Self-Service Application Guide for Oracle Billing Insight

Version 7.0

October 2015

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1 What’s New in This Release

What’s New in Self-Service Application Guide for Oracle Billing Insight, Version 7.0

Table 1 lists the changes in this version of the documentation to support this release of the software.

Table 1. New Product Features in Self-Service Application Guide for Oracle Billing Insight, Version 7.0

Topic	Description
“Use Case: Viewing the Most Frequently Texted Numbers Report” on page 162 “Use Case: Viewing the Number Texted Report” on page 164 “Use Case: Viewing the Number Texted by Service Agreement Report” on page 165	New topics. Added the Most Frequently Texted Numbers and related reports.

Additional Changes

The following documentation changes affect the overall content or organization of this guide:

- Content in this guide was rewritten and reorganized to reflect the new Responsive Web Design in the user interface, as well as the updated look and feel through the use of Cascading Style Sheets.
- This guide describes the use cases for both the Business and Consumer editions of Oracle Billing Insight, replacing the separate Application Guides.
- The Customer Service Representative Use Cases chapter has been removed. Information about the Assisted Service application is located in the new guide, see *Assisted Service Application Guide for Oracle Billing Insight*.

This book also contains the following name changes in this version:

- The product name changed to Oracle Billing Insight.
- The Customer Service Representative application name changed to the Assisted Service application.
- The Billing and Payment application name changed to the Self-Service application.

2 Overview of the Self-Service Application

This chapter describes general features in the Oracle Billing Insight Self-Service application. It includes the following topics:

- About This Guide on page 11
- About the Self-Service Application on page 11
- Self-Service Application User Roles on page 12
- Common UI Elements on page 16
- Common Exceptions on page 27

About This Guide

This guide is intended as a reference for programmers who are planning the customization and implementation of the Self-Service application for an organization; it is not an end-user guide.

The Self-Service application is preconfigured with Oracle Billing Insight, and contains the general use case functions and user interface described in this guide. This guide describes the functionality of both the Business Edition and Consumer Edition of Oracle Billing Insight. Features that vary between editions are noted. Use case functionality can also vary by user role and data, such as billing and business hierarchy contexts, and these variations are also identified in this guide.

Some use cases described in this guide are also viewable from within the Assisted Service application by agents assisting business and consumer users. For details about the Assisted Service application, see *Assisted Service Application Guide for Oracle Billing Insight*.

All use cases in the Self-Service application assume that data has been loaded into Oracle Billing Insight. For details about loading data, see *Administration Guide for Oracle Billing Insight*.

For information about creating a custom implementation of the Self-Service application, see *Implementation Guide for Oracle Billing Insight*.

About the Self-Service Application

The Self-Service application enables consumer and business users to effectively manage their billing, analytics, and payment processing needs.

The use of Responsive Web Design allows the same application to be used across platforms and devices including mobile devices, tablets, and browsers. The Self-Service application can also be embedded in CRM applications.

Self-Service Application User Roles

The Self-Service application use cases are available to users based on their assigned role and the privileges associated with the role, as well as their position in a hierarchy, if any (business users only).

Oracle Billing Insight preconfigures the following user roles for accessing the Self-Service application:

- **Admin.** A business administrator for a company who is responsible for managing company-related data, managing business and billing hierarchies, and creating and managing Self-Service application users.

  The first Admin is created by an Assisted Service administrator. The initial Admin can create new users, including additional Admins.

- **Manager.** A business manager, typically assigned to a billing account in the hierarchy and able to see billing data from that position to the bottom of the hierarchy tree.

  Manager users are created by an Admin.

- **PayerManager.** A business user who can make and manage payments on billing data from that position to the bottom of the hierarchy tree.

  PayerManager users are created by an Admin.

- **Subscriber.** A business user, typically assigned at the service agreement level, who can see from that level to the bottom in the hierarchy tree.

  Subscriber users are created by an Admin.

- **User.** All consumer users are automatically assigned the User role, which lets them make payments and manage their own accounts.

  Users self-enroll in the Self-Service application.

Agents, such as customer service representatives, can also access the Self-Service functionality and data on behalf of customers from within the Assisted Service application. For each user, the agent can see the same functions and data that the user can, with the same privileges as the user's assigned role. For details, see *Assisted Service Application Guide for Oracle Billing Insight*.

For details on the application functionality that each user role can access (privileges), see *Implementation Guide for Oracle Billing Insight*.

Sample Self-Service application Dashboard pages are included for the following user roles:

- "Sample Dashboard for the Admin Role (B2B)" on page 13
- "Sample Dashboard for the Subscriber Role" on page 14
- "Sample Dashboard for the User Role With a Postpay Account" on page 15
- "Sample Dashboard for the User Role With a Pre-Pay Account" on page 16

Sample Dashboard for the Admin Role (B2B)

Figure 1 shows a sample Self-Service Dashboard for the business Admin role.

Figure 1. Sample Dashboard for the Admin Role

Sample Dashboard for the Subscriber Role (B2B)

Figure 2 shows a sample Self-Service Dashboard for the business Subscriber role.

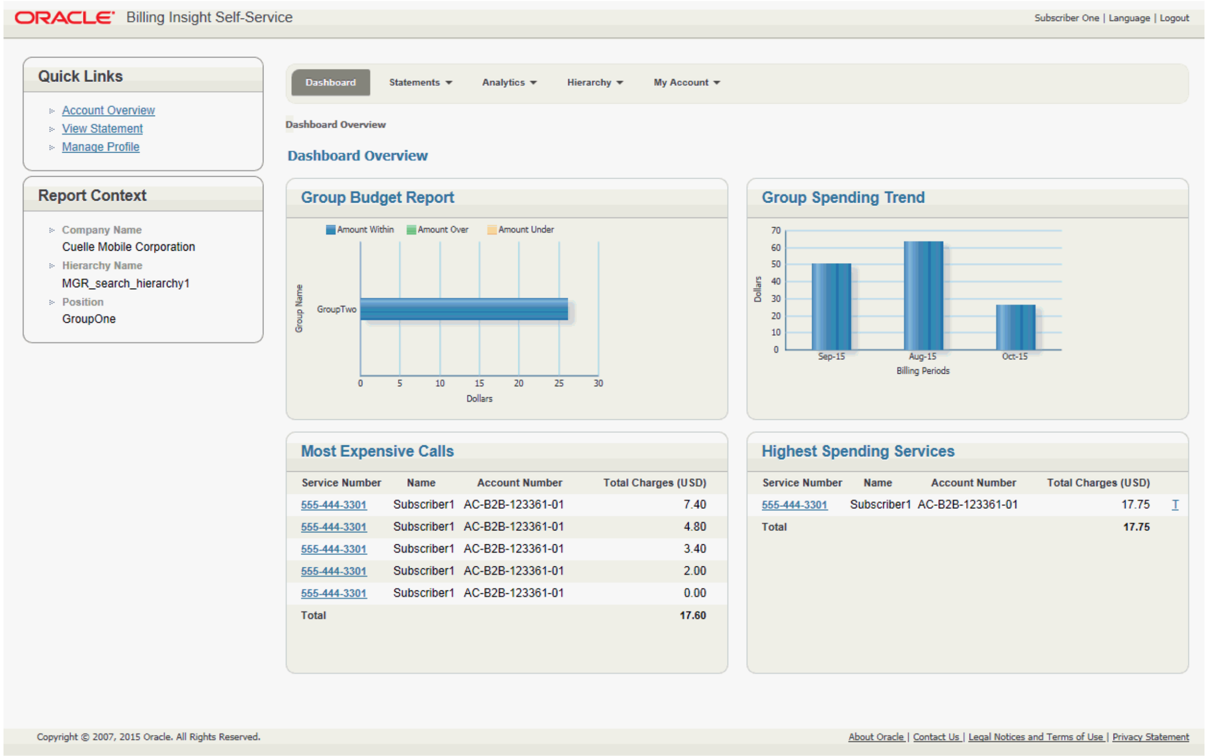

Figure 2. Sample Dashboard for the Subscriber Role

Sample Dashboard for the User Role (B2C Postpay Account)

Figure 3 shows a sample Self-Service Dashboard for the User role for a consumer user with a postpay account.

Figure 3. Sample Dashboard for the User Role With a Postpay Account

Sample Dashboard for the User Role (B2C Pre-Pay Account)

Figure 4 shows a sample Self-Service Dashboard for the User role for a consumer user with a prepay account.

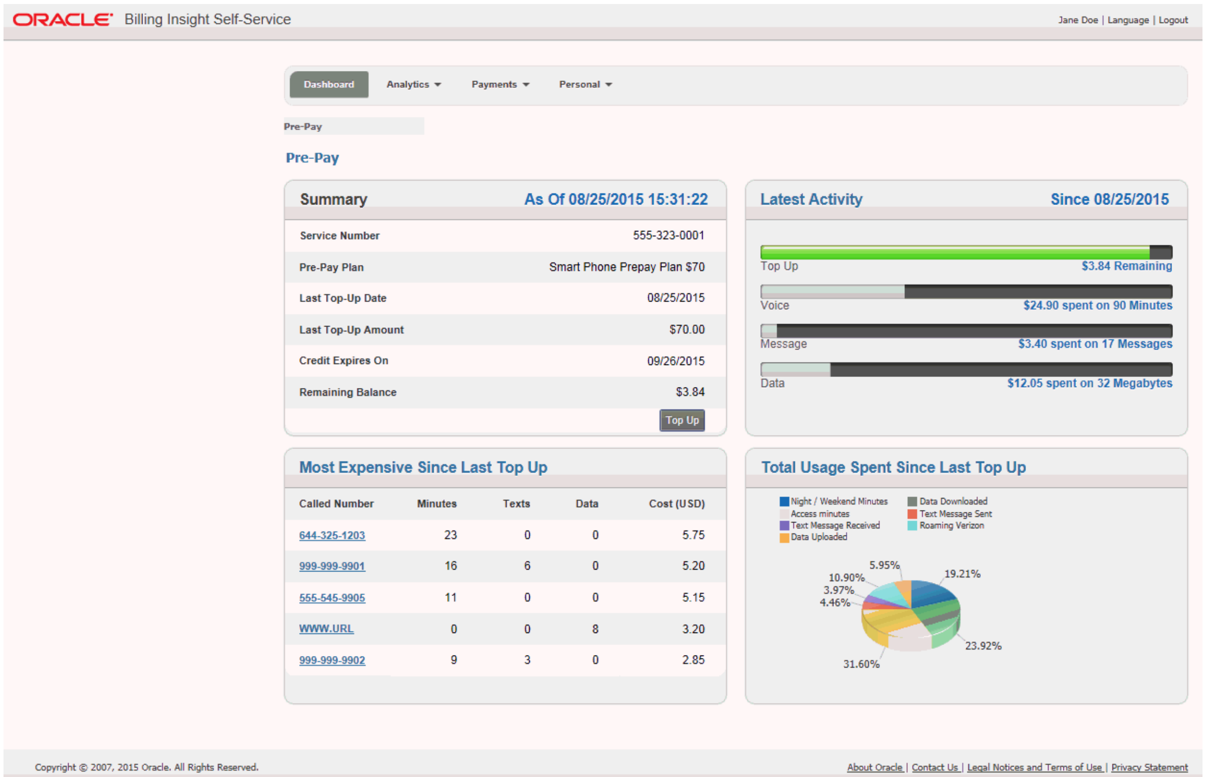

Figure 4. Sample Dashboard for the User Role With a Pre-Pay Account

Common UI Elements

Pages in the Self-Service application share some common user interface elements for navigating and searching for information. These elements frame the main page area that displays user data.

Common UI elements in the Self-Service application are:

- **Masthead.** The masthead displays at the top of each page and displays the application name, user name, and links for choosing a language and logging out. For details, see “Masthead Element” on page 17.
- **Mailing Address module (Consumer users only, if Web Services are enabled)**. The Mailing Address module displays in all pages that a B2C User accesses and displays the user’s address.
- **Quick Links module (Not shown for prepay accounts).** A list of quick links appears on the left side of each page for direct access to a few functional areas of the Self-Service application. Business and consumer users see a different set of quick links. For details, see “Quick Links Module” on page 18.

- **Report Context module (Business users only).** Report context information appears on the left side of each page, showing the name of the company, hierarchy, and position the user is assigned to, and which defines the scope of the report data displayed on the page. For details, see “Report Context Module (Business Edition Only)” on page 19.
- **Scheduled Payments module (Not shown for prepay accounts).** In the payment-related use cases, a list of scheduled payments appears on the left side of each page in payment-related use cases, showing the payments scheduled by account number and date. For details, see “Scheduled Payments Module” on page 20.
- **Tab menus.** Tab menus on each page provide subnavigation for individual functions. Business and consumer user roles see a different sets of tab menus.For details, see “Tab Menus” on page 20.
- **Logical Paths.** Logical paths show the navigation path to each page and provide live links for navigating back. For details, see “Logical Paths” on page 24.
- **Footer module.** The footer displays at the bottom of each screen and displays legal notices and provider contact links. For details, see “Footer Element” on page 25.
- **Paging element.** When needed, the paging element appears to let users navigate multiple report pages. For details, see “Paging Element” on page 25.
- **Download and printer-friendly element.** Where available, the download and printer-friendly features let users download and print reports. For details, see “Download and Printer-Friendly Elements” on page 26.

Masthead Element

The masthead appears at the top of each page in the Self-Service application, as shown in Figure 5.

Figure 5. Masthead Element

The individual masthead components are described in Table 2.

Table 2. Masthead Components

Component	Description
Text: ORACLE© Billing Insight Self-Service	Standard Oracle company logo with copyright symbol, and the application name.
Data: User Name	Displays the name of the user logged into the current session.
Text and link: Language	Displays the Change Language use case. For details, see “Use Case: Setting Personal Preferences” on page 305.
Text and link: Logout	Displays the Logout use case. For details, see “Use Case: Logging Out of the Self-Service Application” on page 33.

Quick Links Module

Quick Links provide access to frequently used functions in the Self-Service application. Quick links vary for business and consumer users, and do not appear on prepay screens.

Quick Links for Business Users

Figure 6 shows the Quick Links module displayed to business users.

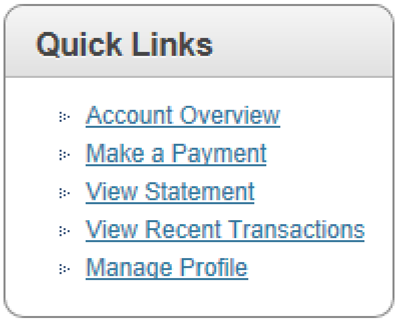

Figure 6. Quick Links Module for Business Users

Table 3. describes the quick links displayed to business users.

Table 3. Quick Links (Business Users)

Quick Link	Use Case
Account Overview	"Use Case: Viewing the Dashboard Overview (Business Edition, Billing Hierarchy)" on page 41
Make a Payment	"Use Case: Making a One-Time Payment" on page 204
View Statement	"Use Case: Viewing a Billing Summary (Business Edition Only)" on page 57
View Recent Transactions	"Use Case: Viewing Payment Activity" on page 237
Manage Profile	"Use Case: Updating a Personal Profile" on page 289

Quick Links for Consumer Users

Figure 7 shows the Quick Links module displayed to consumer users.

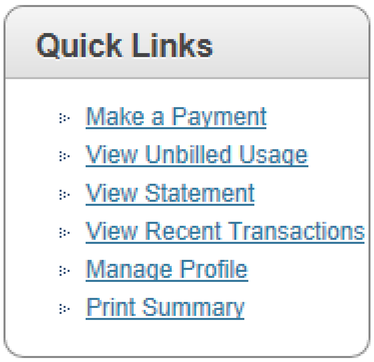

Figure 7. Quick Links Module for Consumer Users

Table 4. describes the quick links displayed to consumer users.

Table 4. Quick Links (Consumer Users)

Quick Link	Use Case
Make a Payment	"Use Case: Making a One-Time Payment" on page 204
View Unbilled Usage	"Use Case: Viewing Unbilled Usage" on page 51
View Statement	"Use Case: Viewing a Statement Summary" on page 63
View Recent Transactions	"Use Case: Viewing Payment Activity" on page 237
Manage Profile	"Use Case: Updating a Personal Profile" on page 289
Print Summary	Displays the File Download dialog for printing a bill summary, similar to the first page of a printed bill. Users can also choose to have this summary sent to them as part of a notification. For details, see "Use Case: Setting Notifications" on page 295. This summary is not available as an application Web page.

Report Context Module (Business Edition Only)

The Report Context module displays in all use cases in the Business Edition that present Self-Service report information. The report context displays the following information, which identifies the user's hierarchy position and defines the scope of the report:

- Text and data: Company Name *Company name*
- Text and data: Hierarchy Name *Hierarchy name*
- Text and data: Position *Position*

Figure 8 shows the Report Context module displayed to business users.

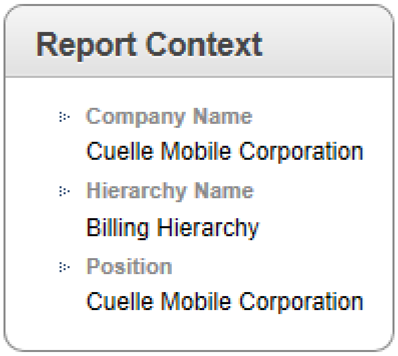

Figure 8. Report Context Module for Business Users

Scheduled Payments Module

The Scheduled Payments module displays in all payment-related use cases, showing all payments scheduled for the account. The Scheduled Payments module does not appear for consumer prepay accounts.

The Scheduled Payments module contains the following elements:

- Text and data: Account Number *Account number*
- Text and data: Date *Date*
- Text (If applicable): No Scheduled Payments

Figure 9 shows the Scheduled Payments module.

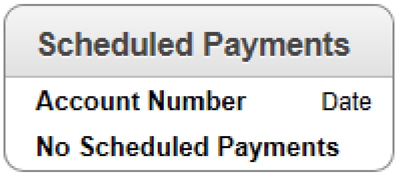

Figure 9. Scheduled Payments Module

Tab Menus

Tab menus appear across the top of all pages in the Self-Service application. Tab menus vary for the following:

- "Tab Menus for Business Users" on page 21
- "Tab Menus for Consumer Users (Postpay Accounts)" on page 23
- "Tab Menus for Consumer Users (Prepay Accounts)" on page 24

Tab Menus for Business Users

Figure 10 shows the tab menus that display to business users in the Self-Service application.

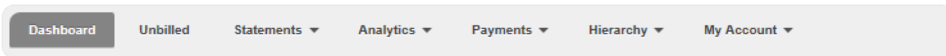

Figure 10. Tab Menus for Business Users

Table 5 describes the tab menu options for business users.

Table 5. Tab Menu Options (Business Users)

Tab Menu	Options	Target Pages
Dashboard	None	Dashboard Overview
Unbilled	None	Unbilled Usage
Statements	Billing Summary (Billing hierarchy only) Summary Account Service Usage Detail	Billing Summary Statement Summary Account Summary Service Summary Usage Summary Usage Detail
Analytics	Billing (Billing hierarchy only) Business (Business hierarchy only) Find Calls Custom Reports	Analytics Find Calls Custom Reports
Payments	One-Time Recurring Activity Accounts	One-Time Payment Recurring Payment Payment Activity Payment Accounts

Table 5. Tab Menu Options (Business Users)

Tab Menu	Options	Target Pages
Hierarchy	Manage Search Compare Admin submenu options: ■ Create ■ Copy ■ Import ■ Publish ■ Download ■ Expire ■ Delete	Manage Hierarchies Search Hierarchy Compare Hierarchy Create Hierarchy Copy Hierarchy Import Hierarchy Publish Hierarchy Download Hierarchy Expire Hierarchy Delete Hierarchy
My Account	Personal submenu options: ■ User Profile ■ Notifications ■ Contacts ■ Preferences	View Profile Notifications Contacts User Preferences
My Account	Company submenu options: ■ Profile ■ Contacts ■ User ■ Settings	Company Profile Company Contacts Users Administrative Settings

Tab Menus for Consumer Users (Postpay Accounts)

Figure 11 shows the tab menus that display to consumer users with postpay accounts in the Self-Service application.

Figure 11. Tab Menus for Consumer Users (Postpay Accounts)

Table 6 shows the tab menu options for consumer users with postpay accounts.

Table 6. Tab Menu Options (Consumer Users, Postpay)

Tab Menu	Options	Target Pages
Dashboard	None	Dashboard
Unbilled	None	Unbilled Usage
Statements	Summary Account Service Usage Detail	Statement Summary Account Summary Service Summary Usage Summary Usage Detail
Analytics	Billing Find Calls Custom Reports	Analytics Find Calls Custom Reports
Payments	One-Time Recurring Activity Accounts	One-Time Payment Recurring Payment Payment Activity Payment Accounts
My Account	User Profile Notifications Contacts Preferences	View Profile Notifications Contacts User Preferences

Tab Menus for Consumer Users (Prepay Accounts)

Figure 12 shows the tab menus that display to consumer users with prepay accounts in the Self-Service application.

Figure 12. Tab Menus for Consumer Users (Prepay Accounts)

Table 7 shows the tab menu options for consumer prepay accounts

Table 7. Tab Menu Options (Consumer Users, Prepay)

Tab Menu	Options	Target Pages
Dashboard	None	Dashboard
Analytics	Billing	Analytics - Standard Reports (3)
Payments	Top-Up Activity Accounts	Pre Pay Top Up Payment Activity Payment Accounts
Personal	User Profile Notifications Preferences	User Details Notifications User Preferences

Logical Paths

Logical paths appear beneath the tabs on each page and show the tab and options leading to the page, for example:

- Statements > Account Summary
- My Account > Personal > User Profile
- Analytics > Billing Reports > Account Billing Overview

Live links within the path let the user navigate back within the same functional tab area.

Figure 13 shows an example of the logical path element.

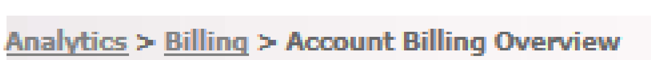

Figure 13. Logical Path Element

Footer Element

The footer displays at the bottom of each screen and displays legal notices and provider contact links.

Figure 14 shows the footer that appears on Self-Service application pages.

Figure 14. Footer Element

Table 8 describes the components of the footer element.

Table 8. Footer Components

Component	Description
Text: *Copyright© 2007, 2015 Oracle. All Rights Reserved.*	The current Oracle copyright statement.
Text and link: About Oracle	Displays the Oracle Web site.
Text and link: Contact Us	Displays the Contact Oracle page on the Oracle Web site.
Text and link: Legal Notices and Terms of Use	Displays Oracle's Privacy Policy Overview on the Oracle Web site.
Text and link: Privacy Statement	Displays Oracle's Privacy Policy Overview on the Oracle Web site.

Paging Element

The paging element displays on detail tables when the number of rows returned exceeds a configured value.

Figure 15 shows an example of the Paging element.

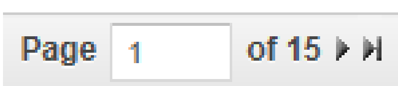

Figure 15. Paging Element

Table 9 describes the components of the paging element.

Table 9. Paging Element Components

Component	Description
Paging *Number* of *Total*	Text and data.
Page field prompt	Field where the user can enter a specific page number.
Next and Prev buttons	Navigation buttons appear when applicable.

Download and Printer-Friendly Elements

Most reporting use cases provide file download and printer-friendly options in the Self-Service application.

Figure 16 shows an example of the Download and Printer-Friendly elements.

Figure 16. Download and Printer-Friendly Elements

CSV and XML are standard download formats and are available in each use case where the Download element appears. PDF file format is also available in the following use cases:

- Print Summary (B2C User only.) For details about the Print Summary Quick Link, see Table 4 on page 19.
- "Use Case: Viewing a Statement Summary" on page 63
- "Use Case: Viewing the Account Billing Overview Report" on page 86
- "Use Case: Viewing the Service Details Report" on page 114
- "Use Case: Viewing the Total Cost by Plan Report" on page 120

Table 10 describes the components of the download and printer-friendly elements.

Table 10. Download and Printer-Friendly Components

Component	Description
Download	This feature contains the following components: ■ Text and drop-down list: Download *List* ■ Button: Download Action: Displays the File Download dialog for saving the report in the selected format.
Printer-Friendly	This feature contains the following elements: ■ Icon: Printer-friendly ■ Text and link: Printer-Friendly Link target: Displays the report in printer-friendly format and displays the Print dialog.

Common Exceptions

The following exceptions can occur throughout the Self-Service application:

- Error messages display in response to the following:
  - The search criteria return no results.
  - One of the form fields is left blank when submitted.
  - Invalid characters are entered.
- The application times out and displays the Login page.

3 Enrolling and Logging In

This chapter describes use cases for logging in to the Self-Service application. It includes the following topics:

- Use Case: Enrolling As a User (Business Edition Only) on page 29
- Use Case: Enrolling As a User (Consumer Edition Only) on page 30
- Use Case: Logging Into the Self-Service Application on page 32
- Use Case: Logging Out of the Self-Service Application on page 33
- Use Case: Forgot User ID on page 34
- Use Case: Forgot Password on page 36
- Use Case: Resetting a Password on page 39

Use Case: Enrolling As a User (Business Edition Only)

This use case lets a business user enroll in the Self-Service application. A user must first be created by an administrator and then he or she receives an automated email containing the login link.

Main Path for Enrolling as a User

The main path occurs when a user clicks the link in the email he or she receives, displaying the Create Personal Password and Security Question page.

Alternate Paths for Enrolling as a User

An alternate path occurs when a user clicks Enroll on the Login page.

Create Personal Password and Security Question Page Elements

Table 11 describes the elements of this page.

Table 11. Create Personal Password and Security Question Page Elements

Page Element	Description
Title Text	Reset Password
Create Personal Password and Security Question Module	This module displays the following elements: ■ Module title text: Create Personal Password and Security Question ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *Password *Field* ■ Text and blank field for data entry: *Confirm Password *Field* ■ Text and blank field for data entry: *Security Question *Field* ■ Text and blank field for data entry: *Security Answer *Field* ■ Button: Submit Action: Saves the data and displays the Login page. For details, see "Login Page Elements" on page 33. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field.

Use Case: Enrolling As a User (Consumer Edition Only)

This use case lets a consumer user self-enroll in the Self-Service application.

Main Path for Enrolling as a User

The main path occurs when a user clicks the link in the automated email he or she receives, displaying the User Enrollment page.

Alternate Paths for Enrolling as a User

An alternate path occurs when a user clicks Enroll on the Login page.

User Enrollment Page Elements

Table 12 describes the elements of this page.

Table 12. User Enrollment Page Elements

Page Element	Description
Title Text	User Enrollment
Enroll as a User Module	This module displays the following elements: ■ Module title text: Enroll as a User ■ Button: Next Action: Enrolls the user and displays the Login page. For details, see "Login Page Elements" on page 33. ■ Button: Cancel Action: Cancels the action. ■ Text: Enrollment for Consumer users only. Business Customers must contact a Customer Care Representative. ■ Text: Billing Information ■ Text and blank field for data entry: *Billing Account Number *Field* ■ Text and blank field for data entry: *Service Number *Field* ■ Text: Personal Information ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *First Name *Field* ■ Text and blank field for data entry: Middle Name *Field* ■ Text and blank field for data entry: *Last Name *Field*

Table 12. User Enrollment Page Elements

Page Element	Description
Enroll as a User Module, continued	■ Text: Mailing Address ■ Text and blank field for data entry: Address Line 1 *Field* ■ Text and blank field for data entry: Address Line 2 *Field* ■ Text and blank field for data entry: Address Line 3 *Field* ■ Text and blank field for data entry: City *Field* ■ Text and drop-down list: Country *List* ■ Text and drop-down list: State *List* ■ Text and blank field for data entry: Postal Code *Field*
Enroll as a User Module, continued	■ Text: Contact Information ■ Text and blank field for data entry: Home Phone Number *Field* ■ Text and blank field for data entry: Mobile Phone Number *Field* ■ Text and drop-down list: Mobile Service Provider *List* ■ Text: Email Address ■ Text and blank field for data entry: *Email Address *Field* ■ Text and blank field for data entry: *Confirm Email Address *Field* ■ Text: *Required Fields

Use Case: Logging Into the Self-Service Application

This use case lets users log into the Self-Service application.

Main Path for Logging Into the Self-Service Application

The main path occurs when a user runs the Self-Service application and is presented with the Login page.

Alternate Paths for Logging Into the Self-Service Application

The following alternate paths can occur in this use case:

- A new consumer user enrolls in the Self-Service application.
- A new business user creates a new password and security question.
- A user clicks the Login link on the Logout page.
- A user clicks Submit on the Forgot User ID page.

- A user clicks Submit on the Reset Password page.

Login Page Elements

Table 13 describes the elements of this page.

Table 13. Login Page Elements

Page Element	Description
Title Text	Login
Login Module	This module displays the following elements: ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *Password *Field* ■ Text and link: Forgot Password Link target: Displays the Forgot Password page. For details, see "Forgot Password Page Elements" on page 37. ■ Text: *Required Fields ■ Button: Submit Action: Logs the user into the Self-Service application and displays the Dashboard Overview page. For details about business and consumer Dashboard pages, see one of the following: ■ "Dashboard Overview Page Elements (Business Edition, Billing Hierarchy)" on page 42 ■ "Dashboard Overview Page Elements (Business Edition, Business Hierarchy)" on page 44 ■ "Dashboard Page Elements (Consumer Edition)" on page 47 ■ Button: Reset Action: Clears the form fields.

Use Case: Logging Out of the Self-Service Application

This use case lets users log out of the Self-Service application.

Main Path for Logging Out of the Self-Service Application

The main path occurs when a user clicks Logout in the page header, and the Self-Service application logs out the user and displays the Logout page.

Alternate Paths for Logging Out of the Self-Service Application

The following alternate paths can occur in this use case:

- A user's session times out, and the Self-Service application automatically ends the session and displays the Login page.
- A user closes the browser during a session.

Logout Page Elements

Table 14 describes the elements of this page.

Table 14. Logout Page Elements

Page Element	Description
Title Text	None
Logout Module	This module displays the following elements: ■ Text and data: You have successfully logged out of the E-Billing application. To ensure maximum protection of your personal information, we recommend that you close your *Browser Name*. ■ Text and link: Login Link target: Displays the Login page. For details, see "Login Page Elements" on page 33.

Use Case: Forgot User ID

This use case lets users retrieve his or her forgotten user ID.

Main Path for Forgot User ID

The main path occurs when a user forgets his or her password, clicks Forgot User ID on the Login page.

Alternate Paths for Forgot User ID

No alternate paths occur in this use case.

Forgot User ID Page Elements

Table 15 describes the elements of this page.

Table 15. Forgot User ID Page Elements

Page Element	Description
Title Text	Forgot User ID
Enter Account Information Module (Business Edition Only)	This module displays the following elements: ■ Radio button, text, and blank field for data entry: *Button* *Account Number *Field* ■ Text: [OR] ■ Radio button, text, and blank field for data entry: *Button* *Service Agreement ID *Field* ■ Button: Next Action: Displays the Provide Security Answer module. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Table 15. Forgot User ID Page Elements

Page Element	Description
Enter Email Address Module (Consumer Edition Only)	This module displays the following elements: ■ Module title text: Enter Email Address ■ Button: Next Action: Displays the Login page with the following message: Success Message Email notification has been sent to your email address with your User ID. For details, see "Login Page Elements" on page 33. ■ Button: Cancel Action: Cancels the action. ■ Text and blank field for data entry: *Email Address *Field* ■ Text: *Required Fields
Provide Security Answer Module	This module displays the following elements: ■ Button: Submit Action: Displays the Login page with the following message: Success Message Email notification has been sent to your email address with your User ID. For details, see "Login Page Elements" on page 33. ■ Button: Cancel Action: Cancels the action. ■ Text and drop-down list: *Select a Question *List* ■ Text and blank field for data entry: *Security Answer *Field* ■ Text: *Required Fields

Use Case: Forgot Password

This use case lets a user answer the security question after forgetting his or her password.

Main Path for Forgot Password

The main path occurs when a user forgets his or her password, clicks Forgot Password on the Login page.

Alternate Paths for Forgot Password

No alternate paths occur in this use case.

Forgot Password Page Elements

Table 16 describes the elements of this page.

Table 16. Forgot Password Page Elements

Page Element	Description
Title Text	Forgot Password
Enter User ID Module	This module displays the following elements: ■ Module title text: Enter User ID ■ Text and blank field for data entry: *User ID *Field* ■ Button: Next Action: Displays the Enter Account Information module. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Table 16. Forgot Password Page Elements

Page Element	Description
Enter Account Information Module	This module displays the following elements: ■ Module title text: Enter Account Information ■ (Business Edition only) Text and blank field for data entry: *Email Address *Field* ■ (Consumer Edition only) Text and blank field for data entry: *Billing Account Number *Field* ■ (Consumer Edition only) Text and blank field for data entry: *Service Number *Field* ■ Button: Next Action: Displays the Select Security Question and Enter Answer module. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field
Select Security Question and Enter Answer Module	This module displays the following elements: ■ Module title text: Select Security Question and Enter Answer ■ Text and drop-down list: *Select a Question *List* ■ Text and blank field for data entry: *Security Answer *Field* ■ Button: Next Action: Displays the Reset Password page. For details, see “Reset Password Page Elements” on page 39. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Use Case: Resetting a Password

This use case lets a user reset his or her password.

Main Path for Resetting a Password

The main path occurs when a user answers the security question on the Forgot Password page.

Alternate Paths for Resetting a Password

No alternate paths occur in this use case.

Reset Password Page Elements

Table 17 describes the elements of this page.

Table 17. Reset Password Page Elements

Page Element	Description
Title Text	Reset Password
Enter New Password Module	This module displays the following elements: ■ Module title text: Enter New Password ■ Text and blank field for data entry: *Password *Field* ■ Text and blank field for data entry: *Confirm Password *Field* ■ Button: Submit Action: Saves the user's new password and displays the Login page. For details, see "Login Page Elements" on page 33. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field.

4 Viewing Billing and Business Account Overviews

This chapter describes use cases for viewing a dashboard of overview information for a billing or business account. It includes the following topics:

- Use Case: Viewing the Dashboard Overview (Business Edition, Billing Hierarchy) on page 41
- Use Case: Viewing the Dashboard Overview (Business Edition, Business Hierarchy) on page 43
- Use Case: Viewing the Dashboard Overview (Consumer Edition) on page 47

Use Case: Viewing the Dashboard Overview (Business Edition, Billing Hierarchy)

This use case lets business users view summary information for a the user's role permissions and assignment in a billing hierarchy, including payments made and current balance information, an account billing trend graph, and total cost by account and budget spending charts.

Main Path for Viewing the Dashboard Overview (Business Edition, Billing Hierarchy)

The main path occurs when a user logs in, and the Self-Service application displays the Dashboard Overview page.

Alternate Paths for Viewing the Dashboard Overview (Business Edition, Billing Hierarchy)

The following alternate paths can occur in this use case:

- A user clicks Dashboard.
- A user selects the Account Overview quick link.
- A user selects the billing hierarchy type on the Manage Hierarchy page, then clicks Dashboard or the Account Overview quick link.

Dashboard Overview Page Elements (Business Edition, Billing Hierarchy)

Table 18 describes the elements of this page.

