Oracle® Revenue Management and Billing

Version 2.5.0.2.0

Release Notes

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ORACLE®

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About this Document

This document describes the new features, enhancements, UI and database level changes, supported platforms, framework upgrade, supported upgrades, and technology upgrade made in this release. It also highlights the discontinued features, bug fixes, and known issues in this release.

This document does not describe the functionality of Oracle Revenue Management and Billing or technical know-how on how to install or upgrade Oracle Revenue Management and Billing. For more detailed information, you can refer to the following documents:

Document	Description
Oracle Revenue Management and Billing Banking User Guide	Lists and describes various banking features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
Oracle Revenue Management and Billing Installation Guide	Lists the application server pre-requisites, supported platforms, and software and hardware requirements for installing the Oracle Revenue Management and Billing application. It explains how to install the Oracle Revenue Management and Billing application.
Oracle Revenue Management and Billing Quick Installation Guide	Provides high-level information on how to install the Oracle Revenue Management and Billing (ORMB) application and selected additional software.
Oracle Revenue Management and Billing Database Administrator's Guide	Provides information about the Oracle Database Server and Client required for installing the Oracle Revenue Management and Billing database. It explains how to install database with and without demo data. It provides database configuration guidelines including recommended settings for the Oracle Exadata Database machine.
Oracle Revenue Management and Billing Server Administration Guide	Explains the Oracle Revenue Management and Billing (ORMB) architecture and technical know-how required for configuring and using the ORMB application. It explains how to configure and deploy web and business application servers. In addition, it explains how to monitor client machines, web and/or business application servers, and database connections.
Oracle Revenue Management and Billing Security Guide	Lists the security features available in the Oracle Revenue Management and Billing application. It explains how to configure security for the Oracle Revenue Management and Billing application using the default security features.
ORMB - Transaction Feed Management - Batch Execution Guide	Describes the sequence in which the batches must be executed while performing various tasks in the Transaction Feed Management module.

Document	Description
Oracle Revenue Management and Billing Batch Guide	Lists and describes various ORMB batches.
Oracle Revenue Management and Billing Upgrade Guide	Explains how to upgrade the Oracle Revenue Management and Billing framework, application, and its database.
Oracle Revenue Management and Billing Upgrade Path Guide	Explains the path and pre-requisites for upgrading Oracle Revenue Management and Billing from one version to another.
Oracle Revenue Management and Billing ODI Integration Guide for TFM	Explains how to install the ODI artifacts for TFM. It also explains how to upload and import the transaction data from a flat file to various tables in the target database.

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Change Log

Revision	Last Update	Updated Section	Comments
1.1	13-May-2016	Persisting Interest Rate for Rate Type Price Items	Updated Information
		Deprecation Planned for Future Releases	Updated Information
		Known Issues	Added Known Issue

Contents

Prerequisites

If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 2.5.0.2.0, then the customer needs to ensure the following (before upgrading):

- All bills generated in the system are in the **Complete** status. In other words, there should not be any bills in the **Pending** status. If there are any bills in the **Pending** status or if any billable charge (generated through TFM) is not yet billed, disaggregation and cancellation of transactions which are uploaded using 2.5.0.1.0 will not happen successfully.

- Transactions which are uploaded using 2.5.0.1.0 must not be in the **Initial Product Determined (INPD)** status. They can be in the **Uploaded (UPLD)**, **Invalid (INVL)**, **Error (EROR)**, **Completed (COMP)**, or **Cancelled (CNCL)** status.

- Equal to (=) or tilde (~) symbol is not used in any existing price item parameter code or value. Otherwise, erroneous results might occur.

Terminology Changes

The following terminology changes are done in Oracle Revenue Management and Billing Version 2.5.0.2.0:

- "Customer" to "Person" – The term "Customer" was used in the screens which were developed for the Banking module. And, the term "Person" was used in the screens which were developed for the Insurance module. To maintain consistency across the application, we have renamed the fields to use the term "Person" instead of "Customer". For example,

  o   Customer ID is renamed to Person ID

  o   Customer Name is renamed to Person Name

  o   Customer Information is renamed to Person Information

  o   Parent Customer is renamed to Parent Person

  o   Customer Address is renamed to Person Address

  o   Customer Identifier Type is renamed to Person Identifier Type

  o   Customer Identifier is renamed to Person Identifier

  However, there are some exceptions where the term "Customer" continues to be called as "Customer" and not "Person". This includes:

  o   Main Customer

  o   Customer Class

  o   Customer Contact

  o   Assignment Levels such as Customer Agreed, Customer Price List, Customer Inherited Price List, Parent Customer Agreed, Parent Customer Price List, and Parent Customer Inherited Price List

