work with.

3. In the Service Charges area of the Bills section, select a service for the selected bill.
   The Charges by service page appears.
4. Click **Show Charge Changes**. This option appears if there are any open settled or unsettled event disputes.

   The Cycle forward dialog box appears and displays any open settled or unsettled event disputes.

5. Click an **Unsettled Event Dispute**.

   The Settle Event Dispute dialog box appears.

6. Select one of the following:
   - **Grant in full**
   - **Grant partial amount**
   - **Deny**

7. If you select **Grant partial amount**, enter the amount.

8. For **Effective**, select a date.

9. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.

10. (Optional) Click **Comment** and enter a comment.

11. Click **OK**.

### Related Tasks

- **Disputing an Event**
- **Viewing Event Dispute Details**
- **Disputing a Bill**
- **Settling a Bill Dispute**
- **Disputing an Item**
- **Settling an Item Dispute**

### Settle Event Dispute Dialog Box

Use the Settle Event dialog box to settle event disputes.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant in full</td>
<td>Select to allow full amount of dispute.</td>
</tr>
<tr>
<td>Grant partial amount</td>
<td>Select to allow a partial amount. Enter the amount.</td>
</tr>
<tr>
<td>Deny</td>
<td>Do not allow dispute. Return disputed amount to bill.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Other open disputes</td>
<td>(Optional) Click to view other open disputes.</td>
</tr>
<tr>
<td>Comment</td>
<td>(Optional) Click and enter a comment.</td>
</tr>
</tbody>
</table>
Viewing Event Dispute Details

You can view event dispute details from the Bills section, through News Feed in the Home section, Notes pop up on top of the chart, A/R Actions in the Bills section, or from within the graph.

To view event dispute details through the Bills tab:

1. On the account page, click the Bills tab.
2. Select a bill you want to work with.
3. In the Service Charges area of the Bills section, select a service for the selected bill.
   The Charges by service page appears.
4. Select a charge amount.
   The Events dialog box appears. This displays the event disputes and any unsettled event disputes.
   You can also select the unsettled event disputes and settle them. For more information, see Settling an Event Dispute.

Related Tasks

Disputing a Bill
Disputing an Event

Working with Refunds

You can initiate a refund to a customer whose account or bill has a credit balance.

Note:
You cannot refund to wholesale child accounts.

Depending on the payment method selected, the customer receives the refund amount later by check or as a credit to the customer’s credit card account, the direct debit account, or the SEPA account.

For more information about refunds in BRM, see "About Refunds" in BRM Managing Accounts Receivable.

Caution:

Refunds cannot be reversed. You should give a refund only in strict compliance with your company’s guidelines. If you refund a customer account by mistake, you can adjust the account balance for the refunded amount.
For refunds, see:
- Refunding an Account
- Refunding a Bill
- Refund Bill Dialog Box

Refunding an Account

To refund an account:

1. From the Actions menu, select Accounts Receivables, and then select Refunds.
   
The Credit Balances Available for Refund dialog box appears and lists all the items that are eligible for refunds.

2. Do one of the following:
   
   To refund all items:
   a. Select Refund all.
      All the items that are eligible for refund are selected.
   b. Click Refund or Next.
      The Refund Multiple Items dialog box appears.

   To refund selected items:
   a. Select Refund selected bills.
   b. Select the items to refund.
   c. Click Refund or Next.
      The Refund Bill or Refund Multiple Items dialog box appears depending on your selection.

3. Enter the required information. See “Refund Bill Dialog Box” for more information.

4. Click OK.

Related Tasks
- Refunding a Bill
- Refund Bill Dialog Box

Refunding a Bill

To create a bill level refund:

1. On the account page, click the Bills section.

2. Select the bill you want to refund from Bills.

3. From the Actions menu, select Refund Bill.
   
The Refund Bill dialog box appears.

4. Enter the required information in the Refund Bill dialog box fields. See “Refund Bill Dialog Box” for more information.
5. Click **Save**.

---

**Note:**
Billing Care only allows refunding of bills when the total amount due for the period is negative. The option is not displayed for bills with positive balances.

### Related Tasks
- Refunding an Account
- Refund Bill Dialog Box

### Refund Bill Dialog Box

Use the Refund Bill dialog box to enter and view bill refund information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refund Amount</td>
<td>The amount to be refunded.</td>
</tr>
<tr>
<td>Refund Type</td>
<td>The type of refund. By default, the following refund types are supported:</td>
</tr>
<tr>
<td></td>
<td>• Cash</td>
</tr>
<tr>
<td></td>
<td>• Check</td>
</tr>
<tr>
<td></td>
<td>• Inter Bank Payment Order</td>
</tr>
<tr>
<td></td>
<td>• Postal Order</td>
</tr>
<tr>
<td></td>
<td>• Wire-Transfer</td>
</tr>
<tr>
<td></td>
<td>After selecting a refund type, provide the required information in the</td>
</tr>
<tr>
<td></td>
<td>displayed fields. For example, if you select Check, provide the date,</td>
</tr>
<tr>
<td></td>
<td>number, bank code, and the bank account number.</td>
</tr>
<tr>
<td>Receipt Date</td>
<td><em>(Optional)</em> The receipt date.</td>
</tr>
<tr>
<td>Receipt No</td>
<td><em>(Optional)</em> The receipt number.</td>
</tr>
<tr>
<td>My charges</td>
<td>The current bill's charges (credit).</td>
</tr>
<tr>
<td>A/R actions</td>
<td>The amount of any accounts receivable actions taken on the current bill.</td>
</tr>
<tr>
<td>Payment applied</td>
<td>The amount of any payments previously applied to the current bill.</td>
</tr>
<tr>
<td>Total due for this period</td>
<td>The total amount due in the current bill.</td>
</tr>
<tr>
<td>Reason</td>
<td>Select a reason.</td>
</tr>
<tr>
<td>Notes</td>
<td><em>(Optional)</em> Enter any notes.</td>
</tr>
</tbody>
</table>

### Working with Write-Offs

When your company determines that it will not receive payment from a customer, you may be asked to write off the amount the customer owes. You can perform a write-off for an account, a bill, or an item charge. The write-off can be performed as one event that includes both the net and tax amounts, or as two events, one for the net amount and one for the tax amount.
Caution:
A write-off can be reversed. However, you should perform a write-off only in strict compliance with your company's guidelines.

To write-off a bad debt and reverse a write-off, see:
- Writing Off an Account
- Writing Off a Bill
- Writing Off a Bill Item
- Viewing Write Off Details
- Reversing a Write Off

Writing Off an Account

Caution:
You can reverse a write-off only if the write-off reversal feature is enabled in your BRM database. You should perform a write-off only in strict compliance with your company's guidelines.

To write off an account:

1. From the Actions menu, select Account Receivables. Select Write-Off Account.
   The Write Off Account dialog box appears.
2. For Effective, select a date.
   
   Note:
   Selecting a future date is not supported. However, backdating is supported.
3. (Optional) Select Inactivate account.
4. (Optional) Select Separate the tax portion from the write-off.
5. Select a reason.
6. (Optional) Enter appropriate notes.
7. Click OK.

Related Tasks
Reversing a Write Off
Writing Off a Bill
Writing Off a Bill Item

Write Off Account dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>The amount to write off, that is, the amount owed on the account.</td>
</tr>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Inactivate account</td>
<td>Select to inactivate the account.</td>
</tr>
<tr>
<td>Separate the tax portion from the write-off</td>
<td>(Optional) Select to keep the tax amount separate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

Writing Off a Bill

To write off a bill:

1. On the account page, click the Bills section. The existing bill details are displayed.
2. Use Switch Bills and select the bill you want to write off.
3. From the Actions menu, select Account Receivables. Select Write Off Bill. The Write Off Bill dialog box appears.
4. For Effective, select a date.
5. (Optional) Select Separate the tax portion from the write off.
6. Select a reason.
7. (Optional) Enter any notes.
8. Click OK.

Note:
The write off action is permanent and cannot be reversed.
Related Tasks

Writing Off an Account
Writing Off a Bill Item

Write Off Bill Dialog Box

Use the Write Off Bill dialog box to write off a bill.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Separate the tax portion from the write off</td>
<td>(Optional) Select to keep the tax amount separate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

Writing Off a Bill Item

To write off a bill item:

1. On the account page, click the Bills tab.
   The existing bill details are displayed.
2. Use Switch Bills and select the bill you want to work with.
3. In the section, select a service for the selected bill.
   The Charges by service page appears.
4. Select a charge, click the Actions menu and select Write Off Item.
   The Write Off Item dialog box appears.
5. (Optional) Select Separate the tax portion from the write off.
6. Select a reason.
7. (Optional) Enter notes.
8. Click OK.

Note:
The write off action is permanent and cannot be reversed.

Related Tasks

Writing Off an Account
Writing Off a Bill
Writing Off Bill Item Dialog Box

Use the Write Off Bill dialog box to write off an item.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective</td>
<td>Select a date.</td>
</tr>
<tr>
<td>Separate the tax portion from the write off</td>
<td>(Optional) Select to keep the tax amount separate.</td>
</tr>
<tr>
<td>Select a reason</td>
<td>Select the reason that most closely matches the situation.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>

Viewing Write Off Details

You can view write off details from News Feed in the Home section, A/R Actions in the Bills section, or from the Service Charges Area in the Bill section. See the following for more information.

- Viewing Write off details from News feed
- Viewing Write Off from the A/R actions
- Viewing Write Off from the Service Charges Area

Viewing Write off details from News feed

To view write off details from the news feed:

1. On the account page, click the Home tab.
2. Click News Feed in the Account History section.
   The News feed page appears. This page displays details about A/R actions, payments, charges, and accounts.
3. To view a write off, click Write off.
   Based on the selected write off type, the appropriate write off dialog box appears. The Details column specifies the write off type.
   - If the selected write off is for an account, the Write Off Account dialog box appears and displays details about the account.
   - If the selected write off is for a bill, the Write Off Bill dialog box appears and displays details about the bill.
   - If the selected write off is for an item, the Write Off Item dialog box appears and displays details about the item.
4. (Optional) Click Comment and enter a comment.
5. Click Post.