Table 18. Dashboard Overview Page Elements (Business Edition, Billing Hierarchy)

Page Element	Description
Title Text	Dashboard Overview
Account Billing Overview Module	This module displays the following elements: ■ Module title text and link: Account Billing Overview Link target: Displays the Billing Summary page. For details, see "Billing Summary Page Elements" on page 58. ■ Text and data: ■ Previous Balance on Statement *Amount* ■ Payments and Adjustments *Amount* ■ Balance Forward *Amount* ■ Current Monthly Charges *Amount* ■ Taxes and Fees *Amount* ■ Statement Amount Due *Amount* ■ Payment Due Date *Date* ■ *Number Days* until Payment Due Date. If the payment due date has past, then the background appears red. Otherwise, the background appears green. ■ Text and link: Pay Now Link target: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204.
Account Billing Trend Module	This module displays the following elements: ■ Module title text and link: Account Billing Trend Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94. ■ Graphical bar chart: Shows dollars billed for the three most recent monthly billing periods. A red bar indicates that the value is greater than the standard deviation. ■ Text and data, based on the standard deviation: *Date* charges were *Amount higher or lower* than average. If charges higher than average are noted, then the background is red. Otherwise, the background is green.

Table 18. Dashboard Overview Page Elements (Business Edition, Billing Hierarchy)

Page Element	Description
Total Cost by Account Module	This module displays the following elements: ■ Module title text and link: Total Cost by Account Link target: Displays the Account Billing Overview page. For details, see "Account Billing Overview Page Elements" on page 87. ■ Graphical pie chart with color key: Shows percentage billed for each account.
Budget Spending Overview Module	This module displays the following elements: ■ Module title text and link: Budget Spending Overview Link target: Displays the Service Budget Report page. For details, see "Service Budget Report Page Elements" on page 172. ■ Graphical bar chart with color key: Shows dollars spent for each service number and indicates whether the amount is within budget.

Use Case: Viewing the Dashboard Overview (Business Edition, Business Hierarchy)

This use case lets a business user view summary information for the user's role permissions and assignment in a business hierarchy, including a group budget chart, group spending chart, list of most expensive calls, and highest spending services.

Main Path for Viewing the Dashboard Overview (Business Edition, Business Hierarchy)

The main path occurs when a user logs in, selects Business Hierarchy on the Manage Hierarchy page, then clicks Dashboard or the Account Overview quick link.

Alternate Paths for Viewing the Dashboard Overview (Business Edition, Business Hierarchy)

The following alternate paths can occur in this use case:

- A user clicks Dashboard.
- A user selects the Account Overview quick link.

Dashboard Overview Page Elements (Business Edition, Business Hierarchy)

Table 19 describes the elements of this page.

Table 19. Dashboard Overview Page Elements (Business Edition, Business Hierarchy)

Page Element	Description
Title Text	Dashboard Overview
Group Budget Report Module	This module displays the following elements: ■ Module title text and link: Group Budget Report Link target: Displays the Group Budget Report page. For details, see "Group Budget Report Page Elements" on page 170. ■ Graphical bar chart with color key: Shows dollars spent for each group and number and indicates whether the amount is within budget.
Group Spending Trend Module	This module displays the following elements: ■ Module title text and link: Group Spending Trend Link target: Displays the Group Spending Trend page. For details, see "Group Spending Trend Page Elements" on page 110. ■ Graphical bar chart: Shows dollars billed for the three most recent monthly billing periods. A red bar indicates that the value is greater than the standard deviation.t

Table 19. Dashboard Overview Page Elements (Business Edition, Business Hierarchy)

Page Element	Description
Most Expensive Calls Module	This module displays the following elements: ■ Module title text and link: Most Expensive Calls Link target: Displays the Most Expensive Calls page. For details, see “Most Expensive Calls Page Elements” on page 135. ■ Column headings: 　■ Text: Service Number 　■ Text: Name 　■ Text: Account Number 　■ Text and data: Total Charges (*Currency*) ■ Column Content: 　■ Data and link: Service Number 　Link target: Displays the Service Transaction Details dialog box. For details, see “Service Transaction Detail Dialog Box Elements” on page 79. 　■ Data: User name 　■ Data: Account number 　■ Data: Total charges ■ Content of the total row: 　■ Text: Total 　■ Data: Total report charges

Table 19. Dashboard Overview Page Elements (Business Edition, Business Hierarchy)

Page Element	Description
Highest Spending Services Module	This module displays the following elements: ■ Module title text and link: Highest Spending Services Link target: Displays the Highest Spending Services page. For details, see “Highest Spending Services Page Elements” on page 130. ■ Column headings: ■ Text: Service Number ■ Text: Name ■ Text: Account Number ■ Text and data: Total Charges (*Currency*) ■ Column Content: ■ Data and link: Service Number Link target: Displays the Service Transaction Details dialog box. For details, see “Service Transaction Detail Dialog Box Elements” on page 79. ■ Data: User name ■ Data: Account number ■ Data: Total charges ■ Text and link: T Link target: Displays the Service Spending Trend page. For details, see “Service Spending Trend Page Elements” on page 112. ■ Content of the total row: ■ Text: Total ■ Data: Total report charges

Use Case: Viewing the Dashboard Overview (Consumer Edition)

This use case lets a consumer user view summary information for a billing account, including total charges, payments made, current usage, monthly trends, and total costs by plan.

Main Path for Viewing the Billing Account Dashboard (Consumer Edition)

The main path occurs when a user logs in, and the Self-Service application displays the Dashboard page.

Alternate Paths for Viewing the Billing Account Dashboard (Consumer Edition)

An alternate path occurs when a user clicks Dashboard.

Dashboard Page Elements (Consumer Edition)

Table 20 describes the elements of this page.

Table 20. Dashboard Page Elements (Consumer Edition)

Page Element	Description
Title Text	Dashboard
Prompt Module	This module displays the following element: ■ Text and drop-down list: Billing Account Number: *List*

Table 20. Dashboard Page Elements (Consumer Edition)

Page Element	Description

Account Summary Module	This module displays the following elements:
	■ Module title text and link: Account Summary
	Link target: Displays the Statement Summary page. For details, see “Statement Summary Page Elements” on page 63.
	■ Text and data:
	  ■ Statement Date *Date*
	  ■ Previous Balance on Statement *Amount*
	  ■ Payments and Adjustments *Amount*
	  ■ Balance Forward *Amount*
	  ■ Current Monthly Charges *Amount*
	  ■ Taxes and Fees *Amount*
	  ■ Statement Amount Due *Amount*
	  ■ Payment Due Date *Date*
	  ■ *Number Days* until Payment Due Date. If the payment due date has past, then the background appears red. Otherwise, the background appears green.
	■ Text and link: Pay Now
	Link target: Displays the Pay Now - Billing Account page. For details, see “Main Path for Making an Anonymous Payment” on page 229.

Table 20. Dashboard Page Elements (Consumer Edition)

Page Element	Description

Current Usage Module	This module displays the following elements:
	■ Module title text, data, and link: Current Usage Since *Date*
	Link target: Displays the Unbilled Usage page. For details, see "Unbilled Usage Page Elements" on page 51.
	■ Horizontal percentage bar showing days used.
	■ Percentage bar label, text and data: Days *Number* Days used
	■ Colored, horizontal percentage bars showing usage for each tariff (voice, messages, data):
	  ■ **Red.** Usage is at or above 90% of the plan allotment.
	  ■ **Yellow.** Usage is between 65% and 90% of the plan allotment.
	  ■ **Green.** Usage is less than 65% of the plan allotment.
	■ Percentage bar labels:
	  ■ Text and data: Days *Number* Days used
	  ■ Text and data: Voice (Minutes) *Percentage* of *Number* Minutes
	  ■ Text and data: Message (Messages) *Percentage* of *Number* Messages
	  ■ Text and data: Data (Kilobytes) *Number* Kilobytes used

Account Billing Trend Module	This module displays the following elements: ■ Module title text and link: Account Billing Trend Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94. ■ Data and link: *Billing Period* Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94. ■ Graphical bar chart: Shows dollars billed for the three most recent monthly billing periods. A red bar indicates that the value is greater than the standard deviation. ■ Text and data, based on the standard deviation: *Date* charges were *Amount higher or lower* than average. If charges higher than average are noted, then the background is red. Otherwise, the background is green.
Total Cost by Plan Module	This module displays the following elements: ■ Module title text and link: Total Cost by Plan Link target: Displays the Total Cost by Plan page. For details, see "Total Cost by Plan Page Elements" on page 121. ■ Graphical pie chart with color key: Shows percentage billed for each plan charge type for the selected billing account and billing period.

5 Viewing Unbilled Usage

This chapter describes use cases for viewing unbilled usage information for a billing account. It includes the following topics:

- Use Case: Viewing Unbilled Usage on page 51
- Use Case: Viewing Unbilled Usage by Service Agreement on page 53
- Use Case: Viewing Unbilled Transaction Details on page 54

Use Case: Viewing Unbilled Usage

This use case lets a business or consumer user view the percentage of voice, message, and data that the account has used in the current billing period, referred to as *unbilled usage*.

Main Path for Viewing Unbilled Usage

The main path occurs when a user clicks Usage or the since date on the Dashboard to display the Unbilled Usage page for the account.

Alternate Paths for Current Unbilled Usage

An alternate path occurs when a user clicks Unbilled.

Unbilled Usage Page Elements

Table 21 describes the elements of this page.

Table 21. Unbilled Usage Page Elements

Page Element	Description
Page Title	Unbilled Usage
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Account Number *List* ■ Button: View Action: Displays the Unbilled Usage page for the selected account. For details, see "Unbilled Usage Page Elements" on page 51. ■ Download and printer-friendly elements

Table 21. Unbilled Usage Page Elements

Page Element	Description

Current (Unbilled) Usage Module	This module displays the following elements:
	■ Module title text: Current (Unbilled) Usage
	■ Horizontal percentage bar showing days used.
	■ Percentage bar label, text and data: Days *Number* Days used
	■ Colored, horizontal percentage bars showing usage for each tariff (voice, messages, data):
	  ■ **Red.** Usage is at or above 90% of the plan allotment.
	  ■ **Yellow.** Usage is between 65% and 90% of the plan allotment.
	  ■ **Green.** Usage is less than 65% of the plan allotment.
	■ Percentage bar labels:
	  ■ Text and data: Days *Number* Days used
	  ■ Text and data: Voice (Minutes) *Percentage* of *Number* Minutes
	  ■ Text and data: Message (Messages) *Percentage* of *Number* Messages
	  ■ Text and data: Data (Kilobytes) *Number* Kilobytes used

Service Plan Module	This module displays the following elements:
	■ Module title data: Plan Name
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Voice (Minutes)
	  ■ Text and sorting link: Message (Messages)
	  ■ Text and sorting link: Data (Kilobytes)
	■ Column content:
	  ■ Data and link: Service number
	  Link target: Displays the Unbilled Usage for a Service Number page. For details, see "Current Unbilled Usage by Service Agreement Page Elements" on page 53.
	  ■ Data: Number of minutes
	  ■ Data: Number of messages
	  ■ Data: Number of kilobytes

Use Case: Viewing Unbilled Usage by Service Agreement

This use case lets a business or consumer user view unbilled usage for a particular service number on a selected account.

Main Path for Viewing Unbilled Usage by Service Agreement

The main path occurs when a user clicks a service number on the Unbilled Usage page to display the Unbilled Usage for a Service Agreement page for the account.

Alternate Paths for Viewing Unbilled Usage by Service Agreement

No alternate paths occur in this use case.

Current Unbilled Usage by Service Agreement Page Elements

Table 22 describes the elements of this page.

Table 22. Unbilled Usage by Service Agreement Page Elements

Page Element	Description
Page Title	Unbilled Usage by Service Agreement
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Account Number *List* ■ Text and drop-down list: Service Number *List* ■ Button: View Action: Displays the Unbilled Usage page for the selected account. ■ Download and printer-friendly elements

Table 22. Unbilled Usage by Service Agreement Page Elements

Page Element	Description

Unbilled Usage by Service Agreement Module	This module displays the following elements:
	■ Module title data: *Plan Name - Service Number*
	■ Column titles:
	  ■ Text: Tariff
	  ■ Text: No. of Transactions
	  ■ Text: Usage
	  ■ Text: Unit

Unbilled Usage by Service Agreement Module, continued	■ Column content:
	  ■ For each tariff type:
	    ❑ Text and data, show or hide links: Total *Tariff Type*
	    ❑ Data and links: Charge types for each tariff, such as Data Downloaded, Text Message Received, and Peak Call Outgoing.
	Link target: Displays the Unbilled Transaction Details dialog box. For details, see "Unbilled Transaction Details Dialog Box Elements" on page 55.
	  ■ Number of transactions
	  ■ Usage amount
	  ■ Units

Use Case: Viewing Unbilled Transaction Details

This use case lets a business or consumer user view unbilled transaction details for a particular tariff type. The unbilled transactions are for a particular service number associated with the selected account.

Main Path for Viewing Unbilled Transaction Details

The main path occurs when a user clicks a tariff type on the Unbilled Usage by Service Agreement page to display the Unbilled Transaction Details dialog box.

Alternate Paths for Unbilled Transaction Details

No alternate paths occur in this use case.

Unbilled Transaction Details Dialog Box Elements

Table 23 describes the elements of this dialog box.

Table 23. Unbilled Transaction Details Dialog Box Elements

Dialog Box Element	Description
Title Text	Transaction Details

Transaction Details Module	This module displays the following elements:
	■ Module title text and data: Unbilled Usage Detail Charges (*Number* items)
	■ Column titles:
	  ■ Called Number
	  ■ Date
	  ■ Time
	  ■ Destination
	  ■ One of the following:
	    ❑ Kilobytes
	    ❑ Messages
	    ❑ Minutes
	■ Column content:
	  ■ Data: Called number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Destination
	  ■ One of the following:
	    ❑ Data: Number of kilobytes in the data transaction
	    ❑ Data: Number of messages in the transaction
	    ❑ Data: Number of minutes in the call

6 Viewing Statement Reports

This chapter describes use cases for viewing statement reports. It includes the following topics:

- Use Case: Viewing a Billing Summary (Business Edition Only) on page 57
- Use Case: Viewing a Group or Service Spending Trend Report (Business Edition Only) on page 60
- Use Case: Viewing a Statement Summary on page 63
- Use Case: Viewing a Statement Account Summary on page 65
- Use Case: Viewing a Statement Service Summary on page 69
- Use Case: Viewing a Statement Usage Summary on page 73
- Use Case: Viewing Statement Usage Details on page 75
- Use Case: Viewing Service Transaction Details on page 78
- Use Case: Disputing a Transaction on page 81

Use Case: Viewing a Billing Summary (Business Edition Only)

This use case lets a business user view billing summary information for a selected statement period, including monthly charges, usage charges, credits, other charges, and taxes. Users can expand the report to view billing summary information by account and service number as well as by company.

Main Path for Viewing a Billing Summary

The main path occurs when a user clicks Account Billing Overview on the Dashboard to display the Billing Summary page for the most recent time period.

Alternate Paths for Viewing a Billing Summary

The following alternate paths can occur in this use case:

- A user clicks Statement, then Billing Summary.
- A user clicks the View Statement quick link.

Billing Summary Page Elements

Table 24 describes the elements of this page.

Table 24. Billing Summary Page Elements

Page Element	Description
Page Title Text	Billing Summary
Prompt Module	This module displays the following elements: ■ Text: Select Period ■ Text and drop-down list: From *List* ■ Text and drop-down list: To *List* ■ Button: View Action: Displays the selected report. ■ Button: Pay Now Action: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204.

Table 24. Billing Summary Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Column headings:
	  ■ Text: Type
	  ■ Text: Number
	  ■ Text: Description
	  ■ Text and data: Monthly Charges (*Currency*)
	  ■ Text and data: Usage Charges (*Currency*)
	  ■ Text and data: Credits (*Currency*)
	  ■ Text and data: Other Charges (*Currency*)
	  ■ Text and data: Taxes (*Currency*)
	  ■ Text and data: Total (*Currency*)
	  ■ Icon: Report
	■ Column content:
	  ■ Button: Expand or contract list
	  ■ Icon: Company, account, or service number icon
	  ■ Data: Line aggregation type (Company, Account, or Service)
	  ■ Data and link: Account or service number
	Link target: Account number links display the Statement Summary page. For details, see "Statement Summary Page Elements" on page 63. Service number links display the Service Summary page. For details, see "Service Summary Page Elements" on page 70.
	  ■ Data: Line description: The name of the company, description of the account charges, or the name associated with the service number.
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits charges
	  ■ Data: Other charges

Table 24. Billing Summary Page Elements

Page Element	Description
Report Details Module, continued	■ Data: Taxes ■ Data: Total row charges ■ Icon and link: Report Link target: Displays the Group or Service Spending Trend Reports page. For details, see "Group or Service Spending Trend Reports Page Elements" on page 61. ■ Content of the total row: ■ Text: Total ■ Data: Total monthly charges ■ Data: Total usage charges ■ Data: Total credits charges ■ Data: Total other charges ■ Data: Total taxes ■ Data: Total report charges ■ Icon and link: Report Link target: Displays the Group or Service Spending Trend Reports page. For details, see "Group or Service Spending Trend Reports Page Elements" on page 61.

Use Case: Viewing a Group or Service Spending Trend Report (Business Edition Only)

This use case lets a business user view spending information for a company, account, or service number for a billing period. The report includes monthly charges, usage charges, credits, and other charges for the group or service. Users can also make payments on the charges.

Main Path for Viewing a Group or Service Spending Trend Report

The main path occurs when a user clicks the Report icon for a group or service on the Billing Summary page to display the Group or Service Summary page.

Alternate Paths for Viewing a Group or Service Spending Trend Report

No alternate paths occur in this use case.

Group or Service Spending Trend Reports Page Elements

Table 25 describes the elements of this page.

Table 25. Group or Service Spending Trend Reports Page Elements

Page Element	Description
Page Title Text	Group or Service Spending Trend Reports
Prompt Module	This module displays the following elements: ■ Text: Report Period ■ Text and drop-down list: From *List* ■ Text and drop-down list: To *List* ■ Button: Pay Now Action: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204. ■ Download and printer-friendly elements

Table 25. Group or Service Spending Trend Reports Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Column headings:
	  ■ Text and sorting link: Billing Periods
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total (*Currency*)

Report Details Module, continued	■ Column content:
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits charges
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total row charges
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total monthly charges
	  ■ Data: Total usage charges
	  ■ Data: Total credits charges
	  ■ Data: Total other charges
	  ■ Data: Total taxes
	  ■ Data: Total report charges

Use Case: Viewing a Statement Summary

This use case lets a user view statement summary information for an account, including balances, current charges, payments and adjustments, billing history, and notes.

Main Path for Viewing a Statement Summary

The main path occurs when a user clicks Statements, then Summary, to display the Statement Summary page for the most recent statement. In the Consumer Edition, the main path occurs when a user clicks the Account Summary heading link on the Dashboard.

Alternate Paths for Viewing a Statement Summary

No alternate paths occur in the Business Edition. In the Consumer Edition, an alternate path occurs when the user clicks the View Statement quick link.

Statement Summary Page Elements

Table 26 describes the elements of this page.

Table 26. Statement Summary Page Elements

Page Element	Description
Page Title Text	Statement Summary
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Statement Date *List* ■ Text and data: Statement Number *Statement Number* ■ Button: Pay Now Action: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204. ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 26. Statement Summary Page Elements

Page Element	Description
Account Summary Module	This module displays the following elements: ■ Module title text: Account Summary ■ Text and link: Previous Balance Link target: Displays the Statement Summary page for the previous month’s statement. ■ Data: Previous Balance Amount ■ Text and data: Payments Posted - Thank You *Amount* ■ Text and data: Total Adjustments *Amount* ■ Text and data: Balance Forward Due Immediately *Amount*
Current Charges Module	This module displays the following elements: ■ Module title text: Current Charges ■ Text and data: Monthly Charges *Amount* ■ Text and data: Usage Charges *Amount* ■ Text and data: Credits *Amount* ■ Text and data: Other Charges *Amount* ■ Text and data: Taxes *Amount* ■ Text and data links: Total Current Charges Due by *Date Amount* Link target: Displays the Account Summary page. For details, see “Account Summary Page Elements” on page 66. ■ Text and data: Total Account Charges *Amount*
Payments Module	This module displays the following elements: ■ Module title text and data: Payments (*Number* items) ■ Data, for each payment: *Payment Transaction Description* and *Amount* ■ Text and data: Total Payments *Amount*
Adjustments Module	This module displays the following elements: ■ Module title text and data: Adjustments (*Number* items) ■ Data, for each adjustment: *Adjustment Transaction Description* and *Amount* ■ Text and data: Total Adjustments *Amount*

Table 26. Statement Summary Page Elements

Page Element	Description
Notes Module	This module displays the following elements: ■ Module title text and data: Notes (*Number* items) ■ Data, for each note: Note text
Billing History Module	This module displays the following elements: ■ Module title text: Billing History ■ Bar chart: Shows dollars billed for the three most recent monthly billing periods. A red bar indicates that the value is greater than the standard deviation.

Use Case: Viewing a Statement Account Summary

This use case lets a user view a summary of account and service charges on a statement for the selected account.

Main Path for Viewing a Statement Account Summary

The main path occurs when a user clicks Statement, then clicks Account to display the Account Summary page for the selected account's most recent statement.

Alternate Paths for Viewing a Statement Account Summary

An alternate path occurs when a user clicks Total Current Charges Due By on the Statement Summary page, and the Account Summary page displays for the selected statement.

Account Summary Page Elements

Table 27 describes the elements of this page.

Table 27. Account Summary Page Elements

Page Element	Description
Page Title Text	Account Summary
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Statement Date *List* ■ Text and data: Statement Number *Statement Number* ■ Button: Pay Now Action: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204. ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 27. Account Summary Page Elements

Page Element	Description

Account Charges Module	This module displays the following elements:
	■ Module title text and data: Account Charges (*Number* items)
	■ Column headings:
	  ■ Text: Description
	  ■ Text and data: Monthly Charges (*Currency*)
	  ■ Text and data: Usage Charges (*Currency*)
	  ■ Text and data: Credits (*Currency*)
	  ■ Text and data: Other Charges (*Currency*)
	  ■ Text and data: Taxes (*Currency*)
	  ■ Text and data: Total (*Currency*)
	■ Column content:
	  ■ Data: Account charge description
	  ■ Data: Total monthly charges
	  ■ Data: Total usage charges
	  ■ Data: Total credits charges
	  ■ Data: Total other charges
	  ■ Data: Total taxes
	  ■ Data: Account charges total
	■ Content of the total account charges row:
	  ■ Text: Total account charges
	  ■ Data: Total monthly charges
	  ■ Data: Total usage charges
	  ■ Data: Total credits charges
	  ■ Data: Total other charges
	  ■ Data: Total taxes
	  ■ Data: Account charges total

Table 27. Account Summary Page Elements

Page Element	Description

Service Charges Module Elements	This module displays the following elements:
	■ Module title text: Service Charges (*Number* items)
	■ Column headings:
	  ■ Text: Service Number
	  ■ Text: Service Name
	  ■ Text and data: Monthly Charges (*Currency*)
	  ■ Text and data: Usage Charges (*Currency*)
	  ■ Text and data: Credits (*Currency*)
	  ■ Text and data: Other Charges (*Currency*)
	  ■ Text and data: Taxes (*Currency*)
	  ■ Text and data: Total (*Currency*)
	■ Column content:
	  ■ Data and link: Service Number
	Link target: Displays the Service Summary page. For details, see "Service Summary Page Elements" on page 70.
	  ■ Data: Service Name
	  ■ Data: Total Monthly Charges
	  ■ Data: Total Usage Charges
	  ■ Data: Total Credits Charges
	  ■ Data: Total Other Charges
	  ■ Data: Total Taxes
	  ■ Data: Service Charges Total
	■ Content for the total service charges row:
	  ■ Text: Total Service Charges
	  ■ Data: Total Monthly Charges
	  ■ Data: Total Usage Charges
	  ■ Data: Total Credits Charges
	  ■ Data: Total Other Charges
	  ■ Data: Total Taxes
	  ■ Data: Service Charges Total

Table 27. Account Summary Page Elements

Page Element	Description

Total Current Charges Module	This module displays the following elements:
	■ Column headings:
	  ■ Text: Description
	  ■ Text and data: Monthly Charges (*Currency*)
	  ■ Text and data: Usage Charges (*Currency*)
	  ■ Text and data: Credits (*Currency*)
	  ■ Text and data: Other Charges (*Currency*)
	  ■ Text and data: Taxes (*Currency*)
	  ■ Text and data: Total (*Currency*)
	■ Content of the page totals row:
	  ■ Text: Total Current Charges
	  ■ Data: Total Monthly Charges
	  ■ Data: Total Usage Charges
	  ■ Data: Total Credits Charges
	  ■ Data: Total Other Charges
	  ■ Data: Total Taxes
	  ■ Data: Current Charges Total

Use Case: Viewing a Statement Service Summary

This use case lets a user view details about services and plan features for a service number associated with the selected account.

Main Path for Viewing a Statement Service Summary

The main path occurs when a user clicks Statement, then clicks Service to display the Service Summary page for the selected account's most recent statement.

Alternate Paths for Viewing a Statement Service Summary

An alternate path occurs when a user clicks a service number on the Account Summary page, and the Service Summary page displays for the selected service number.

Service Summary Page Elements

Table 28 describes the elements of this page.

Table 28. Service Summary Page Elements

Page Element	Description
Page Title Text	Service Summary
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Service Number *List* ■ Text and drop-down list: Statement Date *List* ■ Text and data: Statement Number *Statement Number* ■ Button: Pay Now Action: Displays the Make a One-Time Payment page. For details, see "Make a One-Time Payment Page Elements" on page 204. ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 28. Service Summary Page Elements

Page Element	Description

Service Details Module Elements	This module displays the following elements:
	■ Module title text and data: Service Details
	■ Column titles for monthly service charges:
	  ■ Text and sorting link: Monthly Service Charges
	  ■ Text and sorting link: Description
	  ■ Text, data, and sorting link: Total (*Currency*)
	■ Column content for monthly service charges:
	  ■ Data: Type of monthly service charge
	  ■ Data: Description of monthly service charge type
	  ■ Data: Amount
	■ Data: Total monthly services
	■ Column titles for usage charges:
	  ■ Text and sorting link: Usage Charges
	  ■ Text and sorting link: Description
	  ■ Text, data, and sorting link: Total (*Currency*)
	■ Column content for usage charges:
	  ■ Data: Tariff type
	  ■ Data: Description of usage charge
	  ■ Data and link: Amount
	  Link target: Displays the Usage Summary page. For details, see "Usage Summary Page Elements" on page 73.
	■ Data: Total usage charges

Table 28. Service Summary Page Elements

Page Element	Description

Credit Charges Module	This module displays the following elements:
	■ Module title text and data: Credit Charges (*Number* items)
	■ The following tabular information appears for each credit charge category:
	  ■ Column titles:
	    ❑ Data and sorting link: Credit charge category
	    ❑ Text, data, and sorting link: Total (*Currency*)
	  ■ Column content:
	    ❑ Data: Charge description
	    ❑ Data: Amount
	  ■ Content of the final row for each charge type:
	    ❑ Text: Charge Type
	    ❑ Data: Amount
	■ Content of the final row for all current charges:
	  ■ Text and data: Total current charges for *Service Number*
	  ■ Data: Amount

Plan Summary Module	This module displays the following elements:
	■ Module title text: Plan Summary
	■ Data and sorting link: Service plan name
	■ For each service plan feature, data label and data: *Plan Feature* and *Allotment or Cost*
	■ For each service plan:
	  ■ Data and sorting link: Optional feature category
	  ■ For each chosen option, data: Option level and cost

Use Case: Viewing a Statement Usage Summary

This use case lets a user view a list of statement usage charges for a service number associated with the selected account.

Main Path for Viewing a Statement Usage Summary

The main path occurs when a user clicks Statement, and then clicks Usage to display the Usage Summary page for the first service number on the selected account's most recent statement.

Alternate Paths for Viewing a Statement Usage Summary

An alternate path occurs when a user clicks a usage charge amount on the Service Summary report, and the Usage Summary page displays for the selected tariff type.

Usage Summary Page Elements

Table 29 describes the elements of Usage Summary page.

Table 29. Usage Summary Page Elements

Page Element	Description
Page Title Text	Usage Summary
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Service Number *List* ■ Text and drop-down list: Usage Type *List* ■ Text: Show Split Billing ■ Text and radio buttons: Yes *Button* No *Button* ■ Text and drop-down list: Statement Date *List* ■ Text and data: Statement Number *Statement Number* ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 29. Usage Summary Page Elements

Page Element	Description

Usage Charges Module	This module displays the following elements:
	■ Module title text and data: Usage Charges (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Tariff
	  ■ Text and sorting link: Unit
	  ■ Text and sorting link: Allowance
	  ■ Text and sorting link: Total Usage
	  ■ Text and sorting link: Billable
	  ■ Text, data, and sorting link: Cost (*Currency*)

Usage Charges Module, continued	■ Column content:
	  ■ Data: Tariff charge description
	  ■ Data: Charge unit
	  ■ Data: Allowance amount
	  ■ Data: Usage quantity
	  ■ Data: Number of billable units
	  ■ Data: Amount
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total usage number
	  ■ Data: Total number of billable units
	  ■ Data and link: Total of usage charges
	  Link target: Displays the Usage Details page. For details, see “Usage Detail Page Elements” on page 75.

Use Case: Viewing Statement Usage Details

This use case lets a user view statement usage details for a service number associated with the selected account. A user can also filter the usage data by various criteria.

Main Path for Viewing Statement Usage Details

The main path occurs when a user clicks Statement, then clicks Details, to display the Usage Detail page for the first service number on the selected account’s most recent statement.

Alternate Paths for Viewing Statement Usage Details

An alternate path occurs when a user clicks the total cost of usage charges on the Usage Summary page, and the Usage Detail page displays for the selected statement and service number.

Usage Detail Page Elements

Table 30 describes the elements of this page.

Table 30. Usage Detail Page Elements

Page Element	Description
Page Title Text	Usage Detail
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Service Number *List* ■ Text and drop-down list: Usage Type *List* ■ Text and drop-down list: Search For *List* ■ Text and drop-down list: Statement Date *List* ■ Text and data: Statement Number *Statement Number* ■ Blank field for entering a search value ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 30. Usage Detail Page Elements

Page Element	Description

Usage Detail Charges Module	This module displays the following elements:
	■ Module title text and data: Usage Detail Charges (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Number called
	  ■ Text and sorting link: Category
	  ■ Icon: Memo
	  ■ Icon: Dispute
	  ■ Text and sorting link: Tariff
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Volume
	  ■ Text, data, and sorting link: Total Charges (*Currency*)

Table 30. Usage Detail Page Elements

Page Element	Description
Usage Detail Charges Module, continued	■ Column content: ■ Data: Date ■ Data: Usage charge time ■ Data and link: Number called Link target: Displays the Phone Book Entry dialog box for viewing and entering contact information for the service number. For details, see "Phone Book Entry Dialog Box Elements" on page 78. ■ Data: Category ■ Icon and link (when applicable): Memo Link target: Displays the Service Transaction Detail dialog box. For details, see "Service Transaction Detail Dialog Box Elements" on page 79. ■ Icon and link (when applicable): Dispute Link target: Displays the Dispute Details dialog box. For details, see "Dispute Details Dialog Box Elements" on page 82. ■ Data and link: Usage charge tariff Link target: Displays the Service Transaction Detail dialog for the charge. For details, see "Service Transaction Detail Dialog Box Elements" on page 79. ■ Data: Destination ■ Data: Volume and unit ■ Data: Total usage charge

Phone Book Entry Dialog Box Elements

Table 31 describes the elements of this page.

Table 31. Phone Book Entry Dialog Box Elements

Page Element	Description
Page Title Text	Phone Book Entry

Prompt Module	This module displays the following elements:
	■ Text and data: Service Number *Service number*
	■ Text and drop-down list: Contact Type *List*
	■ Text and editable data: *First Name *First name*
	■ Text and editable data: *Last Name *Last name*
	■ Text and editable data: *Alias *Alias*
	■ Text, one of the following:
	  ■ Personal - From your Personal Address Book.
	  ■ Business - From your Business Address Book.
	■ Button: Save
	Action: Saves the data.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Viewing Service Transaction Details

This use case lets a user view details about a particular transaction for a service number associated with the selected account.

Main Path for Viewing Service Transaction Details

The main path occurs when a user clicks a charge transaction tariff on the Usage Detail page for a usage detail transaction to display the Service Transaction Detail dialog box.

Alternate Paths for Viewing Service Transaction Details

The following alternate paths can occur in this use case:

- A user clicks a category on the Service Details page.
- A user clicks a service number on the Most Expensive Calls report.
- A user clicks a service number on the Longest Calls report.
- A user clicks a service number on the Dashboard Overview page for a business hierarchy.

- A user clicks the Memo icon or the category for a call on the Find Calls report.

Service Transaction Detail Dialog Box Elements

Table 32 describes the elements of this dialog box.

Table 32. Service Transaction Detail Dialog Box Elements

Dialog Box Element	Description
Title Text	Service Transaction Detail
Heading Module	This module displays the following elements ■ (Business Edition Only) Text and data: Company Name *Company name* ■ (Business Edition Only) Text and data: Hierarchy Name *Hierarchy Name* ■ (Business Edition Only) Text and data: Position *Position* ■ Download and printer-friendly elements

Table 32. Service Transaction Detail Dialog Box Elements

Dialog Box Element	Description
Service Transaction Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and data: Date *Date* ■ Text and data: Time *Time* ■ Text and data: Service Number *Number* ■ Text and data: Number Called *Number* ■ Text and data: Contact Name *Name* ■ Text and data: Call Category *Category* ■ Text and data: Call Tariff *Tariff* ■ Text and data: Call Area *Area* ■ Text and data: Call Direction *Direction* ■ Text and data: Usage Type *Type* ■ Text and data: Carrier *Carrier* ■ Text and data: Call Originated *Location* ■ Text and data: Call Destination *Location*
Service Transaction Module, continued	■ Text and data: Volume *Volume* ■ Text and data: Total Usage Charges (*Currency) Amount* ■ Text and drop-down list: Change Call Category *List* ■ Text and blank field for entering a memo: Add Memo *Field* ■ Blank field for entering a search value ■ Button: Submit Action: Submits the change to the call category. ■ Button: Close Action: Closes the dialog box. ■ Button: Dispute Action: Displays the Dispute dialog box. For details, see "Dispute Dialog Box Elements" on page 81.

Use Case: Disputing a Transaction

This use case lets a user dispute a service transaction.

Main Path for Disputing a Transaction

The main path occurs when a user clicks Dispute on the Service Transaction Detail dialog box.

Alternate Paths for Disputing a Transaction

An alternate path occurs when the user clicks the Dispute icon for a call on the Find Calls report.

Dispute Dialog Box Elements

Table 33 describes the elements of this dialog box.

Table 33. Dispute Dialog Box Elements

Dialog Box Element	Description
Title Text	Dispute
Dispute Module	This module displays the following elements: ■ Text: Dispute Transaction ■ Text: To complete your dispute, review the transaction information below, provide a description of the dispute and select a reason for the dispute. ■ Text: Transaction Date: ■ Text and data: Account Number *Account number* ■ Text and data: Amount *Amount* ■ Text and blank field for entering a description: Description: *Field* ■ Text: Please select the reason for this dispute: ■ Radio button and text: *Button* Unauthorized Transaction(s) ■ Radio button and text: *Button* Duplicate Statement ■ Radio button and text: *Button* Incorrect Details ■ Text and data: If the reason for your dispute is not listed above, please contact a customer service representative at *Phone number* ■ Button: Submit Action: Displays the Dispute Details dialog box. For details, see "Dispute Details Dialog Box Elements" on page 82. ■ Button: Cancel Action: Cancels the action.

Dispute Details Dialog Box Elements

Table 34 describes the elements of this dialog box.