- "Product" to "Price Item" - The term "Product" was used to define various products, services, and charges for the services offered to the customer. Now onwards, the system will allow you to define the following two terms:

  o   "Product" – As the name indicates, the term "Product" will be used to define various products which can be offered to the customer. The system will allow you to map a product with an account. For example, a bank may offer wide range of loan products (such as Car Loan, Personal Loan, House Loan, and so on) and a person has opened the car loan account with the bank. In such case, the Car Loan product is mapped to the account.

  o   "Price Item" – The legacy term "Product" used in the previous releases of ORMB is renamed to "Price Item". The term "Price Item" will be used to define various charges for the services offered to a customer. To elevate the product and maintain distinct identity between the two terminologies "Product" and "Price Item", we have renamed the fields to use the term "Price Item" instead of "Product". For example,

    ▪   Product is renamed to Price Item

- Product Parameters is renamed to Price Item Parameters

New Features

This section describes the following new features which are added in this release:

- Pricing Eligibility
- Persisting Interest Rate for Rate Type Price Items
- Pricing Services
- Product
- Pricing Simulation

Pricing Eligibility

Oracle Revenue Management and Billing enables you to define pricing eligibility criteria using the account, person, and product attributes while defining a price item pricing. For example, a bank offers a product named 12 Month Standard Certificate of Deposit (CD). The interest rate charged to a person for this product differs based on two parameters – Deposit Amount and Person Type (Preferred and Non-Preferred). The following table lists the interest rates offered for the 12 Month Standard Certificate of Deposit (CD) product:

Deposit Amount	Non-Preferred	Preferred
Less than $5,000	0.13%	0.20%
Greater than $5,000	0.15%	0.22%

Earlier, you were able to define different interest rates based on different parameters using the rate eligibility feature at the rate component level. Considering the above example, you had to define four rate components. The respective rate component would appear while defining price item pricing based on the following:

- The value defined for the **Deposit Amount** characteristic on the account
- The value defined for the **Customer Type** characteristic on the main customer

However, now, you can implement the above scenario using a single rate component instead of maintaining four different rate components. Now, while defining price item pricing, you need to define four different price components for a rate component. For each price component, you need to define the pricing eligibility criteria in the following manner:

Price Component	Rate	Pricing Eligibility Criteria	If True	If False
P1	0.13%	Deposit Amount > 5000	Check Next Condition	Return False
		Person Type = Non-Preferred	Return True	Return False
P2	0.15%	Deposit Amount < 5000	Check Next Condition	Return False

Price Component	Rate	Pricing Eligibility Criteria	If True	If False
		Person Type = Non-Preferred	Return True	Return False
P3	0.20%	Deposit Amount > 5000	Check Next Condition	Return False
		Person Type = Preferred	Return True	Return False
P4	0.22%	Deposit Amount < 5000	Check Next Condition	Return False
		Person Type = Preferred	Return True	Return False

You can define pricing eligibility criteria only when the appropriate parameters are created in the system. These parameters must be mapped to either of the following:

- Account attributes, characteristics, usage amounts, or usage counters

- Person attributes, characteristics, usage amounts, or usage counters

- Product attributes or characteristics

- Service Quantity Identifier

- Custom algorithm which returns the appropriate value

In the above example, you can define the pricing eligibility criteria only when the following parameters are defined in the system:

Parameter	Source Entity	Source Type	Source Type Code	Value Type
Deposit Amount	Account	Usage Amount	Deposit Amount	Adhoc
Customer Type	Person	Characteristic	Person Type	Predefined

You can define pricing eligibility criteria for rate components whose tiering type is set to **Flat**, **Threshold**, or **Step**. Each criterion in the pricing eligibility criteria is executed in the specified sequence. If the value of the pricing eligibility criteria is **True**, the rate of the respective price component is passed to the rate component for further calculations.

Persisting Interest Rate for Rate Type Price Items

While defining a price item, you can indicate whether the price item is available for pricing and billing or only for pricing. If the price item is available only for pricing, you can indicate the type of the price item. The valid values for the price item type are:

- Rate (i.e. Interest Rate)
- Fees

If the type of a price item is **Rate**, the system calculates and persist the rate for the price item. The rate is persisted only for the price item pricing which is either assigned or inherited by an account.