Viewing Write Off from the A/R actions

To view the write off details from the A/R actions:
1. On the account page, click the Bills tab.

2. Select the bill you want to work with.

3. Click **A/R actions** in the Bills section.
   
   The A/R Actions dialog box appears. This displays all the A/R actions for the bill.

4. Select the required type of Write off A/R action and click **A/R Action Details**.
   
   The appropriate type of Write Off dialog box appears.

5. (Optional) Click **Comment** and enter a comment.

6. Click **Post**.

**Viewing Write Off from the Service Charges Area**

To view the write off from the Services Charges Area:

1. On the account page, click the Bills tab.

2. Select the bill you want to work with.

3. In the Service Charges area, select a service for the selected bill.
   
   The Charges by service page appears.

4. Click **Show Charge Changes**.
   
   The related dialog box appears with the actions that affected the item.

5. Do one of the following:
   
   a. To view an account write off, click **Account Write-off**.
      
      The Write Off Account dialog box appears and displays the details about the account.

   b. To view a bill write off, click **Bill Write-off**.
      
      The Write Off Bill dialog box appears and displays the details about the bill.

   c. To view an item write off, click **Item Write-off**.
      
      The Write Off Item dialog box appears and displays the details about the item.

6. (Optional) Click **Comment** and enter a comment.

7. Click **Post**.

**Reversing a Write Off**

You can reverse a write-off on an account. However, to reverse the write off on an account, the account status must be **Inactive** before you reverse the account write off.

To reverse the account write off:

1. From the Actions menu, select **Account Receivables**.
2. Select **Reverse Account Write Off**.
   The Reverse Write-Off dialog box appears with the selected account name.

3. For **Effective**, select a date.

4. Select a reason.

5. (Optional) Enter appropriate notes.

6. Click **Reverse Write-Off**.

**Related Tasks**
- Writing Off an Account
- Writing Off a Bill
- Writing Off a Bill Item

**Reverse Write Off Account Dialog Box**

Use the Reverse Write Off Account dialog box to reverse write off an account.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effective</strong></td>
<td>The current date.</td>
</tr>
<tr>
<td><strong>Reason</strong></td>
<td>Select a reason that most closely matches the situation.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>(Optional) Enter notes.</td>
</tr>
</tbody>
</table>
Account Hierarchies

Oracle Communications Billing Care supports the configuration and maintenance of the following types of account hierarchies:

- **Organization Hierarchies** are relationships created among accounts specified in account profiles. Assign hierarchy types, classifying multiple accounts by functional roles, used for managing and grouping accounts within your organization's structure in Billing Care.

  Billing Care displays organization hierarchies in a graphical interface used for managing relationships. For more information on how to create, manage, and view organization hierarchies, see "About Organization Hierarchies".

- **Billing Hierarchies** are accounting relationships that enable an account to take financial responsibility for bill units in related accounts. Create billing hierarchies with a parent account responsible for paying a child account's bill units. For more information on how to create, manage, and view billing hierarchies, see "About Billing Hierarchies".

### About Organization Hierarchies

Billing Care includes the following organization hierarchy account types:

<table>
<thead>
<tr>
<th>Hierarchy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Set</td>
<td>No type set for an account.</td>
</tr>
<tr>
<td>Site</td>
<td>A nonservice-owning account used for physical or logical sites in an organization. Classify other account types under a common site when defining an organization's hierarchy in Billing Care.</td>
</tr>
<tr>
<td>Legal Entity</td>
<td>A nonservice-owning account type used for legal entities in an organization with accounts in Billing Care.</td>
</tr>
<tr>
<td>Billing Account</td>
<td>An account type used for configuring billing hierarchies representing a parent billing account with financial responsibility for child account bill units. See &quot;About Billing Hierarchies&quot;.</td>
</tr>
<tr>
<td>Service Account</td>
<td>An account type used for accounts with active, billable services.</td>
</tr>
</tbody>
</table>

### Related Tasks

- Adding an Account to an Organization
- Viewing Organization Hierarchies
- Creating Organization Hierarchy Relationships
- Editing Organization Hierarchy Relationships
- Removing an Account from an Organization Hierarchy
Adding an Account to an Organization

Add accounts to an organization in one of the following ways:

- During account creation, specify the company name and select a value from the Organization Hierarchy Type. Billing Care adds an account using an existing company name to an organization. For more information, see "Creating an Account".

- Move an existing account into a company organization. To move an existing account into an organization:
  1. From the Actions menu, select Account, and then select Account Profile. The account profile appears.
  2. Enter the company name for the organization hierarchy to add the account to.
  3. Select a value from the Organization Hierarchy Type list.
  4. Click Save.

After assigning an account to an organization based on the company name, use the Organization Hierarchy screen to create relationships among accounts. For more information, see "Creating Organization Hierarchy Relationships".

**Note:**

Billing Care uses the primary contact's company name value when assigning an account to an organization hierarchy.

Viewing Organization Hierarchies

To view an account's position in an organization hierarchy:

- From the Actions menu, select Organization Hierarchy, and then select Organization Hierarchy.

The organization hierarchy for the account appears. Billing Care highlights the active account and displays connected accounts in the organization. Each account displays its type using a type icon. No accounts are displayed if no organization hierarchy relationships exist.

For more information, see "Creating Organization Hierarchy Relationships".

Creating Organization Hierarchy Relationships

To create an account organization hierarchy relationship:

1. From the Actions menu, select Organization Hierarchy, and then select Organization Hierarchy.

2. In the Company field, enter the company name used for the account you want to create a relationship with. The search function supports the use of the * wildcard character.
3. In the **Search** field, enter additional name, address, or account number information to help locate the account to add an organization hierarchy relationship to.

4. Click the search icon.
   A list of accounts identified by the search is displayed.

5. Select an account from the list to which to add an organization hierarchy relationship.

6. (Optional) Click **Preview Move** to preview the new organization hierarchy relationship.

7. Click **Move** to create the organization hierarchy relationship.

---

**Note:**
Billing Care displays a message if the account you are adding to an organization hierarchy contains a blank company name value. To update the company name, click **Add Now**.

---

## Editing Organization Hierarchy Relationships

To edit an account’s organization hierarchy relationship:

1. From the **Actions** menu, select **Organization Hierarchy**, and then select **Organization Hierarchy**.

2. Click **Edit**.

3. In the **Company** field, enter the company name used for the account you want to create a new relationship with. The search function supports the use of the * wildcard character. A new relationship can be created with an account in the same or a different company.

4. Click the search icon.
   A list of accounts included in the company is displayed.

5. Select the new account from the list to which to add an organization hierarchy relationship.

6. (Optional) Click **Preview Move** to preview the new organization hierarchy relationship.

7. Click **Move** to update the account’s organization hierarchy relationship.

---

## Removing an Account from an Organization Hierarchy

To remove an account’s organization hierarchy relationship:

1. From the **Actions** menu, select **Organization Hierarchy**, and then select **Organization Hierarchy**.

2. Click **Remove From Hierarchy**.
   Billing Care displays a removal confirmation message.
3. Do one of the following:
   • To remove the account from the organization hierarchy and display the account's profile screen where the company name can be updated or removed, click **Remove, Continue to Account Profile**.
   • To remove the account without displaying the account's profile page, click **Remove**. The company name for the account is not changed.

**About Billing Hierarchies**

Billing hierarchies enable a parent account to assume financial responsibility for one or more child accounts' bill units. Configure billing hierarchies in the **Actions** menu after creating an account.

**Related Tasks**

- Configuring a Bill Unit for Payment by a Parent Account
- Changing a Bill Unit's Parent Account
- Returning a Bill Unit to an Account's Own Payment Method

**Configuring a Bill Unit for Payment by a Parent Account**

To assign an account's bill unit to a parent account:

1. From the **Actions** menu, select **Financial Setup**, and then select **Bill Unit Setup**. The Financial Setup screen appears.
2. Click the pencil icon in the bill unit to assign, or click **New** to create a bill unit to assign.
3. In the **Payment method of Paying Account** list, select one of the following options under **Identify Other Account to Pay**:
   • Select **Account Search**.
     The account search screen appears. Use the search to find the parent account to assign the bill unit to. Select the account and click **Open** to assign the bill unit to the selected account.
     For more information on searching for accounts, see "Finding an Account".
   • Select **Choose From Billing Accounts**: **Company Name**
     where **Company Name** is the value set in the active account's profile.
     Billing Care displays a list of accounts using the same company name and configured as Billing Account types. Select the account to assign the bill unit to.
     For more information about account types, see "About Organization Hierarchies".
Changing a Bill Unit's Parent Account

To change the parent account responsible for a child account's bill unit:

1. From the **Actions** menu, select **Financial Setup**, and then select **Bill Unit Setup**.
   The Financial Setup screen appears.
2. Click the pencil icon in the bill unit to assign, or click **New** to create a bill unit to assign.
3. In the **Payment method of Bill Unit** list, select **Account Search** under **Identify Other Account to Pay**.
   The account search screen appears.
4. Use the search to find the new parent account to assign the bill unit to.
   For more information on searching for accounts, see "Finding an Account".
5. From the list of search results, select an account, and click **Open**.
   The Choose Bill Unit to Pay screen appears.

   **Note:**
   The Choose Bill Unit to Pay screen appears only if multiple units are available. If multiple bill units are not available, you are navigated to the Edit Bill Unit screen. See "Editing a Bill Unit" for more information.

6. Select the parent account bill unit to assign the child account's bill unit to.
7. Click **OK**.
   Billing Care returns to the Financial Setup screen with the new parent account number added to the bill unit as the paying account.
8. Click **Apply**.