Table 34. Dispute Details Dialog Box Elements

Dialog Box Element	Description
Title Text	Dispute Details
Dispute Transaction Module	This module displays the following elements: ■ Text and data: Dispute Date: *Date* ■ Text and data: Transaction Date: *Transaction date* ■ Text and data: Amount Number: *Amount number* ■ Text and data: Dispute Number: *Dispute number* ■ Text and data: Amount: *Amount* ■ Text and data: Dispute Description: *Dispute description* ■ Text and data: Dispute Reason: *Dispute reason* ■ Text and data: Latest Status: *Dispute status* ■ Text and data: A services representative will contact you within 48 hours. You will be contacted by phone or by a posted reply to your message number of *Message number.* If a reply is posted to your message, you will receive an email to alert you. ■ Button: Close Action: Closes the dialog box. ■ Download and printer-friendly elements

7 Viewing Standard Analytic Reports

This chapter describes use cases for viewing and customizing standard billing and business analytic reports. It includes the following topics:

- Use Case: Selecting Analytic Reports on page 83
- Use Case: Viewing the Account Billing Overview Report on page 86
- Use Case: Customizing the Account Billing Overview Report on page 90
- Use Case: Viewing the Account Billing Trend Report on page 93
- Use Case: Viewing the Statement Billing Overview Report on page 96
- Use Case: Viewing the Service Billing Overview Report on page 98
- Use Case: Viewing the Service Billing Trend Report on page 101
- Use Case: Viewing the Group Summary Report (Business Edition Only) on page 104
- Use Case: Viewing the Group Spending Report (Business Edition Only) on page 106
- Use Case: Viewing the Group Spending Trend Report (Business Edition Only) on page 109
- Use Case: Viewing the Service Spending Trend Report (Business Edition Only) on page 112
- Use Case: Viewing the Service Details Report on page 114
- Use Case: Customizing the Service Details Report on page 117
- Use Case: Viewing the Total Cost by Plan Report on page 120
- Use Case: Viewing the Find Calls Report on page 123
- Use Case: Viewing a List of Custom Reports on page 126
- Use Case: Deleting a Custom Report on page 128

Use Case: Selecting Analytic Reports

This use case lets a user select billing and business analytic reports to view, including standard, top X, and batch reports. Business Edition users can also select cost management reports.

Main Path for Selecting Analytic Billing Reports

The main path occurs when a user clicks Analytics, then Billing to display the Analytics page listing the available reports.

Alternate Paths for Selecting Analytic Reports

No alternate paths occur in this use case.

Analytics Page Elements

Table 35 describes the elements of this page.

Table 35. Analytics Page Elements

Page Element	Description
Page Title	Analytics
Standard Billing Reports Module (Business and Consumer Editions)	This module displays the following elements in the Standard Reports module for both the Business and Consumer Editions: ■ Module title text: Standard Reports ■ Text and link (Not available to B2B subscribers: Account Billing Overview Link target: Displays the Account Billing Overview page. For details, see "Account Billing Overview Page Elements" on page 87. ■ Text and link (Not available to B2B subscribers): Account Billing Trend Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94. ■ Text and link (Not available to B2B subscribers): Statement Billing Overview Link target: Displays the Statement Billing Overview page. For details, see "Statement Billing Overview Page Elements" on page 96. ■ Text and link: Service Billing Overview Link target: Displays the Service Billing Overview page. For details, see "Service Billing Overview Page Elements" on page 99. ■ Text and link (Not available to B2B subscribers): Service Billing Trend Link target: Displays the Service Billing Trend page. For details, see "Service Billing Trend Page Elements" on page 102. ■ Text and link: Service Details Link target: Displays the Service Details page. For details, see "Service Details Page Elements" on page 115. ■ Text and link (Not available to B2B subscribers): Total Cost by Plan Link target: Displays the Total Cost by Plan page. For details, see "Total Cost by Plan Page Elements" on page 121.

Table 35. Analytics Page Elements

Page Element	Description
Standard Business Reports Module (Business Edition Only)	This module displays the following elements in the Standard Reports module for the Business Edition only: ■ Module title text: Standard Reports ■ Text and link (Not available to B2B subscribers): Group Summary Link target: Displays the Group Summary page. For details, see "Group Summary Page Elements" on page 104. ■ Text and link (Not available to B2B subscribers): Group Spending Link target: Displays the Group Spending page. For details, see "Group Spending Page Elements" on page 107. ■ Text and link (Not available to B2B subscribers): Group Spending Trend Link target: Displays the Group Spending Trend page. For details, see "Group Spending Trend Page Elements" on page 110. ■ Text and link: Service Spending Trend Link target: Displays the Service Spending Trend page. For details, see "Service Spending Trend Page Elements" on page 112.
Top X Reports Module (Business and Consumer Editions)	This module displays the following elements in the Top X Reports module for the both the Business and Consumer Editions: ■ Module title text: Top X Reports ■ Text and link: Highest Spending Services Link target: Displays the Highest Spending Services page. For details, see "Highest Spending Services Page Elements" on page 130. ■ Text and link: Most Expensive Calls Link target: Displays the Most Expensive Calls page. For details, see "Most Expensive Calls Page Elements" on page 135. ■ Text and link: Longest Calls Link target: Displays the Longest Calls page. For details, see "Longest Calls Page Elements" on page 138. ■ Text and link: Most Frequently Called Numbers Link target: Displays the Most Frequently Called Numbers page. For details, see "Most Frequently Called Numbers Page Elements" on page 141. ■ Text and link: Most Frequently Called Destinations Link target: Displays the Most Frequently Called Destinations page. For details, see "Most Frequently Called Destinations Page Elements" on page 147. ■ Text and link: Most Frequently Called Countries Link target: Displays the Most Frequently Called Countries page. For details, see "Most Frequently Called Countries Page Elements" on page 155.

Table 35. Analytics Page Elements

Page Element	Description
Cost Management Reports Module (Business Edition Only)	This module displays the following elements in the Cost Management Reports module for the both the Business and Consumer Editions: ■ Module title text: Cost Management Module ■ Text and link (Not available to B2B subscribers): Group Budget Report Link target: Displays the Group Budget Report page. For details, see “Group Budget Report Page Elements” on page 170. ■ Text and link: Service Budget Report Link target: Displays the Service Budget Report page. For details, see “Service Budget Report Page Elements” on page 172. ■ Text and link (Not available to B2B subscribers): Budget Management Link target: Displays the Yearly Budget Report page. For details, see “Yearly Budget Report Page Elements” on page 174. ■ Text and link (Not available to B2B subscribers): Cost Reallocation Link target: Displays the Cost Reallocation page. For details, see “Cost Reallocation Page Elements” on page 178.
Batch Reports Module (Business and Consumer Editions)	This module displays the following elements in the Batch Reports module for the both the Business and Consumer Editions: ■ Module title text: Batch Reports Module ■ Text and link: Completed Link target: Displays the Completed Batch Reports page. For details, see Completed Batch Reports Page Elements on page 194. ■ Text and link: Pending Link target: Displays the Pending Batch Reports page. For details, see Pending Batch Reports Page Elements on page 188. ■ Text and link: Failed Link target: Displays the Failed Batch Reports page. For details, see Failed Batch Reports Page Elements on page 197. ■ Text and link: Scheduled Link target: Displays the Scheduled Batch Reports page. For details, see Scheduled Batch Reports Page Elements on page 191.

Use Case: Viewing the Account Billing Overview Report

This use case lets a user view the Account Billing Overview report, showing a pie or bar chart of charges for a period or range, plus details such as the number of contracts in the account and a breakdown of usage and other charges. A user can also choose another billing period or range.

Main Path for Viewing the Account Billing Overview Report

The main path occurs when a user clicks Analytics, Billing, and then Account Billing Overview to display the Account Billing Overview page.

Alternate Paths for Viewing the Account Billing Overview Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another analytic report page.
- A user clicks the Report tab on the Customize Account Billing Overview page.

Account Billing Overview Page Elements

Table 36 describes the elements of this page.

Table 36. Account Billing Overview Page Elements

Page Element	Description
Page Title	Account Billing Overview

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Overview page.
	  ■ Customize
	  Target: Displays the Customize Account Billing Overview page. For details, see "Customize Account Billing Overview Page Elements" on page 91.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text: Billing Reports
	■ Drop-down list for chart type: *List*
	■ Drop-down list for billing report: *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 36. Account Billing Overview Page Elements

Page Element	Description
Report Chart Module	This module displays either a bar or pie chart with the following elements: ■ **Bar chart.** Shows dollars billed for the most recent monthly billing periods. A red bar indicates that the value is greater than the standard deviation. ■ **Pie chart.** Shows percentage of billing amount for each account.

Table 36. Account Billing Overview Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Account Billing Overview Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: Number of Contracts
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Account Number
	  Link target: Displays the Service Billing Overview page. For details, see "Service Billing Overview Page Elements" on page 99.
	  ■ Data: Number of contracts
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data and link: Total charges
	  Link target: Displays the Statement Billing Overview page. For details, see "Statement Billing Overview Page Elements" on page 96
	  ■ Text and link: T
	  Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94.
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Monthly charges total
	  ■ Data: Usage charges total
	  ■ Data: Credits total
	  ■ Data: Other charges total
	  ■ Data: Taxes total
	  ■ Data: Total report charges
	  ■ Text and link: T
	  Link target: Displays the Account Billing Trend page. For details, see "Account Billing Trend Page Elements" on page 94.

Use Case: Customizing the Account Billing Overview Report

This use case lets a user create a custom Account Billing Overview report, narrowing the report for a specific selection criteria and fields.

Main Path for Customizing the Account Billing Overview Report

The main path occurs when a user clicks the Customize tab on the Account Billing Overview page.

Alternate Paths for Customizing the Account Billing Overview Report

No alternate paths occur in this use case.

Customize Account Billing Overview Page Elements

Table 37 describes the elements of this page.

Table 37. Customize Account Billing Overview Page Elements

Page Element	Description
Page Title	Customize Account Billing Overview

Prompt Module	This module displays the following elements:
	■ Module title text: Please enter the criteria for your custom report
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Overview page. For details, see “Account Billing Overview Page Elements” on page 87.
	  ■ Customize
	  Target: Displays the Customize Account Billing Overview page.
	■ Text and radio button: Period Range *Button*
	■ Text and drop-down list: Period Start *List*
	■ Text and drop-down list: Period End *List*
	■ Text and radio button: Relative Period Range *Button*
	■ Text and drop-down list: Previous *List* Reporting Periods
	■ Text and drop-down list: Account Charges *List*
	■ Text and blank fields for data entry: *Field* and *Field*
	■ Text and drop-down list: Usage Charges *List*
	■ Text and blank fields for data entry: *Field* and *Field*

Table 37. Customize Account Billing Overview Page Elements

Page Element	Description
Prompt Module, continued	■ Text and drop-down list: Adjustments *List* ■ Text and blank fields for data entry: *Field* and *Field* ■ Text and drop-down list: Discounts *List* ■ Text and blank fields for data entry: *Field* and *Field* ■ Text and drop-down list: Other Charges *List* ■ Text and blank fields for data entry: *Field* and *Field* ■ Text and drop-down list: Charges *List* ■ Text and blank fields for data entry: *Field* and *Field* ■ Text and drop-down list: Taxes *List* ■ Text and blank fields for data entry: *Field* and *Field* ■ Text and drop-down list: Total *List* ■ Text and blank fields for data entry: *Field* and *Field*
Column Selection Module	This module displays the following elements: ■ Module title text: Please select columns to display in a custom report. ■ Text and list: Available Fields *List* ■ Button: Add Action: Moves the highlighted field to the Current Display Fields list. ■ Button: Remove Action: Moves the highlighted field to the Available Fields list. ■ Text and list: Current Display Fields *List* ■ Button: Submit Action: Displays the Save Report Criteria module. ■ Button: Cancel Action: Cancels the action.

Table 37. Customize Account Billing Overview Page Elements

Page Element	Description
Save Report Criteria Module	This module displays the following elements: ■ Module title text: Save Report Criteria ■ Text and blank field for data entry: Report Name *Field* ■ Text: Period Range ■ Text: Period Start *Date* Period End *Date* ■ Button: Save Action: Displays the Confirm Custom Report module. ■ Button: Cancel Action: Cancels the action. ■ Report Chart and Report Details modules for the selected Account Billing report criteria. For details, see “Account Billing Overview Page Elements” on page 87. ■ Download and printer-friendly elements
Confirm Custom Report Module	This module displays the following elements: ■ Module title text: Confirm Custom Report ■ Text and data: Confirm that you want to save the following report: *Name*? ■ Button: Save Action: Saves the data and displays the Custom Reports page. For details, see “Custom Reports Page Elements” on page 127. ■ Button: Cancel Action: Cancels the action.

Use Case: Viewing the Account Billing Trend Report

This use case lets a user view the Account Billing Trend report for the selected billing account and period, showing a bar chart of charges plus billing trend details such as the number of contracts in the account and a breakdown of usage and other charges. A user can also choose another billing period or range.

Main Path for Viewing the Account Billing Trend Report

The main path occurs when a user clicks Account Billing Trend on the Dashboard Overview page to display the Account Billing Trend page for the billing account. In the Consumer Edition, the user clicks Account Billing Trend or the billing period in the Billing Trend module on the Dashboard page.

Alternate Paths for Viewing the Account Billing Trend Report

The following alternate paths can occur in this use case:

- A user clicks Analytics, Billing, and then Account Billing Trend.
- A user selects the report from the Prompt module on another analytic report page.
- A user clicks the T link on the Account Billing Overview report.

Account Billing Trend Page Elements

Table 38 describes the elements of this page.

Table 38. Account Billing Trend Page Elements

Page Element	Description
Page Title Text	Account Billing Trend
Prompt Module	This module displays the following elements: ■ Tabs: ■ Report Target: Displays the Account Billing Trend page. ■ Batch Request Target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182. ■ Text: Period Range ■ Text and drop-down list: From *List* ■ Text and drop-down list: To *List* ■ Text and drop-down list: Billing Reports *List* ■ Button: Submit Action: Displays the selected report. ■ Download and printer-friendly elements
Report Chart Module	The Billing Trend Bar Chart module displays a bar chart showing dollars billed for the selected billing period range. A red bar indicates that the value is greater than the standard deviation.

Table 38. Account Billing Trend Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Account Billing Trend Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Periods
	  ■ Text and sorting link: Number of Contracts
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total Charges (*Currency*)

Report Details Module, continued	■ Column content:
	  ■ Data and link: Billing period
	  Link target: Displays the Service Billing Overview page. For details, see "Service Billing Overview Page Elements" on page 99.
	  ■ Data: Number of contracts
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges
	■ Column content for total row:
	  ■ Text: Total
	  ■ Data: Monthly charges total
	  ■ Data: Usage charges total
	  ■ Data: Credits total
	  ■ Data: Other charges total
	  ■ Data: Taxes total
	  ■ Data: Total charges for the report

Use Case: Viewing the Statement Billing Overview Report

This use case lets a user view the Statement Billing Overview report for the selected billing account and period, showing a breakdown of usage and other charges for each statement. A user can also choose another billing period or range.

Main Path for Viewing the Statement Billing Overview Report

The main path occurs when a user clicks Analytics, Billing, and then Statement Billing Overview to display the Statement Billing Overview page.

Alternate Paths for Viewing the Statement Billing Overview Report

An alternate path occurs when a user selects the report from the Prompt module on another analytic report page.

Statement Billing Overview Page Elements

Table 39 describes the elements of this page.

Table 39. Statement Billing Overview page Elements

Page Element	Description
Page Title Text	Statement Billing Overview

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Billing Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 39. Statement Billing Overview page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Statement Billing Overview Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Statement Number
	  ■ Text and sorting link: Statement Date
	  ■ Text and sorting link: Billing Periods
	  ■ Text and sorting link: Account Number
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Statement Number
	  Link target: Displays the Statement Summary page. For details, see "Statement Summary Page Elements" on page 63.
	  ■ Data: Statement date
	  ■ Data: Billing periods
	  ■ Data: Account number
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges

Table 39. Statement Billing Overview page Elements

Page Element	Description
Report Details Module, continued	■ Column content for total row: ■ Text: Total ■ Data: Monthly charges total ■ Data: Usage charges total ■ Data: Credits total ■ Data: Other charges total ■ Data: Taxes total ■ Data: Total charges for the report

Use Case: Viewing the Service Billing Overview Report

This use case lets a user view the Service Billing Overview report for the selected billing account and period, showing a breakdown of usage and other charges by service number. A user can also choose one or all service numbers, and a new billing period or range.

Main Path for Viewing the Service Billing Overview Report

The main path occurs when a user clicks Analytics, Billing, and then Service Billing Overview to display the Service Billing Overview page.

Alternate Paths for Viewing the Service Billing Overview Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another analytic report page.
- A user clicks an account number on the Account Billing Overview report.

Service Billing Overview Page Elements

Table 40 describes the elements of this page.

Table 40. Service Billing Overview Page Elements

Page Element	Description
Page Title Text	Service Billing Overview

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Billing Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 40. Service Billing Overview Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Service Billing Overview Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Account Number
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total Charges (*Currency*)

Table 40. Service Billing Overview Page Elements

Page Element	Description
Report Details Module, continued	■ Column content: ■ Data and link: Service Number Link target: Displays the Service Details page. For details, see “Service Details Page Elements” on page 115. ■ Data: Name ■ Data: Account number ■ Data: Monthly charges ■ Data: Usage charges ■ Data: Credits ■ Data: Other charges ■ Data: Taxes ■ Data: Total charges ■ Text and link: T Link target: Displays the Service Billing Trend page. For details, see “Service Billing Trend Page Elements” on page 102. ■ Column content for total row: ■ Text: Total ■ Data: Monthly charges total ■ Data: Usage charges total ■ Data: Credits total ■ Data: Other charges total ■ Data: Taxes total ■ Data: Total charges for the report

Use Case: Viewing the Service Billing Trend Report

This use case lets a user view the Service Billing Trend report for the selected service number and period, showing a bar chart of charges plus billing trend details, such as breakdown of usage and other charges. A user can also choose one or all service numbers, and a new billing period or range.

Main Path for Viewing the Service Billing Trend Report

The main path occurs when a user clicks Analytics, Billing, and then Service Billing Trend to display the Service Billing Trend page.

Alternate Paths for Viewing the Service Billing Trend Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another analytic report page.
- A user clicks the T link on the one of the following reports:
  - Service Billing Overview
  - Highest Spending Services

Service Billing Trend Page Elements

Table 41 describes the elements of this page.

Table 41. Service Billing Trend page Elements

Page Element	Description
Page Title Text	Service Billing Trend

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Billing Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 41. Service Billing Trend page Elements

Page Element	Description
Chart Module	The chart module displays a bar chart showing dollars billed for the service numbers over the selected billing period range. A red bar indicates that the value is greater than the standard deviation.

Report Details Module	This module displays the following elements:
	■ Module title text and data: Service Billing Trend Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Periods
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Billing Periods
	  Link target: Displays the Service Details page. For details, see "Service Details Page Elements" on page 115.
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges
	■ Column content for total row:
	  ■ Text: Total
	  ■ Data: Monthly charges total
	  ■ Data: Usage charges total
	  ■ Data: Credits total
	  ■ Data: Other charges total
	  ■ Data: Taxes total
	  ■ Data: Total charges for the report

Use Case: Viewing the Group Summary Report (Business Edition Only)

This use case lets a user view group summary information for a business hierarchy, for a range of statement periods, including monthly charges, usage charges, credits, other charges, and taxes. Users can also expand the report to view group summary information service number.

Main Path for Viewing the Group Summary Report

The main path occurs when a user clicks Analytics, Business, and then Group Summary to display the Group Summary page.

Alternate Paths for Viewing the Group Summary Report

An alternate path occurs when a user selects the report from the Prompt module on another analytic business report page.

Group Summary Page Elements

Table 42 describes the elements of this page.

Table 42. Group Summary Page Elements

Page Element	Description
Page Title Text	Group Summary
Prompt Module	This module displays the following elements: ■ Text: Period Range ■ Text and drop-down list: From *List* ■ Text and drop-down list: To *List* ■ Text and drop-down list: Business Reports *List* ■ Button: Submit Action: Displays the selected report.

Table 42. Group Summary Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Column titles:
	  ■ Text: Type
	  ■ Text: Name
	  ■ Text: Description
	  ■ Text and data: Monthly Charges (*Currency*)
	  ■ Text and data: Usage Charges (*Currency*)
	  ■ Text and data: Credits (*Currency*)
	  ■ Text and data: Other Charges (*Currency*)
	  ■ Text and data: Taxes (*Currency*)
	  ■ Text and data: Total (*Currency*)
	  ■ Icon: Report
	■ Column content:
	  ■ Button: Expand or contract list
	  ■ Icon: Group or service number icon
	  ■ Data: Line aggregation type (Group or Service)
	  ■ Data and link: Account or service number
	Link target: Account number links display the Group Spending page. For details, see "Group Spending Page Elements" on page 107. Service number links display the Service Details page. For details, see "Service Details Page Elements" on page 115.
	  ■ Data: Charge description
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total
	  ■ Icon and link: Report
	Link target: Displays the Group Spending Trend page. For details, see "Group Spending Trend Page Elements" on page 110.

Table 42. Group Summary Page Elements

Page Element	Description
Report Details Module, continued	■ Column content for total row: ■ Text: Total ■ Data: Monthly charges ■ Data: Usage charges ■ Data: Credits ■ Data: Other charges ■ Data: Taxes ■ Data: Total charges for the report

Use Case: Viewing the Group Spending Report (Business Edition Only)

This use case lets a user view group spending information for a business hierarchy, for a range of billing periods including monthly charges, usage charges, credits, other charges, and taxes. The Group Spending report shows this data in both bar chart and report format.

Main Path for Viewing the Group Spending Report

The main path occurs when a user clicks Analytics, Business, and then Group Spending to display the Group Spending page.

Alternate Paths for Viewing the Group Spending Report

An alternate path occurs when a user selects the report from the Prompt module on another analytic business report page.

Group Spending Page Elements

Table 43 describes the elements of this page.

Table 43. Group Spending Page Elements

Page Element	Description
Page Title Text	Group Spending

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Business Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Group Spending Chart Module	This module displays a bar chart showing dollars billed for each service number in a group, and the group name.

Table 43. Group Spending Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Group Spending Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Type
	  ■ Text and sorting link: Service Number
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total (*Currency*)
	■ Column content:
	  ■ Icon: Group or service number icon
	  ■ Data and link: Service number
	  Link target: Displays the Service Details page. For details, see "Service Details Page Elements" on page 115.
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total
	  ■ Text and link: T
	  Link target: Displays the Service Spending Trend page. For details, see "Service Spending Trend Page Elements" on page 112.

Table 43. Group Spending Page Elements

Page Element	Description
Report Details Module, continued	■ Column content for total row: ■ Data: Monthly charges ■ Data: Usage charges ■ Data: Credits ■ Data: Other charges ■ Data: Taxes ■ Data: Total charges for the report

Use Case: Viewing the Group Spending Trend Report (Business Edition Only)

This use case lets a user the Group Spending Trend report for a business hierarchy, for a range of billing periods, showing monthly charges, usage charges, credits, other charges, and taxes by billing period for a hierarchy group. The Group Spending report shows this data in both bar chart and report format.

Main Path for Viewing the Group Spending Trend Report

The main path occurs when a user clicks Analytics, Business, and then Group Spending Trend to display the Group Spending Trend page.

Alternate Paths for Viewing the Group Spending Trend Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another analytic business report page.
- A user clicks Group Spending Trend on the Dashboard Overview page.

Group Spending Trend Page Elements

Table 44 describes the elements of this page.

Table 44. Group Spending Trend Page Elements

Page Element	Description
Page Title Text	Group Spending Trend

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Business Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Group Spending Trend Chart Module	This module displays a bar chart showing dollars billed for each billing period.

Table 44. Group Spending Trend Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Group Spending Trend Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Periods
	  ■ Text and sorting link: Type
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total (*Currency*)
	■ Column content:
	  ■ Data and link: Billing period
	  Link target: Displays the Group Spending page. For details, see "Group Spending Page Elements" on page 107.
	  ■ Icon: Billing Period icon
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges

Report Details Module, continued	■ Column content for total row:
	  ■ Text: Total
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges for the report

Use Case: Viewing the Service Spending Trend Report (Business Edition Only)

This use case lets a user view the Service Spending Trend report for a business hierarchy, for a range of billing periods, showing monthly charges, usage charges, credits, other charges, and taxes by period.

Main Path for Viewing the Service Spending Trend Report

The main path occurs when a user clicks Analytics, Business, and then Service Spending Trend to display the Service Spending Trend page.

Alternate Paths for Viewing the Service Spending Trend Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another analytic business report page.
- A user clicks a T link next to a service number under Highest Spending Services on the Dashboard Overview page.

Service Spending Trend Page Elements

Table 45 describes the elements of this page.

Table 45. Service Spending Trend Page Elements

Page Element	Description
Page Title Text	Service Spending Trend

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Account Billing Trend page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Period Range
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and drop-down list: Business Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 45. Service Spending Trend Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Service Spending Trend Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Periods
	  ■ Text, data, and sorting link: Monthly Charges (*Currency*)
	  ■ Text, data, and sorting link: Usage Charges (*Currency*)
	  ■ Text, data, and sorting link: Credits (*Currency*)
	  ■ Text, data, and sorting link: Other Charges (*Currency*)
	  ■ Text, data, and sorting link: Taxes (*Currency*)
	  ■ Text, data, and sorting link: Total (*Currency*)
	■ Column content:
	  ■ Data and link: Billing period
	  Link target: Displays the Group Spending page. For details, see "Group Spending Page Elements" on page 107.
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges

Report Details Module, continued	■ Column content for total row:
	  ■ Text: Total
	  ■ Data: Monthly charges
	  ■ Data: Usage charges
	  ■ Data: Credits
	  ■ Data: Other charges
	  ■ Data: Taxes
	  ■ Data: Total charges for the report

Use Case: Viewing the Service Details Report

This use case lets a user view the Service Details report showing details about each call, text message, and data transaction made by each service number for the selected billing period. A user can also choose one or all service numbers, usage types, and a new billing period or range.

Main Path for Viewing the Service Details Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Service Details to display the Service Details page.

Alternate Paths for Viewing the Service Details Report

The following alternate paths can occur in this use case:

- A user clicks a billing period on the Service Billing Trend page.
- A user clicks a billing period on the Service Spending Trend page.
- A user selects the report from the Prompt module on another analytic billing or business report page.

Service Details Page Elements

Table 46 describes the elements of this page.

Table 46. Service Details Page Elements

Page Element	Description
Page Title Text	Service Details

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Service Details page.
	  ■ Customize
	  Target: Displays the Customize Service Details page. For details, see “Customize Service Details Page Elements” on page 118.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Period Range
	■ Text and drop-down list: Period Start *List*
	■ Text and drop-down list: Period End *List*
	■ Text and drop-down list: Service Number *List*
	■ Text and drop-down list: Usage Type *List*
	■ One of the following:
	  ■ Text and drop-down list: Billing Reports *List*
	  ■ Text and drop-down list: Business Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 46. Service Details Page Elements

Page Element	Description

Service Details Module	This module displays the following elements:
	■ Module title text and data: Service Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Number Called
	  ■ Text and filter: Category
	  ■ Graphic: Note icon
	  ■ Graphic: Dispute icon
	  ■ Text and sorting link: Usage Type
	  ■ Text and sorting link: Tariff
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Duration
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Service Number
	  ■ Data: Name
	  ■ Data: Number Called
	  ■ Data and link: Category
	  Link target: Displays the Service Transaction Details dialog box. For details, see "Service Transaction Detail Dialog Box Elements" on page 79.
	  ■ Graphic: Note icon
	  ■ Graphic: Dispute icon
	  ■ Data: Usage Type

Table 46. Service Details Page Elements

Page Element	Description
Report Details Module, continued	■ Data and link: Tariff Link target: Displays the Service Transaction Details dialog box. For details, see "Service Transaction Detail Dialog Box Elements" on page 79. ■ Data: Destination ■ Data: Duration ■ Data: Total Charges (*Currency*) ■ Column content for total row: ■ Text: Total ■ Data: Total charges for the report

Use Case: Customizing the Service Details Report

This use case lets a user create a custom Service Details report, narrowing the report for a specific selection criteria and fields.

Main Path for Customizing the Service Details Report

The main path occurs when a user clicks the Customize tab on the Service Details page.

Alternate Paths for Customizing the Service Details Report

No alternate paths occur in this use case.

Customize Service Details Page Elements

Table 47 describes the elements of this page.

Table 47. Customize Service Details Page Elements

Page Element	Description
Page Title	Customize Service Details

Prompt Module	This module displays the following elements:
	■ Module title text: Please enter the criteria for your custom report
	■ Tabs:
	  ■ Report
	  Target: Displays the Service Details page. For details, see “Service Details Page Elements” on page 115.
	  ■ Customize
	  Target: Displays the Customize Service Details page.
	■ Text and radio button: Period Range *Button*
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and radio button: Relative Period Range *Button*
	■ Text and drop-down list: Previous *List* Reporting Periods
	■ Text and drop-down list: Usage Type *List*
	■ Text and drop-down list: Duration *List*
	■ Text and blank fields for data entry: *Field* and *Field*
	■ Text and drop-down list: Called Number *List*
	■ Text and drop-down list: Toll Charges *List*
	■ Text and blank fields for data entry: *Field* and *Field*
	■ Text and drop-down list: Total *List*
	■ Text and blank fields for data entry: *Field* and *Field*

Table 47. Customize Service Details Page Elements

Page Element	Description
Column Selection Module	This module displays the following elements: ■ Module title text: Please select columns to display in a custom report. ■ Text and list: Available Fields *List* ■ Button: Add Action: Moves the highlighted field to the Current Display Fields list. ■ Button: Remove Action: Moves the highlighted field to the Available Fields list. ■ Text and list: Current Display Fields *List* ■ Button: Submit Action: Displays the Save Report Criteria module. ■ Button: Cancel Action: Cancels the action.
Save Report Criteria Module	This module displays the following elements: ■ Module title text: Save Report Criteria ■ Text and blank field for data entry: Report Name *Field* ■ Text: Period Range ■ Text: From *Date* To *Date* ■ Button: Save Action: Displays the Confirm Custom Report module. ■ Button: Cancel Action: Cancels the action. ■ Download and printer-friendly elements

Table 47. Customize Service Details Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Customize Service Details Report Details (*Number* items)
	■ Column headings: Text and sorting links for chosen Service Detail report fields.
	■ Column content: Data for chosen report fields.
	■ Column content for total row:
	  ■ Text: Total
	  ■ Data: Total charges for the report

Confirm Custom Report Module	This module displays the following elements: ■ Module title text: Confirm Custom Report ■ Text and data: Confirm that you want to save the following report: *Name*? ■ Button: Save Action: Saves the data and displays the Custom Reports page. For details, see "Custom Reports Page Elements" on page 127. ■ Button: Cancel Action: Cancels the action.

Use Case: Viewing the Total Cost by Plan Report

This use case lets a user view the Total Cost by Plan report for the selected billing account, showing a cost pie chart and detailed report of plan charges by tariff type.

Main Path for Viewing the Total Cost by Plan Report

The main path occurs when a user clicks Total Cost by Plan or the billing period on the Account Overview page to display the Total Cost by Plan page.

Alternate Paths for Viewing the Total Cost by Plan Report

The following alternate paths can occur with this use case:

- A user clicks Analytics, Billing, and then Total Cost by Plan.
- A user selects the report from the Prompt module on another analytic report page.

Total Cost by Plan Page Elements

Table 48 describes the elements of this page.

Table 48. Total Cost by Plan Page Elements

Page Element	Description
Page Title	Total Cost by Plan

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Target: Displays the Total Cost by Plan page.
	  ■ Batch Request
	  Target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text and drop-down list: Account Number *List*
	■ Text and drop-down list: Select Period *List*
	■ Text and drop-down list: Billing Reports *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 48. Total Cost by Plan Page Elements

Page Element	Description
Total Cost by Plan Chart Module	This module displays the following elements: ■ Data: Plan name ■ Data: Plan cost ■ Graphical pie chart with color key: Shows percentage billed for each plan charge type for the selected billing account and billing period.

Total Charges by Tariff Module	This module displays the following elements:
	■ Column titles:
	  ■ Text: Allowance
	  ■ Text: Usage
	  ■ Text: Average
	  ■ Text: Total Charges
	■ Column content:
	  ■ For each tariff type:
	    ❑ Text and data, show or hide links: Total *Data Plan Name*
	    ❑ Text and links: Tariff charge types for each data plan, such as Data Downloaded, Text Message Received, and Peak Call Outgoing.
	  ■ Data: Allowance amount
	  ■ Data: Usage amount
	  ■ Data: Average
	  ■ Data: Total charges
	■ Content of the monthly service charge rows:
	  ■ Data: Type of monthly service charge
	  ■ Data: Amount
	■ Content of the total plan charges row:
	  ■ Text: Total Plan Charges
	  ■ Data: Amount

Use Case: Viewing the Find Calls Report

This use case lets a user view the Find Calls report, showing service calls for various search criteria, including period or date range, service number, usage type, called number, memo content, disputes, call volume, and total charges.

Main Path for Viewing the Find Calls Report

The main path occurs when a user clicks Analytics, then Find Calls to display the Find Calls page.

Alternate Paths for Viewing the Find Calls Report

No alternate paths occur in this use case.

Find Calls Page Elements

Table 49 describes the elements of this page.

Table 49. Find Calls Page Elements

Page Element	Description
Page Title	Find Calls

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Find
	  Target: Displays the Search Criteria module.
	  ■ Report
	  Target: Displays the Report Details module.
	■ Text: Please enter search criteria to find calls.
	■ Text and radio button: Relative Period Range *Button*
	■ Text and drop-down list: Previous *List* Reporting Periods
	■ Text and radio button: Period Range *Button*
	■ Text and drop-down list: From *List*
	■ Text and drop-down list: To *List*
	■ Text and radio button: Date Range *Button*

Table 49. Find Calls Page Elements

Page Element	Description
Prompt Module, continued	■ Text and blank field for data entry: From *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Text and blank field for data entry: To *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Text and drop-down list: Service Number *List* ■ Text and drop-down list: Usage Type *List* ■ Text and blank field for data entry: Called Number *Field* ■ Text and blank field for data entry: Memo *Field* ■ Text and drop-down list: Disputed *List* ■ Text and drop-down list: Volume *List* ■ Text and blank fields for volume range entries: *Field* and *Field* ■ Text and drop-down list: Total Charges *List* ■ Text and blank fields for total charges range entries: *Field* and *Field* ■ Text: *Please input amount in format #,##0.00 (e.g. 1,000.00)
Prompt Module, Continued	■ Button: Find Action: Displays the report details. ■ Button: Reset Action: Clears the form fields. ■ Button: Cancel Action: Cancels the action.

Table 49. Find Calls Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Find Calls Report Details (*Number* items)
	■ Column headings:
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Category
	  ■ Icon: Memo
	  ■ Icon: Dispute
	  ■ Text and sorting link: Tariff
	  ■ Text and sorting link: Usage Type
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Volume
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Service Number
	  ■ Data: Name
	  ■ Data: Number Called
	  ■ Data and link: Category
	Link target: Displays the Service Transaction Details dialog box for the call, where the Category field is selectable. For details, see "Service Transaction Detail Dialog Box Elements" on page 79.
	  ■ Icon and link (when applicable): Memo
	Link target: Displays the Service Transaction Details dialog box, where the Memo field is editable. For details, see "Service Transaction Detail Dialog Box Elements" on page 79.
	  ■ Icon and link (when applicable): Dispute
	Link target: Displays the Dispute Details dialog box. For details, see "Dispute Details Dialog Box Elements" on page 82.