If the account or person attributes are changed, the system allows you to recalculate and persist the interest rate for rate type price items. This process is known as Repricing. The Repricing process is triggered in the following scenarios when:

- You edit the attributes and characteristics of an account.

- You add or delete the usage amount and counter details of an account.

- You edit the attributes and characteristics of a person.

- You add or delete the usage amount and counter details of a person.

- You define or edit the price item pricing of an active price list which is assigned to an account or a person.

- You define, edit, override, or copy the price item pricing of an account or a person.

- You assign a price list to an account or a person, or edit the price list assignment details of an account or a person.

The system behaves in the following manner in the above scenarios:

Scenario	System Behaviour
On editing the attributes and characteristics of an account	The system checks whether the account is eligible for repricing. If the account is eligible for repricing, the system checks whether a parameter for the account attribute or characteristic whichever is changed is already defined in the system. If the required parameters are available in the system, the system creates a repricing request for the account and effective date combination in the CI_REPRC_REQ_DTL table. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table.
	Note: On editing the account attributes, the effective date is set to the date when you edit the account attributes. However, on editing the account's characteristic, the effective date is set to the date from when the characteristic is effective for the account.

Scenario	System Behaviour
On adding or deleting the usage amount and counter details of an account	The system checks whether the account is eligible for repricing. If the account is eligible for repricing, the system checks whether a parameter for the usage amount or counter whichever is changed is already defined in the system. If the required parameters are available in the system, the system creates a repricing request for the account and effective date combination in the CI_REPRC_REQ_DTL table. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table. **Note:** The effective date is set to the date from when the usage amount or counter is effective for the account.
On editing the attributes and characteristics of a person	The system identifies all accounts which belong to the person and its child persons, and then checks whether the identified accounts are eligible for repricing. If one or more accounts are eligible for repricing, the system checks whether a parameter for the person attribute or characteristic whichever is changed is already defined in the system. If the required parameters are available in the system, the system creates a repricing request for the account and effective date combination in the CI_REPRC_REQ_DTL table. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table. **Note:** Only accounts where the person and child person are the main customers are considered for repricing. On editing the person attributes, the effective date is set to the date when you edit the person attributes. However, on editing the person's characteristic, the effective date is set to the date from when the characteristic is effective for the person.

Scenario	System Behaviour
On adding or deleting the usage amount and counter details of a person	The system identifies all accounts which belong to the person and its child persons, and then checks whether the identified accounts are eligible for repricing. If one or more accounts are eligible for repricing, the system checks whether a parameter for the usage amount or counter whichever is changed is already defined in the system. If the required parameters are available in the system, the system creates a repricing request for the account and effective date combination in the CI_REPRC_REQ_DTL table. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table.
	Note: Only accounts where the person and child person are the main customers are considered for repricing. The effective date is set to the date from when the usage amount or counter is effective for the person.

Scenario	System Behaviour
On assigning a price list to an account or editing the price list assignment details of an account	The system creates a repricing request for the account, price item, and effective date combination in the CI_REPRC_REQ_DTL table. If the price assignment end date and/or price list assignment end date is available, the system creates two repricing requests – one request where the effective date is set to the start date and another request where the effective date is set to the end date. The effective date is set to the price assignment start date or price list assignment start date depending on the following conditions: • If the Price Assignment Start Date is later than the Price List Assignment Start Date, then the effective date is set to Price Assignment Start Date. • If the Price Assignment Start Date is earlier than or equal to the Price List Assignment Start Date, then the effective date is set to Price List Assignment Start Date. However, the effective date is set to the price assignment end date or price list assignment end date depending on the following conditions: • If the Price Assignment End Date is earlier than the Price List Assignment End Date, then the effective date is set to Price Assignment End Date + 1 Day. • If the Price Assignment End Date is later than or equal to the Price List Assignment End Date, then the effective date is set to Price List Assignment End Date + 1 Day. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table. **Note:** The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.

Scenario	System Behaviour
On assigning a price list to a person or editing the price list assignment details of a person	The system identifies all accounts which belong to the person and its child persons, and then creates a repricing request for the account, price item, and effective date combination in the CI_REPRC_REQ_DTL table. If the price assignment end date and/or price list assignment end date is available, the system creates two repricing requests – one request where the effective date is set to the start date and another request where the effective date is set to the end date. The effective date is set to the price assignment start date or price list assignment start date depending on the following conditions: • If the Price Assignment Start Date is later than the Price List Assignment Start Date, then the effective date is set to Price Assignment Start Date. • If the Price Assignment Start Date is earlier than or equal to the Price List Assignment Start Date, then the effective date is set to Price List Assignment Start Date. However, the effective date is set to the price assignment end date or price list assignment end date depending on the following conditions: • If the Price Assignment End Date is earlier than the Price List Assignment End Date, then the effective date is set to Price Assignment End Date + 1 Day. • If the Price Assignment End Date is later than or equal to the Price List Assignment End Date, then the effective date is set to Price List Assignment End Date + 1 Day. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table. **Note:** Only accounts where the person and child person are the main customers are considered for repricing. The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.