Returning a Bill Unit to an Account's Own Payment Method

To return an account's bill unit to one of its own payment methods:

1. From the **Actions** menu, select **Financial Setup**, and then select **Bill Unit Setup**.
   The Financial Setup screen appears.
2. Click the pencil icon in the bill unit to assign, or click **New** to create a bill unit to assign.
3. In the **Payment method of Bill Unit** list, select an On File payment method or an option to create a new payment method.

   For more information on adding a new payment method, see "Adding a Payment Method".

4. Click **Apply**.
Financial Setup

Use Financial Setup in Oracle Communications Billing Care to perform the following tasks:

- Working with Payment Methods
- Adding a Payment Method
- Editing a Payment Method
- Deleting a Payment Method
- Adding Additional Bill Units to an Account
- Editing a Bill Unit
- Adding and Changing Basic Tax Information
- Adding Tax Exemptions

Working with Payment Methods

Payment methods are assigned to bill units. Only one payment method can be assigned to a bill unit at any particular time. Assigned payment methods are listed before unassigned payment methods, and the last assigned appears first.

Adding a Payment Method

To add a payment method to an account or bill unit:

1. From the Actions menu, select Financial Setup, and then Payment Methods. The Financial Setup dialog appears.
2. Click New, next to Payment Methods. The New Payment Method section appears.
3. Select a Payment type.
4. Do one of the following:
   - For Credit Card and Direct Debit, enter the card, bank, and account information.
   - For Invoice, enter the invoice ID and delivery method.
   - For SEPA, enter SEPA-related information such as the International Bank Account Number (IBAN), Bank Identifier Code (BIC), date of signing, creditor's information, debtor's information, unique mandate reference information, type of payment, and address details.
5. Enter the contact information:
   - For **Credit Card** or **Direct Debit** payment types, provide the address details or select **Use name and billing address from primary contact**.
   - For **Invoice**, provide the invoice payment method, select the delivery method, email, and address details.

Note:

For SEPA, you cannot manually enter the creditor's information. Based on the creditor's ID, the system displays the required information.

Note:

Provide an email address to which the invoices have to be delivered.

- For **SEPA**, provide the type of payment and address details.

6. (Optional) For **Bill unit assignment**, select one or more bill units to assign the new payment method to.

7. Click **Apply**.

Related Tasks

- **Making a Payment**
- **Editing a Payment Method**

Financial Setup New Payment Method Section

Use the New Payment Method section of Financial Setup to add a new payment method to an account.
Field | Description
---|---
Payment type | Select the payment type. The payment type determines the other fields that display. Enter the details according to the selected payment type. For Direct Debit, enter the Bank number, Account number, and select appropriate account type details. For Credit Card, enter the card number, CVV2/CID, and card expiration details. For Invoice, enter the Invoice payment method ID and Delivery method. For SEPA, enter the IBAN, BIC, date of signing, creditor’s and debtor’s information, unique mandate reference information, type of payment, and address details. **Note:** For SEPA, you cannot manually enter creditor related information. Based on the creditor ID, the creditor’s information is displayed by the system. **Note:** SEPA only supports EURO accounts.

Contact Details | Enter the contact information, or select Use name and billing address from primary contact. For email delivery method, provide the email address.

Bill unit assignment | Select to assign this payment method to one or more bill units. If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.

Related Tasks

**Adding a Payment Method**

**Editing a Payment Method**

*Note:*

To change credit card numbers, you need to add a new payment method.

To change a payment method:

1. From the Actions menu, select Financial Setup, and then Payment Methods. The Financial Setup dialog appears with the existing payment methods.

2. For the payment method that you want to work with, click the edit icon. The Edit Payment Method section appears. The contents of the section depend on the payment type.

3. (Optional) You can change the following:
   - For credit cards, change the expiration date.
   - For direct debit, change the bank number, account number, and account type.
• For invoices, change the invoice ID and the contact method. For invoice payments that use email for delivery, the email address is required.
• For SEPA, change the IBAN, BIC, and the Unique Mandate Reference number as required.

4. (Optional) Change the contact information.

5. (Optional) Select Bill unit assignment, to assign the payment method to a bill unit. If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.

6. Click Apply.

Financial Setup Edit Payment Method Section

Use the Edit Payment Method section to change an existing payment method.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Area</td>
<td>The payment type determines the fields that display. Enter the changed values for the payment type. For credit card payments: if you need to change more than the expiration date, you must add a payment method. See &quot;Adding a Payment Method&quot;.</td>
</tr>
<tr>
<td>Contact Area</td>
<td>Enter the contact information, or select Use name and billing address from primary contact. For invoice payments that use email for delivery, the street address information is also required.</td>
</tr>
<tr>
<td>Bill unit assignment</td>
<td>Select to assign or unassign the payment method to one or more bill units. If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.</td>
</tr>
</tbody>
</table>

Related Tasks
Adding a Payment Method

Deleting a Payment Method

Note:
You cannot delete a payment method:
• If it is the only payment method for the account.
• If it is assigned to one or more bill units.

To delete a payment method:
1. From the Actions menu, select Financial Setup, and then Payment Methods.
   The Financial Setup dialog appears.
2. On the payment method that you want to delete, click the delete icon.
3. Click Delete.

Adding Additional Bill Units to an Account

You can add additional bill units to an account used for setting up billing hierarchies. Billing hierarchies allow another account to assume financial responsibility of an account's bill unit. See “About Billing Hierarchies” for information on setting up billing hierarchies.

Each bill unit uses any payment method configured in an account, or assigned to another account for financial responsibility. Billing Care generates unique invoices for each bill unit. See “Adding a Payment Method” for information on adding additional payment methods to an account.

To add a bill unit to an account:

1. On the account page, select Actions, Financial Setup and then Bill Unit Setup.
   The Financial Setup screen appears.
2. Click New next to Bill Units.
   The New Bill Unit screen appears.
3. Enter the Bill Unit name. Select the Payment method, Accounting type, Billing frequency, Billing day of month, and Re-rated invoice options from the lists for the new bill unit.
   If the payment method is not available, you can select No Payment Method.
4. Click Apply.

   **Tip:**
   You can move services between bill units. See “Moving Services between Bill Units” for information on how to move services between bill units.

Editing a Bill Unit

**Note:**

You can change a non-paying bill unit; for example, a child bill unit into a paying bill unit. However, you cannot change a paying bill unit into a non-paying bill unit.

To edit a bill unit:
1. On the account page, select **Actions**, **Financial Setup**, and then **Bill Unit Setup**. The Bill Unit(s) screen appears. It displays all the existing Bill Units.

2. Click the edit icon of a bill unit. The Edit Bill Unit screen appears.

3. (Optional) Enter a new name or edit the **Bill unit name**.

4. (Optional) Select or edit a new value for **Payment method or Payment Account**. If you selected a payment method that is new to the account, perform the following steps:

   If the payment method is not available, you can select **No Payment Method** and proceed to the step 6.

   a. Do one of the following:

      For **Credit Card** and **Direct Debit**, enter the card details, account, and billing information.

      For **Invoice**, enter the invoice payment method ID, Email, Address, and Billing details.

      For **SEPA**, enter the International Bank Account Number (IBAN), Bank Identifier Code (BIC), Unique Mandate Reference information, Type of Payment, Date of Signing, Mandate Signed Place, Creditor's or Debtor's details such as Creditor's or Debtor's ID, Address, and Billing details.

   b. Enter the contact information:

      For **Credit Card** and **Direct Debit**, enter the delivery address, or select **Use name and billing address from primary contact**.

      For **Invoice**, select the delivery method, and enter the address (email or postal). For the street address, you can select **Use name and billing address from primary contact**.

      **Note:**

      For email delivery of the invoices, the email or postal address is required.

      For **SEPA**, enter the Address. You can select **Use name and billing address from primary contact**.

5. (Optional) For **Accounting type**, select a new value.

6. (Optional) To change the **Billing frequency**, select a new value.

7. (Optional) To change the **Billing day of month**, select a new day.

8. (Optional) In the Business Profile list, if the selected business profile contains the Wholesale Billing key and the value of this key is set to **Yes**, the selected account is considered as a wholesale parent. For more information on creating wholesale accounts and bill unit hierarchies, see **BRM Patch Set Release Notes**.

9. (Optional) To change the **Re-rated invoice option**, select a value.

10. Click **Apply**.
Moving Services between Bill Units

To move a service or balance group from one bill unit to another:

1. On the account page, select Actions, Financial Setup and then Bill Unit Setup. The Financial Setup screen appears.
2. Click Move services between Bill Units. The Financial Setup screen displays the bill units.
3. Select the required bill unit from the list.
4. Select a balance group.
5. Drag and drop the selected balance group to the other bill unit. All the services that are part of the balance group are moved at once.
6. Click Apply.

Changing a Bill Unit's Invoice Template

Assign an alternative invoice template for a bill unit that determines which template Billing Care selects when creating a new or re-rated invoice. Templates can be customized in Oracle Business Intelligence Publisher.

To assign an alternative invoice template to a bill unit in an account:

1. Edit an existing account bill unit. See “Editing a Bill Unit” for more information on how to edit a bill unit.
2. In the Invoice template list, select a template for regular invoicing.
3. In the Re-rated invoice option list, select a template for re-rated invoices.
4. Click Apply.

Assigning a Bill Unit for Payment by Another Account

You can assign a bill unit for payment by another account when editing or creating a new bill unit. See "Configuring a Bill Unit for Payment by a Parent Account" for more information on assigning an account's bill unit for payment by a separate account.

Financial Setup Bill Unit Section

Use the Bill Unit section to find a bill unit.
Field | Description
--- | ---
General area | Describes the account’s bill units or the selected bill unit if there several bill units. The information includes:
- Payment method
- Account that pays for the bill unit
- Start and end dates for the current billing cycle
- The services included in the bill unit

**Note:** If you are viewing a wholesale parent account, the services of wholesale child accounts are not displayed.
Click the edit icon to change.