Table 49. Find Calls Page Elements

Page Element	Description
Find Calls Report Details Module, continued	■ Data: Tariff ■ Data and link: Usage Type Link target: Displays the Service Transaction Detail dialog box. For details, see “Service Transaction Detail Dialog Box Elements” on page 79. ■ Data: Destination ■ Data: Volume ■ Data: Total Charges (*Currency*) ■ Download and printer-friendly elements

Use Case: Viewing a List of Custom Reports

This use case lets a user view a list of custom reports that he or she has created.

Main Path for Viewing a List of Custom Reports

The main path occurs when a user clicks Analytics, then Custom Reports to display the Custom Reports page.

Alternate Paths for Viewing a List of Custom Reports

No alternate paths occur in this use case.

Custom Reports Page Elements

Table 50 describes the elements of this page.

Table 50. Custom Reports Page Elements

Page Element	Description
Page Title	Custom Reports

Report Details Module	This module displays the following elements:
	■ Module title text and data: Custom Reports Report Details (*Number* items)
	■ Column Headings:
	  ■ Text and sorting link: Description
	  ■ Text and sorting link: Date Modified
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Description
	  ■ Data: Date and time
	  ■ Text and link: Edit
	  Link target: Displays the Customize page for the selected report.
	  ■ Text and link: Delete
	  Link target: Displays the Delete Custom reports page. For details, see "Delete Custom Reports Page Elements" on page 128.

Use Case: Deleting a Custom Report

This use case lets a user delete a custom report.

Main Path for Viewing a List of Custom Reports

The main path occurs when a user clicks Delete next to a report on the Custom Reports page.

Alternate Paths for Viewing a List of Custom Reports

No alternate paths occur in this use case.

Delete Custom Reports Page Elements

Table 51 describes the elements of this page.

Table 51. Delete Custom Reports Page Elements

Page Element	Description
Page Title	Delete Custom Reports
Delete Custom Reports Module	This module displays the following elements: ■ Module title text: Delete Custom Reports ■ Text: Confirm Delete ■ Text: Please confirm that you want to delete the following custom batch report: ■ Button: Delete Action: Deletes the report. ■ Button: Cancel Action: Cancels the action. ■ Text and data: Report Name *Report name* ■ Text and data: Company Name *Company name* ■ Text and data: User ID *ID* ■ Text and data: Hierarchy Name *Hierarchy name* ■ Text and data: Hierarchy Position *Hierarchy position*

8 Viewing Top X Analytic Reports

This chapter describes use cases for viewing analytic reports on the greatest expenses or most frequent activities, called Top X reports. It includes the following topics:

- Use Case: Viewing the Highest Spending Services Report on page 130
- Use Case: Viewing the Highest Spending Services by Service Agreement Report on page 132
- Use Case: Viewing the Most Expensive Calls Report on page 135
- Use Case: Viewing the Longest Calls Report on page 137
- Use Case: Viewing the Most Frequently Called Numbers Report on page 140
- Use Case: Viewing the Most Frequently Called Numbers by Service Agreement Report on page 143
- Use Case: Viewing the Most Frequently Called Numbers by Service Agreement Details Report on page 145
- Use Case: Viewing the Most Frequently Called Destinations Report on page 147
- Use Case: Viewing the Most Frequently Called Destinations by Service Agreement Report on page 149
- Use Case: Viewing the Most Frequently Called Destinations by Service Agreement Details Report on page 152
- Use Case: Viewing the Most Frequently Called Countries Report on page 155
- Use Case: Viewing the Most Frequently Called Countries by Service Agreement Report on page 157
- Use Case: Viewing the Most Frequently Called Countries by Service Agreement Details Report on page 159
- Use Case: Viewing the Most Frequently Texted Numbers Report on page 162
- Use Case: Viewing the Number Texted Report on page 164
- Use Case: Viewing the Number Texted by Service Agreement Report on page 165

Use Case: Viewing the Highest Spending Services Report

This use case lets a user view the Highest Spending Services report for a billing period, showing which service agreements for a billing account or business hierarchy position have the highest total charges, independent of usage type. You can optionally generate this report using a batch request.

Main Path for Viewing the Highest Spending Services Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Highest Spending Services to display the Highest Spending Services page.

Alternate Paths for Viewing the Highest Spending Services Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another top X report page.
- A user clicks Highest Spending Services on Dashboard Overview page (Business Edition, Business Hierarchy).

Highest Spending Services Page Elements

Table 52 describes the elements of this page.

Table 52. Highest Spending Services Page Elements

Page Element	Description
Page Title	Highest Spending Services

Table 52. Highest Spending Services Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Table 52. Highest Spending Services Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Highest Spending Services Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Service Number
	Link target: Displays the Highest Spending Services by Service Agreement page. For details, see "Highest Spending Services by Service Agreement Page Elements" on page 134.
	  ■ Data: Name
	  ■ Data: Account Number
	  ■ Data: Total charges for the service agreement
	  ■ Text and link: T
	Link target: Displays the Service Billing Trend page. For details, see "Service Billing Trend Page Elements" on page 102.
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total report charges

Use Case: Viewing the Highest Spending Services by Service Agreement Report

This use case lets a user view the Highest Spending Services by Service Agreement report, showing the individual transactions for a high-spending service agreement.

Main Path for Viewing the Highest Spending Services Report

The main path occurs when a user clicks a service number on the Highest Spending Services page.

Alternate Paths for Viewing the Highest Spending Services Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another top X report page.
- A user clicks a service number under Highest Spending Services on the Dashboard Overview page (Business Edition, Business Hierarchy).

Highest Spending Services by Service Agreement Page Elements

Table 53 describes the elements of this page.

Table 53. Highest Spending Services by Service Agreement Page Elements

Page Element	Description
Page Title	Highest Spending Services by Service Agreement

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Highest Spending Services by Service Agreement Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Service Number
	  ■ Text: Name
	  ■ Text: Account Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Usage Type
	  ■ Text and sorting link: Volume
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Service number
	  ■ Data: Name
	  ■ Data: Account number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Usage type
	  ■ Data: Volume
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total report charges

Use Case: Viewing the Most Expensive Calls Report

This use case lets a user view the Most Expensive Calls report for a billing period, showing the most expensive calls for a billing account or business hierarchy position. You can optionally generate this report using a batch request.

Main Path for Viewing the Most Expensive Calls Report

The main path occurs when a user clicks Analytics, Billing or Business, then Most Expensive Calls to display the Most Expensive Calls page.

Alternate Paths for Viewing the Most Expensive Calls Report

The following alternate paths can occur in this use case:

- A user selects the report from the Prompt module on another top X report page.
- A user clicks Most Expensive Calls on the Dashboard Overview page (Business Edition, Business Hierarchy).

Most Expensive Calls Page Elements

Table 54 describes the elements of this page.

Table 54. Most Expensive Calls Page Elements

Page Element	Description
Page Title	Most Expensive Calls

Table 54. Most Expensive Calls Page Elements

Page Element	Description
Prompt Module	This module displays the following elements: ■ Tabs: ■ Report Tab target: Displays the Group Budget Report page. ■ Batch Request Tab target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182. ■ Text: Select Period Range ■ Text and drop-down list: From ■ Text and drop-down list: To ■ Text and drop-down list: Number of Results ■ Text and drop-down list: Top X Reports ■ Button: Submit Action: Displays the selected report.

Table 54. Most Expensive Calls Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Most Expensive Calls Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Volume
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Service Number
	Link target: Displays the Service Transaction Details dialog. For details, see "Service Transaction Detail Dialog Box Elements" on page 79.
	  ■ Data: Name
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Number Called
	  ■ Data: Volume
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total report charges

Use Case: Viewing the Longest Calls Report

This use case lets a user view the Longest Calls report for a billing period, showing the calls with longest duration for a billing account or business hierarchy position. You can optionally generate this report using a batch request.

Main Path for Viewing the Longest Calls Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Longest Calls to display the Longest Calls page.

Alternate Paths for Viewing the Longest Calls Report

An alternate path occurs when a user selects the report from the Prompt module on another top X report page.

Longest Calls Page Elements

Table 55 describes the elements of this page.

Table 55. Longest Calls Page Elements

Page Element	Description
Page Title	Longest Calls

Table 55. Longest Calls Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Table 55. Longest Calls Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Longest Calls Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Volume
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Service Number
	  Link target: Displays the Service Transaction Details dialog box. For details, see "Service Transaction Detail Dialog Box Elements" on page 79.
	  ■ Data: Name
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Number called
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Numbers Report

This use case lets a user view the Most Frequently Called Numbers report for a billing period, showing the most frequently called numbers for a billing account or business hierarchy position. You can optionally generate this report using a batch request.

Main Path for Viewing the Most Frequently Called Numbers Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Most Frequently Called Numbers to display the Most Frequently Called Numbers page.

Alternate Paths for Viewing the Most Frequently Called Numbers Report

An alternate path occurs when a user selects the report from the Prompt module on another top X report page.

Most Frequently Called Numbers Page Elements

Table 56 describes the elements of this page.

Table 56. Most Frequently Called Numbers Page Elements

Page Element	Description
Page Title	Most Frequently Called Numbers

Table 56. Most Frequently Called Numbers Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	    ■ Report
	    Tab target: Displays the Group Budget Report page.
	    ■ Batch Request
	    Tab target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Table 56. Most Frequently Called Numbers Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Numbers Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Number called
	  Link target: Displays the Most Frequently Called Numbers by Service Agreement page. For details, see "Most Frequently Called Numbers by Service Agreement Page Elements" on page 144.
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charges for the number called
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of calls
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Numbers by Service Agreement Report

This use case lets a user view the Most Frequently Called Number by Service Agreement report showing summary information for each service agreement that made calls to a frequently called number.

Main Path for Viewing the Most Frequently Called Numbers by Service Agreement Report

The main path occurs when a user clicks a called number on the Most Frequently Called Numbers page.

Alternate Paths for Viewing the Most Frequently Called Numbers by Service Agreement Report

No alternate paths occur in this use case.

Most Frequently Called Numbers by Service Agreement Page Elements

Table 57 describes the elements of this page.

Table 57. Most Frequently Called Numbers by Service Agreement Page Elements

Page Element	Description
Page Title	Most Frequently Called Numbers by Service Agreement

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Numbers by Service Agreement (*Number* items)
	■ Column titles:
	  ■ Text: Number Called
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Number called
	  ■ Data and link: Service number
	  Link target: Displays the Most Frequently Called Numbers by Service Agreement Details page. For details, see “Most Frequently Called Number by Service Agreement Details Page Elements” on page 146.
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charges for the number called by the service agreement
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of calls
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Numbers by Service Agreement Details Report

This use case lets a user view the Most Frequently Called Numbers by Service Agreement Detail report showing the details about each call made to a frequently called number by a selected service number.

Main Path for Viewing the Most Frequently Called Numbers by Service Agreement Details Report

The main path occurs when a user clicks a service number on the Most Frequently Called Numbers by Service Agreement page.

Alternate Paths for Viewing the Most Frequently Called Numbers by Service Agreement Details Report

No alternate paths occur in this use case.

Most Frequently Called Number by Service Agreement Details Page Elements

Table 58 describes the elements of this page.

Table 58. Most Frequently Called Numbers by Service Agreement Details Page Elements

Page Element	Description
Page Title	Most Frequently Called Numbers by Service Agreement Details

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Numbers by Service Agreement Details Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Number Called
	  ■ Text: Service Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Call Type
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Number called
	  ■ Data: Service number
	  ■ Data: Number of calls
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Destination
	  ■ Data: Call type
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Destinations Report

This use case lets a user view the Most Frequently Called Destinations report for a billing period, showing the most frequently called destinations for a billing account or business hierarchy position. You can optionally generate this report using a batch request.

Main Path for Viewing the Most Frequently Called Destinations Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Most Frequently Called Destinations to display the Most Frequently Called Destinations Report page.

Alternate Paths for Viewing the Most Frequently Called Destinations Report

An alternate path occurs when a user selects the report from the Prompt module on another top X report page.

Most Frequently Called Destinations Page Elements

Table 59 describes the elements of this page.

Table 59. Most Frequently Called Destinations Page Elements

Page Element	Description
Page Title	Most Frequently Called Destinations

Table 59. Most Frequently Called Destinations Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Table 59. Most Frequently Called Destinations Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Most Frequently Called Destinations Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Country
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Destination
	  Link target: Displays the Most Frequently Called Destinations by Service Agreement page. For details, see "Most Frequently Called Destinations by Service Agreement Page Elements" on page 151.
	  ■ Data: Country
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charges for calls to the destination
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of calls
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Destinations by Service Agreement Report

This use case lets a user view the Most Frequently Called Destinations by Service Agreement report showing summary information for each service agreement that made calls to a frequently called destination.

Main Path for Viewing the Most Frequently Called Destinations by Service Agreement Report

The main path occurs when a user clicks a destination on the Most Frequently Called Destinations page.

Alternate Paths for Viewing the Most Frequently Called Destinations by Service Agreement Report

No alternate paths occur in this use case.

Most Frequently Called Destinations by Service Agreement Page Elements

Table 60 describes the elements of this page.

Table 60. Most Frequently Called Destinations by Service Agreement Details Page Elements

Page Element	Description
Page Title	Most Frequently Called Destinations by Service Agreement

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Destinations by Service Agreement Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Destination
	  ■ Text: Country
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Destination
	  ■ Data: Country
	  ■ Data and link: Service number
	  Link target: Displays the Most Frequently Called Destinations by Service Agreement Details page. For details, see "Most Frequently Called Destinations by Service Agreement Details Page Elements" on page 153.
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charge amount for the destination called by the service agreement
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Destinations by Service Agreement Details Report

This use case lets a user view the Most Frequently Called Destinations by Service Agreement Details report showing the details about each call made to a frequently called destination by a selected service number.

Main Path for Viewing the Most Frequently Called Destination by Service Agreement Details Report

The main path occurs when a user clicks a service number on the Most Frequently Called Destination by Service Agreement page.

Alternate Paths for Viewing the Most Frequently Called Destination by Service Agreement Details Report

No alternate paths occur in this use case.

Most Frequently Called Destinations by Service Agreement Details Page Elements

Table 61 describes the elements of this page.

Table 61. Most Frequently Called Destinations by Service Agreement Details Page Elements

Page Element	Description
Page Title	Most Frequently Called Destinations by Service Agreement Details

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Destinations by Service Agreement Details Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Destination
	  ■ Text: Country
	  ■ Text: Service Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Call Type
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Destination
	  ■ Data: Country
	  ■ Data: Service number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Number called
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Call type
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Countries Report

This use case lets a user view the Most Frequently Called Countries report for a billing period, showing the most frequently called countries for a billing account or business hierarchy position. You can optionally generate this report using a batch request.

Main Path for Viewing the Most Frequently Called Countries Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Most Frequently Called Countries to display the Most Frequently Called Countries page.

Alternate Paths for Viewing the Most Frequently Called Countries Report

An alternate path occurs when a user selects the report from the Prompt module on another top X report page.

Most Frequently Called Countries Page Elements

Table 62 describes the elements of this page.

Table 62. Most Frequently Called Countries Page Elements

Page Element	Description
Page Title	Most Frequently Called Countries

Table 62. Most Frequently Called Countries Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see "Create Batch Report Page Elements" on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Table 62. Most Frequently Called Countries Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Most Frequently Called Countries Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Country
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Country
	  Link target: Displays the Most Frequently Called Countries by Service Agreement page. For details, see "Most Frequently Called Countries by Service Agreement Page Elements" on page 158.
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charges for the country called
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of calls
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Countries by Service Agreement Report

This use case lets a user view the Most Frequently Called Countries by Service Agreement report showing summary information for each service agreement that made calls to a frequently called country.

Main Path for Viewing the Most Frequently Called Countries by Service Agreement Report

The main path occurs when a user clicks a country on the Most Frequently Called Countries page.

Alternate Paths for Most Frequently Called Countries by Service Agreement Report

No alternate paths occur in this use case.

Most Frequently Called Countries by Service Agreement Page Elements

Table 63 describes the elements of this page.

Table 63. Most Frequently Called Countries by Service Agreement Page Elements

Page Element	Description
Page Title	Most Frequently Called Countries by Service Agreement

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Countries by Service Agreement Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Country
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Number of Calls
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Country
	  ■ Data and link: Service Number
	Link target: Displays the Most Frequently Called Countries by Service Agreement Details page. For details, see "Most Frequently Called Countries by Service Agreement Details Page Elements" on page 160.
	  ■ Data: Number of calls
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Total charges for the country called by service agreement
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of calls
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Called Countries by Service Agreement Details Report

This use case lets a user view the Most Frequently Called Countries by Service Agreement Details report showing the details about each call made to a frequently called country by a service agreement.

Main Path for Viewing the Most Frequently Called Countries by Service Agreement Details Report

The main path occurs when a user clicks a service number on the Most Frequently Called Countries by Service Agreement page.

Alternate Paths for Viewing the Most Frequently Called Countries by Service Agreement Details Report

No alternate paths occur in this use case.

Most Frequently Called Countries by Service Agreement Details Page Elements

Table 64 describes the elements of this page.

Table 64. Most Frequently Called Countries by Service Agreement Details Page Elements

Page Element	Description
Page Title	Most Frequently Called Countries by Service Agreement Details

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Most Frequently Called Countries by Service Agreement Details Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Country
	  ■ Text: Service Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Number Called
	  ■ Text and sorting link: Volume (hh:mm:ss)
	  ■ Text and sorting link: Call Type
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Country
	  ■ Data: Service number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Number called
	  ■ Data: Volume in hh:mm:ss format
	  ■ Data: Call type
	  ■ Data: Destination
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total volume
	  ■ Data: Total report charges

Use Case: Viewing the Most Frequently Texted Numbers Report

This use case lets a user view the Most Frequently Texted Numbers report for the selected billing account and most recent billing period. A user can also choose another billing period. You can optionally generate this report using a batch request.

Main Path for Viewing the Most Frequently Texted Numbers Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Most Frequently Texted Numbers to display the Most Frequently Texted Numbers page.

Alternate Paths for Viewing the Most Frequently Texted Numbers Report

An alternate path occurs when a user selects the report from the Prompt module on another top X report page.

Most Frequently Texted Numbers Page Elements

Table 65 describes the elements of this page.

Table 65. Most Frequently Texted Numbers Page Elements

Page Element	Description
Page Title	Most Frequently Texted Numbers

Table 65. Most Frequently Texted Numbers Page Elements

Page Element	Description

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text: Select Period Range
	■ Text and drop-down list: From
	■ Text and drop-down list: To
	■ Text and drop-down list: Number of Results
	■ Text and drop-down list: Top X Reports
	■ Button: Submit
	Action: Displays the selected report.

Report Details Module	This module displays the following elements:
	■ Module title text and data: Most Frequently Texted Numbers Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Number Texted
	  ■ Text and sorting link: Number of Texts
	  ■ Text and sorting link: Tariff/Direction
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data and link: Number texted
	  Link target: Displays the Number Texted page. For details, see “Number Texted Page Elements” on page 165.
	  ■ Data: Number of texts
	  ■ Text and data: *Tariff - Direction*
	  ■ Data: Total charges for the number texted
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of texts
	  ■ Data: Total report charges

Use Case: Viewing the Number Texted Report

This use case lets a user view the Number Texted report showing summary information for each service agreement that texted a frequently texted number.

Main Path for Viewing the Number Texted Report

The main path occurs when a user clicks a country on the Most Frequently Texted Numbers page.

Alternate Paths for Viewing the Number Texted Report

No alternate paths occur in this use case.

Number Texted Page Elements

Table 66 describes the elements of this page.

Table 66. Number Texted Page Elements

Page Element	Description
Page Title	Number Texted

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Number Texted Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Number Texted
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Number of Texts
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Number texted
	  ■ Data and link: Service Number
	  Link target: Displays the Number Texted by Service Agreement page. For details, see "Number Texted by Service Agreement Page Elements" on page 166.
	  ■ Data: Number of texts
	  ■ Data: Total charges for the number texted by the service agreement
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total number of text messages
	  ■ Data: Total report charges

Use Case: Viewing the Number Texted by Service Agreement Report

This use case lets a user view the Number Texted by Service Agreement report showing the details about each text message sent to a frequently texted number by a selected service number.

Main Path for Viewing the Number Texted by Service Agreement Report

The main path occurs when a user clicks a service number on the Number Texted page.

Alternate Paths for Viewing the Number Texted Called by Service Agreement Report

No alternate paths occur in this use case.

Number Texted by Service Agreement Page Elements

Table 67 describes the elements of this page.

Table 67. Number Texted by Service Agreement Page Elements

Page Element	Description
Page Title	Number Texted by Service Agreement

Report Details Module	This module displays the following elements:
	■ Tab: Report
	■ Module title text and data: Number Texted by Service Agreement Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Number Texted
	  ■ Text: Service Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Tariff/Direction
	  ■ Text and sorting link: Destination
	  ■ Text and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Number texted
	  ■ Data: Service number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Text and data: *Tariff - Direction*
	  ■ Data: Destination
	  ■ Data: Total charges for the call
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total report charges

9 Managing Costs and Budgets (Business Edition Only)

This chapter describes use cases for viewing cost and budget reports, managing the budget, and specifying cost reallocation settings. It includes the following topics:

- Use Case: Viewing the Group Budget Report (Business Edition Only) on page 169
- Use Case: Viewing the Service Budget Report (Business Edition Only) on page 171
- Use Case: Viewing the Yearly Budget Report (Business Edition Only) on page 173
- Use Case: Viewing the List of Budget Reports (Business Edition Only) on page 175
- Use Case: Managing Budgets (Business Edition Only) on page 176
- Use Case: Managing Cost Reallocation Settings (Business Edition Only) on page 178

Use Case: Viewing the Group Budget Report (Business Edition Only)

This use case lets a Business Edition admin or manager view the Group Budget report, which contains a bar chart showing budget amounts against actual charges incurred over a particular budget period or frequency for each group below the current selected hierarchy position. Report details also show the amount within, over, or under budget. You can optionally generate this report using a batch request.

A *Group* is defined as the folder that is directly under the current hierarchy position and has at least one or more account nodes under it or under its sub-folders.

Main Path for Viewing the Group Budget Report

The main path occurs when a user clicks Group Budget Report on the Dashboard Overview page

Alternate Paths for Viewing the Group Budget Report

An alternate paths occurs when a user clicks Analytics, Billing or Business, and then Group Budget Report to display the Group Budget Report page.

Group Budget Report Page Elements

Table 68 describes the elements of this page.

Table 68. Group Budget Report Page Elements

Page Element	Description
Page Title	Group Budget Report

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Group Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text and drop-down list: Budget Frequency *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Report Chart Module	This module displays the following element: ■ Graphical bar chart with color key: Shows dollars spent and dollars budgeted for each group and indicates whether the amount is within budget. A red bar indicates that the value is greater than the standard deviation.

Table 68. Group Budget Report Page Elements

Page Element	Description
Report Details Module	This module displays the following elements: ■ Module title text and data: Group Budget Report Details (*Number* items) ■ Column titles: 　■ Text and sorting link: Group Name 　■ Text, data, and sorting link: Current Period Charges (*Currency*) 　■ Text, data, and sorting link: Current Period Budget (*Currency*) 　■ Text, data, and sorting link: Amount Within (*Currency*) 　■ Text, data, and sorting link: Amount Over (*Currency*) 　■ Text, data, and sorting link: Amount Under (*Currency*) ■ Column content: 　■ Data: Service number 　■ Data: Current period charges 　■ Data: Current period budget 　■ Data: Amount within 　■ Data: Amount over 　■ Data: Amount under
Report Details Module, continued	■ Content of the total row: 　■ Text: Total 　■ Data: Total current period charges for the report 　■ Data: Total current period budget for the report 　■ Data: Total amount within for the report 　■ Data: Total amount over for the report 　■ Data: Total amount under for the report

Use Case: Viewing the Service Budget Report (Business Edition Only)

This use case lets a Business Edition admin or manager view the Service Budget report, which contains a bar chart showing budget amounts against actual charges incurred over a particular budget period or frequency for each service number in the hierarchy. Report details also show the amount within, over, or under budget. You can optionally generate this report using a batch request.

Main Path for Viewing the Service Budget Report

The main path occurs when a user clicks Account Billing Trend from the Dashboard.

Alternate Paths for Viewing the Service Budget Report

The following alternate paths can occur in this use case:

- A user clicks Analytics, Billing or Business, and then Service Budget Report to display the Service Budget Report page.
- A user selects the report from the Budget Reports page.

Service Budget Report Page Elements

Table 69 describes the elements of this page.

Table 69. Service Budget Report Page Elements

Page Element	Description
Page Title	Service Budget Report

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Report
	  Tab target: Displays the Service Budget Report page.
	  ■ Batch Request
	  Tab target: Displays the Create Batch Report page. For details, see “Create Batch Report Page Elements” on page 182.
	■ Text and drop-down list: Budget Frequency *List*
	■ Text and drop-down list: Budget Period *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Report Chart Module	This module displays the following element: ■ Graphical bar chart with color key: Shows dollars spent and dollars budgeted for each service number and indicates whether the amount is within budget. A red bar indicates that the value is greater than the standard deviation.

Table 69. Service Budget Report Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Service Budget Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text, data, and sorting link: Current Period Charges (*Currency*)
	  ■ Text, data, and sorting link: Current Period Budget (*Currency*)
	  ■ Text, data, and sorting link: Amount Within (*Currency*)
	  ■ Text, data, and sorting link: Amount Over (*Currency*)
	  ■ Text, data, and sorting link: Amount Under (*Currency*)
	■ Column content:
	  ■ Data: Service number
	  ■ Data: Current period charges
	  ■ Data: Current period budget
	  ■ Data: Amount within
	  ■ Data: Amount over
	  ■ Data: Amount under

Report Details Module, continued	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total current period charges for the report
	  ■ Data: Total current period budget charges for the report
	  ■ Data: Total amount within charges for the report
	  ■ Data: Total amount over charges for the report
	  ■ Data: Total amount under charges for the report

Use Case: Viewing the Yearly Budget Report (Business Edition Only)

This use case lets a Business Edition admin or manager view the Yearly Budget report, which shows the budgeted amount for each service number.

Main Path for Viewing the Yearly Budget Report

The main path occurs when a user clicks Analytics, Billing or Business, and then Budget Management to display the Yearly Budget Report page.

Alternate Paths for Viewing the Yearly Budget Report

An alternate path occurs when a user clicks Budget Management on another cost management page.

Yearly Budget Report Page Elements

Table 70 describes the elements of this page.

Table 70. Yearly Budget Report Page Elements

Page Element	Description
Page Title	Yearly Budget Report

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Budget Reports
	  Tab target: Displays the Budget Reports page. For details, see "Budget Reports Page Elements" on page 176.
	  ■ Budget Management
	  Tab target: Displays the Yearly Budget Report page.
	  ■ Cost Reallocation
	  Tab target: Displays the Cost Reallocation page. For details, see "Cost Reallocation Page Elements" on page 178.
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Table 70. Yearly Budget Report Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Yearly Budget Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Service Number
	  ■ Text, data, and sorting link: Yearly Budget Amount (*Currency*)
	■ Column content:
	  ■ Data and link: Service Number
	  Link target: Displays the Budget Management page. For details, see "Budget Management Page Elements" on page 177.
	  ■ Data: Yearly budget amount

Report Details Module, continued	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Total yearly budget amount for the report

Use Case: Viewing the List of Budget Reports (Business Edition Only)

This use case lets a Business Edition admin or manager view the list of available budget reports.

Main Path for Viewing the List of Budgets Reports

The main path occurs when a user clicks Analytics, Billing or Business, Budget Management, and then Budget Reports to display the Budget Reports page.

Alternate Paths for Viewing the List of Budgets Report

An alternate path occurs when a user clicks Budget Reports on another cost management page.

Budget Reports Page Elements

Table 71 describes the elements of this page.

Table 71. Budget Reports Page Elements

Page Element	Description
Page Title	Budget Reports
Prompt Module	This module displays the following elements: ■ Tabs: ■ Budget Reports Tab target: Displays the Budget Reports page. ■ Budget Management Tab target: Displays the Yearly Budget Report page. For details, see "Yearly Budget Report Page Elements" on page 174. ■ Cost Reallocation Tab target: Displays the Cost Reallocation page. For details, see "Cost Reallocation Page Elements" on page 178.
Report Details Module	This module displays the following elements: ■ Module title text: List of Budget Reports ■ Data and link: Report name. Link target: Displays the selected report.

Use Case: Managing Budgets (Business Edition Only)

This use case lets a Business Edition admin or manager set a spending budget for each service number for several individual fiscal years in the future.

Main Path for Managing Budgets

The main path occurs when a user clicks a service number on the Yearly Budget Report page to display the Budget Management page.

Alternate Paths for Managing Budgets

No alternate paths occur in this use case.

Budget Management Page Elements

Table 72 describes the elements of this page.

Table 72. Budget Management Page Elements

Page Element	Description
Page Title	Budget Management

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Budget Reports
	  Tab target: Displays the Budget Reports page. For details, see "Budget Reports Page Elements" on page 176.
	  ■ Budget Management
	  Tab target: Displays the Yearly Budget Report page. For details, see "Yearly Budget Report Page Elements" on page 174.
	  ■ Cost Reallocation
	  Tab target: Displays the Cost Reallocation page. For details, see "Cost Reallocation Page Elements" on page 178.
	■ Text and drop-down list: Budget Year *List*
	■ Button: Submit
	Action: Displays the selected report.
	■ Download and printer-friendly elements

Report Details Module	This module displays the following elements:
	■ Module title text and data: Budget Management Report Details (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Periods
	  ■ Text and sorting link: Budget Amount
	■ Column content:
	  ■ Data: Billing periods
	  ■ Data and blank field for data entry: *Currency Symbol* and *Field*
	■ Content of the total row:
	  ■ Text: Total
	  ■ Data: Currency symbol
	  ■ Data: Total budgeted amount for the report
	  ■ Button: Submit
	  Action: Saves the data.

Use Case: Managing Cost Reallocation Settings (Business Edition Only)

This use case lets a Business Edition admin or manager set cost allocation amounts for account-level charges, enabling charges to be distributed among the individual subscribers. The reallocated charges are available on any report where non-usage charges are displayed.

Main Path for Reallocating Costs

The main path occurs when a user clicks Analytics, Billing or Business, and then Cost Reallocation to display the Cost Reallocation page.

Alternate Paths for Reallocating Costs

An alternate path occurs when a user clicks Cost Reallocation on another cost management page.

Cost Reallocation Page Elements

Table 73 describes the elements of this page.

Table 73. Cost Reallocation Page Elements

Page Element	Description
Page Title	Cost Reallocation

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Budget Reports
	  Tab target: Displays the Budget Reports page. For details, see "Budget Reports Page Elements" on page 176.
	  ■ Budget Management
	  Tab target: Displays the Yearly Budget Report page. For details, see "Yearly Budget Report Page Elements" on page 174.
	  ■ Cost Reallocation
	  Tab target: Displays the Cost Reallocation page.

Cost Reallocation Selection Module	This module displays the following elements: ■ Module title text: Select Cost Reallocation ■ Radio button and text: *Button* Disable Account Cost Reallocation ■ Radio button and text: *Button* Enable Account Cost Reallocation equal distribution across all subscribers ■ Button: Submit Action: Saves the selection.

10 Creating and Viewing Analytic Batch Reports

This chapter describes use cases for creating and viewing analytic batch reports. It includes the following topics:

- Use Case: Creating a Batch Report on page 181
- Use Case: Viewing a List of Pending Batch Reports on page 187
- Use Case: Viewing a List of Scheduled Batch Reports on page 190
- Use Case: Viewing a List of Completed Batch Reports on page 193
- Use Case: Viewing a List of Failed Batch Reports on page 197
- Use Case: Viewing the Selected Options for a Batch Report on page 199
- Use Case: Deleting a Batch Report on page 201

Use Case: Creating a Batch Report

This use case lets a user create a batch report for the analytic billing and top X reports, and the Service Budget Report. Batch reporting lets users schedule reports to run in a single occurrence or generate a reports regularly over a period of time. Users can choose the report period range, file download file formats, report generation date, and the effective period. The file formats available for downloading a report on-demand are the same types available in batch, plus HTML file format is available for all reports.

In the Business Edition, a report sharing option lets users specify whether the report is private or available publicly. Publicly available reports can be viewed by other users with the same hierarchy privileges. The current hierarchical position context is used for reporting criteria.

Main Path for Creating a Batch Report

The main path occurs when a user clicks Batch Request on an analytic billing, cost management, or top X report page to display the Create Batch Report page.

Alternate Paths for Creating a Batch Report

No alternate paths occur in this use case.

Create Batch Report Page Elements

Table 74 describes the elements of this page.

Table 74. Create Batch Report Page Elements

Page Element	Description
Page Title	Create Batch Report
Create Batch Report Module	This module displays the following elements: ■ Module title text: Create Batch Report ■ Text and blank field for data entry: *Batch Report Name *Field* ■ (Business Edition Only) Selection button and text: *Button* Share With Others ■ Button: Next Action: Displays the Confirm Batch Report page. For details, see "Confirm Batch Report Page Elements" on page 185. ■ Button Back Action: Displays the analytic report page.

Report Details Module (Business Edition)	This module displays the following elements:
	■ Module title text: Report Details
	■ Column Headings:
	  ■ Text: Company Name
	  ■ Text: Hierarchy Name
	  ■ Text: Position
	  ■ Text: Report Name
	■ Column Content:
	  ■ Data: Company name
	  ■ Data: Hierarchy name
	  ■ Data: Hierarchy position
	  ■ Data: Report name

Table 74. Create Batch Report Page Elements

Page Element	Description

Report Details Module (Consumer Edition)	This module can display the following elements:
	■ Module title text: Report Details
	■ Column Headings:
	  ■ Text: User ID
	  ■ Text: Account Number
	■ Column Content:
	  ■ Data: User ID
	  ■ Drop-down list for account number: *List*

Select Report Options Module	Depending on the report, this module can display the following elements: ■ Module title text: Select Report Options ■ Text: Period Range ■ Text and drop-down list: From *List* ■ Text and drop-down list: To *List* ■ Text and drop-down list: Chart Type *List* ■ Text and drop-down list: Service Number *List* ■ Text and drop-down list: Usage Type *List* ■ Text and drop-down list: Account Number *List* ■ Text and drop-down list: Number of Results *List* ■ Text and drop-down list: Budget Frequency *List* ■ Text and drop-down list: Budget Period *List*

Select Download File Types Module	This module displays the following elements:
	■ Module title text: Select File Download Types
	■ One or more of the following:
	  ■ Selection button, icon, and text: *Button* HTML icon, HTML
	  ■ Selection button, icon, and text: *Button* Microsoft Excel icon, CSV
	  ■ Selection button, icon, and text: *Button* XML icon, XML
	  ■ Selection button, icon, and text: *Button* Adobe Acrobat PDF icon, PDF

Table 74. Create Batch Report Page Elements

Page Element	Description
Select Report Generation Date Module	This module displays the following elements: ■ Module title text: Select Report Generation Date ■ Radio button and text: *Button* Single occurrence ■ Radio button, text, and drop-down list: *Button* Select Day of the Week to Run Weekly *List* ■ Radio button, text, and drop-down list: *Button* Select Day of the Week to Run Bi-Weekly *List* ■ Radio button, text, and drop-down list: *Button* Schedule a Specific Day Within the Month *List*
Select Effective Period Module	This module displays the following elements: ■ Module title text: Select Effective Period ■ Radio button and text: *Button* Until canceled ■ Radio button, text, and blank field for data entry: *Button* Set Maximum Number of Times to Run Report *Field* ■ Radio button, text, and blank field for data entry: *Button* Until Date *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector

Confirm Batch Report Page Elements

Table 75 describes the elements of this page.