Scenario	System Behaviour
On defining, editing, overriding, or copying the price item pricing of an account	The system creates a repricing request for the account, price item, and effective date combination in the CI_REPRC_REQ_DTL table. If the price assignment end date is specified, the system creates two repricing requests – one request where the effective date is set to the price assignment start date and another request where the effective date is set to the price assignment end date + 1 Day. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table.
	Note: The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.
On defining, editing, overriding, or copying the price item pricing of a person	The system identifies all accounts which belong to the person and its child persons, and then creates a repricing request for the account, price item, and effective date combination in the CI_REPRC_REQ_DTL table. If the price assignment end date is specified, the system creates two repricing requests – one request where the effective date is set to the price assignment start date and another request where the effective date is set to the price assignment end date + 1 Day. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table.
	Note: Only accounts where the person and child person are the main customers are considered for repricing. The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.

Scenario	System Behaviour
On defining or editing the price item pricing of an active price list which is assigned to an account or a person	The system creates an entry for the price item pricing in the CI_REPRC_ENTITY_DTL table. On executing the **Identify Accounts for Repricing (C1-REPC1)** batch, the system identifies the following in the specified order: 1. Price list on which the price item pricing is assigned 2. Account or Person on which the price list is assigned 3. All accounts which belong to the person and its child persons when the price list is assigned to a person Once the accounts are identified, the system checks whether the identified accounts are eligible for repricing. If one or more accounts are eligible for repricing, a repricing request is created for the account, price item, and effective date combination in the CI_REPRC_REQ_DTL table. If the price assignment end date is specified, the system creates two repricing requests – one request where the effective date is set to the price assignment start date and another request where the effective date is set to the price assignment end date + 1 Day. On executing the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch, you can recalculate and persist the rate for the account in the CI_PRCE_CALC table. **Note:** Only accounts where the person and child person are the main customers are considered for repricing.

Pricing Services

The following pricing services are shipped in Oracle Revenue Management and Billing Version 2.5.0.2.0:

- C1-GetEffectivePricing
- C1-AssignPriceList
- C1-GetAccountRate
- C1-PriceAccount
- C1-GetPricing
- C1-GetAllAssignedPricelist
- C1_PRICEASSIGN_SERVICE

C1-GetEffectivePricing

The C1-GetEffectivePricing business service is called or invoked when you:

- **View or Filter Effective Pricing in the Pricing (Account) Screen** - While viewing or filtering effective pricing of an account, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Effective Pricing Date
  - Assignment Level, Parent Person, Pricing Status, Show Default and Global Pricing, Price Item, or Price Item Description
  - Parameters whose the source entity is set to Transaction and their parameter values

  Once the details are passed, the business service fetches the effective price item pricing for the account with the exact match based on the specified criteria. If the **Show Default and Global Pricing** field is set to **Yes**, effective price item pricing inherited from either of the following is listed in the search results:
  - Product-specific default price list defined for the division
  - Default price list defined for division
  - Global price list

- **View or Filter Effective Pricing in the Pricing (Person) Screen** - While viewing or filtering effective pricing of a person, the following details are passed to the business service:
  - Person ID or Person Identifier Type and Person Identifier
  - Effective Pricing Date
  - Assignment Level, Parent Person, Pricing Status, Show Default and Global Pricing, Price Item, or Price Item Description
  - Parameters whose the source entity is set to Transaction and their parameter values

  Once the details are passed, the business service fetches the effective price item pricing for the person with the exact match based on the specified criteria. If the **Show Default and Global Pricing** field is set to **Yes**, effective price item pricing inherited from either of the following is listed in the search results:
  - Default price list defined for division
  - Global price list

- **Simulate Effective Pricing in the Pricing Simulation Screen** - While simulating effective pricing for an account, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Simulation Date
  - Pricing Status, Show Default and Global Pricing, Price Item, or Price Item Description
  - Parameters whose the source entity is set to **Account**, **Person**, **Product**, **Transaction**, **Service Quantity Identifier**, or **Algorithm** and their parameter values