Summary area | If there are several bill units associated with the account, the unselected bill units are listed in a summary area on the right. The services associated with a bill unit are listed.
Click hide to close a list of services.

**Financial Setup Edit Bill Unit Section**

Use the Edit Bill Unit section to change a bill unit.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Unit name</td>
<td>Enter a new name.</td>
</tr>
<tr>
<td>Payment Method Area</td>
<td>Select an existing payment method, or select one of the options to create a new method. For a new payment method, enter the account details and contact information. See “Adding a Payment Method”. If the payment method is not available, you can select No Payment Method.</td>
</tr>
<tr>
<td>Accounting type</td>
<td>Select either Balance forward or Open Item. You cannot change the accounting type of a child bill unit.</td>
</tr>
<tr>
<td>Billing frequency</td>
<td>(Optional) Select a new interval.</td>
</tr>
<tr>
<td>Billing day of month</td>
<td>(Optional) Enter a new day of the month.</td>
</tr>
<tr>
<td>Currency</td>
<td>Select the currency. For SEPA payment, select the currency type as EUR.</td>
</tr>
</tbody>
</table>

**Adding and Changing Basic Tax Information**

Whether an account is a business account or subject to city taxes can affect taxation. To add or change basic tax information for an account:

1. On the account page, select Actions, Financial Setup, and then Tax Setup. The Tax Setup section of the Financial Setup dialog appears.
2. If the account is a business account, select This is a business account.
3. If the account address is inside the incorporated area of a city, select Inside incorporated area of a city.
4. (Optional) Enter any notes that are required for the account’s taxation setup. Select a Reason when entering notes.

5. Click Apply, or continue with adding exemptions.

See "Adding Tax Exemptions".

Adding Tax Exemptions

To add tax exemptions:

1. From the Actions menu, select Financial Setup, and then Tax Setup.
   The Tax Setup section of the Financial Setup dialog appears.

2. Do one of the following:
   • If this is the first tax exemption, under No tax exempt information, click Add.
   • If this is not the first tax exemption, click the plus icon to add a new exemption.

3. For each exemption:
   a. For Tax type, select the type.
   b. For Certificate number, enter the number.
   c. For Percent exempt, enter the amount.
   d. For From, select the date the exemption starts.
      You can back date an exemption.
   e. For To, select the end date, or leave as never ends.

4. To add a new exemption, click the plus icon.

Tip:
You can edit an existing exemption. To delete an exemption, click the minus icon.

Financial Setup Tax Setup Section

Use the Tax Setup section to configure tax information for an account.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is a business account</td>
<td>Select for business accounts.</td>
</tr>
<tr>
<td>Inside incorporated area of a city</td>
<td>Select for customers whose billing address is inside the incorporated area of a city.</td>
</tr>
<tr>
<td>Add</td>
<td>Click to add first tax exemption.</td>
</tr>
<tr>
<td>Tax type</td>
<td>Select the type of tax exemption.</td>
</tr>
<tr>
<td>Certificate number</td>
<td>Enter the certificate number that authorizes the exemption.</td>
</tr>
<tr>
<td>Percent exempt</td>
<td>Enter the percentage of the bill that is exempt from taxation.</td>
</tr>
<tr>
<td>From</td>
<td>Select the date the exemption starts. The start date can be backdated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>To</td>
<td>Select the date the exemption ends, or select never ends.</td>
</tr>
<tr>
<td></td>
<td>Click the plus icon to add a new exemption.</td>
</tr>
<tr>
<td></td>
<td>Click the minus to delete an exception.</td>
</tr>
</tbody>
</table>

Related Tasks

- Adding and Changing Basic Tax Information
- Adding Tax Exemptions
Sharing Groups

Use Sharing Groups in Oracle Communications Billing Care to create and maintain resource sharing groups. For information on resource sharing and performing the required tasks, see the following topics:

- Working with Resource Sharing Groups
- About Charge Sharing
- About Discount Sharing
- About Profile Sharing
- About Collections Sharing

Working with Resource Sharing Groups

A resource sharing group consists of an owner and one or more members who share resources. A resource sharing group can be one of the following types:

- Charge Sharing. See "About Charge Sharing".
- Discount Sharing. See "About Discount Sharing".
- Profile Sharing. See "About Profile Sharing".
- Collections Sharing. See "About Collections Sharing".

You create resource sharing groups by selecting members and the services that the owner wants to include. For example, the charges and discounts for IP services could be shared. A member account can participate in multiple sharing groups. And, if multiple group owners invite a member to share charges or discounts for the same service, the member can join any or all of the sharing groups for that service.

About Charge Sharing

Charge sharing enables a customer to sponsor the charges of other accounts or services in the system. For example, it enables a company to pay for all of its employees' GSM telephony services, or a parent to pay for the child's SMS and email services.

When a member incurs charges sponsored by the owner, the charges are applied to the owner's balance group first. Any charges that remain afterward impact the member's balance group.

Use Charge Sharing in the Sharing Groups menu to add, view, modify, or delete charge sharing groups and to add or delete members from a charge sharing group. For more information, see the following topics:

- Creating a New Charge Sharing Group
- Modifying a Charge Sharing Group
- Deleting a Charge Sharing Group
Creating a New Charge Sharing Group

To create a new charge sharing group:

1. From the Actions menu, select Sharing Groups, and then Charge Sharing. The Sharing Groups page appears.
2. Click New, next to Charge Sharing. The New Charge Sharing Group dialog box appears.
3. In the Name field, enter a name for the charge sharing group.
4. From the Services list, select the required service.

   Note:
   Select Account for non-services.

   A list of charges appear in the Charges Shared table. This table displays the name, description, events, and the validity period of the charge.
5. Select the charges for sharing.
6. Click Apply.

Related Tasks

Modifying a Charge Sharing Group
Deleting a Charge Sharing Group
Adding Members to the Charge Sharing Group
Selecting Specific Services for Charge Sharing
Removing a Member from the Charge Sharing Group
Modifying Priorities for Charge Sharing Group
Charge Sharing Group Dialog Box

Modifying a Charge Sharing Group

To modify a charge sharing group:

1. From the Actions menu, select Sharing Groups, and then Charge Sharing. The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.
2. In the Charge Sharing Ownership dialog box, click on the edit icon for the group that you want to modify.
   The Edit Charge Sharing Group dialog box appears.

3. (Optional) To change the name of the charge sharing group, enter a new name in the Name field.

4. (Optional) To add or remove charges from the group, select or deselect the charges in the Charges Shared table.

5. Click Apply.

Related Tasks
Creating a New Charge Sharing Group
Deleting a Charge Sharing Group
Adding Members to the Charge Sharing Group
Selecting Specific Services for Charge Sharing
Modifying Priorities for Charge Sharing Group
Removing a Member from the Charge Sharing Group
Charge Sharing Group Dialog Box

Deleting a Charge Sharing Group

To delete a charge sharing group:

1. From the Actions menu, select Sharing Groups, and then Charge Sharing.
   The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Ownership dialog box, click the delete icon for the group that you want to delete.
   A warning message appears.

3. Click Delete.

Related Tasks
Creating a New Charge Sharing Group
Modifying a Charge Sharing Group
Adding Members to the Charge Sharing Group
Selecting Specific Services for Charge Sharing
Removing a Member from the Charge Sharing Group
Modifying Priorities for Charge Sharing Group
Charge Sharing Group Dialog Box
Adding Members to the Charge Sharing Group

To add members to a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.
   The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. Click **Add Members**.
   The **GroupName: Members** section appears.

3. Click **Add account**.
   The account search dialog box appears.

4. Enter the account search criteria and click **Search**.
   The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.

5. Select an account and click **Add Account**.

6. Click **Close**.
   After you add the account, you can select specific services for charge sharing. See "Selecting Specific Services for Charge Sharing".

Related Tasks

- Creating a New Charge Sharing Group
- Modifying a Charge Sharing Group
- Deleting a Charge Sharing Group
- Selecting Specific Services for Charge Sharing
- Removing a Member from the Charge Sharing Group
- Modifying Priorities for Charge Sharing Group
- Charge Sharing Group Dialog Box

Selecting Specific Services for Charge Sharing

You can configure charge sharing based on specific services when the group owner wants to limit sharing to a small subset of the services within a type. For example, if a member has work email (smith@internetprovider.com) and home email (john@internetprovider.com). Both are specific services of the email service type. If the group owner wants to share charges only for the work email, you can select only the work email service for the group owner to assume the charges.

The charges for each of the specific services you select are assumed by the group owner.

To select specific services for charge sharing:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.
The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Ownership dialog box, click the number of members for the group that you want to edit.
   
   The *GroupName: Members* section appears.

3. Click the edit icon for the member for which you want to select the services for charge sharing.
   
   The Specific Services to Charge Share page appears with a list of services eligible for charge sharing. In this list, the services for which the charges are currently assumed by the group owner are selected by default.

4. Select or deselect the services as required.

5. Click **Apply**.

Related Tasks

- Creating a New Charge Sharing Group
- Modifying a Charge Sharing Group
- Deleting a Charge Sharing Group
- Adding Members to the Charge Sharing Group
- Removing a Member from the Charge Sharing Group
- Modifying Priorities for Charge Sharing Group
- Charge Sharing Group Dialog Box

### Removing a Member from the Charge Sharing Group

To remove a member from the charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.
   
   The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Ownership dialog box, click the link showing the number of members.
   
   The *GroupName: Members* section appears.

3. Click the delete icon for the member you want to remove from the group.

**Caution:**

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.
Related Tasks

Creating a New Charge Sharing Group
Modifying a Charge Sharing Group
Deleting a Charge Sharing Group
Adding Members to the Charge Sharing Group
Selecting Specific Services for Charge Sharing
Modifying Priorities for Charge Sharing Group
Charge Sharing Group Dialog Box

Modifying Priorities for Charge Sharing Group

You can increase or decrease priorities for charge sharing groups. To modify priorities of the charge sharing groups:

1. From the Actions menu, select Sharing Groups, and then Charge Sharing. The Sharing Groups page appears with the Charge Sharing Ownership and Charge Sharing Membership dialog boxes.