Table 75. Confirm Batch Report Page Elements

Page Element	Description
Page Title	Confirm Batch Report

Table 75. Confirm Batch Report Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text: Report Details
	■ Column Headings:
	  ■ Text: Company Name
	  ■ Text: Hierarchy Name
	  ■ Text: Position
	  ■ Text: Report Name
	■ Column Content:
	  ■ Data: Company name
	  ■ Data: Hierarchy name
	  ■ Data: Hierarchy position
	  ■ Data: Report name
	■ Button: Submit
	Action: Displays the Pending Batch Reports page. For details, see “Pending Batch Reports Page Elements” on page 188.
	■ Button Cancel
	Action: Cancels the action.

Table 75. Confirm Batch Report Page Elements

Page Element	Description
Select Report Options Module	Depending on the available options selected for the report type, this module can display the following elements: ■ Module title text: Select Report Options ■ Text and data: Batch Report Name *Report name* ■ Text and data: Marked for *Share setting* ■ Text and data: Period Range *Range* ■ Text and data: Chart Type *Chart type* ■ Text and data: Service Number *Service number* ■ Text and data: Usage Type *Type* ■ Text and data: Account Number *Account number* ■ Text and data: Number of Results *Number* ■ Text and data: Budget Frequency *Frequency* ■ Text and data: Budget Period *Period* ■ Text and data: File Type Options *File icons and type* ■ Text and data: Generation Date: Generation date description ■ Text and data: Effective Period: Period

Use Case: Viewing a List of Pending Batch Reports

This use case lets a user view a list of the batch reports that have been requested and are in the queue pending processing (not yet scheduled). Users can view the report selection criteria for a pending batch report, or choose a report to delete.

In the Business Edition, the current business hierarchical position is used for viewing the list of reports.

Main Path for Viewing a List of Pending Batch Reports

The main path occurs when a user clicks Analytics, Billing or Business, and then Pending to display the Pending Batch Reports page.

Alternate Paths for Viewing a List of Pending Batch Reports

An alternate path occurs when a user clicks the Pending tab on one of the batch report status pages.

Pending Batch Reports Page Elements

Table 76 describes the elements of this page.

Table 76. Pending Batch Reports Page Elements

Page Element	Description
Page Title	Pending Batch Reports

Prompt Module	This module displays the following elements:
	■ Tabs:
	  ■ Completed
	  Tab target: Displays the Completed Batch Reports page. For details, see “Completed Batch Reports Page Elements” on page 194
	  ■ Pending
	  Tab target: Displays the Pending Batch Reports page.
	  ■ Failed
	  Tab target: Displays the Failed Batch Reports page. For details, see “Failed Batch Reports Page Elements” on page 197
	  ■ Scheduled
	  Tab target: Displays the Scheduled Reports page. For details, see “Scheduled Batch Reports Page Elements” on page 191.

Table 76. Pending Batch Reports Page Elements

Page Element	Description

Pending Business Reports Module (Business Edition)	This module displays the following elements:
	■ Module title text and data: Pending Business Reports (*Number* items)
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: Hierarchy Name
	  ■ Text and sorting link: Position
	  ■ Text and sorting link: Request Date
	  ■ Text and sorting link: Private
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: User ID
	  ■ Data: Hierarchy name
	  ■ Data: Position
	  ■ Data: Request date
	  ■ Data: Privacy setting
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see “Delete Batch Report Page Elements” on page 201.

Table 76. Pending Batch Reports Page Elements

Page Element	Description

Pending Batch Reports Module (Consumer Edition)	This module displays the following elements:
	■ Module title text: Pending Batch Reports
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: Request Date
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: Account Number
	  ■ Data: Request date
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.

Use Case: Viewing a List of Scheduled Batch Reports

This use case lets a user view a list of the batch reports that are scheduled for processing. Users can view the report selection criteria for a scheduled batch report, or choose a report to delete.

In the Business Edition, the current business hierarchical position is used for viewing the list of reports.

Main Path for Viewing a List of Scheduled Batch Reports

The main path occurs when a user clicks Analytics, Billing or Business, and then Scheduled to display the Scheduled Batch Reports page.

Alternate Paths for Viewing a List of Scheduled Batch Reports

An alternate path occurs when a user clicks the Scheduled tab on one of the batch report status pages.

Scheduled Batch Reports Page Elements

Table 77 describes the elements of this page.

Table 77. Scheduled Batch Reports Page Elements

Page Element	Description
Page Title	Scheduled Batch Reports
Prompt Module	This module displays the following elements: ■ Tabs: ■ Completed Tab target: Displays the Completed Batch Reports page. For details, see "Completed Batch Reports Page Elements" on page 194 ■ Pending Tab target: Displays the Pending Batch Reports page. For details, see "Pending Batch Reports Page Elements" on page 188. ■ Failed Tab target: Displays the Failed Batch Reports page. For details, see "Failed Batch Reports Page Elements" on page 197 ■ Scheduled Tab target: Displays the Scheduled Reports page.

Table 77. Scheduled Batch Reports Page Elements

Page Element	Description

Scheduled Business Reports Module (Business Edition)	This module displays the following elements:
	■ Module title text: Scheduled Business Reports
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: Hierarchy Name
	  ■ Text and sorting link: Position
	  ■ Text and sorting link: Request Date
	  ■ Text and sorting link: Run Date
	  ■ Text and sorting link: Private
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: User ID
	  ■ Data: Hierarchy Name
	  ■ Data: Position
	  ■ Data: Request Date
	  ■ Data: Run Date
	  ■ Data: Privacy setting
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see “Delete Batch Report Page Elements” on page 201.

Table 77. Scheduled Batch Reports Page Elements

Page Element	Description

Scheduled Batch Reports Module (Consumer Edition)	This module displays the following elements:
	■ Module title text: Scheduled Batch Reports
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: Request Date
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: Account Number
	  ■ Data: Request date
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.

Use Case: Viewing a List of Completed Batch Reports

This use case lets a user view a list of the batch reports that have run successfully are ready to be downloaded. Users can also click a link on the report to display a completed report, download the report in a selected format, or view the selection criteria used for report generation. Users can view also choose a report to delete.

In the Business Edition, the current business hierarchical position is used for viewing the list of reports.

Main Path for Viewing a List of Completed Batch Reports

The main path occurs when a user clicks Analytics, Billing or Business, and then Completed to display the Completed Batch Reports page.

Alternate Paths for Viewing a List of Completed Batch Reports

An alternate path occurs when a user clicks the Completed tab on one of the batch report status pages.

Completed Batch Reports Page Elements

Table 78 describes the elements of this page.

Table 78. Completed Batch Reports Page Elements

Page Element	Description
Page Title	Completed Batch Reports
Prompt Module	This module displays the following elements: ■ Tabs: ■ Completed Tab target: Displays the Completed Batch Reports page. ■ Pending Tab target: Displays the Pending Batch Reports page. For details, see “Pending Batch Reports Page Elements” on page 188. ■ Failed Tab target: Displays the Failed Batch Reports page. For details, see “Failed Batch Reports Page Elements” on page 197. ■ Scheduled Tab target: Displays the Scheduled Reports page. For details, see “Scheduled Batch Reports Page Elements” on page 191.

Table 78. Completed Batch Reports Page Elements

Page Element	Description

Completed Business Reports Module (Business Edition)	This module displays the following elements:
	■ Module title text and data: Completed Business Reports (*Number* items)
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: Hierarchy Name
	  ■ Text and sorting link: Position
	  ■ Text and sorting link: Request Date
	  ■ Text and sorting link: Run Date
	  ■ Text and sorting link: Private
	  ■ Text: Actions
	■ Column Content:
	  ■ Data and link: Report name
	Link target: Displays the report.
	  ■ Data: User ID
	  ■ Data: Hierarchy Name
	  ■ Data: Position
	  ■ Data: Request Date
	  ■ Data: Run Date
	  ■ Data: Privacy setting
	  ■ Icon and link: Microsoft Excel icon
	Link target: Displays the File Download dialog for saving the completed batch report in CSV format.
	  ■ Icon and link: XML icon
	Link target: Displays the File Download dialog for saving the completed batch report in XML format.
	  ■ Icon and link: Adobe Acrobat icon
	Link target: Displays the File Download dialog for saving the completed batch report in PDF format.

Table 78. Completed Batch Reports Page Elements

Page Element	Description
Completed Business Reports Module (Business Edition), continued	■ Icon and link: View icon Link target: Displays the report. ■ Icon and link: Delete icon Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.
Completed Batch Reports Module (Consumer Edition)	This module displays the following elements: ■ Module title text and data: Completed Business Reports (*Number* items) ■ Column Headings: ■ Text and sorting link: Report Name ■ Text and sorting link: Account Number ■ Text and sorting link: Request Date ■ Text and sorting link: Run Date ■ Text: Actions ■ Column Content: ■ Data and link: Report name Link target: Displays the report. ■ Text and sorting link: Account Number ■ Data: Request Date ■ Data: Run Date ■ Icon and link: Microsoft Excel icon Link target: Displays the File Download dialog for saving the completed batch report in CSV format. ■ Icon and link: XML icon Link target: Displays the File Download dialog for saving the completed batch report in XML format. ■ Icon and link: Adobe Acrobat icon Link target: Displays the File Download dialog for saving the completed batch report in PDF format. ■ Icon and link: View icon Link target: Displays the report. ■ Icon and link: Delete icon Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.

Use Case: Viewing a List of Failed Batch Reports

This use case lets a user view a list of the batch reports that failed to process successfully. Users can view the report selection criteria for a pending batch report, or choose a report to delete.

In the Business Edition, the current business hierarchical position is used for viewing the list of reports.

Main Path for Viewing a List of Failed Batch Reports

The main path occurs when a user clicks Analytics, Billing or Business, and then Failed to display the Failed Batch Reports page.

Alternate Paths for Viewing a List of Failed Batch Reports

An alternate path occurs when a user clicks the Failed tab on one of the batch report status pages.

Failed Batch Reports Page Elements

Table 79 describes the elements of this page.

Table 79. Failed Batch Reports Page Elements

Page Element	Description
Page Title	Failed Batch Reports
Prompt Module	This module displays the following elements: ■ Tabs: ■ Completed Tab target: Displays the Completed Batch Reports page. For details, see "Completed Batch Reports Page Elements" on page 194 ■ Pending Tab target: Displays the Pending Batch Reports page. For details, see "Pending Batch Reports Page Elements" on page 188. ■ Failed Tab target: Displays the Failed Batch Reports page. ■ Scheduled Tab target: Displays the Scheduled Batch Reports page. For details, see "Scheduled Batch Reports Page Elements" on page 191.

Table 79. Failed Batch Reports Page Elements

Page Element	Description

Failed Business Reports Module (Business Edition)	This module displays the following elements:
	■ Module title text: Failed Business Reports
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: Hierarchy Name
	  ■ Text and sorting link: Position
	  ■ Text and sorting link: Request Date
	  ■ Text and sorting link: Run Date
	  ■ Text and sorting link: Private
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: User ID
	  ■ Data: Hierarchy Name
	  ■ Data: Position
	  ■ Data: Request Date
	  ■ Data: Run Date
	  ■ Data: Privacy setting
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.

Table 79. Failed Batch Reports Page Elements

Page Element	Description

Failed Batch Reports Module (Consumer Edition)	This module displays the following elements:
	■ Module title text: Failed Batch Reports
	■ Column Headings:
	  ■ Text and sorting link: Report Name
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: Run Date
	  ■ Text: Actions
	■ Column Content:
	  ■ Data: Report name
	  ■ Data: Account Number
	  ■ Data: Run date
	  ■ Icon and link: View icon
	  Link target: Displays the selected report options.
	  ■ Icon and link: Delete icon
	  Link target: Displays the Delete Batch Report page. For details, see "Delete Batch Report Page Elements" on page 201.

Use Case: Viewing the Selected Options for a Batch Report

This use case lets a user view the options that were selected for a batch report.

Main Path for Viewing the Selected Options for a Batch Report

The main path occurs when a user clicks the View Icon next to a report name on the Pending Batch Reports, Scheduled Batch Reports, Completed Batch Reports, or Failed Batch Reports pages to display the Selected Report Options page.

Alternate Paths for Viewing the Selected Options for a Batch Report

No alternate paths occur in this use case.

Select Report Options Page Elements

Table 80 describes the elements of this page.

Table 80. Select Report Options Page Elements

Page Element	Description
Report Name	(Name of report)

Report Details Module (Business Edition)	This module displays the following elements:
	■ Module title text: Report Details
	■ Column Headings:
	  ■ Text: Company Name
	  ■ Text: Hierarchy Name
	  ■ Text: Position
	■ Column Content:
	  ■ Data: Company name
	  ■ Data: Hierarchy name
	  ■ Data: Position

Report Details Module (Consumer Edition)	This module displays the following elements:
	■ Module title text: Report Details
	■ Column Headings:
	  ■ Text: User ID
	  ■ Text: Account Number
	■ Column Content:
	  ■ Data: User ID
	  ■ Data: Account Number

Select Report Options	This module displays the following elements: ■ Module title text: Select Report Options ■ Text and data: Batch Report Name *Batch Report Name* ■ (Business Edition Only) Text and data: Marked for *Security Privacy setting* ■ Text and data: Number of Results *Number of results* ■ Text, icon, and data: File Type Options *File type icon File type* ■ Text and data: Billing Period Generated *Billing period* ■ Text and data: Actual Run Date *Run date* ■ Text and data: Submitted Report Date *Date submitted*

Use Case: Deleting a Batch Report

This use case lets a user delete a batch report. A batch report of any status can be deleted: Completed, Pending, Failed, or Scheduled.

Main Path for Deleting a Batch Report

The main path occurs when a user clicks the Delete icon on the Pending Batch Reports, Scheduled Batch Reports, Completed Batch Reports, or Failed Batch Reports pages to display the Delete Batch Report page.

Alternate Paths for Deleting a Batch Report

No alternate paths occur in this use case.

Delete Batch Report Page Elements

Table 81 describes the elements of this page.

Table 81. Delete Batch Report Page Elements

Page Element	Description
Page Title	Delete Batch Report
Delete Batch Report Module	This module displays the following elements: ■ Module title text: Delete Batch Report ■ Text and data: Confirm that you want to delete the following batch report: Report name

Report Details Module (Business Edition)	his module displays the following elements:
	■ Module title text: Report Details
	■ Column titles:
	  ■ Text: Company Name
	  ■ Text: Hierarchy Name
	  ■ Text: Position
	■ Column content:
	  ■ Data: Company Name
	  ■ Data: Hierarchy Name
	  ■ Data: Position

Table 81. Delete Batch Report Page Elements

Page Element	Description

Report Details Module (Consumer Edition)	This module displays the following elements:
	■ Module title text: Report Details
	■ Column titles:
	  ■ Text: User ID
	  ■ Text: Account Number
	■ Column content:
	  ■ Data: User ID
	  ■ Data: Account number

Select Report Options	This module displays the following elements: ■ Module title text: Select Report Options ■ Text and data: Batch Report Name *Batch Report Name* ■ (Business Edition Only) Text and data: Marked for *Security Privacy setting* ■ Text and data: Number of Results *Number of results* ■ Text, icon, and data: File Type Options *File type icon File type* ■ Text and data: Billing Period Generated *Billing period* ■ Text and data: Actual Run Date *Run date* ■ Text and data: Submitted Report Date *Date submitted* ■ Button: Delete Action: Deletes the batch report. ■ Button Cancel Action: Cancels the action.

11 Making and Managing Payments

This chapter describes use cases for making and managing payments. It includes the following topics:

- Use Case: Making a One-Time Payment on page 204
- Use Case: Editing a One-Time Payment Transaction on page 216
- Use Case: Canceling a One-Time Payment Transaction on page 219
- Use Case: Creating a Recurring Payment on page 221
- Use Case: Viewing Recurring Payments on page 225
- Use Case: Editing a Recurring Payment on page 226
- Use Case: Canceling a Recurring Payment on page 228
- Use Case: Making a Quick Payment on page 229
- Use Case: Viewing Payment Activity on page 237
- Use Case: Creating a Payment Account on page 240
- Use Case: Viewing a List of Payment Accounts on page 246
- Use Case: Selecting a Default Payment Account on page 250
- Use Case: Sharing a Payment Account on page 252
- Use Case: Editing a Bank Account (Payment Account) on page 253
- Use Case: Editing a Credit Card Account (Payment Account) on page 254
- Use Case: Editing a Debit Card Account (Payment Account) on page 256
- Use Case: Deleting a Bank Account (Payment Account) on page 258
- Use Case: Deleting a Credit Card Account (Payment Account) on page 260
- Use Case: Deleting a Debit Card Account (Payment Account) on page 261

Use Case: Making a One-Time Payment

This use case lets a user make a one-time bill payment. A user can make a one-time payment on one or more billing accounts and specify the amount to pay on each. Existing payment accounts or a new bank account, debit card, or credit card can be used to make the payment.

Main Path for Making a One-Time Payment

The main path occurs when a user clicks Pay Now on the Dashboard to display the Make a One-Time Payment page.

Alternate Paths for Making a One-Time Payment

The following alternate paths can occur in this use case:

- The user clicks Payments, and then One Time.
- The user clicks Pay Now on a statement-related page.

Make a One-Time Payment Page Elements

Table 82 describes the elements of this page.

Table 82. Make a One-Time Payment Page Elements

Page Element	Description
Page Title	Make a One-Time Payment
Search Billing Accounts Module	This module displays the following elements: ■ Module title text: Search Billing Accounts ■ Text: *To filter the list of billing accounts below you can either provide a billing account number (wildcards are accepted), or a statement due by date. ■ Text and blank field for data entry: Billing Accounts *Field* ■ Text and blank field for data entry: Statement Due By *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: Submit Action: Searches for the account.

Table 82. Make a One-Time Payment Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Select 1 or More Billing Accounts (*Number* items)
	■ Column titles:
	  ■ Column selection radio button
	  ■ Text and sorting link: Billing Account
	  ■ Text and sorting link: Rec.
	  ■ Text, data, and sorting link: Statement Date
	  ■ Text, data, and sorting link: Statement Amount Due (*Currency*)
	  ■ Text, data, and sorting link: Statement Due Date
	  ■ Text, data, and sorting link: Latest Payment Date
	  ■ Text, data, and sorting link: Latest Payment Amount (*Currency*)
	  ■ Text, data, and sorting link: Current Amount Due (*Currency*)

Report Details Module, continued	■ Column content:
	  ■ Radio button
	  ■ Data: Account Number
	  ■ Data: *Recurring payment icon* or *blank*
	  ■ Data: Statement date
	  ■ Data: Statement amount due
	  ■ Data: Statement due date
	  ■ Data: Latest payment date
	  ■ Data: Latest payment amount
	  ■ Data: Current amount due
	■ Button: Next
	Action: Displays the Select Payment Options page for the selected billing accounts. For details, see "Select Payment Options Page Elements" on page 206.
	■ Button: Reset
	Action: Clears the form fields.

Select Payment Options Page Elements

Table 83 describes the elements of this page.

Table 83. Select Payment Options Page Elements

Page Element	Description
Page Title	Select Payment Options

Selected Billing Accounts Module	This module displays the following elements:
	■ Module title text and data: Selected Billing Accounts (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Account
	  ■ Text, data, and sorting link: Statement Date
	  ■ Text, data, and sorting link: Statement Amount Due (*Currency*)
	  ■ Text, data, and sorting link: Statement Due Date
	  ■ Text, data, and sorting link: Latest Payment Date
	  ■ Text, data, and sorting link: Latest Payment Amount (*Currency*)
	  ■ Text, data, and sorting link: Current Amount Due (*Currency*)
	  ■ Text and data: Payment Amount (*Currency*)

Table 83. Select Payment Options Page Elements

Page Element	Description
Selected Billing Accounts Module, continued	■ Column content: ■ Data: Account Number ■ Data: Statement date ■ Data: Statement amount due ■ Data: Statement due date ■ Data: Latest payment date ■ Data: Latest payment amount ■ Data: Current amount due ■ Blank field for data entry ■ Total row: ■ Text: Total ■ Data: Statement amount due ■ Data: Latest payment amount ■ Data: Current amount due ■ Data: Amount entered for payment

Table 83. Select Payment Options Page Elements

Page Element	Description
Enter Payment Details Module	This module displays the following elements: ■ Module title text and data: Enter Payment Details ■ Text: Please select a payment account and a date for this payment transaction. ■ Radio button and text: *Button* Use Payment Account ■ Drop-down list: *Payment account* ■ Radio button and text: *Button* Enter Payment Account ■ Drop-down list: *Payment account type* ■ Text and blank field for data entry: Payment Date *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: Next Action: If the users selected the Use Payment Account option, the Confirm One -Time Payment page displays. For details, see "Confirm One-Time Payment Page Elements" on page 208. If the user selected the Enter Payment Account option and account type, then one of the following pages displays: ■ **Enter Bank Account Information.** For details, see "Enter Bank Account Information Page Elements" on page 210. ■ **Enter Credit Card Information.** For details, see "Enter Credit Card Information Page Elements" on page 212. ■ **Enter Debit Card Information.** For details, see "Enter Debit Card Information Page Elements" on page 214. ■ Button: Cancel Action: Cancels the action.

Confirm One-Time Payment Page Elements

Table 84 describes the elements of this page.

Table 84. Confirm One-Time Payment Page Elements

Page Element	Description
Page Title	Confirm One-Time Payment

Table 84. Confirm One-Time Payment Page Elements

Page Element	Description
Confirmation Message Module	This module displays the following element: ■ Text: Confirmation You are about to make a payment transaction with the selected payment account, for the billing accounts listed below.
Payment Details Module	This module displays the following elements: ■ Module title text: Payment Details ■ Text and data: Payment Account *Payment account name* ■ Text and data: Payment Date *Payment date* ■ Text and data: Billing Account *Account number* ■ Text and data: Total Payment Amount *Currency Total payment amount* ■ (If configured) Text and data: Convenience Fee *Currency Fee* ■ Button: Submit Action: Submits the payment and displays the Payment Summary page. For details, see "Payment Summary Page Elements" on page 209. ■ Button: Cancel Action: Cancels the action.

Payment Summary Page Elements

Table 85 describes the elements of this page.

Table 85. Payment Summary Page Elements

Page Element	Description
Page Title	Payment Summary

Table 85. Payment Summary Page Elements

Page Element	Description
Payment Success Message Module	This module displays the following element: ■ Text and data: Thank you for your payment. It is currently being processed and your Payment ID is *Payment ID*. Please review the Payment Activity screen for an updated status in the next 24 hours. Email notification will be sent to *Email Address*. ■ Printer-friendly element
Payment Details Module	This module displays the following elements: ■ Module title text: Payment Details ■ Text and data: Payment Account *Payment account name* ■ Text and data: Payment Date *Payment date* ■ Text and data: Billing Account *Account number* ■ Text and data: Total Payment Amount *Currency Total payment amount*

Enter Bank Account Information Page Elements

Table 86 describes the elements of this page.

Table 86. Enter Bank Account Information Page Elements

Page Element	Description
Page Title	Enter Bank Account Information

Table 86. Enter Bank Account Information Page Elements

Page Element	Description
Payment Account Type Module	This module displays the following elements: ■ Text: Select Payment Account Type: ■ Radio button (selected) and text: *Button* Bank Account ■ Radio button and text: *Button* Credit Card Action: Displays the Enter Credit Card Information Page. For details, see "Enter Credit Card Information Page Elements" on page 212. ■ Radio button and text: *Button* Debit Card Action: Displays the Enter Debit Card Information Page. For details, see "Enter Debit Card Information Page Elements" on page 214.
Bank Account Information Module	This module displays the following elements: ■ Module title text: Enter Bank Account Information ■ Text: Bank Account Information ■ Text and blank field for data entry: *Bank Name *Field* ■ Text and drop-down list: * Account Type *Account type* ■ Text and blank field for data entry: *Account Number *Field* ■ Text and blank field for data entry: *Confirm Acct Number *Field* ■ Text and blank field for data entry: *Routing Number *Field* ■ Graphic: Bank check with routing and account number callouts ■ Text: *Required Fields ■ Button: Next Action: Displays the Confirm One-Time Payment page. For details, see "Confirm One-Time Payment Page Elements" on page 208. ■ Button: Cancel Action: Cancels the action.

Enter Credit Card Information Page Elements

Table 87 describes the elements of this page.

Table 87. Enter Credit Card Information Page Elements

Page Element	Description
Page Title	Enter Credit Card Information
Payment Account Type Module	This module displays the following elements: ■ Radio button and text: *Button* Bank Account Action: Displays the Enter Bank Account Information Page. For details, see “Enter Bank Account Information Page Elements” on page 210. ■ Radio button (selected) and text: *Button* Credit Card ■ Radio button and text: *Button* Debit Card Action: Displays the Enter Debit Card Information Page. For details, see “Enter Debit Card Information Page Elements” on page 214.

Table 87. Enter Credit Card Information Page Elements

Page Element	Description
Credit Card Information Module	This module displays the following elements: ■ Module title text: Enter Credit Card Information ■ Text: Credit Card Information ■ Text and blank field for data entry: *Name on Credit Card *Field* ■ Text and blank field for data entry: *Street Address *Field* ■ Text and blank field for data entry: Apt./Suite Number *Field* ■ Text and blank field for data entry: *City *Field* ■ Text and drop-down list: *State *State* ■ Text and blank field for data entry: *Postal Code *Field* ■ Text and drop-down list: *Country *Country* Text and blank field for data entry: *Credit Card Number *Field*
Credit Card Information Module, continued	■ Text and blank field for data entry: *Confirm Card Number *Field* ■ Text and drop-down list: *Credit Card Type *Credit card type* ■ Text and blank field for data entry: *Expiration Date (MM/YYYY) *Field* ■ Text and blank field for data entry: *CVV Code *Field* ■ Text: CV Code is used for validation purpose only ■ Text: * Required Fields ■ Graphical logos: Pulse, NYCE, and Star ■ Button: Next Action: If you have configured your implementation to charge convenience fees, then the Convenience Fee Confirmation page displays. For details, see "Convenience Fee Confirmation Page Elements" on page 216. Otherwise, the Confirm One-Time Payment page displays. For details, see "Confirm One-Time Payment Page Elements" on page 208. ■ Button: Cancel Action: Cancels the action.

Enter Debit Card Information Page Elements

Table 88 describes the elements of this page.

Table 88. Enter Debit Card Information Page Elements

Page Element	Description
Page Title	Enter Debit Card Information
Payment Account Type Module	This module displays the following elements: ■ Radio button and text: *Button* Bank Account Action: Displays the Enter Bank Account Information Page. For details, see "Enter Bank Account Information Page Elements" on page 210. ■ Radio button and text: *Button* Credit Card Action: Displays the Enter Credit Card Information Page. For details, see "Enter Credit Card Information Page Elements" on page 212. ■ Radio button (selected) and text: *Button* Debit Card

Table 88. Enter Debit Card Information Page Elements

Page Element	Description
Debit Card Information Module	This module displays the following elements: ■ Module title text: Enter Debit Card Information ■ Text: Debit Card Information ■ Text and blank field for data entry: *Name on Debit Card *Field* ■ Text and blank field for data entry: *Street Address *Field* ■ Text and blank field for data entry: Apt./Suite Number *Field* ■ Text and blank field for data entry: *City *Field* ■ Text and drop-down list: *State *State* ■ Text and blank field for data entry: *Postal Code *Field* ■ Text and drop-down list: *Country *Country*
Debit Card Information Module, continued	■ Text and blank field for data entry: *Debit Card Number *Field* ■ Text and blank field for data entry: *Confirm Card Number *Field* ■ Text and blank field for data entry: *Expiration Date (MM/YYYY) *Field* ■ Text and blank field for data entry: *CVV Code *Field* ■ Text: CVV Code is used for validation purpose only ■ Text: *Required Fields ■ Graphical logos: Pulse, NYCE, and Star ■ Button: Next Action: If you have configured your implementation to charge convenience fees, then the Convenience Fee Confirmation page displays. For details, see "Convenience Fee Confirmation Page Elements" on page 216. Otherwise, the Confirm One-Time Payment page displays. For details, see "Confirm One-Time Payment Page Elements" on page 208. ■ Button: Cancel Action: Cancels the action.

Convenience Fee Confirmation Page Elements

Table 89 describes the elements of this page.

Table 89. Convenience Fee Confirmation Page Elements

Page Element	Description
Page Title	Convenience Fee Confirmation
Convenience Fee Module	This module displays the following elements: ■ Module title text: Convenience Fee ■ Text and data: Payment Account *Payment account name* ■ Text and data: Payment Date *Date* ■ Text and data: Payment Amount *Amount* ■ (If configured) Text and data: *Card type* Convenience Fee *Currency Amount* ■ Text and data: Total Payment Amount *Currency Amount* ■ Text and data: There is a *Currency Amount* convenience fee to process this payment. If you understand and accept this fee and wish to continue, please check the box below and continue. Otherwise, select the Cancel button and no charges will be made to your account. ■ Radio button, text, and data: *Button* I understand and accept the *Currency Amount* convenience fee and wish to proceed with my payment. ■ Button: Next Action: Displays the Confirm One-Time Payment page. For details, see "Confirm One-Time Payment Page Elements" on page 208. ■ Button: Cancel Action: Cancels the action.

Use Case: Editing a One-Time Payment Transaction

This use case lets a user edit a one-time payment they previously submitted. A one-time payment can only be edited if the payment status is Scheduled.

Main Path for Editing a One-Time Payment

The main path occurs when a user clicks Edit on the Payment Activity page to display the Edit One-Time Payment page.

Alternate Paths for Editing a One-Time Payment

No alternate paths occur in this use case.

Edit One-Time Payment Page Elements

Table 93 describes the elements of this page.

Table 90. Edit One-Time Payment Page Elements

Page Element	Description
Page Title	Edit One-Time Payment
Edit One-Time Payment Module	This module displays the following elements: ■ Module title text: Edit One-Time Payment ■ Text and blank field for data entry: *Payment Date *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector

Table 90. Edit One-Time Payment Page Elements

Page Element	Description

Accounts Selected for Payment Module	This module displays the following elements:
	■ Module title text and data: Accounts Selected for Payment (*Number* items)
	■ Column titles:
	  ■ Text: Account Number
	  ■ Text: Payment Account
	  ■ Text: Due Date
	  ■ Text and data: Amount Due (*Currency*)
	  ■ Text: Payment Date
	  ■ Text and data: Payment Amount (*Currency*)

Accounts Selected for Payment Module, continued	■ Column content:
	  ■ Data: Account number
	  ■ Data: Payment account
	  ■ Data: Due date
	  ■ Data: Amount due
	  ■ Data: Payment date
	  ■ Data: Payment amount
	■ Content of total row:
	  ■ Text: Total
	  ■ Data: Total payment amount
	■ Button: Submit
	Action: Displays the Confirm One-Time Payment page. For details, see "Confirm One-Time Payment Page Elements" on page 208.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Canceling a One-Time Payment Transaction

This use case lets a user cancel a one-time payment they previously submitted. A one-time payment can only be canceled if the payment status is Scheduled.

Main Path for Deleting a Scheduled One-Time Payment

The main path occurs when a user clicks Cancel on the Payment Activity page to display the Cancel One-Time Payment page.

Alternate Paths for Deleting a Scheduled One-Time Payment

No alternate paths occur in this use case.

Cancel One-Time Payment Page Elements

Table 93 describes the elements of this page.

Table 91. Cancel One-Time Payment Page Elements

Page Element	Description
Page Title	Cancel One-Time Payment

Table 91. Cancel One-Time Payment Page Elements

Page Element	Description
Cancel One-Time Payment Module	This module displays the following elements: ■ Module title text: Cancel One-Time Payment ■ Text: You are about to cancel the payment. Do you wish to continue? ■ Button: Submit Action: Displays the Cancel Payment Confirmation page with a confirmation message. For details, see "Cancel Payment Confirmation Page Elements" on page 221. ■ Button: Cancel Action: Cancels the action.

Payment Information Module	This module displays the following elements:
	■ Module title text and data: Payment Information (*Number* items)
	■ Column titles:
	  ■ Text: Billing Account
	  ■ Text: Payment Account
	  ■ Text: Due Date
	  ■ Text and data: Amount Due (*Currency*)
	  ■ Text: Payment Date
	  ■ Text and data: Payment Amount (*Currency*)
	■ Column content:
	  ■ Data: Account number
	  ■ Data: Payment account
	  ■ Data: Due date
	  ■ Data: Amount due
	  ■ Data: Payment date
	  ■ Data: Payment amount

Cancel Payment Confirmation Page Elements

Table 92 describes the elements of this page.

Table 92. Cancel Payment Confirmation Page Elements

Page Element	Description
Page Title	Cancel Payment Confirmation
Cancel Payment Module	This module displays the following elements: ■ Module title text: Cancel Payment ■ Text: You are about to cancel the payment. Do you wish to continue? ■ Button: Back Action: Displays the Payment Activity page. For details, see “Payment Activity Page Elements” on page 238.

Use Case: Creating a Recurring Payment

This use case lets a user set up recurring payments for one or more billing accounts using a saved payment account. A recurring payment is an automatic payment made on a chosen transfer date, for a chosen amount type (total, total with threshold, or a fixed amount), and for a selected effective period.

Main Path for Creating a Recurring Payment

The main path occurs when a user clicks Add Recurring Payment on the Recurring Payment page.

Alternate Paths for Creating a Recurring Payment

No alternate paths occur in this use case.

Create Recurring Payment Page Elements

Table 93 describes the elements of this page.

Table 93. Create Recurring Payment Page Elements

Page Element	Description
Page Title	Create Recurring Payment
Search Billing Accounts Module	This module displays the following elements: ■ Module title text: Search Billing Accounts ■ Text: *To filter the list of billing accounts below you can either provide a billing account number (wildcards are accepted), or a statement due by date. ■ Text and blank field for data entry: Billing Accounts *Field* ■ Text and blank field for data entry: Statement Due By *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: Submit Action: Searches for the account.

Select Billing Accounts Module	This module displays the following elements:
	■ Module title text and data: Select Billing Accounts (*Number* items)
	■ Column titles:
	  ■ Column selection radio button
	  ■ Text and sorting link: Billing Account
	  ■ Text, data, and sorting link: Statement Date
	  ■ Text, data, and sorting link: Statement Amount Due (*Currency*)
	  ■ Text, data, and sorting link: Statement Due Date
	■ Column content:
	  ■ Radio button
	  ■ Data: Account number
	  ■ Data: Statement date
	  ■ Data: Statement amount due
	  ■ Data: Statement due date

Table 93. Create Recurring Payment Page Elements

Page Element	Description
Select Payment Account Module	This module displays the following elements: ■ Module title text: Select Payment Account ■ Radio button and text: *Button* Use Saved Payment Account ■ Drop-down list: *Payment account list* ■ Text and link: Create New Payment Account Link target: Displays the Create Payment Account page. For details, see "Create Payment Account Page Elements" on page 241. ■ Button: Next Action: Displays the Select Payment Amount Type, Select Payment Transfer Date, and Select Effective Period modules. ■ Button: Back Action: Displays the Search Billing Accounts module.
Message Module	This module displays the following elements: ■ Text: Warning Message Recurring Payment setup will be effective only from the next billing cycle. Please take a moment to pay the total amount due for your current bill by making a One-Time Payment. ■ Button: Next Action: Displays the Confirm Recurring Payment page. For details, see "Confirm Recurring Payment Page Elements" on page 224. ■ Button: Back Action: Displays the Search Billing Accounts module.
Select Payment Amount Type Module	This module displays the following elements: ■ Radio button and text: *Button* Total Account Due ■ Radio button, text, data, and blank field for data entry: *Button* Total Amount Due With a Threshold of *Currency Field* ■ Text: (You will be notified by e-mail if Amount Due exceeds the desired threshold.) ■ Radio button, text, data, and blank field for data entry: *Button* Fixed Amount *Currency Field*

Table 93. Create Recurring Payment Page Elements

Page Element	Description
Select Payment Transfer Date Module	This module displays the following elements: ■ Radio button, text, and blank field for data entry: *Button Field* Days Before Due Date ■ Text: (Please enter a valid number of days between 0 and 30) ■ Radio button, text, and drop-down list: *Button* On The *List* Of Every Month
Select Effective Period	This module displays the following elements: ■ Radio button and text: *Button* Until Canceled ■ Radio button, text, and blank field for data entry: *Button* For *Field* payments ■ Radio button, text, and blank field for data entry: *Button* Until Date *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector

Confirm Recurring Payment Page Elements

Table 94 describes the elements of this page.

Table 94. Confirm Recurring Payment Page Elements

Page Element	Description
Page Title	Confirm Recurring Payment
Selected Billing Accounts Module	This module displays the following elements: ■ Module title text: Select Billing Accounts ■ Text and data: Account Number *Account number* ■ Button: Submit Action: Displays the Recurring Payment page with a success message. For details, see “Recurring Payment Page Elements” on page 226. ■ Button: Cancel Action: Cancels the action.

Table 94. Confirm Recurring Payment Page Elements

Page Element	Description
Recurring Payment Summary Module	This module displays the following elements: ■ Module title text: Select Billing Accounts ■ Text and data: From Payment Account *Account name* ■ Text and data: Account Type *Type* ■ Text and data: Payment Interval *Payment interval* ■ Text and data: Effective Period *Effective period*
Confirm Recurring Payment Module (After editing an existing recurring payment)	This module displays the following elements: ■ Module title text: Confirm Recurring Payment ■ Text and data: Billing Account *Billing account* From Payment Account *Payment account* ■ Text and data: Account Type *Type* Payment Date Option *Payment date option* ■ Text and data: Effective Period *Effective period* ■ Button: Submit Action: Displays the Recurring Payment page. For details, see "Recurring Payment Page Elements" on page 226. ■ Button: Cancel Action: Cancels the action.

Use Case: Viewing Recurring Payments

This use case lets a user view the list of the recurring payments that he or she has created for billing accounts to which they are assigned in the billing hierarchy.

Main Path for Viewing Recurring Payments

The main path occurs when a user clicks Payments, and then Recurring to display the Recurring Payment page.

Alternate Paths for Viewing Recurring Payments

No alternate paths occur in this use case.

Recurring Payment Page Elements

Table 95 describes the elements of this page.

Table 95. Recurring Payment Page Elements

Page Element	Description
Page Title	Recurring Payment

Recurring Payments Module	This module displays the following elements:
	■ Module title text and data: Recurring Payments (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Account
	  ■ Text and sorting link: Amount Type
	  ■ Text and sorting link: Payment Date Option
	  ■ Text: Effective Period
	  ■ Text: Actions
	■ Column content:
	  ■ Data: Account number
	  ■ Data: Amount type
	  ■ Data: Payment date option
	  ■ Data: Effective period
	  ■ Text and link: Edit
	  Link action: Displays the Edit Recurring Payment page. For details, see "Edit Recurring Payment Page Elements" on page 227.
	  ■ Text and link: Cancel
	  Link action: Displays the Cancel Recurring Payment page. For details, see "Cancel Recurring Payment Page Elements" on page 229.
	■ Button: Add Recurring Payment
	Action: Displays the Create Recurring Payment page. For details, see "Create Recurring Payment Page Elements" on page 222.

Use Case: Editing a Recurring Payment

This use case lets a user edit the details of an existing recurring payment.

Main Path for Editing a Recurring Payment

The main path occurs when a user clicks Edit on the Recurring Payment page to display the Edit Recurring Payment page.

Alternate Paths for Editing a Recurring Payment

No alternate paths occur in this use case.

Edit Recurring Payment Page Elements

Table 96 describes the elements of this page.

Table 96. Edit Recurring Payment Page Elements

Page Element	Description
Page Title	Edit Recurring Payment
Edit Recurring Payments Module	This module displays the following elements: ■ Module title text and data: Edit Recurring Payment ■ Text: After editing a recurring payment, the changes will be applied to all future payments. ■ Text and data: Amount Number *Amount number* ■ Text and link: Submit Link action: Displays the Confirm Recurring Payment page. For details, see "Confirm Recurring Payment Page Elements" on page 224. ■ Text and link: Cancel Link action: Cancels the action.
Payment Account Module	This module displays the following elements: ■ Text: Payment Account ■ Text and drop-down list: *Payment Account *List* ■ Button: New Payment Account Action: Displays the Payment Accounts page. For details, see "Payment Accounts Page Elements" on page 247.

Table 96. Edit Recurring Payment Page Elements

Page Element	Description
Select Payment Option Module	This module displays the following elements: ■ Module title text: Select Payment Option ■ Radio button and text: *Button* Total Amount Due ■ Radio button, text, data, and blank field for data entry: *Button* Total Amount Due With a Threshold of *Currency Field* ■ Text: (You will be notified by e-mail if Amount Due exceeds the desired threshold.)
Payment Transfer Date Module	This module displays the following elements: ■ Radio button, text, and blank field for data entry: *Button Field* Days Before Due Date ■ Text: (Please enter a valid number of days between 0 and 30) ■ Radio button, text, and drop-down list: *Button* On The *List* Of Every Month

Use Case: Canceling a Recurring Payment

This use case lets a user cancel an existing recurring payment.

Main Path for Canceling a Recurring Payment

The main path occurs when a user clicks Cancel on the Recurring Payment page to display the Edit Recurring Payment page.

Alternate Paths for Canceling a Recurring Payment

No alternate paths occur in this use case.

Cancel Recurring Payment Page Elements

Table 97 describes the elements of this page.

Table 97. Cancel Recurring Payment Page Elements

Page Element	Description
Page Title	Cancel Recurring Payment
Cancel Recurring Payments Module	This module displays the following elements: ■ Module title text and data: Cancel Recurring Payment ■ Text and data: Billing Account *Account* ■ Text and data: Payment Date Option *Payment date option* ■ Text and data: Amount Type *Amount type* ■ Text and data: Effective Period *Effective period* ■ Text and link: Submit Link action: Cancels the recurring payment and displays the Recurring Payment page with a success message. For details, see "Recurring Payment Page Elements" on page 226. ■ Text and link: Back Link action: Displays the Recurring Payment page. For details, see "Recurring Payment Page Elements" on page 226.

Use Case: Making a Quick Payment

This use case lets an enrolled or unenrolled user make a payment on a particular billing account without logging in.

Main Path for Making an Anonymous Payment

The main path occurs when an enrolled or unenrolled user clicks Pay Now on the Login page to display the Pay Now - Billing Account page.

Alternate Paths for Making an Anonymous Payment

No alternate paths occur in this use case.

Pay Now - Billing Account Page Elements

Table 98 describes the elements of this page.

Table 98. Pay Now - Billing Account Page Elements

Page Element	Description
Page Title	Pay Now - Billing Account
Provide Billing Account Information Module	This module displays the following elements: ■ Module title text: Provide Billing Account Information ■ Text: Billing Information ■ Text and blank field for data entry: Name *Field* ■ Text and blank field for data entry: *Billing Account Number *Field* ■ Text and blank field for data entry: Email Address *Amount Field* ■ Text and blank field for data entry: *Service Number *Field* ■ Text and link: Submit Link action: Submits the data and displays the Pay Now - Select Payment Type page. For details, see "Pay Now - Select Payment Type Page Elements" on page 231. ■ Text and link: Cancel Link action: Cancels the action and displays the Login page. For details, see "Login Page Elements" on page 33. ■ Text: *Required Fields

Pay Now - Select Payment Type Page Elements

Table 99 describes the elements of this page.

Table 99. Pay Now - Select Payment Type Page Elements

Page Element	Description
Page Title	Pay Now - Select Payment Type
Billing Information Module	This module displays the following elements: ■ Module title text: Billing Information ■ Text: Billing Information ■ Text: Mailing Address ■ Text and data: Name *Name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Postal Code *Postal code* ■ Text and data: Country *Country* ■ Text: Billing Account ■ Text and data: Account Number *Account number* ■ Text and data: Service Number *Service number*
Select Payment Option Module	This module displays the following elements: ■ Module title text: Select Payment Option ■ Text and drop-down list: *Select Payment Method *List* ■ Text and data: Payment Date *Date*

Table 99. Pay Now - Select Payment Type Page Elements

Page Element	Description
Bank Account Information Module	This module displays the following elements: ■ Module title text: Bank Account Information ■ Text and blank field for data entry: *Bank Name *Field* ■ Text and drop-down list: *Account Type *List* ■ Text and blank field for data entry: *Payment Amount *Field* ■ Text and blank field for data entry: *Routing Number *Field* ■ Text and blank field for data entry: *Account Number *Field* ■ Text and blank field for data entry: *Confirm Acct Number *Field* ■ Graphic: Bank check routing and account numbers. ■ Text: *Required Field ■ Button: Next Action: Displays the Pay Now - *Payment Type* - Confirmation page. For details, see “Pay Now - Payment Type - Confirmation Page Elements” on page 234. ■ Button: Cancel Action: Cancels the action and displays the Pay Now - Billing Account page. For details, see “Pay Now - Billing Account Page Elements” on page 230 page.

Table 99. Pay Now - Select Payment Type Page Elements

Page Element	Description
Provide Your Credit Card Information Module	This module displays the following elements: ■ Module title text: Provide Your Credit Card Information ■ Text and blank field for data entry: *Name on Credit Card *Field* ■ Text and blank field for data entry: *Street Address *Field* ■ Text and blank field for data entry: Apt./Suite Number *Field* ■ Text and blank field for data entry: *City *Field* ■ Text and drop-down list: *State *List* ■ Text and blank field for data entry: *Postal Code *Field* ■ Text and blank field for data entry: *Credit Card Number *Field* ■ Text and blank field for data entry: *Confirm Card Number *Field* ■ Text and drop-down list: *Credit Card Type *List* ■ Text and blank field for data entry: *Expiration Date: (MM/YYYY) *Field* ■ Text and blank field for data entry: *CVV Code *Field* ■ Text and blank field for data entry: *Payment Amount *Field* ■ Text: CVV Code is used for validation purpose only ■ Text: *Required Field ■ Button: Next Action: Displays the Pay Now - *Payment Type* - Confirmation page. For details, see "Pay Now - Payment Type - Confirmation Page Elements" on page 234. ■ Button: Cancel Action: Cancels the action and displays the Pay Now - Billing Account page. For details, see "Pay Now - Billing Account Page Elements" on page 230 page.

Pay Now - *Payment Type* - Confirmation Page Elements

Table 100 describes the elements of this page.

Table 100. Pay Now - *Payment Type* - Confirmation Page Elements

Page Element	Description
Page Title	Displays one of the following titles: ■ Pay Now - Bank Account - Confirmation ■ Pay Now - Credit Card- Confirmation
Billing Information Module	This module displays the following elements: ■ Module title text: Billing Information ■ Text: Billing Information ■ Text: Mailing Address ■ Text and data: Name *Name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Postal Code *Postal code* ■ Text and data: Country *Country* ■ Text: Billing Account ■ Text and data: Account Number *Account number* ■ Text and data: Service Number *Service number*
Select Payment Option Module	This module displays the following elements: ■ Module title text: Select Payment Option ■ Text and data: *Select Payment Method *Method* ■ Text and data: Payment Date *Date*

Table 100. Pay Now - *Payment Type* - Confirmation Page Elements

Page Element	Description
Bank Account Information Module (If selected)	This module displays the following elements: ■ Module title text: Bank Account Information ■ Text and data: *Bank Name *Field* ■ Text and data: *Account Type *List* ■ Text and data: *Payment Amount *Field* ■ Text and data: *Routing Number *Field* ■ Text and data: *Account Number *Field* ■ Text and data: *Confirm Acct Number *Field* ■ Graphic: Bank check routing and account numbers. ■ Text: *Required Field ■ Button: Next Action: Displays the Pay Now - Thank You page. For details, see "Pay Now - Thank You Page Elements" on page 237. ■ Button: Cancel Action: Cancels the action and displays the Pay Now - Select Payment Type page. For details, see "Pay Now - Select Payment Type Page Elements" on page 231.

Table 100. Pay Now - *Payment Type* - Confirmation Page Elements

Page Element	Description
Provide Your Credit Card Information Module (If selected)	This module displays the following elements: ■ Module title text: Provide Your Credit Card Information ■ Text and data: *Name on Credit Card *Field* ■ Text and data: *Street Address *Field* ■ Text and data: Apt./Suite Number *Field* ■ Text and data: *City *Field* ■ Text and data: *State *List* ■ Text and data: *Postal Code *Field* ■ Text and data: *Credit Card Number *Field* ■ Text and data: *Confirm Card Number *Field* ■ Text and data: *Credit Card Type *List* ■ Text and data: *Expiration Date: (MM/YYYY) *Field* ■ Text and data: *CVV Code *Field* ■ Text and data: *Payment Amount *Field* ■ Text: CVV Code is used for validation purpose only ■ Text: *Required ■ Button: Next Action: Displays the Pay Now - Thank You page. For details, see “Pay Now - Thank You Page Elements” on page 237. ■ Button: Cancel Action: Cancels the action and displays the Pay Now - Select Payment Type page. For details, see “Pay Now - Select Payment Type Page Elements” on page 231.

Pay Now - Thank You Page Elements

Table 101 describes the elements of this page.

Table 101. Pay Now - Thank You Page Elements

Page Element	Description
Page Title	Pay Now - Thank You
Pay Now - Thank You Module	This module displays the following elements: ■ Text: Success Message ■ Text and data: Thank you for your payment. it is currently being processed and your Payment ID is *Payment ID* ■ Text: To ensure maximum protection of your personal information, we recommend that you close your browser. ■ Text and link: Login Link target: Displays the Login page. For details, see "Login Page Elements" on page 33.

Use Case: Viewing Payment Activity

This use case lets a user view a list of payment transactions that are scheduled, completed, or canceled. A user can search for payment activity by account number, payment type, status, and date range.

Main Path for Viewing Payment Activity

The main path occurs when a user clicks Payments, and then Activity.

Alternate Paths for Viewing Payment Activity

No alternate paths occur in this use case.

Payment Activity Page Elements

Table 102 describes the elements of this page.

Table 102. Payment Activity Page Elements

Page Element	Description
Page Title	Payment Activity
Search Module	This module displays the following elements: ■ Module title text: Search By ■ Text and blank field for data entry: Account Number *Field* ■ Text and drop-down list: Payment Type *List* ■ Text and blank field for data entry: Payment Transactions From *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: View Action: Displays the payment transactions for the selected account and criteria.

Table 102. Payment Activity Page Elements

Page Element	Description

List of Payment Transactions Module	This module displays the following elements:
	■ Module title text and data: List of Payment Transactions (*Number* items)
	■ Column titles:
	  ■ Text and sorting link: Billing Account
	  ■ Text and sorting link: Payment Type
	  ■ Text and sorting link: Payment Scheduled Date
	  ■ Text and sorting link: Payment Transaction Date
	  ■ Text, data, and sorting link: Amount (*Currency)*
	  ■ Text and sorting link: Status
	  ■ Text: Actions

List of Payment Transactions Module, continued	■ Column content:
	  ■ Data: Billing account
	  ■ Data: Payment type
	  ■ Data: Payment scheduled date
	  ■ Data: Payment transaction date
	  ■ Data: Amount (*Currency)*
	  ■ Data: Status
	  ■ For scheduled transactions:
	    ❑ Text and link: Edit
	    Link target: Displays the Edit One-Time Payment page. For details, see "Edit One-Time Payment Page Elements" on page 217.
	    ❑ Text and link: Cancel.
	    Displays the Cancel One-Time Payment page. For details, see "Cancel One-Time Payment Page Elements" on page 219.
	  ■ For completed and canceled transactions):
	    ❑ Text and link: View Details
	    Link target: Displays the Payment Details page. For details, see "Payment Details Page Elements" on page 240.

Payment Details Page Elements

Table 103 describes the elements of this page.

Table 103. Payment Details Page Elements

Page Element	Description
Page Title	Payment Details
Payment Information Module	This module displays the following elements: ■ Module title text: Payment Information ■ Text and data: Account Number *Account number* ■ Text and data: Payment Type *Type* ■ Text and data: Payment Scheduled Date *Date* ■ Text and data: Payment Transaction Date *Date* ■ Text and data: Payment Amount *Amount* ■ Text and data: Payment Account *Payment account number* ■ Text and data: Status *Status* ■ Text and data: Created by User *User name* ■ Text and data: Updated by User *User name* ■ Text and data: Date Created *Date* ■ Text and data: Date Modified *Date Date* ■ Button: Back Action: Displays the Payment Activity page.

Use Case: Creating a Payment Account

This use case lets a user create a new payment account for use in making one-time and recurring payments.

Main Path for Creating a Payment Account

The main path occurs when a user clicks Create New Payment Account on the Payment Accounts page to display the Create Payment Account page.

Alternate Paths for Creating a Payment Account

An alternate path occurs when a user clicks Create New Payment Account on the Create Recurring Payment page.

Create Payment Account Page Elements

Table 104 describes the elements of this page.

Table 104. Create Payment Account Page Elements

Page Element	Description
Page Title	Create Payment Account
Search Billing Accounts Module	This module displays the following elements: ■ Module title text: Search Billing Accounts ■ Text: *To filter the list of billing accounts below you can either provide a billing account number (wildcards are accepted), or a statement due by date. ■ Text and blank field for data entry: Billing Accounts *Field* ■ Text and blank field for data entry: Statement Due By *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: Submit Action: Searches for the account.

Payment Account Confirmation Page Elements

Table 105 describes the elements of this page.

Table 105. Payment Account Confirmation Page Elements

Page Element	Description
Page Title	Payment Account Confirmation
Message Module	This module displays the following element: ■ Text: Confirmation Upon clicking submit the following bank account information will be saved as a valid payment account.

Table 105. Payment Account Confirmation Page Elements

Page Element	Description

Payment Account Information Module	This module displays the following elements:
	■ Module title text: Payment Account Information
	■ Text: Payment Account Information
	■ Text: Payment Account Name
	■ Data: Payment Account Name
	■ For a bank account:
	  ■ Text: Bank Account Information
	  ■ Text: Bank Name
	  ■ Data: Bank Name
	■ For a credit card:
	  ■ Text: Credit Card Information
	  ■ Text: Name on Credit Card
	  ■ Data: Name on card
	  ■ Text: Street Address
	  ■ Data: Street address
	  ■ Text: Apt./Suite Number
	  ■ Data: Apt. or suite number
	  ■ Text: State
	  ■ Data: State
	  ■ Text: Postal Code
	  ■ Data: Code
	  ■ Text: Country
	  ■ Data: Country
	  ■ Text: Credit Card Number
	  ■ Data: Credit card number
	  ■ Text: Credit Card Type
	  ■ Data: Credit card type

Table 105. Payment Account Confirmation Page Elements

Page Element	Description
Payment Account Information Module, continued	■ Text: Expiration Date (MM/YYYY) ■ Data: Date ■ Text: City ■ Data: City ■ For a debit card: ■ Text: Debit Card Information ■ Text: Name on Debit Card ■ Data: Name on card ■ Text: Street Address ■ Data: Street address ■ Text: Apt./Suite Number ■ Data: Apt. or suite number ■ Text: State ■ Data: State ■ Text: Postal Code ■ Data: Code ■ Text: Country ■ Data: Country ■ Text: Debit Card Number ■ Data: Debit card number ■ Text: Expiration Date (MM/YYYY) ■ Data: Date ■ Text: City ■ Data: City ■ Text: Account Type ■ Data: Account type ■ Button: Submit Action: Submits the data and displays the Payment Account Summary page. For details, see "Payment Account Summary Page Elements" on page 244. ■ Button: Cancel Action: Cancels the action.

Payment Account Summary Page Elements

Table 106 describes the elements of this page.

Table 106. Payment Account Summary Page Elements

Page Element	Description
Page Title	Payment Account Summary
Message Module	This module displays the following element: ■ Text and link: Success Message Your payment account has been created successfully. Would you like to share this payment account? Click here. Link target: Displays the Share Payment Account page. For details, see “Share Payment Account Page Elements” on page 252.

Table 106. Payment Account Summary Page Elements

Page Element	Description

Payment Account Information Module	This module displays the following elements:
	■ Module title text: Payment Account Information
	■ Text: Payment Account Information
	■ Text: Payment Account Name
	■ Data: Payment Account Name
	■ For a bank account:
	  ■ Text: Bank Account Information
	  ■ Text: Bank Name
	  ■ Data: Bank Name
	■ For a credit card:
	  ■ Text: Credit Card Information
	  ■ Text: Name on Credit Card
	  ■ Data: Name on card
	  ■ Text: Street Address
	  ■ Data: Street address
	  ■ Text: Apt./Suite Number
	  ■ Data: Apt. or suite number
	  ■ Text: State
	  ■ Data: State
	  ■ Text: Postal Code
	  ■ Data: Code
	  ■ Text: Country
	  ■ Data: Country
	  ■ Text: Credit Card Number
	  ■ Data: Credit card number
	  ■ Text: Credit Card Type
	  ■ Data: Credit card type
	  ■ Text: Expiration Date (MM/YYYY)
	  ■ Data: Date
	  ■ Text: City
	  ■ Data: City

Table 106. Payment Account Summary Page Elements

Page Element	Description
	■ For a debit card: ■ Text: Debit Card Information ■ Text: Name on Debit Card ■ Data: Name on card ■ Text: Street Address ■ Data: Street address ■ Text: Apt./Suite Number ■ Data: Apt. or suite number ■ Text: State ■ Data: State ■ Text: Postal Code ■ Data: Code ■ Text: Country ■ Data: Country ■ Text: Debit Card Number ■ Data: Debit card number ■ Text: Expiration Date (MM/YYYY) ■ Data: Date ■ Text: City ■ Data: City ■ Text: Account Type ■ Data: Account type

Use Case: Viewing a List of Payment Accounts

This use case lets a user view a list of payment accounts he or she has created. A user can also view payment accounts assigned to individual billing accounts.

Main Path for Viewing Payment Accounts

The main path occurs when a user clicks Payments, and then Accounts.

Alternate Paths for Viewing Payment Accounts

An alternate path occurs when a user clicks New Payment Account on the Edit Recurring Payment page.

Payment Accounts Page Elements

Table 107 describes the elements of this page.

Table 107. Payment Accounts Page Elements

Page Element	Description
Page Title	Payment Accounts
Prompt Module	This module displays the following elements: ■ Text: View by ■ Radio button and text: *Button* Payment Accounts ■ Radio button and text: *Button* Billing Accounts ■ Text and link: Create New Payment Account Link target: Displays the Create Payment Account page. For details, see "Create Payment Account Page Elements" on page 241.

Table 107. Payment Accounts Page Elements

Page Element	Description

Payment Accounts Module	This module displays the following elements:
	■ Module title text and data: Payment Accounts (*Number* items)
	■ When viewed by payment accounts:
	  ■ Column titles:
	    ❑ Text and sorting link: Payment Account Name
	    ❑ Text and sorting link: Payment Account Type
	    ❑ Text and sorting link: Payment Account/Card Number
	    ❑ Text and sorting link: Status
	    ❑ Text and sorting link: Billing Account Number
	    ❑ Text: Actions
	  ■ Column content:
	    ❑ Data: Payment account name
	    ❑ Data: Payment account type
	    ❑ Data: *Payment account number* or *card number*
	    ❑ Data: Status
	    ❑ Data, or icon and link: *Shared billing Account Number, Billing account number icon*, or *blank*
	Link target: Displays the Billing Account dialog box showing a list of billing accounts with which share this payment account. For details, see “Billing Account Dialog Box Elements” on page 250.
	    ❑ Data: Billing account number
	    ❑ Text and link: Edit
	Link target: Displays the Edit page for the payment account type. For details, see one of the following:
	“Enter Bank Account Information Page Elements” on page 210
	“Enter Credit Card Information Page Elements” on page 212
	“Enter Debit Card Information Page Elements” on page 214
	    ❑ Text and link: Share
	Link target: Displays the Share Payment Account Page. For details, see “Share Payment Account Page Elements” on page 252.

Table 107. Payment Accounts Page Elements

Page Element	Description
Payment Accounts Module, continued	❑ Text and link: Delete Link target: Displays the Delete page for the payment account type. For details, see one of the following: "Delete Bank Account Page Elements" on page 258 "Delete Credit Card Page Elements" on page 260 "Delete Debit Card Page Elements" on page 262 ■ When viewed by billing accounts: ■ Column titles: ❑ Text and sorting link: Billing Account Number ❑ Text: Payment Accounts ❑ Text and sorting link: Default Payment Account Name ❑ Text and sorting link: Payment Account Type ❑ Text and sorting link: Payment Account/Card Number ❑ Text: Actions ■ Column content: ❑ Data: Billing account number ❑ Icon and link: *Payment accounts icon* or *blank* Link target: Displays the Payment Accounts for Billing Account dialog box. For details, see "Payment Accounts for Billing Account Dialog Box Elements" on page 250. ❑ Data: Default payment account name ❑ Data: Payment account type ■ Data: *Payment account number* or *card number* ❑ Text and link: Edit Link target: Displays the Select Default Payment Account page. For details, see "Select Default Payment Account Page Elements" on page 251.

Billing Account Dialog Box Elements

Table 108 describes the elements of this page.

Table 108. Billing Account Dialog Box Elements

Page Element	Description
Title Text	Billing Account
Billing Accounts Module	This module displays the following elements: ■ Column title: Numbers ■ Column data: Billing account number

Payment Accounts for Billing Account Dialog Box Elements

Table 109 describes the elements of this page.

Table 109. Payment Accounts for Billing Account Dialog Box Elements

Page Element	Description
Title Text	Billing Account
Payment Accounts for Billing Accounts Module	This module displays the following elements: ■ Column titles: ■ Text: Payment Account Name ■ Text: Payment Account Type ■ Text: Payment Account/Card Number ■ Column content: ■ Data: Payment account name ■ Data: Payment account type ■ Data: *Payment account number* or *card number*

Use Case: Selecting a Default Payment Account

This use case lets a user specify a payment account as the default for a particular billing account.

Main Path for Selecting a Default Payment Account

The main path occurs when a user clicks Edit on the Payment Accounts page for a billing account.

Alternate Paths for Selecting a Default Payment Account

No alternate paths occur in this use case.

Select Default Payment Account Page Elements

Table 110 describes the elements of this page.

Table 110. Select Default Payment Account Page Elements

Page Element	Description
Page Title	Select Default Payment Account
Billing Account Information	This module displays the following elements: ■ Module title text: Billing Account Information ■ Text and data: Billing Account Number *Account number* ■ Text and data: Name on Billing Account *Name*

Select Default Payment Account Module	This module displays the following elements:
	■ Module title text and data: Select Default Payment Account (*Number* items)
	■ Column titles:
	  ■ Text: Select
	  ■ Text and sorting link: Payment Account Name
	  ■ Text and sorting link: Payment Account Type
	  ■ Text: Payment Account/Card Number
	■ Column content:
	  ■ Radio button
	  ■ Data: Payment account name
	  ■ Data: Payment account type
	  ■ Data: *Payment account number* or *card number*
	■ Button: Submit
	Action: Submits the data and displays a success message on the Payment Accounts page. For details, see "Payment Accounts Page Elements" on page 247.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Sharing a Payment Account

This use case lets a user share a payment account with selected billing accounts. Sharing a payment account makes it available to anyone who has access to the billing accounts that share the payment account.

Main Path for Sharing a Payment Account

The main path occurs when a user clicks Share on the Payment Accounts page.

Alternate Paths for Sharing a Payment Account

An alternate path occurs when a user clicks Click Here on the Payment Account Summary page when setting up a new payment account.

Share Payment Account Page Elements

Table 111 describes the elements of this page.

Table 111. Share Payment Account Page Elements

Page Element	Description
Page Title	Share Payment Account
Message Module	This module displays the following elements: ■ Text: Informational By selecting this option, the payment account will be available to anyone who has access to the billing account(s) you have shared this payment account with.

Table 111. Share Payment Account Page Elements

Page Element	Description
Payment Account Information Module	This module displays the following elements: ■ Module title text: Payment Account Information ■ Text and data: Payment Account Name *Payment account name* ■ Text and data: Account Type *Account type*

Billing Account Share List Module	This module displays the following elements:
	■ Module title text and data: Payment Account will be shared with the following Billing Accounts (*Number* items)
	■ Column titles:
	  ■ Column selection radio button
	  ■ Text and sorting link: Billing Account
	  ■ Text and sorting link: Name on Billing Account
	■ Column content:
	  ■ Radio button
	  ■ Data: Account number
	  ■ Data: Name on billing account
	■ Button: Next
	Action: Displays the Payment Accounts page with a success message. For details, see “Payment Accounts Page Elements” on page 247.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Editing a Bank Account (Payment Account)

This use case lets a user edit information about a bank account type of payment account.

Main Path for Editing a Bank Account

The main path occurs when a user clicks Edit on the Payment Accounts page for a bank account payment account.

Alternate Paths for Editing a Bank Account

No alternate paths occur in this use case.

Edit Bank Account Page Elements

Table 112 describes the elements of this page.

Table 112. Edit Bank Account Page Elements

Page Element	Description
Page Title	Edit Bank Account
Edit Bank Account Module	This module displays the following elements: ■ Module title text: Edit Bank Account ■ Text: Payment Account Information ■ Text and blank field for data entry: *Payment Account Name *Field* ■ Text: Bank Account Information ■ Text and blank field for data entry: *Bank Name *Field* ■ Text and blank field for data entry: *Account Type *Field* ■ Text and blank field for data entry: *Account Number *Field* ■ Text and blank field for data entry: *Routing Number *Field* ■ Text: *Required Fields ■ Graphic: Bank check with routing and account number callouts ■ Button: Update Action: Updates the information. ■ Button: Cancel Action: Cancels the action.

Use Case: Editing a Credit Card Account (Payment Account)

This use case lets a user edit information about a credit card type of payment account.

Main Path for Editing a Credit Card Account

The main path occurs when a user clicks Edit on the Payment Accounts page for a credit card payment account.

Alternate Paths for Editing a Credit Card Account

No alternate paths occur in this use case.

Edit Credit Card Account Page Elements

Table 113 describes the elements of this page.

Table 113. Edit Credit Card Account Page Elements

Page Element	Description
Page Title	Edit Credit Card Account
Edit Credit Card Account Module	This module displays the following elements: ■ Module title text: Edit Credit Card ■ Text: Payment Account Information ■ Text and blank field for data entry: *Payment Account Name *Field* ■ Text: Credit Card Information ■ Text and blank field for data entry: *Name on Credit Card *Field* ■ Text and blank field for data entry: *Street Address *Field* ■ Text and blank field for data entry: Apt./Suite Number *Field* ■ Text and blank field for data entry: *City *Field* ■ Text and drop-down list: *State *State* ■ Text and blank field for data entry: *Postal Code *Field* ■ Text and drop-down list: *Country *Country* ■ Text and blank field for data entry: *Credit Card Number *Field* ■ Text and drop-down list: *Credit Card Type *Credit card type* ■ Text and blank field for data entry: *Expiration Date (MM/YYYY) *Field* ■ Text and blank field for data entry: *CVV Code *Field* ■ Text: CVV Code is used for validation purpose only ■ Text: *Required Fields ■ Button: Update Action: Updates the information. ■ Button: Cancel Action: Cancels the action.

Use Case: Editing a Debit Card Account (Payment Account)

This use case lets a user edit information about a debit card type of payment account.

Main Path for Editing a Debit Card Account

The main path occurs when a user clicks Edit on the Payment Accounts page for a debit card payment account.

Alternate Paths for Editing a Debit Card Account

No alternate paths occur in this use case.

Edit Debit Card Account Page Elements

Table 114 describes the elements of this page.

Table 114. Edit Debit Card Account Page Elements

Page Element	Description
Page Title	Edit Debit Card Account
Edit Debit Card Account Module	This module displays the following elements: ■ Module title text: Edit Debit Card ■ Text: Payment Account Information ■ Text and blank field for data entry: *Payment Account Name *Field* ■ Text: Debit Card Information ■ Text and blank field for data entry: *Name on Debit Card *Field* ■ Text and blank field for data entry: *Street Address *Field* ■ Text and blank field for data entry: Apt./Suite Number *Field* ■ Text and blank field for data entry: *City *Field* ■ Text and drop-down list: *State *State* ■ Text and blank field for data entry: *Postal Code *Field* ■ Text and drop-down list: *Country *Country* ■ Text and blank field for data entry: *Debit Card Number *Field* ■ Text and blank field for data entry: *Expiration Date (MM/YYYY) *Field* ■ Text and blank field for data entry: *CVV Code *Field* ■ Text: CVV Code is used for validation purpose only ■ Text: *Required Fields ■ Graphic: Bank check with routing and account number callouts ■ Button: Update Action: Updates the information. ■ Button: Cancel Action: Cancels the action.

Use Case: Deleting a Bank Account (Payment Account)

This use case lets a user delete a bank account type of payment account.

Main Path for Deleting a Bank Account

The main path occurs when a user clicks Delete on the Payment Accounts page for a bank account.

Alternate Paths for Deleting a Bank Account

No alternate paths occur in this use case.

Delete Bank Account Page Elements

Table 115 describes the elements of this page.

Table 115. Delete Bank Account Page Elements

Page Element	Description
Page Title	Delete Bank Account

Table 115. Delete Bank Account Page Elements

Page Element	Description
Bank Account Information Module	This module displays the following elements: ■ Module title text: Bank Account Information ■ Text: Payment Account Information ■ Text and blank field for data entry: Payment Account Name *Account name* ■ Text: Bank Account Information ■ Text and data: Bank Name *Name* ■ Text and data: Account Type *Type* ■ Text and data: Account Number *Account number* ■ Text and data: Routing Number *Routing number*

Billing Accounts the Payment Account is Shared With Module	This module displays the following elements:
	■ Module title text and data: Billing Accounts the Payment Account is Shared with (*Number* items)
	■ Column titles:
	  ■ Text and sorting data: Billing Account
	  ■ Text and sorting data: Name on Billing Account
	■ Column content:
	  ■ Data: Billing account
	  ■ Data: Name on billing account
	■ Button: Submit
	Action: Displays the Payment Accounts page with a success message. For details, see "Payment Accounts Page Elements" on page 247.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Deleting a Credit Card Account (Payment Account)

This use case lets a user delete a credit card account type of payment account.

Main Path for Deleting a Credit Card Account

The main path occurs when a user clicks Delete on the Payment Accounts page for a credit card account.

Alternate Paths for Deleting a Credit Card Account

No alternate paths occur in this use case.

Delete Credit Card Page Elements

Table 116 describes the elements of this page.

Table 116. Delete Credit Card Page Elements

Page Element	Description
Page Title	Delete Credit Card
Credit Card Information Module	This module displays the following elements: ■ Module title text: Credit Card Information ■ Text: Payment Account Information ■ Text and blank field for data entry: Payment Account Name *Account name* ■ Text: Credit Card Information ■ Text and data: Name on Credit Card *Name* ■ Text and data: Street Address *Street Address* ■ Text and data: Apt./Suite Number *Number* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Postal Code *Code* ■ Text and data: Country *Country*

Table 116. Delete Credit Card Page Elements

Page Element	Description
Credit Card Information Module, continued	■ Text and data: Credit Card Number *Number* ■ Text and data: Credit Card Type *Credit card type* ■ Text and data: Expiration Date (MM/YYYY) *Date* ■ Button: Submit Action: Displays the Payment Accounts page with a success message. For details, see "Payment Accounts Page Elements" on page 247. ■ Button: Cancel Action: Cancels the action.