2. In the Charge Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority. The Modify Priorities dialog box appears with a list of group names and existing priority settings.

3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.

4. Click Apply.

Related Tasks

Creating a New Charge Sharing Group
Modifying a Charge Sharing Group
Deleting a Charge Sharing Group
Adding Members to the Charge Sharing Group
Selecting Specific Services for Charge Sharing
Removing a Member from the Charge Sharing Group
Charge Sharing Group Dialog Box

Charge Sharing Group Dialog Box

Use the Charge Sharing dialog box to:

• Create and modify charge sharing groups
• Add or remove members from charge sharing groups
• Select specific services for charge sharing groups
About Discount Sharing

Discount sharing is based on discounts purchased by the owner as part of a product rate plans. For discount sharing, shared discounts impact the member's balance groups by either increasing non-currency resources or reducing the currency impact of an event.

For discount sharing groups, the non-currency resources that were offered as part of the discount have been depleted in the owner account; for example, a monthly discount of free minutes that has already been consumed by the owner or other members. In this case, the member still benefits from currency-type shared discounts such as a 10% reduction on bills for email usage or a $15 discount on overseas calls.

Use Discount Sharing in the Sharing Groups menu to add, modify, or delete charge sharing groups and to add or delete members from a discount sharing group. For more information, see the following topics:

- Creating a Discount Sharing Group
- Modifying a Discount Sharing Group
- Deleting a Discount Sharing Group
- Adding Members to the Discount Sharing Group
- Selecting Specific Services for Discount Sharing
- Removing a Member from Discount Sharing Group
- Modifying Priorities for Discount Sharing Group
- Discount Sharing Group Dialog Box

Creating a Discount Sharing Group

To create a discount sharing group:

1. From the Actions menu, select Sharing Groups, and then Discount Sharing.
   The Sharing Groups page appears.
2. Click New next to Discount Sharing.
The New Discount Sharing Group dialog box appears.

3. In the **Name** field, enter a name for the discount sharing group.

4. From the **Services** list, select a required service.

   **Note:**
   
   Select **Account** for non-services.

A list of discounts appear in the **Discounts to apply** table. For more information, see **Discount Sharing Group Dialog Box**.

5. Select the discounts for sharing.

6. Click **Apply**.

**Related Tasks**

- **Modifying a Discount Sharing Group**
- **Deleting a Discount Sharing Group**
- **Adding Members to the Discount Sharing Group**
- **Selecting Specific Services for Discount Sharing**
- **Removing a Member from Discount Sharing Group**
- **Modifying Priorities for Discount Sharing Group**
- **Discount Sharing Group Dialog Box**

**Modifying a Discount Sharing Group**

To modify a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.
   
   The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the edit icon for the group that you want to modify.
   
   The Edit Discount Sharing Group dialog box appears.

3. (Optional) To change the name of the discount sharing group, in the **Name** field, enter a new name.

4. (Optional) To add or remove discounts from the group, in the **Discounts to Apply** table, select or deselect the discounts.

5. Click **Apply**.

**Related Tasks**

- **Creating a Discount Sharing Group**
- **Deleting a Discount Sharing Group**
Deleting a Discount Sharing Group

To delete a discount sharing group:

1. From the Actions menu, select Sharing Groups, and then Discount Sharing.
   The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.
2. In the Discount Sharing Ownership dialog box, click the delete icon for the group that you want to delete.
   A warning message appears.
3. Click Delete.

Related Tasks

Creating a Discount Sharing Group
Modifying a Discount Sharing Group
Adding Members to the Discount Sharing Group
Selecting Specific Services for Discount Sharing
Removing a Member from Discount Sharing Group
Modifying Priorities for Discount Sharing Group
Discount Sharing Group Dialog Box

Adding Members to the Discount Sharing Group

To add members to a discount sharing group:

1. From the Actions menu, select Sharing Groups, and then Discount Sharing.
   The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.
2. Click Add Members.
   The GroupName: Members section appears.
3. Click Add account.
   The account search dialog box appears.
4. Enter the account search criteria and click Search.
   The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.
5. Select an account and click **Add Account**.

6. Click **Close**.

After you add the account, you can select specific services for discount sharing. See "Selecting Specific Services for Discount Sharing".

**Related Tasks**

- Creating a Discount Sharing Group
- Modifying a Discount Sharing Group
- Deleting a Discount Sharing Group
- Selecting Specific Services for Discount Sharing
- Removing a Member from Discount Sharing Group
- Modifying Priorities for Discount Sharing Group

**Discount Sharing Group Dialog Box**

**Selecting Specific Services for Discount Sharing**

You can configure discount sharing based on specific services when the group owner wants to limit sharing to a small subset of the services within a type.

To select specific services for discount sharing:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**. The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the number of members for the group that you want to edit.

   The **GroupName: Members** section appears.

3. Click the edit icon for the member for which you want to select the services for discount sharing.

   The Specific Services to Discount Share dialog box appears with a list of services eligible for discount sharing. In that list, the services for which the discounts are currently assumed by the group owner are selected by default.

4. Select or deselect the services as required.

5. Click **Apply**.

**Related Tasks**

- Creating a Discount Sharing Group
- Modifying a Discount Sharing Group
- Deleting a Discount Sharing Group
- Adding Members to the Discount Sharing Group
- Removing a Member from Discount Sharing Group
- Modifying Priorities for Discount Sharing Group
Discount Sharing Group Dialog Box

Removing a Member from Discount Sharing Group

To remove a member from the discount sharing group:

1. From the Actions menu, select Sharing Groups, and then Discount Sharing. The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Ownership dialog box, click the link showing the number of members. The GroupName: Members section appears.

3. Click the delete icon for the member you want to remove from the group.

Caution:

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

Related Tasks

Creating a Discount Sharing Group
Modifying a Discount Sharing Group
Deleting a Discount Sharing Group
Adding Members to the Discount Sharing Group
Selecting Specific Services for Discount Sharing
Modifying Priorities for Discount Sharing Group
Discount Sharing Group Dialog Box

Modifying Priorities for Discount Sharing Group

You can increase or decrease priorities for discount sharing groups. To modify priorities of the discount sharing groups:

1. From the Actions menu, select Sharing Groups, and then Discount Sharing. The Sharing Groups page appears with the Discount Sharing Ownership and Discount Sharing Membership dialog boxes.

2. In the Discount Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority. The Modify Priorities dialog box appears with a list of group names and existing priority settings.

3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.
4. Click **Apply**.

**Related Tasks**
- Creating a Discount Sharing Group
- Modifying a Discount Sharing Group
- Deleting a Discount Sharing Group
- Adding Members to the Discount Sharing Group
- Selecting Specific Services for Discount Sharing
- Removing a Member from Discount Sharing Group
- Discount Sharing Group Dialog Box

**Discount Sharing Group Dialog Box**

Use the Discount Sharing dialog box to:

- Create and modify discount sharing groups
- Add or remove members from discount sharing groups
- Select specific services for discount sharing groups

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name the discount sharing group. The name you enter must be unique. You cannot use this name for any other discount or charge sharing group owned by the account.</td>
</tr>
<tr>
<td>Services</td>
<td>Select a service.</td>
</tr>
<tr>
<td>Discounts to Apply</td>
<td>This table lists the discounts that the group owner will share with the group members. Each row displays the discount name, description, quantity, event type included in the discount, and validity period of the discount.</td>
</tr>
<tr>
<td>Add Members</td>
<td>Adds members to a discount sharing group. You can specify the search criteria for the accounts you want to add as members. You can use wildcard, First Name, Last Name, or Company name for the search criteria. You use the search results to select accounts for membership.</td>
</tr>
</tbody>
</table>

**About Profile Sharing**

A profile sharing group enables an account or an account’s service to share a profile with other accounts or services. A profile stores ERAs or other types of information about an account.

The group owner can be an account or a service. If an account is the owner, profiles from all the services owned by the account are available for sharing. If a specific service is the owner, only profiles of that service are available for sharing. For example, a friends and family list can be set up for a GSM service owned by one account and then shared so that a GSM service belonging to other accounts can use the same list.
Related Tasks

Creating a Profile Sharing Group
Modifying a Profile Sharing Group
Deleting a Profile Sharing Group
Adding Members to the Profile Sharing Group
Selecting Specific Services for Profile Sharing
Removing a member from a Profile Sharing Group
Profile Sharing Dialog Box

Creating a Profile Sharing Group

To create a profile sharing group:

1. From the Actions menu, select Sharing Groups, and then Profile Sharing.
   The Sharing Groups page appears.
2. Click New, next to Profile Sharing.
   The New Profile Sharing Group dialog box appears.
3. In the Name field, enter a name for the profile sharing group.
4. From the Group Owners list, select the group owner.
   A list of profiles that are available for sharing, appear in the Profile Shared table.
   This table displays the type, label and the account/service of the accounts.
5. Select the accounts for profile sharing.
6. Click Apply.

Related Tasks

About Profile Sharing
Modifying a Profile Sharing Group
Deleting a Profile Sharing Group
Adding Members to the Profile Sharing Group
Selecting Specific Services for Profile Sharing
Removing a member from a Profile Sharing Group
Profile Sharing Dialog Box

Note:

Only service-level profiles can be shared. Account-level profiles cannot be shared, even if the profile sharing group is owned by an account.
Modifying a Profile Sharing Group

To modify a profile sharing group:

1. From the Actions menu, select Sharing Groups, and then Profile Sharing. The Sharing Groups page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. In the Profile Sharing Ownership dialog box, click on the edit icon for the group that you want to modify. The Edit Profile Sharing Group dialog box appears.

3. (Optional) To change the name of the profile sharing group, in the Name field, enter a new name for the group.

4. To add or remove profiles shared from the group, in the Profiles Shared table, select or deselect the profiles in the group.