Billing Accounts the Payment Account is Shared With Module	This module displays the following elements:
	■ Module title text and data: Billing Accounts the Payment Account is Shared with (*Number* items)
	■ Column titles:
	  ■ Text and sorting data: Billing Account
	  ■ Text and sorting data: Name on Billing Account
	■ Column content:
	  ■ Data: Billing account
	  ■ Data: Name on billing account
	■ Button: Submit
	Action: Displays the Payment Accounts page with a success message. For details, see "Payment Accounts Page Elements" on page 247.
	■ Button: Cancel
	Action: Cancels the action.

Use Case: Deleting a Debit Card Account (Payment Account)

This use case lets a user delete a debit card account type of payment account.

Main Path for Deleting a Debit Card Account

The main path occurs when a user clicks Delete on the Payment Accounts page for a debit card account.

Alternate Paths for Deleting a Debit Card Account

No alternate paths occur in this use case.

Delete Debit Card Page Elements

Table 117 describes the elements of this page.

Table 117. Delete Debit Card Page Elements

Page Element	Description
Page Title	Delete Credit Card
Debit Card Information Module	This module displays the following elements: ■ Module title text: Debit Card Information ■ Text: Payment Account Information ■ Text and blank field for data entry: Payment Account Name *Account name* ■ Text: Debit Card Information ■ Text and data: Name on Debit Card *Name* ■ Text and data: Street Address *Street Address* ■ Text and data: Apt./Suite Number *Number* ■ Text and data: City *City* ■ Text and data: State *State*

Table 117. Delete Debit Card Page Elements

Page Element	Description
Debit Card Information Module, continued	■ Text and data: Postal Code *Code* ■ Text and data: Country *Country* ■ Text and data: Debit Card Number *Number* ■ Text and data: Expiration Date (MM/YYYY) *Date* ■ Button: Submit Action: Displays the Payment Accounts page with a success message. For details, see "Payment Accounts Page Elements" on page 247. ■ Button: Cancel Action: Cancels the action.

Billing Accounts the Payment Account is Shared With Module	This module displays the following elements:
	■ Module title text and data: Billing Accounts the Payment Account is Shared with (*Number* items)
	■ Column titles:
	  ■ Text and sorting data: Billing Account
	  ■ Text and sorting data: Name on Billing Account
	■ Column content:
	  ■ Data: Billing account
	  ■ Data: Name on billing account
	■ Button: Submit
	Action: Displays the Payment Accounts page with a success message. For details, see "Payment Accounts Page Elements" on page 247.
	■ Button: Cancel
	Action: Cancels the action.

12 Managing Hierarchies

This chapter describes use cases for viewing and managing hierarchies in the Business Edition of Oracle Billing Insight. It includes the following topics:

- Use Case: Managing Hierarchies (Business Edition Only) on page 265
- Use Case: Searching a Hierarchy (Business Edition Only) on page 270
- Use Case: Comparing Hierarchy Periods (Business Edition Only) on page 275

Use Case: Managing Hierarchies (Business Edition Only)

This use case lets a user manage hierarchies, including modifying or deleting element details, and removing or unassigning a user from a hierarchy.

Users can view information about a billing or business hierarchy, for one or more billing periods. Users can filter the search within a hierarchy by elements assigned to the hierarchy (such as company, account, service agreement, and user), element status, (such as assigned, unassigned, authorized, and unauthorized), and element attributes. Users can refine searches by keywords found within the selection criteria. Users can search across an entire hierarchy or from a particular position within the hierarchy.

Main Path for Managing Hierarchies

The main path occurs when a user clicks Hierarchy, and then Manage to display the Manage Hierarchy page. A new session shows the Manage Hierarchy page from the top; subsequently accessing this page displays the last displayed hierarchy position.

Alternate Paths for Managing Hierarchies

No alternate paths occur in this use case.

Manage Hierarchy Page Elements

Table 118 describes the elements of this page.

Table 118. Manage Hierarchy Page Elements

Page Element	Description
Company Name	Name of the company for the report context.
Select Hierarchy Module	This module displays the following elements: ■ Module title text: Please Select Hierarchy ■ Text and drop-down list: Type *List* ■ Text and drop-down list: Name *List* ■ Text and drop-down list: Billing Periods *List* ■ Button: Show Filter Action: Displays the Select Hierarchy Criteria module.
Select Hierarchy Criteria Module	This module displays the following elements: ■ Module title text: Please Select Hierarchy Criteria ■ Text and drop-down list: Element *List* ■ Text and drop-down list: Status *List* ■ Text and drop-down list: Attribute *List* ■ Text and blank field for data entry: Keyword *Field* ■ Text: Hierarchy Location ■ Radio button and text: *Button* Entire Hierarchy *Button* From Current Position ■ Button: Submit Action: Submits the search, and displays any returned values in the Manage Elements module. ■ Button: Reset Action: Clears the form fields.
Hierarchy Display Module	This module displays the following elements: ■ Module title text: Hierarchy Display ■ Hierarchy tree ■ Text and data: Last Modified *Date Time* Modified By *Method or User*

Table 118. Manage Hierarchy Page Elements

Page Element	Description

Node and Element Module	This module displays the following elements:
	■ Module title text: Current Node (or Manage Elements)
	■ Tabs:
	  ■ Details
	  Tab target: Displays details about the selected hierarchy node (user, company, account number, or service number)
	  ■ Elements
	  Tab target: Displays the elements returned by the Select Hierarchy Criteria module.
	■ Entities on the Details tab:
	  ■ Button: Submit
	  Action: Updates the modified or deleted details.
	  ■ Button: Reset
	  Action: Clears the form fields.
	  ■ (For a selected User) Button: Remove
	  Action: Displays a message and buttons.
	    ❑ Text: Performing this operation will permanently remove this item from this location in the hierarchy. The item will be unassigned. Do you want to continue?
	    ❑ Button: Submit
	    Action: Removes, or unassigns, the user from the hierarchy position.
	    ❑ Button: Cancel
	    Action: Cancels the action.
	  ■ Account number and group details:
	    ❑ Text and editable data: Account Number *Account number*
	    ❑ Text and editable data: Account Name *Account name*
	    ❑ Text and editable data: Contact Name *Contact name*
	    ❑ Text and editable data: Company Name *Company name*
	    ❑ Text and editable data: Description *Description*

Table 118. Manage Hierarchy Page Elements

Page Element	Description
Node and Element Module, continued	■ Company details: ❏ Text and editable data: Company ID *Company ID* ❏ Text and editable data: Company Name *Company name* ❏ Text and editable data: Address *Address* ❏ Text and editable data: City *City* ❏ Text and editable data: State *State* ❏ Text and editable data: Postal Code *Postal code* ❏ Text and editable data: Country *Country* ■ Service number details: ❏ Text and editable data: Service Number *Service number* ❏ Text and editable data: Account Number *Account number* ❏ Text and editable data: Subscriber Name *Subscriber name* ❏ Text and editable data: Description *Description* ❏ Text and editable data: Address *Address* ❏ Text and editable data: City *City* ❏ Text and editable data: State *State*

Table 118. Manage Hierarchy Page Elements

Page Element	Description
Node and Element Module, continued	❑ Text and editable data: Postal Code *Postal code* ❑ Text and editable data: Country *Country* ❑ Text and editable data: Geography *Geography description* ❑ Text and editable data: Division *Division* ❑ Text and editable data: Department *Department* ❑ Text and editable data: Cost Center *Cost center* ❑ Text and editable data: Employee ID *Employee ID* ■ User details: ❑ Text and editable data: First Name *First name* ❑ Text and editable data: Last Name *Last name* ❑ Text and editable data: Street 1 *Street address line 1* ❑ Text and editable data: Street 2 *Street address line 2* ❑ Text and editable data: City *City* ❑ Text and editable data: State *State* ❑ Text and editable data: Postal Code *Postal code* ❑ Text and editable data: County *County* ❑ Text and editable data: Country *Country* ❑ Text and editable data: Email 1 *Email address 1* ❑ Text and editable data: Email 2 *Email address 2* ❑ Text and editable data: Phone 1 *Phone number 1* ❑ Text and editable data: Phone 2 *Phone number 2* ❑ Text and editable data: Fax *Fax number* ■ Entities on the Manage Elements tab: ■ Title text and data: Results (*Number* items) ■ Column headings: ❑ Check box (for All) ❑ Data: Element type ❑ Text: Position ■ Column content: ❑ Check box

Table 118. Manage Hierarchy Page Elements

Page Element	Description
Node and Element Module, continued	❑ Data and link: Element Link target: Displays details for the element. ❑ Data and link: Hierarchy position Link target: Selects the hierarchy position as the current position for the Manage Hierarchy page.

Use Case: Searching a Hierarchy (Business Edition Only)

This use case lets a user view information about a billing or business hierarchy, for one or more billing periods. Users can filter the search within a hierarchy by elements assigned to the hierarchy (such as company, account, service agreement, and user), element status, (such as assigned, unassigned, authorized, and unauthorized), and element attributes. Users can refine searches by keywords found within the selection criteria. Users can search across an entire hierarchy or from a particular position within the hierarchy.

Main Path for Searching a Hierarchy

The main path occurs when a user clicks Hierarchy, and then Search to display the Search Hierarchy page. A new session shows the Search Hierarchy page with no data; subsequently accessing this page displays the previous search results.

Alternate Paths for Searching a Hierarchy

No alternate paths occur in this use case.

Search Hierarchy Page Elements

Table 119 describes the elements of this page.

Table 119. Search Hierarchy Page Elements

Page Element	Description
Title Text or Data	Search Hierarchy. Alternately, a selected element displays (data).
Select Hierarchy Module	This module displays the following elements: ■ Module title text: Please Select Hierarchy ■ Text and drop-down list: Type *List* ■ Text and drop-down list: Name *List* ■ Text and drop-down list: Billing Periods *List* ■ Button: Show or Hide Filter Action: Displays or hides the Select Hierarchy Criteria module.
Select Hierarchy Criteria Module	This module displays the following elements: ■ Module title text: Please Select Hierarchy Criteria ■ Text and drop-down list: Element *List* ■ Text and drop-down list: Status *List* ■ Text and drop-down list: Attribute *List* ■ Text and blank field for data entry: Keyword *Field* ■ Text: Hierarchy Location ■ Radio button and text: *Button* Entire Hierarchy *Button* From Current Position ■ Button: Submit Action: Submits the search, and displays the results on the Report module. ■ Button: Reset Action: Clears the form fields. ■ Text: Please select an element and status to perform the search within the selected hierarchy.

Table 119. Search Hierarchy Page Elements

Page Element	Description

Report Module	This module displays the following elements:
	■ Module title text and data: Results (*Number* items)
	■ Account number and group results:
	  ■ Column headings:
	    ❑ Text: Account Number
	    ❑ Text: Position
	    ❑ Text: Account Name
	    ❑ Text: Contact Name
	    ❑ Text: Address
	    ❑ Text: City
	    ❑ Text: State
	    ❑ Text: Country
	    ❑ Text: Postal Code
	  ■ Column content:
	    ❑ Data: and link: Account number
	    Link target: Displays the Hierarchy Display module, and the Node and Element Modules for the selected hierarchy.
	    ❑ Data: Position
	    ❑ Data: Account name
	    ❑ Data: Contact name
	    ❑ Data: Address
	    ❑ Data: City
	    ❑ Data: State
	    ❑ Data: Country
	    ❑ Data: Postal Code
	■ Company results:
	  ■ Column headings:
	    ❑ Text: Identity ID
	    ❑ Text: Position
	    ❑ Text: Company Name
	    ❑ Text: Address
	    ❑ Text: City

Table 119. Search Hierarchy Page Elements

Page Element	Description
Report Module, continued	❑ Text: State ❑ Text: Postal Code ■ Column content: ❑ Data and link: Company ID Link target: Displays the Hierarchy Display module, and the Node and Element Modules for the selected hierarchy. ❑ Data: Position ❑ Data: Company name ❑ Data: Address ❑ Data: City ❑ Data: State ❑ Data: Postal Code ■ Service number results: ■ Column headings: ❑ Text: Service Number ❑ Text: Position ❑ Text: Account Number ❑ Text: Subscriber Name ❑ Text: Geography ❑ Text: Division ❑ Text: Department

Table 119. Search Hierarchy Page Elements

Page Element	Description
Report Module, continued	❑ Text: Cost Center ❑ Text: Employee ID ■ Column content: ❑ Data and link: Service number Link target: Displays the Hierarchy Display module, and the Node and Element Modules for the selected hierarchy. ❑ Data: Position ❑ Data: Account number ❑ Data: Subscriber name ❑ Data: Geography ❑ Data: Division ❑ Data: Department ❑ Data: Cost center ❑ Data: Employee ID ■ User results: ■ Column headings: ❑ Check box (for All) ❑ Text: Name ❑ Text: Position ❑ Text: Email ■ Column content: ❑ Check box ❑ Data and link: User name Link target: Displays the Hierarchy Display module, and the Node and Element Modules for the selected hierarchy. ❑ Data: Hierarchy position ❑ Data: Email ■ Button: Submit Action: Displays the Hierarchy Display module, and the Node and Element Modules for the selected hierarchies.

Table 119. Search Hierarchy Page Elements

Page Element	Description
Hierarchy Display Module	For details on the Hierarchy Display module, see Table 118 on page 266.
Node and Elements Module	For details on the Node and Elements module (Details and Elements tabs), see Table 118 on page 266.

Use Case: Comparing Hierarchy Periods (Business Edition Only)

This use case lets a user compare a hierarchy over two business periods.

Main Path for Comparing Hierarchy Periods

The main path occurs when a user clicks Hierarchy, and then Compare to display the Compare Hierarchy page.

Alternate Paths for Comparing Hierarchy Periods

No alternate paths occur in this use case.

Compare Hierarchy Page Elements

Table 120 describes the elements of this page.

Table 120. Compare Hierarchy Page Elements

Page Element	Description
Title Text	Compare Hierarchy
Period Selection Module	This module displays the following elements: ■ Module title text: Please Select Two Different Periods to Compare ■ Text and drop-down list: Hierarchy Type *List* ■ Text and drop-down list: Hierarchy Name *List* ■ Text and drop-down list: Period One *List* ■ Text and drop-down list: Period Two *List* ■ Button: Submit Action: Displays the results on the Period One and Period Two modules. ■ Button: Reset Action: Clears the form fields.

Table 120. Compare Hierarchy Page Elements

Page Element	Description
Period One Module	This module displays the following elements: ■ Module title text and data: Period 1 *Date* ■ Hierarchy tree ■ Text and data: Last Modified *Date Time* Modified By *Method or User*
Period Two Module	This module displays the following elements: ■ Module title text and data: Period 2 *Date* ■ Hierarchy tree ■ Text and data: Last Modified *Date Time* Modified By *Method or User*

13 Administering Hierarchies

This chapter describes use cases for creating and managing hierarchies in the Business Edition of Oracle Billing Insight. This chapter includes the following topics:

- Use Case: Creating a Hierarchy (Business Edition Only) on page 277
- Use Case: Copying a Hierarchy (Business Edition Only) on page 278
- Use Case: Importing a Hierarchy (Business Edition Only) on page 280
- Use Case: Publishing a Hierarchy (Business Edition Only) on page 282
- Use Case: Downloading a Hierarchy (Business Edition Only) on page 283
- Use Case: Expiring a Hierarchy (Business Edition Only) on page 284
- Use Case: Deleting a Hierarchy (Business Edition Only) on page 286

Use Case: Creating a Hierarchy (Business Edition Only)

This use case lets a user create a new billing or business hierarchy.

Main Path for Creating a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Create to display the Create Hierarchy page.

Alternate Paths for Creating a Hierarchy

No alternate paths occur in this use case.

Create Hierarchy Page Elements

Table 121 describes the elements of this page.

Table 121. Create Hierarchy Page Elements

Page Element	Description
Title Text	Create Hierarchy
Create Hierarchy Module	This module displays the following elements: ■ Module title text: Create Hierarchy ■ Text and drop-down list: *Select Hierarchy Type *List* ■ Text and blank field for data entry: *Enter Hierarchy Name *Name* ■ Text and drop-down list: Billing Periods *List* ■ Text and blank field for data entry: Description ■ Button: Submit Action: Displays the following: ■ Text: Confirm Create ■ Button: OK Action: Creates the new hierarchy. ■ Button: Cancel Action: Cancels the action. ■ Button: Reset Action: Clears the form fields. ■ Text: *Required Fields

Use Case: Copying a Hierarchy (Business Edition Only)

This use case lets a user copy an existing hierarchy. The user can modify the hierarchy name and description details.

Main Path for Copying a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Copy to display the Copy Hierarchy page.

Alternate Paths for Copying a Hierarchy

No alternate paths occur in this use case.

Copy Hierarchy Page Elements

Table 122 describes the elements of this page.

Table 122. Copy Hierarchy Page Elements

Page Element	Description
Title Text	Copy Hierarchy
Select Hierarchy to Copy Module	This module displays the following elements: ■ Module title text: Please Select Hierarchy to Copy ■ Text and drop-down list: *Select Hierarchy Type *List* ■ Text and drop-down list: *Select Hierarchy Name *List* ■ Text and drop-down list: *Select Hierarchy Period *List* ■ Button: Submit Action: Displays the Hierarchy Display and Details modules. ■ Button: Reset Action: Clears the form fields. ■ Text: *Required Fields

Table 122. Copy Hierarchy Page Elements

Page Element	Description
Hierarchy Display Module	This module displays the following elements: ■ Module title text: Hierarchy Display ■ A hierarchy tree for the selected hierarchy. ■ Text and data: Last Modified *Date Time* Modified By *Method or User*

Details Module	This module displays the following elements:
	■ Module title text: Details
	■ Text and data: Hierarchy Type *Type*
	■ Text and data: Hierarchy Name *Name*
	■ Text and data: Description *Description*
	■ Button: Copy
	Action: Initiates the hierarchy copy, making the following fields editable, though still pre-filled with the original details:
	  ■ Text and editable data: Hierarchy Name *Name*
	  ■ Text and editable data: Description *Description*
	■ Button: Submit
	Action: Displays the following:
	  ■ Text: Confirm Copy
	  ■ Button: OK
	  Action: Copies the new hierarchy.
	  ■ Button: Cancel
	  Action: Cancels the action.
	■ Button: Reset
	Action: Clears the form fields.

Use Case: Importing a Hierarchy (Business Edition Only)

This use case lets a user import a hierarchy in an XML file.

Main Path for Importing a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Import to display the Import Hierarchy page.

Alternate Paths for Importing a Hierarchy

No alternate paths occur in this use case.

Import Hierarchy Page Elements

Table 123 describes the elements of this page.

Table 123. Import Hierarchy Page Elements

Page Element	Description
Title Text	Import Hierarchy
Import Hierarchy Module	This module displays the following elements: ■ Module title text: Import Hierarchy ■ Text: To import a hierarchy and leave it unpublished, leave the start and end periods as Select and click submit. You can publish the hierarchy at later time using the Publish function. By selecting a start and end period the hierarchy will be imported and published for those periods.

Selection Module	This module displays the following elements:
	■ Button: Submit
	Action: Displays the following:
	  ■ Text: Confirm Import
	  ■ Button: OK
	  Action: Imports the hierarchy file.
	  ■ Button: Cancel
	  Action: Cancels the action.
	■ Button: Reset
	Action: Clears the form fields.
	■ Text: *Select Hierarchy File *Type*
	■ Browse button and field: *Field* Browse
	■ Text and drop-down list: *Select Hierarchy Start Period *List*
	■ Text and drop-down list: *Select Hierarchy End Period *List*
	■ Text: *Required Fields

Use Case: Publishing a Hierarchy (Business Edition Only)

This use case lets a user publish a hierarchy. Publishing a hierarchy creates a version set for a specified time period.

Main Path for Publishing a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Publish to display the Publish Hierarchy page.

Alternate Paths for Publishing a Hierarchy

No alternate paths occur in this use case.

Publish Hierarchy Page Elements

Table 124 describes the elements of this page.

Table 124. Publish Hierarchy Page Elements

Page Element	Description
Title Text	Publish Hierarchy

Publish Hierarchy Module	This module displays the following elements:
	■ Module title text: Publish Hierarchy
	■ Button: Submit
	Action: Displays the following:
	  ■ Text: Confirm Publish
	  ■ Button: OK
	  Action: Publishes the hierarchy file.
	  ■ Button: Cancel
	  Action: Cancels the action.
	■ Button: Reset
	Action: Clears the form fields.
	■ Text and drop-down list: *Select Hierarchy Type *List*
	■ Text and drop-down list: *Select Hierarchy Name *List*
	■ Text and drop-down list: *Select Hierarchy Start Period *List*
	■ Text and drop-down list: *Select Hierarchy End Period *List*
	■ Text: *Required Fields

Use Case: Downloading a Hierarchy (Business Edition Only)

This use case lets a user download a hierarchy in an XML file.

Main Path for Downloading a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Download to display the Download Hierarchy page.

Alternate Paths for Downloading a Hierarchy

No alternate paths occur in this use case.

Download Hierarchy Page Elements

Table 125 describes the elements of this page.

Table 125. Download Hierarchy Page Elements

Page Element	Description
Title Text	Download Hierarchy

Download Hierarchy Module	This module displays the following elements:
	■ Module title text: Download Hierarchy
	■ Button: Submit
	Action: Displays a dialog with a message and buttons.
	  ■ Text: Do you want to open or save *FilenameExample.ext* (*size*) from *ServerName*?
	  ■ Button: Open
	Action: Opens the selected file.
	  ■ Button: Save
	Action: Displays the Save drop-down options.
	  ■ Button: Cancel
	Action: Cancels the action.
	■ Button: Reset
	Action: Clears the form fields.
	■ Text and drop-down list: *Select Hierarchy Type *List*
	■ Text and drop-down list: *Select Hierarchy Name *List*
	■ Text and drop-down list: *Select Hierarchy Period *List*
	■ Text and blank field for data entry: *Enter Hierarchy Name *Name*
	■ Text and drop-down list: *Select Hierarchy Format *List*
	■ Text: *Required Fields

Use Case: Expiring a Hierarchy (Business Edition Only)

This use case lets a user expire a hierarchy.

Main Path for Expiring a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Expire to display the Expire Hierarchy page.

Alternate Paths for Expiring a Hierarchy

No alternate paths occur in this use case.

Expire Hierarchy Page Elements

Table 126 describes the elements of this page.

Table 126. Expire Hierarchy Page Elements

Page Element	Description
Title Text	Expire Hierarchy
Expire Hierarchy Module	This module displays the following elements: ■ Module title text: Expire Hierarchy ■ Button: Submit Action: Displays a the Hierarchy Display and Hierarchy Expire Details modules. ■ Button: Reset Action: Clears the form fields. ■ Text and drop-down list: *Select Hierarchy Type *List* ■ Text and drop-down list: *Select Hierarchy Name *List* ■ Text and drop-down list: *Select Expire Through Period *List* ■ Text: *Required Fields

Table 126. Expire Hierarchy Page Elements

Page Element	Description
Hierarchy Display Module	This module displays the following elements: ■ Module title text: Hierarchy Display ■ A hierarchy tree for the selected hierarchy. ■ Text and data: Last Modified *Date Time* Modified By *Method or User*

Expire Hierarchy Details Module	This module displays the following elements:
	■ Module title text: Expire Hierarchy Details
	■ Text and data: Hierarchy Name *Name*
	■ Text and data: Description *Description*
	■ Text: Performing this operation will permanently expire the Hierarchy and cannot be reversed. Do you want to continue?
	■ Button: Submit
	Action: Displays the following:
	  ■ Text: Confirm Expire
	  ■ Button: OK
	  Action: Copies the new hierarchy.
	  ■ Button: Cancel
	  Action: Cancels the action.

Use Case: Deleting a Hierarchy (Business Edition Only)

This use case lets a user delete a hierarchy.

Main Path for Deleting a Hierarchy

The main path occurs when a user clicks Hierarchy, Admin, and then Delete to display the Delete Hierarchy page.

Alternate Paths for Deleting a Hierarchy

No alternate paths occur in this use case.

Delete Hierarchy Page Elements

Table 127 describes the elements of this page.

Table 127. Delete Hierarchy Page Elements

Page Element	Description
Title Text	Delete Hierarchy

Delete Hierarchy Module	This module displays the following elements:
	■ Module title text: Delete Hierarchy
	■ Button: Submit
	Action: Displays a message and buttons.
	  ■ Text: Confirm Delete
	  Performing this operation will permanently delete the Hierarchy including all batch reports under it and cannot be reversed. Do you want to continue?
	  ■ Button: Confirm
	  Action: Deletes the hierarchy.
	  ■ Button: Cancel
	  Action: Cancels the action.
	■ Button: Reset
	Action: Clears the form fields.
	■ Text and drop-down list: *Select Hierarchy Type *List*
	■ Text and drop-down list: *Select Hierarchy Name *List*
	■ Text: *Required Fields

14 Managing a Personal Profile

This chapter describes use cases for a user to manage his or her personal profile, notification preferences, personal address book contacts, and other user preferences. It includes the following topics:

- Use Case: Updating a Personal Profile on page 289
- Use Case: Changing a Password on page 293
- Use Case: Changing a Security Question and Answer on page 294
- Use Case: Setting Notifications on page 295
- Use Case: Viewing Personal Contacts on page 298
- Use Case: Editing a Personal Contact on page 300
- Use Case: Deleting a Personal Contact on page 301
- Use Case: Adding a Personal Contact on page 302
- Use Case: Importing Personal Contacts on page 303
- Use Case: Setting Personal Preferences on page 305

Use Case: Updating a Personal Profile

This use case lets a user update the information in his or her personal profile, including name, address, phone numbers, mobile service provider, and email address.

Main Path for Updating a Personal Profile

The main path occurs when a user clicks My Account, Personal, and then User Profile to display the View Profile page. In the Consumer Edition, the users clicks Personal, then User Profile.

Alternate Paths for Updating a Personal Profile

No alternate paths occur in this use case.

View Profile Page Elements

Table 128 describes the elements of this page.

Table 128. View Profile Page Elements

Page Element	Description
Title Text	View Profile
User Details Module	This module displays the following elements: ■ Module title text: User Details ■ Text and data: User ID *User ID* ■ Text and data: *First Name *First name* ■ Text and data: Middle Name *Middle name* ■ Text and data: *Last Name *Last name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: Address Line 3 *Address line 3* ■ Text and data: City *City* ■ Text and data: Country *Country* ■ Text and data: State *State* ■ Text and data: Postal Code *Postal code*

Table 128. View Profile Page Elements

Page Element	Description
User Details Module, continued	■ Text and data: Home Phone Number *Home phone number* ■ Text and data: Mobile Phone Number *Mobile phone number* ■ Text and data: Mobile Service Provider *Provider name* ■ Text and data: *Email Address *Email address* ■ Text and data: *Role *Role* ■ Text and data: *Status *Status* ■ Text: *Required Fields ■ Text and link: Change Password Link target: Displays the Change Password page. For details, see "Change Password Page Elements" on page 294. ■ Text and link: Change Security Question Link target: Displays the Change Security Question page. For details, see "Change Security Question Page Elements" on page 295.
User Details Module, continued	■ Selection button (not selectable) and text: *Button* Additional Bill Ready Notification Format is Available ■ Button: Edit Action: Displays the Edit User page. For details, see "Edit User Page Elements" on page 292.

Edit User Page Elements

Table 129 describes the elements of this page.

Table 129. Edit User Page Elements

Page Element	Description
Title Text	Edit User
User Details Module	This module displays the following elements: ■ Module title text: User Details ■ Text and data: User ID *User ID* ■ Text and editable data: *First Name *First name* ■ Text and editable data: Middle Name *Middle name* ■ Text and editable data: *Last Name *Last name* ■ Text and editable data: Address Line 1 *Address line 1* ■ Text and editable data: Address Line 2 *Address line 2* ■ Text and editable data: Address Line 3*Address line 3* ■ Text and editable data: City *City* ■ Text and drop-down list: Country *Country* ■ Text and drop-down list: State *State* ■ Text and editable data: Postal Code *Postal code*

Table 129. Edit User Page Elements

Page Element	Description
User Details Module, continued	■ Text and editable data: Home Phone Number *Home phone number* ■ Text and editable data: Mobile Phone Number *Mobile phone number* ■ Text and drop-down list: Mobile Service Provider *Provider name* ■ Text and editable data: *Email Address *Email address* ■ Text and drop-down list (Company Administrator only): *Role *Role* ■ Text and data: *Status *Status* ■ Text: *Required Fields ■ Text and link: Change Password Link target: Displays the Change Password page. For details, see "Change Password Page Elements" on page 294. ■ Text and link: Change Security Question Link target: Displays the Change Security Question page. For details, see "Change Security Question Page Elements" on page 295.
User Details Module, continued	■ Selection button and text: *Button* Additional Bill Ready Notification Format is Available ■ Button: Submit Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Use Case: Changing a Password

This use case lets a user change his or her Self-Service password.

Main Path for Changing a Password

The main path occurs when a user clicks Change Password on the View Profile page to display the Change Password page.

Alternate Paths for Changing a Password

An alternate path can occur when a user clicks Change Password on the Edit User page.

Change Password Page Elements

Table 130 describes the elements of this page.

Table 130. Change Password Page Elements

Page Element	Description
Page Title Text	Change Password
Change Password Module	This module displays the following elements: ■ Module title text: Change Password ■ Text and blank field for data entry: *Old Password *Field* ■ Text and blank field for data entry: *New Password *Field* ■ Text and blank field for data entry: *Confirm New Password *Field* ■ Button: Submit Action: Submits the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Changing a Security Question and Answer

This use case lets a user change his or her Self-Service security question and answer.

Main Path for Changing a Security Question

The main path occurs when a user clicks Change Security Question on the View Profile page to display the Change Security Question page.

Alternate Paths for Changing a Security Question

An alternate path can occur when a user clicks Change Security Question on the on the Edit User page.

Change Security Question Page Elements

Table 131 describes the elements of this page.

Table 131. Change Security Question Page Elements

Page Element	Description
Page Title Text	Change Security Question
Enter Security Question and Answer Module	This module displays the following elements: ■ Module title text: Enter Security Question and Answer ■ Text and drop-down list: *Security Question *List* ■ Text and blank field for data entry: *Security Answer *Field* ■ Button: Submit Action: Submits the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Setting Notifications

This use case lets a Consumer Edition user specify which notifications he or she wants to receive, and by which method; email or SMS.

Main Path for Setting Notifications

The main path occurs when a user clicks My Account, Personal, and then Notifications to display the Notifications page. In the Consumer Edition, the users clicks Personal, then Notifications.

Alternate Paths for Setting Notifications

No alternate paths occur in this use case.

Notifications Page Elements

Table 132 describes the elements of this page.

Table 132. Notifications Page Elements

Page Element	Description
Page Title Text	Notifications

Table 132. Notifications Page Elements

Page Element	Description

Notifications Module	This module displays the following elements:
	■ Module title text: Notifications
	■ Button: Update
	Action: Saves the data.
	■ Button: Cancel
	Action: Cancels the action.
	■ Text: Select method of notification delivery:
	■ Column headings:
	  ■ Text: Email
	  ■ Text: *SMS
	■ Column content:
	  ■ Check button (for email)
	  ■ Check button (for SMS)
	  ■ Notification types:
	    ❑ Text: My bill is ready for viewing
	    ❑ Text: My bill summary is ready via PDF
	    ❑ Text: My payment account has been created, deleted or updated
	    ❑ Text and editable data field: My payment is due is *Field* days
	    ❑ Text: My payment was submitted, modified or deleted

Notifications Module, continued	❑ Text: My recurring payment is set up, modified or deleted ❑ Text: My recurring payment is less than the total amount due (threshold exceeded) ❑ Text: My payment was made successfully ❑ Text: My payment failed ❑ Text: My credit card is about to expire ❑ Text: My batch report is ready ❑ Text: My batch report request is expired. ■ Text: *By selecting notifications to be delivered via SMS, this may incur additional charges, please check with your service provider.

Use Case: Viewing Personal Contacts

This use case lets a user view the personal contacts in his or her personal address book. A user can also search for contacts by alias, first or last name, or phone number.

Main Path for Viewing Personal Contacts

The main path occurs when a user clicks My Account, Personal, and then Contacts to display the Contacts page. In the Consumer Edition, the user clicks Personal, then Contacts.

Alternate Paths for Viewing Personal Contacts

No alternate paths occur in this use case.

Contacts Page Elements

Table 133 describes the elements of this page.

Table 133. Contacts Page Elements

Page Element	Description
Page Title Text	Contacts
Contacts Module	This module displays the following elements: ■ Module title text: Contacts ■ Button: Add New Contact Action: Displays the Add Contact page. For details, see “Add Contact Page Elements” on page 302. ■ Button: Import Contacts Action: Displays the Import Contacts page. For details, see “Importing Contacts Page Elements” on page 304. ■ Download and printer-friendly elements

Table 133. Contacts Page Elements

Page Element	Description
Search Contacts Module	This module displays the following elements: ■ Module title text: Search Contacts ■ Text and drop-down list: Filter By *List* ■ Text and blank field for data entry: Search For *Field* ■ Button: View Action: Displays the Contacts page for the selected contacts.
Report Details Module	This module displays the following elements: ■ Module title text and data: Contacts (*Number* items) ■ Column headings: ■ Text and sorting link: Alias ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: Phone Number ■ Text and sorting link: Contact Type ■ Text: Actions ■ Column content: ■ Data: Alias ■ Data: First name ■ Data: Last name ■ Data: Phone number ■ Data: Contact type ■ Text and link: Edit Link action: Displays the Edit Contact page. For details, see “Edit Contact Page Elements” on page 300. ■ Text and link: Delete Link action: Displays the Delete Contact page. For details, see “Delete Contact Page Elements” on page 301.

Use Case: Editing a Personal Contact

This use case lets a user edit the information for a personal contact.

Main Path for Editing a Personal Contact

The main path occurs when a user clicks Edit next to a contact on the Contacts page.

Alternate Paths for Editing a Personal Contact

No alternate paths occur in this use case.

Edit Contact Page Elements

Table 134 describes the elements of this page.

Table 134. Edit Contact Page Elements

Page Element	Description
Page Title Text	Edit Contact
Edit Contacts Module	This module displays the following elements: ■ Module title text: Edit Contacts ■ Text and editable data: Alias *Alias* ■ Text and editable data: *First Name *First name* ■ Text and editable data: *Last Name *Last name* ■ Text and editable data: *Phone Number *Phone number* ■ Text and drop-down list: *Category *List* ■ Button: Update Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Deleting a Personal Contact

This use case lets a user delete a personal contact.

Main Path for Deleting a Personal Contact

The main path occurs when a user clicks Delete next to a contact on the Contacts page.

Alternate Paths for Deleting a Personal Contact

No alternate paths occur in this use case.

Delete Contact Page Elements

Table 135 describes the elements of this page.

Table 135. Delete Contacts Page Elements

Page Element	Description
Page Title Text	Delete Contacts
Delete Personal Contact Module	This module displays the following elements: ■ Module title text: Delete Contact ■ Text: Warning Message ■ Text: You are about to delete the following contact. Are you sure you want to do this? ■ Text and data: Alias *Alias* ■ Text and data: *First Name *First name* ■ Text and data: *Last Name *Last name* ■ Text and data: *Phone Number *Phone number* ■ Text and data: Contact Type *Contact type* ■ Button: Delete Action: Deletes data. ■ Button: Cancel Action: Cancels the action.

Use Case: Adding a Personal Contact

This use case lets a user add a new personal contact.

Main Path for Adding a Personal Contact

The main path occurs when a user clicks Add New Contact on the Contacts page to display the Add Contact page.

Alternate Paths for Adding a Personal Contact

No alternate paths occur in this use case.

Add Contact Page Elements

Table 136 describes the elements of this page.