5. Click Apply.

Related Tasks
About Profile Sharing
Creating a New Charge Sharing Group
Deleting a Profile Sharing Group
Adding Members to the Profile Sharing Group
Selecting Specific Services for Profile Sharing
Removing a member from a Profile Sharing Group
Profile Sharing Dialog Box

Deleting a Profile Sharing Group

To delete a profile sharing group:

1. From the Actions menu, select Sharing Groups, and then Profile Sharing. The Sharing Groups page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. In the Profile Sharing Ownership dialog box, click the delete icon for the group that you want to delete. A warning message appears.

3. Click Delete.

Related Tasks
About Profile Sharing
Creating a New Charge Sharing Group
Modifying a Profile Sharing Group
Adding Members to the Profile Sharing Group
Adding Members to the Profile Sharing Group

To add members to a profile sharing group:

1. From the Actions menu, select Sharing Groups, and then Profile Sharing.
   The Sharing Groups page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. Click Add Members.
   The GroupName: Members section appears.

3. Click Add account if there are one or more members in the group.
   The account search dialog box appears by default, if the group is empty.

4. Enter the account search criteria and click Search.
   The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.

5. Select an account and click Add Account.

6. Click Close.

Related Tasks

About Profile Sharing
Creating a New Charge Sharing Group
Modifying a Profile Sharing Group
Deleting a Profile Sharing Group
Selecting Specific Services for Profile Sharing
Removing a member from a Profile Sharing Group
Profile Sharing Dialog Box

Selecting Specific Services for Profile Sharing

You can configure profile sharing based on specific services when the group owner wants to limit sharing to a small subset of the profiles within a type.

To select specific profiles for discount sharing:

1. From the Actions menu, select Sharing Groups, and then Profile Sharing.
   The Sharing Groups page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. In the Profile Sharing Ownership dialog box, click the number of members for the group that you want to edit.
   The GroupName: Members section appears.
3. Click the edit icon for the member for which you want to select the services for profile sharing.

   The Specific Services to Profile Share dialog box appears with a list of services eligible for profile sharing. In that list, the services for which the profiles are currently assumed by the group owner are selected by default.

4. Select or deselect the services as required.

5. Click **Apply**.

Related Tasks

About Profile Sharing

Creating a Profile Sharing Group

Modifying a Profile Sharing Group

Deleting a Profile Sharing Group

Adding Members to the Profile Sharing Group

Removing a member from a Profile Sharing Group

Profile Sharing Dialog Box

Removing a member from a Profile Sharing Group

To remove a member from a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The Sharing Groups page appears with the Profile Sharing Ownership and Profile Sharing Membership dialog boxes.

2. In the Profile Sharing Ownership dialog box, click the link showing the number of members.

   The **GroupName: Members** section appears.

3. Click the delete icon for the member you want to remove from the group.

   **Caution:**

   Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.

Related Tasks

About Profile Sharing

Creating a Profile Sharing Group

Modifying a Profile Sharing Group

Deleting a Profile Sharing Group
Adding Members to the Profile Sharing Group

Selecting Specific Services for Profile Sharing

Profile Sharing Dialog Box

Profile Sharing Dialog Box

Use the New Profile Sharing dialog box to:

- Create and modify profile sharing groups
- Add or remove members from profile sharing groups

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name the profile sharing group. The name you enter must be unique. You cannot use this name for any other profile sharing group owned by the account.</td>
</tr>
<tr>
<td>Group owner</td>
<td>Select a group owner.</td>
</tr>
</tbody>
</table>

Related Tasks

About Profile Sharing

Creating a New Charge Sharing Group

Modifying a Profile Sharing Group

Deleting a Profile Sharing Group

Adding Members to the Profile Sharing Group

Selecting Specific Services for Profile Sharing

Removing a member from a Profile Sharing Group
Use Oracle Communications Billing and Revenue Management (BRM) Billing Care to manage bill units in collections.

To work with collections, see the following topics:

- About Collections
- Viewing a Bill Unit in Collections
- Finding an Account in Collections
- Filtering Collections Search Results
- Sorting Collections Search Results
- Removing a Bill Unit from Collections
- Adding an action for a Bill Unit in Collections
- Editing an Action for a Bill Unit in Collections
- Viewing Actions History for a Bill Unit in Collections
- Replacing a Bill Unit’s Collections Scenario
- Making Payment for a Collections Bill Unit
- Assigning Collection Account to a Collections Agent
- Exempting a Bill Unit from Collections
- Viewing Bill Units Exempted from Collections
- Removing a Bill Unit from Exemption
- Adding Promise-to-Pay Installment Payment Details
- Canceling Promise-to-Pay Agreement
- About Collections Sharing

### About Collections

*Collections*, or debt management, is a proactive process used by businesses to collect overdue payments from their customers. Collections includes identifying accounts that have overdue balances, determining whether those accounts meet predefined criteria for action, and then taking those actions. When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, see “About Collections Sharing”.

### Finding an Account in Collections

To find an account in Collections:
1. On the landing page, click Collections.

   **Note:**
   The Collections button appears on the landing page only if you have installed Collections Manager in BRM. For information on installing Collections Manager, see *BRM Collections Manager*.

   The Collections Search page appears with the details of all the accounts and bill units in collections.

2. In the Filter section, select the fields to filter the search. See “Filtering Collections Search Results”.
   If there are many results, you can add more filters to refine the search, and you can sort the search results. See "Sorting Collections Search Results".

3. From the search results list, select an account.
   The collection details for the account appears. See "Viewing a Bill Unit in Collections" for more information.

   **Tip:**
   To return to the landing page, click the Close link.

**Related Tasks**
- Filtering Collections Search Results
- Sorting Collections Search Results
- Viewing a Bill Unit in Collections
- Adding an action for a Bill Unit in Collections
- Editing an Action for a Bill Unit in Collections
- Making Payment for a Collections Bill Unit
- Assigning Collection Account to a Collections Agent

**Viewing a Bill Unit in Collections**

   To view details of a bill unit in collections:

   1. Find the bill unit, see "Finding an Account in Collections" for more information.
   2. Select a bill unit to view its details.

      The Collections Details page appears containing details of all the bill units that a user has and shows the following information for each bill unit:
Tip:
Click the Search Results link to return to the Collections Search Results page.

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name</td>
<td>Displays the name of the account. Click this link to open the account in a new tab.</td>
</tr>
<tr>
<td>N bill units in collections</td>
<td>Displays the number of bill units in collections. N is the number of bill units.</td>
</tr>
<tr>
<td>N assigned to you</td>
<td>Displays the number of bill units assigned to you.</td>
</tr>
<tr>
<td>Collections Group</td>
<td>Click the link to see the collection group details. This link appears only if the bill unit is part of a Collections Group.</td>
</tr>
<tr>
<td>Past due</td>
<td>Displays the past due amount.</td>
</tr>
<tr>
<td>Overdue for N days</td>
<td>Displays the number of days the payment is overdue.</td>
</tr>
<tr>
<td>Entry date</td>
<td>Displays the entry date of the bill unit.</td>
</tr>
<tr>
<td>In collections N time</td>
<td>Displays the number of times the bill unit was added for collections.</td>
</tr>
<tr>
<td>Last payment</td>
<td>Displays the last payment amount and the date for the bill unit.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>Displays the agent to whom the collections action is assigned or displays Unassigned if the bill unit is not assigned to an agent.</td>
</tr>
<tr>
<td>Action table</td>
<td>Displays the current action and all the other actions added for the bill unit and their schedule and status. You can add new actions or edit an existing action in the Actions table. See &quot;Adding an action for a Bill Unit in Collections&quot; and &quot;Editing an Action for a Bill Unit in Collections&quot; for more information.</td>
</tr>
<tr>
<td>Actions menu icon</td>
<td>Displays the list of collections actions. Click the list icon on the top right to view the Actions menu. Select an action from the Actions menu to perform the corresponding action, for example, to replace scenario, make payment, exit from collections, or add promise to pay.</td>
</tr>
<tr>
<td>Payment Details</td>
<td>Displays the payment amount and payment date for the bill unit.</td>
</tr>
<tr>
<td>Minimum Payment</td>
<td>Displays the minimum payment to be made to exit collections.</td>
</tr>
<tr>
<td>Notes</td>
<td>Displays consolidated notes for each bill unit. It includes all the comments added for various collections operations on that bill unit. You can also enter notes for the bill unit if required.</td>
</tr>
</tbody>
</table>

Related Tasks
Finding an Account in Collections
Filtering Collections Search Results
Filtering Collections Search Results

Narrow your collections search results by using the filters provided under **Bill Unit**, **Collections** and **Account**. You can modify the search criteria in a filter by clicking **Update**. You can also add new filters to narrow the search by clicking the **Add Filter** link.

**Tip:**

Click the **Reset** link to return to the default filter page.

Under **Bill Unit**, these are following fields available to filter your search:

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Unit Name</td>
<td>Filter the results using the name of the bill unit.</td>
</tr>
<tr>
<td>Bill Unit Status</td>
<td>Filter the results using the status of the bill unit.</td>
</tr>
<tr>
<td>Billing Day</td>
<td>Filter the results using the billing day.</td>
</tr>
</tbody>
</table>

Under **Collections**, these are following fields available to filter your search:

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned</td>
<td>Filter the results using the CSR assigned. Click <strong>Assigned to me</strong> to see Bill Units assigned to you.</td>
</tr>
<tr>
<td>Amount Due</td>
<td>Filter the results using the amount due to be collected.</td>
</tr>
<tr>
<td>Days Overdue</td>
<td>Filter the results using the days overdue for collection information.</td>
</tr>
<tr>
<td>Scenario</td>
<td>Filter the results using the scenario information.</td>
</tr>
<tr>
<td>Profile</td>
<td>Filter the results using the collections profile information.</td>
</tr>
</tbody>
</table>

Under **Account**, these are following fields available to filter your search:

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Filter the results using account number for bill unit.</td>
</tr>
<tr>
<td>Name</td>
<td>Filter the results using the customer name.</td>
</tr>
</tbody>
</table>
### Fields

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Filter the results using the company name.</td>
</tr>
<tr>
<td>Schema</td>
<td>Filter the results using the schema number. By default, the primary schema is selected.</td>
</tr>
</tbody>
</table>

### Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Sorting Collections Search Results

## Sorting Collections Search Results

By default, the search results are sorted in the ascending order of days overdue (smallest first) for a bill unit. You can change how the results are sorted by clicking on **Days Overdue** or **Amount Due**. Click the specific criteria to change from ascending to descending sort.

**Tip:**

Click **Show More** to see the next set of records.

### Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Filtering Collections Search Results

## Removing a Bill Unit from Collections

To remove a bill unit from collections:

1. Find the bill unit, see "Finding an Account in Collections" for more information.
2. Select the bill unit you want to remove.
3. From the **Actions** menu, select **Exit Collections**. The **Exit Collections** dialog box appears.
4. (Optional) Enter a note.
5. Click **Exit**.

### Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Filtering Collections Search Results
Adding an action for a Bill Unit in Collections

To add an action for a bill unit in Collections:

1. Find the bill unit, see "Finding an Account in Collections" for more information.

2. Select the bill unit.

3. Click the add icon that appears above the Actions table.

   The Add Action dialog box appears.

4. From the Action list, select an action to be taken for the bill unit.

5. If you selected Collect Payment from the Action list, do the following:
   - In the Amount field, enter the payment amount to be collected.
   - In the Payment Method list, select a payment method for collecting payment.

6. In the Scheduled field, enter a date or select a date from the calendar.

7. From the Follow on actions list, select one of the following:
   - No schedule change
   - Days to slip schedule and enter the days in the field beside
   - Cancel all

8. From the reasons list, select a reason.

9. (Optional) Enter a note.

10. Click Save.

Related Tasks

Finding an Account in Collections
Viewing a Bill Unit in Collections
Editing an Action for a Bill Unit in Collections
Making Payment for a Collections Bill Unit
Assigning Collection Account to a Collections Agent

Add Action Dialog Box

Use the Add Action dialog box to add an action for collections for a bill unit.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Select an action to be taken for collections for the bill unit.</td>
</tr>
<tr>
<td>Amount</td>
<td>Enter the payment amount to be collected.</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Select a payment method for collecting payment.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Enter the schedule for collections.</td>
</tr>
<tr>
<td>Follow on actions</td>
<td>Select a follow on action for collections.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reason</td>
<td>Select a reason for the action.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter the notes for future reference.</td>
</tr>
</tbody>
</table>

**Editing an Action for a Bill Unit in Collections**

To edit an action for a bill unit:

1. Find the bill unit, see "Finding an Account in Collections" for more information.
2. Select the bill unit.
3. Select an action and click the edit icon that appears above the Actions table. The Edit Action Dialog Box appears.

**Note:**

You cannot edit an action added for the promise-to-pay agreement.

4. From the **Status** list, select a status.
5. If you selected **Pending** from the **Status** list, do the following:
   a. Select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions.
   b. In the **Change the schedule to** field, enter a date or select a date from the calendar.
   c. From the **Follow on actions** list, select an action.
6. If you selected **Cancelled** from the **Status** list, select one of the following options:
   a. **Only this task** (and select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions.)
   b. **All following tasks**
7. From the reasons list, select a reason.
8. (Optional) Enter a note.
9. Click **Save**.

**Related Tasks**

- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Viewing Actions History for a Bill Unit in Collections
- Making Payment for a Collections Bill Unit
- Assigning Collection Account to a Collections Agent
Edit Action Dialog Box

Use the Edit Action dialog box to change the scheduled date or the status for an action.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Displays the action selected.</td>
</tr>
<tr>
<td>Status</td>
<td>Select a status as appropriate.</td>
</tr>
<tr>
<td>Change schedule to</td>
<td>Enter the new schedule for a pending action.</td>
</tr>
<tr>
<td>Follow on actions</td>
<td>Select a follow on action for a pending action:</td>
</tr>
<tr>
<td></td>
<td>• No schedule change</td>
</tr>
<tr>
<td></td>
<td>• Days to slip schedule</td>
</tr>
<tr>
<td></td>
<td>• Cancel all</td>
</tr>
<tr>
<td>Reason</td>
<td>Select a reason for the action.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter the notes for future reference.</td>
</tr>
</tbody>
</table>

Viewing Actions History for a Bill Unit in Collections

The actions history for a bill unit in collections displays all the actions assigned to the bill unit.

To view the action history for a bill unit in collections:

1. Find the bill unit, see "Finding an Account in Collections" for more information.
2. Select the bill unit.
3. In the Actions table, click an action.

The Actions History dialog box appears with the details of the past actions.

Related Tasks

- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Adding an action for a Bill Unit in Collections
- Editing an Action for a Bill Unit in Collections
- Making Payment for a Collections Bill Unit
- Assigning Collection Account to a Collections Agent

Replacing a Bill Unit's Collections Scenario

To replace a bill unit's collection scenario:

1. Find a bill unit. See "Finding an Account in Collections" for more information.
2. Select the bill unit.
3. From the Actions menu, select Replace Scenario.
The Replace Scenario dialog box appears.

4. Do one of the following:
   - To specify the new collections scenario to assign to the bill unit, click **New Scenario** and then select the new collections scenario from the list that appears.
   - To automatically assign a collections scenario based on the amount owed, the number of days the bill unit has been in collections, and any custom criteria, click **Auto Assigned by collections criteria**.

5. From the **Scheduled** list, select one of the following:
   - To schedule the new scenario from the bill unit's next payment due date, select **Bill due date**.
   - To schedule the new scenario from a specific date, select **On** and enter the date or select a date from the calendar.

   **Note:**
   - The date specified must occur on or after the next bill due date.

6. If you want the new scenario's entry days to be considered for scheduling the collections actions, select **Collections entry**.

7. (Optional) Enter a note.

8. Click **Save**.

**Related Tasks**

- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Adding an action for a Bill Unit in Collections
- Editing an Action for a Bill Unit in Collections
- Making Payment for a Collections Bill Unit
- Assigning Collection Account to a Collections Agent

**Replace Scenario Dialog Box**

Use the Replace Scenario dialog box to replace the scenarios for bill units in collections.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario</td>
<td>Displays the current scenario of the bill unit.</td>
</tr>
<tr>
<td>Replace with</td>
<td>Select a new scenario or automatically assign a collections scenario based on the amount owed.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Mention the schedule for collections.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections entry</td>
<td>Select this option to consider the new scenario's entry days for scheduling the collections actions.</td>
</tr>
<tr>
<td>Notes</td>
<td>(Optional) Enter a note if required.</td>
</tr>
</tbody>
</table>

### Making Payment for a Collections Bill Unit

To make payment for a bill unit under collections:

1. Find the bill unit. See "Finding an Account in Collections" for more information.
2. Select the bill unit.
3. From the **Actions** menu, select **Make Payment**.
   
The Make a Payment dialog box appears. See "Making a Payment" in Billing Care Online Help for information on making payments.

### Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Adding an action for a Bill Unit in Collections
- Editing an Action for a Bill Unit in Collections
- Assigning Collection Account to a Collections Agent
- Removing a Bill Unit from Collections

### Assigning Collection Account to a Collections Agent

By default, bill units in collections are not assigned to any collections agent. When you assign a bill unit to a collections agent, the agent becomes responsible for completing all the manual tasks for that bill unit.

> **Note:**
> Only users with permission to assign collections agents, can assign a collection account to an agent.

To assign a collections account to an authorized user:

1. Find the bill unit. See "Finding an Account in Collections" for more information.
2. From the list of search results, select an account.
   
The collection details for the account appears.
3. Select the bill unit to assign the collections agent.
4. From the **Assigned to** list, select a Billing Care user.
Exempting a Bill Unit from Collections

To exempt a bill unit from collections:

1. On the landing page, click **Collections**.
   The Collections Search page appears containing details of all the bill units in collections.

2. (Optional) In the Filter section, enter the filter criteria.
   For more information, see "Filtering Collections Search Results" and "Sorting Collections Search Results".

3. From the list of search results, select an account.
   The collection details for the account appears.

4. Select the bill unit you want to exempt from collections.

5. From the **Actions** menu, select **Exempt Bill Unit**.
   The Exempt bill unit Dialog box appears.

6. Select a reason for the exemption from the list.

7. (Optional) Enter a note.

8. Click **Save**.

**Related Tasks**
Finding an Account in Collections
Viewing a Bill Unit in Collections
Making Payment for a Collections Bill Unit

**Exempt Bill Units Dialog Box**

Use the Exempt Bill Units dialog box to exempt the bill units from collections.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reason</strong></td>
<td>Select a reason for removal of exemption.</td>
</tr>
<tr>
<td><strong>Exemption Notes</strong></td>
<td>(Optional) Enter the notes for future reference.</td>
</tr>
</tbody>
</table>
Viewing Bill Units Exempted from Collections

To view bill units exempted from collections:

1. On the landing page, click **Collections**.
   The Collections Search page appears containing details of all the bill units in collections.

2. Click **Show Exempt Bill Units**.
   The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections.

3. Click **Close**.

Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Filtering Collections Search Results
- Sorting Collections Search Results
- Removing a Bill Unit from Exemption
- Exempting a Bill Unit from Collections

Removing a Bill Unit from Exemption

To remove a bill unit from exemption:

1. On the landing page, click **Collections**.
   The Collections Search page appears containing details of all the bill units in collections.

2. Click **Show Exempt Bill Units**.
   The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections.

3. (Optional) Enter any comments in the notes section.