Table 136. Add Contact Page Elements

Page Element	Description
Page Title Text	Add Contact
Add Personal Contact Module	This module displays the following elements: ■ Module title text: Add Personal Contact ■ Text and blank field for data entry: Alias *Field* ■ Text and blank field for data entry: *First Name *Field* ■ Text and blank field for data entry: *Last Name *Field* ■ Text and blank field for data entry: *Phone Number *Field* ■ Text and drop-down list: Contact Type *Contact type* ■ Button: Add Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Importing Personal Contacts

This use case lets a user import, or bulk load, a CSV file with contacts to his or her personal address book. Oracle Billing Insight provides a preconfigured Microsoft Excel file, personalContactsTemplate_en_US.csv, to use as a template for creating the personal contact input file. The template file can be also downloaded in this use case.

Main Path for Importing Personal Contacts

The main path occurs when a user clicks Import Contacts on the Contacts page to display the Import Contacts page.

Alternate Paths for Importing Personal Contacts

No alternate paths occur in this use case.

Importing Contacts Page Elements

Table 137 describes the elements of this page.

Table 137. Importing Contacts Page Elements

Page Element	Description
Page Title Text	Contacts
Import Personal Contacts Module	This module displays the following elements: ■ Module title text: Import Personal Contacts ■ Icon: Microsoft Excel ■ Text: CSV Template ■ Text: This option is available to Bulk Load Personal Contacts. ■ Text: Uploading a CSV file to the Personal Address Book will overwrite any existing entries. ■ Text: Please download the Comma Separated Values (CSV) template provided. In this file you will need to provide the following attributes: Alias, First Name, Last Name, Contact Type (Business/Personal) and Service Number. (Service number has to be entered in the exact format as it is displayed within the analytics reports.) When completed save this file locally by providing a file name, and a file type of CSV (comma delimited) (*csv) ■ Text and blank field for data entry: * File *Field* ■ Button: Browse Action: Displays the Choose File to Upload dialog box. ■ Button: Submit Action: Imports the contacts. ■ Button: Back Action: Displays the Contacts page. ■ Text: *Required Fields

Use Case: Setting Personal Preferences

This use case lets a user set his or her personal preferences for language and paper delivery.

Main Path for Setting Personal Preferences

The main path occurs when a user clicks My Account, Personal, and then Preferences to display the User Preferences page. In the Consumer Edition, the users clicks Personal, then Preferences.

Alternate Paths for Setting Personal Preferences

No alternate paths occur in this use case.

User Preferences Page Elements

Table 138 describes the elements of this page.

Table 138. User Preferences Page Elements

Page Element	Description
Page Title Text	User Preferences
User Preferences Module	This module displays the following elements: ■ Module title text: User Preferences ■ Text and drop-down list: *Language *List* ■ Text: *Paper On/Off ■ Radio button and text: *Button* Off ■ Radio button and text: *Button* On ■ Button: Submit Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

15 Managing Company Information

This chapter describes use cases for viewing a company's profile information, maintaining contacts, adding and deleting users, and managing company settings, such as assigning service numbers and importing subscribers. It includes the following topics:

- Use Case: Viewing a Company Profile (Business Edition Only) on page 307
- Use Case: Viewing Company Contacts (Business Edition Only) on page 308
- Use Case: Editing a Company Contact (Business Edition Only) on page 311
- Use Case: Deleting a Company Contact (Business Edition Only) on page 311
- Use Case: Adding a Company Contact (Business Edition Only) on page 312
- Use Case: Importing Company Contacts (Business Edition Only) on page 313
- Use Case: Viewing Company Users (Business Edition Only) on page 315
- Use Case: Editing a Company User (Business Edition Only) on page 318
- Use Case: Deleting a Company User (Business Edition Only) on page 319
- Use Case: Reactivating a Company User (Business Edition Only) on page 320
- Use Case: Adding a Company User (Business Edition Only) on page 321
- Use Case: Importing Company Users (Business Edition Only) on page 324
- Use Case: Managing Company Settings (Business Edition Only) on page 326

Use Case: Viewing a Company Profile (Business Edition Only)

This use case lets an Admin or Manager view the profile information for the company with which they are assigned. Company profile information includes the number of associated accounts and service agreements, and the number of associated admins, managers, and users.

Main Path for Viewing a Company Profile

The main path occurs when an admin or manager clicks My Account, Company, and then Profile to display the Company Profile page.

Alternate Paths for Viewing a Company Profile

No alternate paths occur in this use case.

Company Profile Page Elements

Table 139 describes the elements of this page.

Table 139. Company Profile Page Elements

Page Element	Description
Page Title Text	Company Profile
Company Information Module	This module displays the following elements: ■ Module title text: Company Information ■ Text and data: Company Name *Company Name* ■ Text and data: Address *Address* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Postal Code *Code* ■ Text and data: Country *Country* ■ Text and data: Corporate Account Number *Number* ■ Text and data: Tax ID *ID* ■ Text and data: Primary Contact *Contact* ■ Text and data: Text and data: Number of Accounts *Number* ■ Text and data: Number of Service Agreements *Number*
Company User Information Module	This module displays the following elements: ■ Module title text: Company User Information ■ Text and data: Admin *Number* ■ Text and data: Manager *Number* ■ Text and data: PayerManager *Number* ■ Text and data: Subscriber *Number* ■ Text and data: Total *Number*

Use Case: Viewing Company Contacts (Business Edition Only)

This use case lets an Admin or Manager manage the contacts in the address book of the company with which they are assigned, and search for company contacts by alias, first or last name, or phone number.

Main Path for Viewing Company Contacts

The main path occurs when an admin or manager clicks My Account, Company, and then Contacts to display the Company Contacts page.

Alternate Paths for Viewing Company Contacts

No alternate paths occur in this use case.

Company Contacts Page Elements

Table 140 describes the elements of this page.

Table 140. Company Contacts Page Elements

Page Element	Description
Page Title Text	Company Contacts
Contacts Module	This module displays the following elements: ■ Module title text and data: *Company name* Company Contacts ■ Button: Add New Contact Action: Displays the Add Contact page. For details, see "Add Contact Page Elements" on page 313. ■ Button: Import Contacts Action: Displays the Upload Contacts page. For details, see "Upload Contacts Page Elements" on page 314. ■ Download and printer-friendly elements

Table 140. Company Contacts Page Elements

Page Element	Description
Search Company Contacts Module	This module displays the following elements: ■ Module title text: Search Company Contacts ■ Text and drop-down list: Filter By *List* ■ Text and blank field for data entry: Search For *Field* ■ Button: View Action: Displays the Company Contacts page for the selected contacts.
Report Details Module	This module displays the following elements: ■ Module title text and data: Company Contacts (*Number* items) ■ Column headings: ■ Text and sorting link: Alias ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: Phone Number ■ Text: Actions ■ Column content: ■ Data: Alias ■ Data: First name ■ Data: Last name ■ Data: Phone number ■ Text and link: Edit Link action: Displays the Edit Contact page. For details, see “Edit Contact Page Elements” on page 311. ■ Text and link: Delete Link action: Displays the Delete Contact page. For details, see “Delete Contact Page Elements” on page 312.

Use Case: Editing a Company Contact (Business Edition Only)

This use case lets an Admin or Manager edit the information for a company contact.

Main Path for Editing a Company Contact

The main path occurs when an admin or manager clicks Edit next to a contact on the Company Contacts page to display the Edit Contact page.

Alternate Paths for Editing a Company Contact

No alternate paths occur in this use case.

Edit Contact Page Elements

Table 141 describes the elements of this page.

Table 141. Edit Company Contact Page Elements

Page Element	Description
Page Title Text	Edit Contact
Edit Contacts Module	This module displays the following elements: ■ Module title text: Edit Contact ■ Text and editable data: Alias *Alias* ■ Text and editable data: *First Name *First name* ■ Text and editable data: *Last Name *Last name* ■ Text and editable data: *Phone Number *Phone number* ■ Button: Update Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Deleting a Company Contact (Business Edition Only)

This use case lets an Admin or Manager delete a company contact.

Main Path for Deleting a Company Contact

The main path occurs when an admin or manager clicks Delete next to a contact on the Contacts page.

Alternate Paths for Deleting a Company Contact

No alternate paths occur in this use case.

Delete Contact Page Elements

Table 142 describes the elements of this page.

Table 142. Delete Contacts Page Elements

Page Element	Description
Page Title Text	Delete Contacts
Delete Personal Contact Module	This module displays the following elements: ■ Module title text: Delete Contact ■ Text: Warning Message ■ Text: You are about to delete the following contact. Are you sure you want to do this? ■ Text and data: Alias *Alias* ■ Text and data: *First Name *First name* ■ Text and data: *Last Name *Last name* ■ Text and data: *Phone Number *Phone number* ■ Text and data: Contact Type *Contact type* ■ Button: Delete Action: Deletes data. ■ Button: Cancel Action: Cancels the action.

Use Case: Adding a Company Contact (Business Edition Only)

This use case lets an Admin or Manager add a new company contact.

Main Path for Adding a Company Contact

The main path occurs when an admin or manager clicks Add New Contact on the Company Contacts page to display the Add Contact page.

Alternate Paths for Adding a Company Contact

No alternate paths occur in this use case.

Add Contact Page Elements

Table 143 describes the elements of this page.

Table 143. Add Contact Page Elements

Page Element	Description
Page Title Text	Add Contact
Add Company Contacts Module	This module displays the following elements: ■ Module title text: Add Company Contacts ■ Text and blank field for data entry: Alias *Field* ■ Text and blank field for data entry: *First Name *Field* ■ Text and blank field for data entry: *Last Name *Field* ■ Text and blank field for data entry: *Phone Number *Field* ■ Button: Add Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Importing Company Contacts (Business Edition Only)

This use case lets an Admin or Manager import, or bulk load, a CSV file with contacts to the company address book. Oracle Billing Insight provides a preconfigured Microsoft Excel file, corporateContactsTemplate_en_US.csv, to use as a template for creating the company contact input file. The template file can also be downloaded in this use case.

Main Path for Importing Company Contacts

The main path occurs when an admin or manager clicks Import Contacts on the Company Contacts page to display the Import Contacts page.

Alternate Paths for Importing Company Contacts

No alternate paths occur in this use case.

Upload Contacts Page Elements

Table 144 describes the elements of this page.

Table 144. Upload Contacts Page Elements

Page Element	Description
Page Title Text	Upload Contacts
Import Company Contacts Module	This module displays the following elements: ■ Module title text: Import Company Contacts ■ Icon: Microsoft Excel ■ Text: CSV Template ■ Text: This option is available to Bulk Load Company Contacts. ■ Text: Uploading a CSV file to the Company Address Book will overwrite any existing entries. ■ Text: Please download the Comma Separated Values (CSV) template provided. In this file you will need to provide the following attributes: Alias, First Name, Last Name, Contact Type (Business/Personal) and Service Number. (Service number has to be entered in the exact format as it is displayed within the analytics reports.) When completed save this file locally by providing a file name, and a file type of CSV (comma delimited) (*csv) ■ Text and blank field for data entry: * File *Field* ■ Button: Browse Action: Displays the Choose File to Upload dialog box. ■ Button: Submit Action: Imports the contacts. ■ Button: Back Action: Displays the Contacts page. ■ Text: *Required Fields

Use Case: Viewing Company Users (Business Edition Only)

This use case lets an Admin view the users for the company with which they are assigned, including user ID, name, role, status, assignment, status, last log in date, and date created. Admins can also search for users by first or last name, role, status, or user ID.

Main Path for Viewing Company Users

The main path occurs when an admin clicks My Account, Company, and then Users to display the Users page.

Alternate Paths for Viewing Company Users

No alternate paths occur in this use case.

Users Page Elements

Table 145 describes the elements of this page.

Table 145. Users Page Elements

Page Element	Description
Page Title Text	Users
Users Module	This module displays the following elements: ■ Button: Import Company Users Action: Displays the Import Company Users page. For details, see “Import Company Users Page Elements” on page 325. ■ Button: Add New Company User Action: Displays the Add Contact page. For details, see “Add Contact Page Elements” on page 313. ■ Download and printer-friendly elements

Table 145. Users Page Elements

Page Element	Description
Search Module	This module displays the following elements: ■ Module title text: Search for Company Users ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and drop-down list: Role *List* ■ Text and drop-down list: Status *List* ■ Text and blank field for data entry: User ID *Field* ■ Button: Search Action: Displays the Users page for the selected contacts.

Table 145. Users Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Company Users (*Number* items)
	■ Column headings:
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: Name
	  ■ Text and sorting link: Role
	  ■ Text and sorting link: Status
	  ■ Text and sorting link: Assigned
	  ■ Text and sorting link: Last Login
	  ■ Text and sorting link: Date Created
	  ■ Text: Actions
	■ Column content:
	  ■ Data: User ID
	  ■ Data: Name
	  ■ Data: Role
	  ■ Data: Status
	  ■ Data: Assigned status
	  ■ Data: Last login date
	  ■ Data: Date created
	  ■ Text and link: Edit
	  Link action: Displays the Edit Company User page. For details, see "Edit Company User Page Elements" on page 318.
	  ■ Text and link: Delete
	  Link action: Displays the Delete Company User page. For details, see "Deleting Company User Page Elements" on page 319.

Use Case: Editing a Company User (Business Edition Only)

This use case lets an Admin edit information for a particular company user, including first and last name, email address, and role.

Main Path for Editing Company Users

The main path occurs when an admin clicks Edit next to a user on the Users page to display the Edit Company User page.

Alternate Paths for Editing Company Users

No alternate paths occur in this use case.

Edit Company User Page Elements

Table 146 describes the elements of this page.

Table 146. Edit Company User Page Elements

Page Element	Description
Page Title Text	Edit Company User
Edit Company User Module	This module displays the following elements: ■ Text and data: *User ID *User ID* ■ Text and editable data: *First Name *First name* ■ Text and editable data: *Last Name *Last name* ■ Text and editable data: Email Address *Email address* ■ Text and drop-down list: Role *List* ■ Button: Update Action: Saves the data. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Deleting a Company User (Business Edition Only)

This use case lets an Admin delete a particular company user.

Main Path for Deleting Company Users

The main path occurs when an Admin clicks Delete next to a user on the Users page to display the Delete Company User page.

Alternate Paths for Deleting Company Users

No alternate paths occur in this use case.

Deleting Company User Page Elements

Table 147 describes the elements of this page.

Table 147. Delete Company User Page Elements

Page Element	Description
Page Title Text	Delete Company User
Delete Company User Module	This module displays the following elements: ■ Text: Confirm Delete ■ Text: You are about to delete this user. Are you sure you want to do this? ■ Button: Confirm Delete Action: Deletes the data. ■ Button: Cancel Action: Cancels the action. ■ Text and data: User ID *User ID* ■ Text and data: First Name *First name* ■ Text and data: Last Name *Last name* ■ Text and data: Email Address *Email address* ■ Text and data: Role *List*

Use Case: Reactivating a Company User (Business Edition Only)

This use case lets an Business Edition admin or manager reactivate a locked company user.

Main Path for Reactivating a Company User

The main path occurs when an Admin clicks Reactivate next to a user on the Users page to display the Delete Company User page.

Alternate Paths for Reactivating a Company User

No alternate paths occur in this use case.

Reactivate Company User Page Elements

Table 148 describes the elements of this page.

Table 148. Reactivate Company User Page Elements

Page Element	Description
Page Title Text	Reactivate Company User
Reactivate Company User Module	This module displays the following elements: ■ Module title text: Reactivate Company User ■ Text: You are about to reactivate this user. Are you sure you want to do this? ■ Button: Reactivate Action: Reactivates the user. ■ Button: Cancel Action: Cancels the action. ■ Text and data: User ID *User ID* ■ Text and data: First Name *First name* ■ Text and data: Last Name *Last name* ■ Text and data: Email Address *Email address* ■ Text and data: Role *List*

Use Case: Adding a Company User (Business Edition Only)

This use case lets an Admin add a new company user, and optionally assign a service agreement to the user.

Main Path for Adding a Company User

The main path occurs when an admin clicks Add New Company User on the Users page to display the Add Company User page.

Alternate Paths for Adding a Company User

No alternate paths occur in this use case.

Add Company User Page Elements

Table 149 describes the elements of this page.

Table 149. Add Company User Page Elements

Page Element	Description
Page Title Text	Add Company User
Add Company User Module	This module displays the following elements: ■ Module title text: Add Company User ■ Text and blank field for data entry: User ID *Field* ■ Text and drop-down list: *Role *List* ■ Text and blank field for data entry: *First Name *Field* ■ Text and blank field for data entry: *Last Name *Field* ■ Text and blank field for data entry: *Email Address *Field* ■ Text and blank field for data entry: *Confirm Email *Field* ■ Button: Next Action: Displays the Assign Service Number page. For details, see "Assign Service Number Page Elements" on page 322. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Assign Service Number Page Elements

Table 150 describes the elements of this page.

Table 150. Assign Service Number Page Elements

Page Element	Description
Page Title Text	Assign Service Number

Assign Service Number Module	This module displays the following elements:
	■ Module title text: Assign Service Number
	■ Text: Assign Service Agreement to User?
	■ Radio button and text: *Button* Yes
	Action: The following elements appear.
	  ■ Text and blank field for data entry: Service Agreement *Field*
	  ■ Button: Find
	  Action: Displays the Available Service Agreements module for the service number criteria entered.
	■ Radio button and text: *Button* No
	■ Button: Next
	Action: Displays the Assign Account Access page. For details, see "Assign Account Access Page Elements" on page 323.
	■ Button: Back
	Action: Displays the Add Company User page.
	■ Button: Cancel
	Action: Cancels the action.

Available Service Agreements Module	This module displays the following elements:
	■ Module title text and data: Service Agreements (*Number* items)
	■ Column headings:
	  ■ Text: Select
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Account Number
	■ Column content:
	  ■ Radio button
	  ■ Data: Service number
	  ■ Data: Account number

Assign Account Access Page Elements

Table 151 describes the elements of this page.

Table 151. Assign Account Access Page Elements

Page Element	Description
Page Title Text	Assign Account Access

Assign Account Access Module	This module displays the following elements:
	■ Module title text: Assign Account Access
	■ Text: Assign Account Access to User?
	■ Radio button and text: *Button* Yes
	Action: The following elements appear.
	  ■ Text and blank field for data entry: Account *Field*
	  ■ Button: Find
	  Action: Displays the Available Accounts module for the account number criteria entered.
	■ Radio button and text: *Button* No
	■ Button: Next
	Action: Displays the Verify Company User page. For details, see "Verify Company User Elements" on page 324.
	■ Button: Back
	Action: Displays the Assign Service Number page.
	■ Button: Cancel
	Action: Cancels the action.

Available Accounts Module	This module displays the following elements:
	■ Module title text and data: Available Accounts (*Number* items)
	■ Column headings:
	  ■ Text: Select
	  ■ Text and sorting link: Account Number
	■ Column content:
	  ■ Radio button
	  ■ Data: Account number

Verify Company User Elements

Table 152 describes the elements of this page.

Table 152. Verify Company User Page Elements

Page Element	Description
Page Title Text	Verify Company User
Verify Company User Module	This module displays the following elements: ■ Module title text: Verify Company User ■ Text and blank field for data entry: User ID *Field* ■ Text and data: *Role *Role* ■ Text and editable data: *First Name *First name* ■ Text and editable data field: *Last Name *Last name* ■ Text and editable data field: *Email Address *Email address* ■ Text and editable data field: *Confirm Email *Email address* ■ Text and data: Service Number *Service number* ■ Button: Submit Action: Saves the data and displays the following message: Success Message User *UserID* enrollment has been initiated and a email notification has been sent to the users email address supplied during the enrollment process. ■ Button: Back Action: Displays the Assign Account Access page. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

Use Case: Importing Company Users (Business Edition Only)

This use case lets an Admin import, or bulk load, a CSV file with company users. Oracle Billing Insight provides a preconfigured Microsoft Excel file, bulkLoadCompanyUsersTemplate_en_US.csv, to use as a template for creating the company users input file. The template file can be also downloaded in this use case.

Main Path for Importing Company Users

The main path occurs when an admin clicks Import Company Users on the Users page to display the Import Company Users page.

Alternate Paths for Importing Company Users

No alternate paths occur in this use case.

Import Company Users Page Elements

Table 153 describes the elements of this page.

Table 153. Import Company Users Page Elements

Page Element	Description
Page Title Text	Import Company Users
Import Company Users Module	This module displays the following elements: ■ Module title text: Import Company Users ■ Icon: Microsoft Excel ■ Text: CSV Template ■ Text: This option is available to Bulk Load Company Users who are eligible to enroll within the On-Line application. ■ Text: In this file you will need to provide the following attributes: User ID, First Name, Last Name, Role, Email Address, Service Number and Account Number. ■ Text: The user ID, first name, last name, role, and email address are required fields. Service Number and Account Number are also available so that you can directly associate a user to these billing objects. ■ Text: When completed save this file locally by providing a file name, and a file type of CSV (comma delimited) (*csv) ■ Text and blank field for data entry: * File *Field* ■ Button: Browse Action: Displays the Choose File to Upload dialog box. ■ Button: Submit Action: Imports the users. ■ Button: Back Action: Displays the Users page. ■ Text: *Required Fields

Use Case: Managing Company Settings (Business Edition Only)

This use case lets an Admin assign and unassign service agreements to company users, and to import, or bulk load, a CSV file with subscribers.

Oracle Billing Insight provides a preconfigured Microsoft Excel file, bulkLoadSubscribersTemplate_en_US.csv, to use as a template for creating the company subscriber input file. The template file can be also downloaded in this use case.

Main Path for Managing Company Settings

The main path occurs when an admin clicks My Account, Company, and then Settings to display the Administrative Settings page.

Alternate Paths for a Managing Company Settings

No alternate paths occur in this use case.

Administrative Settings Page Elements

Table 154 describes the elements of this page.

Table 154. Administrative Settings Page Elements

Page Element	Description
Page Title Text	Administrative Settings
Search Company Service Agreements Module	This module displays the following elements: ■ Module title text: Search Company Service Agreements ■ Text and blank field for data entry: Account Number *Field* ■ Text and blank field for data entry: Service Number *Field* ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and blank field for data entry: User ID *Field* ■ Text and check box: Display Unassigned Service Agreements *Button* ■ Button: Search Action: Displays the selected service agreements. ■ Button: Import Subscribers Action: Displays the Import Subscribers module. ■ Download and printer-friendly elements

Table 154. Administrative Settings Page Elements

Page Element	Description

Company Service Agreements Module	This module displays the following elements:
	■ Module title text and data: Company Service Agreements (*Number* items)
	■ Column headings:
	  ■ Text and sorting link: Service Number
	  ■ Text and sorting link: Account Number
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: First Name
	  ■ Text and sorting link: Last Name
	  ■ Text: Actions
	■ Column content:
	  ■ Data: Service Number
	  ■ Data: Account Number
	  ■ Data: User ID
	  ■ Data: First Name
	  ■ Data: Last Name
	  ■ Text and links: Assign or Unassign
	  Action: The Assign link displays the Assign Service Number module. The Unassign link displays the Unassign Service Number module.

Assign Service Number Module	This module displays the following elements: ■ Module title text: Assign Service Number ■ Text: Warning Message: You have selected the following Service Number to be assigned. ■ Text and data: Account Number *Account number* ■ Text and data: Service Number *Service number* ■ Text and drop-down list: Select User Type *List* ■ Button: Back Action: Displays the Users page.

Table 154. Administrative Settings Page Elements

Page Element	Description
Search for Users Module	This module displays the following elements: ■ Module title text: Search for Users ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Button: Go Action: Displays the report details.

Users Report Details Module	This module displays the following elements:
	■ Module title text and data: Users (*Number* items)
	■ Column headings:
	  ■ Text: Select
	  ■ Text and sorting link: User ID
	  ■ Text and sorting link: First Name
	  ■ Text and sorting link: Last Name
	■ Column content:
	  ■ Radio button
	  ■ Data: User ID
	  ■ Data: First name
	  ■ Data: Last name
	■ Button: Assign
	Action: Assigns the service agreement to the user.

Enter Subscriber’s Name Module	This module displays the following elements: ■ Module title text: Enter Subscriber’s Name ■ Text and blank field for data entry: First Name ■ Text and blank field for data entry: Last Name ■ Button: Submit Action: Saves the data.

Table 154. Administrative Settings Page Elements

Page Element	Description
Unassign Service Number Module	This module displays the following elements: ■ Module title text: Unassign Service Number ■ Text: You are about to un assign the following Service Number. Are you sure you want to do this? ■ Text and data: Service Number *Service number* ■ Text and data: Name *Name* ■ Button: Unassign Action: Unassigns the service number from the user. ■ Button: Cancel Action: Cancels the action.
Import Subscribers Module	This module displays the following elements: ■ Module title text: Import Subscribers ■ Icon: Microsoft Excel ■ Text: CSV Template ■ Text: This option is available to Bulk Load Subscribers who are not enrolled within the On-Line application. ■ Text: Please download the Comma Separated Values (CSV) template provided. In this file you will need to provide the following attributes: Service Number, Account Number, First Name and Last Name (Service Number and Account Number are required) Caution: If a Subscriber has been previously entered, this action will overwrite the details previously entered. When completed save this file locally by providing a file name, and a file type of CSV (comma delimited)(*csv) ■ Text and blank field for data entry: * File *Field* ■ Button: Browse Action: Displays the Choose File to Upload dialog box. ■ Button: Submit Action: Imports the subscribers. ■ Button: Back Action: Displays the Search Company Service Agreements module. ■ Text: *Required Fields

16 Servicing Prepay Accounts

This chapter describes the use cases for servicing prepay billing accounts. It includes the following topics:

- Use Case: Viewing a Prepay Billing Account Overview (Consumer Edition Only) on page 331
- Use Case: Viewing Most Expensive Transactions Report for a Prepay Account (Consumer Edition Only) on page 333
- Use Case: Viewing Most Expensive Transactions by Called Number Report for a Prepay Account (Consumer Edition Only) on page 335
- Use Case: Viewing Total Usage Spent Report for a Prepay Account (Consumer Edition Only) on page 337
- Use Case: Viewing the Transaction Details Report for a Prepay Account (Consumer Edition Only) on page 339

Use Case: Viewing a Prepay Billing Account Overview (Consumer Edition Only)

This use case lets a user view summary information for his or her prepay billing account, including plan and account information, the latest activity, the most expensive transactions, and the total usage spent since the last account top-up.

Main Path for Viewing a Prepay Billing Account Overview

The main path occurs when a user logs into the Self-Service application to display the Pre-Pay page.

Alternate Paths for Viewing a Prepay Billing Account Overview

No alternate paths occur in this use case.

Pre-Pay Page Elements

Table 155 describes the elements of this page.

Table 155. Pre-Pay Page Elements

Page Element	Description
Title Text	Pre-Pay
Summary Module	This module displays the following elements: ■ Title text and data: Summary As Of *Date Time* ■ Text and data: Service Number *Number* ■ Text and data: Pre-Pay Plan *Plan Description* ■ Text and data: Last Top-Up Date *Date* ■ Text and data: Last Top-Up Amount *Amount* ■ Text and data: Credit Expires On *Date* ■ Text and data: Remaining Balance *Amount*

Latest Activity Module	This module displays the following elements:
	■ Module title text and link: Latest Activity
	Link target: Displays the Transaction Details page. For details, see "Transaction Details Page Elements" on page 339.
	■ Text and data link: Since *Date*
	Link target: Displays the Transaction Details page. For details, see "Transaction Details Page Elements" on page 339.
	■ Colored, horizontal percentage bar showing top-up usage:
	  ■ **Red.** Usage is at or above 90% of the top-up amount.
	  ■ **Yellow.** Usage is between 65% and 90% of the top-up amount.
	  ■ **Green.** Usage is less than 65% of the top-up amount.
	■ Percentage bar label, text and data: Top Up *Amount* Remaining
	■ Horizontal percentage bars showing usage for each tariff (voice, messages, data), with the following labels:
	  ■ Text and data: Voice *Amount* Spent on *Number* Minutes
	  ■ Text and data: Message *Amount* Spent on *Number* Messages
	  ■ Text and data: Data *Amount* Spent on *Number* Kilobytes

Table 155. Pre-Pay Page Elements

Page Element	Description

Top 5 Most Expensive Transactions Since Last Top Up Module	This module displays the following elements:
	■ Module title text and link: Most Expensive Since Last Top Up
	Link target: Displays the Most Expensive Transactions page. For details, see "Most Expensive Transactions Page Elements" on page 334.
	■ Column titles:
	  ■ Text: Called Number
	  ■ Text: Minutes
	  ■ Text: Texts
	  ■ Text: Data
	  ■ Text and data: Cost (*Currency*)
	■ Column content:
	  ■ Data and link (for voice transactions): *Called number*
	  Link target: Displays the Most Expensive Transactions by Called Number page. For details, see "Most Expensive Transactions by Called Number Page Elements" on page 336.
	■ Data: Number of minutes
	■ Data: Number of texts
	■ Data: Amount of data
	■ Data: Cost

Total Usage Spent Since Last Top Up Module	This module displays the following elements: ■ Module title text and link: Total Usage Spent Since Last Top Up Link target: Displays the Total Usage Spent page. For details, see "Total Usage Spent Page Elements" on page 337. ■ Graphical pie chart with color key: Shows percentage usage spent by charge type for the selected prepay billing account.

Use Case: Viewing Most Expensive Transactions Report for a Prepay Account (Consumer Edition Only)

This use case lets a user view the Most Expensive Transactions report for his or her prepay billing account, showing details about the most expensive calls or other transactions since the last top-up or for a selected time period.

Main Path for Viewing the Most Expensive Transactions Report for a Prepay Account

The main path occurs when a user clicks Most Expensive Since Last Top Up on the Pre-Pay page to display the Most Expensive Transactions page for the prepay billing account.

Alternate Paths for Viewing the Most Expensive Transactions Report for a Prepay Account

An alternate path occurs when a user clicks Analytics, Billing Reports, and then Most Expensive Transactions.

Most Expensive Transactions Page Elements

Table 156 describes the elements of this page.

Table 156. Most Expensive Transactions Page Elements

Page Element	Description
Page Title Text	Most Expensive Transactions
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Number of Results *List* ■ Text and drop-down list: Select Transactions Since *List* ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 156. Most Expensive Transactions Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	■ Module title text and data: Report Details (*Number* items)
	■ Column titles:
	  ■ Text: Called Number
	  ■ Text: Minutes
	  ■ Text: Texts
	  ■ Text: Data
	  ■ Text and data: Cost (*Currency*)

Report Details Module, continued	■ Column content:
	  ■ Data and link (for voice transactions): *Called number*
	  Link target: Displays the Most Expensive Transactions by Called Number page. For details, see "Most Expensive Transactions by Called Number Page Elements" on page 336.
	■ Data: Number of minutes
	■ Data: Number of texts
	■ Data: Amount of data
	■ Data: Cost amount

Use Case: Viewing Most Expensive Transactions by Called Number Report for a Prepay Account (Consumer Edition Only)

This use case lets a user view the Most Expensive Transactions by Called Number report for his or her prepay billing account, showing transaction details about the most expensive calls made to a selected number.

Main Path for Viewing the Most Expensive Transactions by Called Number Report for a Prepay Account

The main path occurs when a user clicks a called number on the Pre-Pay page to display the Most Expensive Transactions by Called Number page for the prepay billing account.

Alternate Paths for Viewing the Most Expensive Transactions by Called Number Report for a Prepay Account

An alternate path occurs when a user clicks a called number on the Most Expensive Transactions report.

Most Expensive Transactions by Called Number Page Elements

Table 157 describes the elements of this page.

Table 157. Most Expensive Transactions by Called Number Page Elements

Page Element	Description
Page Title Text	Most Expensive Transactions by Called Number

Called Number Details Module	This module displays the following elements:
	■ Module title text and data: Called Number Details (*Number* items)
	■ Column titles:
	  ■ Text: Called Number
	  ■ Text and sorting link: Date
	  ■ Text and sorting link: Time
	  ■ Text and sorting link: Usage Type
	  ■ Text and sorting link: Tariff
	  ■ Text and sorting link: Destination
	  ■ Text: Volume
	  ■ Text, data, and sorting link: Total Charges (*Currency*)
	■ Column content:
	  ■ Data: Called number
	  ■ Data: Date
	  ■ Data: Time
	  ■ Data: Usage type
	  ■ Data: Tariff
	  ■ Data: Volume
	  ■ Data: Total charges
	■ Total row:
	  ■ Text: Total
	  ■ Data: Total charges
	■ Download and printer-friendly elements

Use Case: Viewing Total Usage Spent Report for a Prepay Account (Consumer Edition Only)

This use case lets a user view the Total Usage Spent report for his or her prepay billing account, showing a usage pie chart and detailed report of usage by tariff type since the last top-up or for a particular time period.

Main Path for Viewing the Total Usage Spent Report for a Prepay Account

The main path occurs when a user clicks Total Usage Spent Since Last Top-Up on the Pre-Pay page to display the Total Usage Spent page for the prepay billing account.

Alternate Paths for Viewing the Total Usage Spent Report for a Prepay Account

An alternate path occurs when a user clicks Analytics, Billing Reports, and then Total Usage Spent.

Total Usage Spent Page Elements

Table 158 describes the elements of this page.

Table 158. Total Usage Spent Page Elements

Page Element	Description
Page Title Text	Total Usage Spent
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Select Transactions Since *List* ■ Text and drop-down list: Billing Reports *List* ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements

Table 158. Total Usage Spent Page Elements

Page Element	Description

Total Usage Spent for Plan Module	This module displays the following elements:
	■ Data: Plan Name
	■ Data: Top-up amount
	■ Graphical pie chart with color key: Shows percentage usage spent by charge type for the selected prepay billing account.
	■ Column titles:
	  ■ Text: Usage
	  ■ Text: Total Charges

Total Usage Spent for Plan Module, continued	■ Column content:
	  ■ For each usage type:
	    ❑ Text and data, show or hide links: Total *Tariff Type*
	    ❑ Data: Description of each tariff for the usage type, such as Data Downloaded, Text Message Received, and Night/Weekend Minutes.
	  ■ Data: Usage amount
	  ■ Data: Total amount
	■ Total row:
	  ■ Text: Total Plan Charges
	  ■ Data: Total charges

Use Case: Viewing the Transaction Details Report for a Prepay Account (Consumer Edition Only)

This use case lets a user view the Transaction Details report for his or her prepay billing account, showing transaction details since the last top-up or for a particular time period.

Main Path for Viewing the Transaction Details Report for a Prepay Account

The main path occurs when a user clicks Latest Activity or the Since date on the Pre-Pay page to display the Transaction Details page for the prepay billing account.

Alternate Paths for Viewing the Transaction Details Report for a Prepay Account

An alternate path occurs when a user clicks Analytics, Billing Reports, and then Transaction Details.

Transactions Details Page Elements

Table 159 describes the elements of this page.

Table 159. Transaction Details Page Elements

Page Element	Description
Page Title Text	Transaction Details

Table 159. Transaction Details Page Elements

Page Element	Description
Prompt Module	This module displays the following elements: ■ Text and data: Account Number *Account Number* ■ Text and drop-down list: Select Transactions Since *List* ■ Button: View Action: Displays the selected report. ■ Download and printer-friendly elements
Transaction Details Module	This module displays the following elements: ■ Module title text and data: Transaction Details (*Number* items) ■ Column titles: ■ Text and sorting link: Date ■ Text and sorting link: Time ■ Text and sorting link: Number Called ■ Text and sorting link: Usage Type ■ Text and sorting link: Tariff ■ Text and sorting link: Destination ■ Text: Volume ■ Text, data, and sorting link: Cost (*Currency*) ■ Column content: ■ Data: Date ■ Data: Time ■ Data: Number called ■ Data: Usage type ■ Data: Tariff ■ Data: Destination ■ Data: Volume ■ Data: Cost amount

Index

No index available for this guide.