4. Select an exempted bill unit and click **Remove Exemption**.

5. Click **Close**.

Related Tasks
- Finding an Account in Collections
- Filtering Collections Search Results
- Sorting Collections Search Results
- Viewing Bill Units Exempted from Collections
- Exempting a Bill Unit from Collections
Exempted Bill Units Dialog Box

Use the Exempted Bill Units dialog box to view the bill units exempted from collections. Select a bill unit to view its details or to remove it from exemption.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove exemption</td>
<td>Click to remove the bill unit from collections exemption.</td>
</tr>
<tr>
<td>Notes</td>
<td>Displays the bill unit details.</td>
</tr>
<tr>
<td>Comment</td>
<td>Click and enter a comment.</td>
</tr>
</tbody>
</table>

Adding Promise-to-Pay Installment Payment Details

When a bill unit is in collections, you can offer customers the option of a promise-to-pay agreement. This agreement allows you to defer running the collections action for a bill unit and allows the customer to pay the amount owed in installments. The number of installments can range from one to multiple installments scheduled at regular intervals.

When a customer requests a promise-to-pay agreement, you add the promise-to-pay installment payment details to the bill unit.

To add promise-to-pay installment payment details to a bill unit:

1. Find the bill unit to enable promise to pay. See "Finding an Account in Collections" for more information.
2. Select the bill unit to add the promise-to-pay installment payment details.
3. From the Actions menu, select Promise To Pay.
   The Promise to Pay dialog box appears.
4. In the Amount promised field, enter the amount that is agreed to be paid in installments.
   Billing Care displays the minimum amount to be paid to exit collections.
5. In the First installment due field, enter or select the due date for the first installment payment.
6. From the Payment method list, select a payment method.
7. From the Payment options list, select one of the following:
   - Make a specific number of payments
   - Pay a specific amount each time
   Based on your selection, appropriate text box appears. Enter the desired number of payments or specify the amount to be paid every time.
8. From the Time options list, select one of the following:
   - Specify number of days between payments
   - Complete payments by a specified date
9. (Optional) Enter a note.
10. Click Save.
Related Tasks
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Canceling Promise-to-Pay Agreement
- Making Payment for a Collections Bill Unit

**Canceling Promise-to-Pay Agreement**

To cancel a promise-to-pay agreement:

1. Find the bill unit to cancel promise to pay. See "Finding an Account in Collections" for more information.
2. Select the bill unit for which you need to cancel the promise-to-pay agreement.
3. From the **Actions** menu, select **Cancel Promise To Pay**.

**Note:**
You can cancel a promise-to-pay agreement only if there is an active promise-to-pay agreement for the selected bill unit and the installments are not completed or cancelled.

4. Click **Yes**.

**Related Tasks**
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Adding Promise-to-Pay Installment Payment Details
- Making Payment for a Collections Bill Unit

**Promise to Pay Dialog Box**

Use the Promise to Pay dialog box to enable promise to pay for a bill unit.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past due</td>
<td>Displays the total due in collections.</td>
</tr>
<tr>
<td>Amount promised</td>
<td>Enter the amount that is agreed to be paid. The amount must be greater than</td>
</tr>
<tr>
<td></td>
<td>the minimum payment amount. By default, displays the total due in collections</td>
</tr>
<tr>
<td></td>
<td>and the minimum payment to be made to exit collections.</td>
</tr>
<tr>
<td>First installment</td>
<td>Enter or select the due date for the first installment. By default,</td>
</tr>
<tr>
<td>due</td>
<td>displays the existing due date.</td>
</tr>
<tr>
<td>Payment method</td>
<td>Select a payment method; for example, credit card.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Payment options</td>
<td>Select a payment option. If you select <strong>Make a specific number of payments</strong>, enter the number of payments. If you select <strong>Pay a specific amount each time</strong>, enter the amount to be paid for each installment.</td>
</tr>
<tr>
<td>Time options</td>
<td>Select the time milestone for installments. To add the number of days between each installment, select <strong>Specific number of days between payments</strong> and enter the number of days between payments. To add the date by which the all the payments will be made, select <strong>Complete payments by a specific date</strong> and enter or select a date.</td>
</tr>
<tr>
<td>Tentative Payment</td>
<td>Displays the installment details, such as the number of installments scheduled, the date for each installment, and installment amount to be paid.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td>(Optional) Enter a note.</td>
</tr>
</tbody>
</table>

### About Collections Sharing

When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, which consists of a group owner and one or more members.

A bill unit can belong to only one collections sharing group, and the group owner cannot be a member of the same collections sharing group. You can change a collections sharing group's owner and add or remove members bill units at any time.

Use Collections Sharing in the Sharing Groups menu to add, view, modify, or delete collections sharing groups and to add or delete members from a collections sharing group. For more information, see the following topics:

- Creating a Collections Sharing Group
- Viewing a Collections Sharing Group
- Modifying a Collections Sharing Group
- Deleting a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Removing a Member from the Collections Sharing Group
- Modifying Priorities for Collections Sharing Group

### Creating a Collections Sharing Group

To create a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**. The Sharing Groups page appears.
2. Click **New**, next to **Collections Sharing**. The New Collections Sharing Group dialog box appears.
3. In the **Name** field, enter a name for the collections sharing group.
4. Select a **Group Owner** from the list.
5. Add members to the collections group, see "Adding Members to the Collections Sharing Group" for more information.
6. Click **Apply**.

**Related Tasks**
- Viewing a Collections Sharing Group
- Modifying a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Removing a Bill Unit from Collections
- Deleting a Collections Sharing Group

**Viewing a Collections Sharing Group**

To view a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.
2. Select **Collections Group**.
   
   The Collections Sharing Ownership and Collections Sharing Membership dialog box appears.

   The Collections Sharing Ownership dialog box displays all the collections groups owned by the account.

   The Collections Sharing Membership dialog box displays the collections groups in which the account has been associated as a member.

3. Click **Close**.

**Related Tasks**
- Modifying a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Viewing a Collections Sharing Group
- Removing a Bill Unit from Collections
- Deleting a Collections Sharing Group

**Modifying a Collections Sharing Group**

To modify a collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.
   
   The Sharing Groups page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.

2. Click on the edit icon for the collections group that you want to modify.
The Edit Collections Sharing Group dialog box appears.

3. (Optional) To change the name of the collection sharing group, enter a new name in the Name field.

4. (Optional) To add or remove collections from the group, select or deselect the collections in the Collections Shared table.

5. Click Apply.

Related Tasks
- Viewing a Collections Sharing Group
- Modifying a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Removing a Member from the Collections Sharing Group
- Removing a Bill Unit from Collections
- Deleting a Collections Sharing Group
- Modifying Priorities for Collections Sharing Group

Deleting a Collections Sharing Group

To delete a collections group:

1. From the Actions menu, select Sharing Groups, and then Collections Sharing.
   The Sharing Groups page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.

2. In the Collections Sharing Ownership dialog box, click the delete icon for the group that you want to delete.
   A warning message appears.

3. Click Delete.

Related Tasks
- Viewing a Collections Sharing Group
- Modifying a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Removing a Bill Unit from Collections
- Deleting a Collections Sharing Group
- Modifying Priorities for Collections Sharing Group

Adding Members to the Collections Sharing Group

To add members to the collections sharing group:

1. From the Actions menu, select Sharing Groups, and then Collections Sharing.
The Sharing Groups page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.

2. Click **Add members**.
   The **GroupName: Members** section appears.

3. Click **Add account**.
   The account search dialog box appears.

4. Enter the account search criteria and click **Search**.
   The search results appear. Search returns a maximum of 50 results by default. Refine your search criteria if the account you are searching for is not initially found.

5. Select an account and click **Add Account**.

6. Click **Close**.

**Related Tasks**

Viewing a Collections Sharing Group

Modifying a Collections Sharing Group

Adding Members to the Collections Sharing Group

Removing a Member from the Collections Sharing Group

Removing a Bill Unit from Collections

Deleting a Collections Sharing Group

Modifying Priorities for Collections Sharing Group

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### Removing a Member from the Collections Sharing Group

To remove a member from the collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.
   The Sharing Groups page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.

2. In the Collections Sharing Ownership dialog box, click the link showing the number of members.
   The **GroupName: Members** section appears.

3. Click the delete icon for the member you want to remove from the group.

**Caution:**

Be cautious while removing the members from the group. When you click the delete icon for a member, the member will be removed from the group. Billing Care does not display warning messages when you remove members from a group.
Related Tasks

Modifying a Collections Sharing Group
Adding Members to the Collections Sharing Group
Viewing a Collections Sharing Group
Removing a Bill Unit from Collections
Deleting a Collections Sharing Group
Modifying Priorities for Collections Sharing Group

Modifying Priorities for Collections Sharing Group

You can increase or decrease priorities for collections sharing groups.

To modify priorities of the collections sharing groups:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.
   The Sharing Groups page appears with the Collections Sharing Ownership and Collections Sharing Membership dialog boxes.

2. In the Collections Sharing Membership dialog box, click the edit icon for the member for which you want to modify the priority.
   The Modify Priorities dialog box appears with a list of group names and existing priority settings.

3. Select the up arrow (ascending order) or the down arrow (descending order) to increase or decrease the priority.

4. Click **Apply**.

Related Tasks

Modifying a Collections Sharing Group
Adding Members to the Collections Sharing Group
Viewing a Collections Sharing Group
Removing a Member from the Collections Sharing Group
Removing a Bill Unit from Collections
Deleting a Collections Sharing Group

Collections Sharing Group Dialog Box

Use the Collections Sharing Group dialog box to:

- Create and modify collections sharing groups
- Add or remove members from collections sharing groups
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name the collections sharing group. The name you enter must be unique. You cannot use this name for any other sharing group owned by the account.</td>
</tr>
<tr>
<td>Group Owner</td>
<td>Displays the group owner of the collections sharing group.</td>
</tr>
<tr>
<td>Add Members</td>
<td>Adds members to a collections sharing group. You can specify the search criteria for the accounts you want to add as members. You can use wildcard, First Name, Last Name, or Company name for the search criteria. You use the search results to select accounts for membership.</td>
</tr>
</tbody>
</table>