Once the details are passed, the business service fetches the effective price item pricing for the account with the exact match based on the specified criteria. If the **Show Default and Global Pricing** field is set to **Yes**, effective price item pricing inherited from either of the following is listed in the search results:

- o Product-specific default price list defined for the division
- o Default price list defined for division
- o Global price list

C1-AssignPriceList

The C1-AssignPriceList business service is called or invoked when you:

- **Assign a price list to an account** – While assigning a price list to an account, the following details are passed to the business service:
  - o Account ID or Account Identifier Type, Account Identifier and Division
  - o Price List ID, Effective Start Date, Effective End Date (if any), Priority, Price List Inheritance, and Assignment Status
- **Assign a price list to a person** – While assigning a price list to a person, the following details are passed to the business service:
  - o Person ID or Person Identifier Type and Person Identifier
  - o Price List ID, Effective Start Date, Effective End Date (if any), Priority, Price List Inheritance, and Assignment Status
- **Edit the price list assignment details of an account or a person** - While editing the price list assignment details of an account or a person, the following details are passed to the business service:
  - o Price List Assignment ID
  - o Effective End Date, Priority, Price List Inheritance, or Assignment Status

> **Note:** You can also pass the priority indicator in the business service if the priority is not available. The valid values for priority indicator are – **Highest**, **Lowest**. If the priority indicator is set to **Highest**, the system sets the priority of the price list assignment to:
>
> Highest Priority of the Existing Price List Assignment - 1
>
> And, if the priority indicator is set to **Lowest**, the system sets the priority of the price list assignment to:
>
> Lowest Priority of the Existing Price List Assignment + 1
>
> For example, there are two existing price list assignments with priority 10 and 20. If the priority indicator is set to **Highest**, the system sets the priority of the price list assignment to 9 (i.e. 10-1). And, if the priority indicator is set to **Lowest**, the system sets the priority of the price list assignment to 21 (i.e. 20+1).
>
> If both the priority and priority indicator are not passed in the business service, the priority of the price list assignment is set to the value defined in the **Default Price List Priority** option type of the **Pricing Configuration (C1_PRICING)** feature configuration.

> **Note:** If the price list assignment end date is not passed and the **End Date Calculation** flag is set to **Yes**, the system will set the price list assignment end date to either of the following whichever is earlier:
>
> >> Price list assignment validity end date (which is price list assignment start date + validity period)
>
> >> Price list effective end date
>
> While editing the price list assignment details, you cannot change the status of a price list assignment which is in the **Rejected** or **Inactive** status. In addition, you can only change the status of an active price list assignment to **Inactive** and proposed price list assignment to **Active**.

It invokes the algorithm which is created using the **C1_PLASGNAUD** algorithm type and attached to the **Audit** algorithm spot of the **C1_PLASGNADD** business object. If the new price list is assigned to an account or existing price list assignment details of an account are modified, this algorithm fetches the account ID, effective date, and price item (whose price assignment is available on the price list) and passes the information to the CreateRepricingRequest_Impl.java class file. However, if the new price list is assigned to a person or existing price list assignment details of a person are modified, this algorithm fetches the person ID, effective date, and price item (whose price assignment is available on the price list), and passes the information to the IdentifyAccountsToBeRepriced_Impl.java class file.

This algorithm passes information for only those price items which are available for 'Only Pricing' and whose price item type is set to RATE.

The effective date is set depending on the following conditions:

- If the Price Assignment Start Date is later than the Price List Assignment Start Date, then the effective date is set to Price Assignment Start Date.

- If the Price Assignment Start Date is earlier than or equal to the Price List Assignment Start Date, then the effective date is set to Price List Assignment Start Date.

- If the Price Assignment End Date is earlier than the Price List Assignment End Date, then the effective date is set to Price Assignment End Date + 1 Day.

- If the Price Assignment End Date is later than or equal to the Price List Assignment End Date, then the effective date is set to Price List Assignment End Date + 1 Day.

C1-GetAccountRate

The C1-GetAccountRate business service is only used for price items which are available for 'Only Pricing' and whose price item type is set to RATE. It is used to fetch price item pricing details and persisted rate for the price item on a given date. This business service is invoked or called when you:

- **View Effective Pricing Information of a Price Item from the Pricing (Account) Screen** - On clicking the **View** icon corresponding to a price item pricing in the **Pricing (Account)** screen, the following details are passed to the business service:
  - Account ID
  - Price Assignment ID
  - Effective Date

- **Fetch Rate for a Price Item through the C1-GetAccountRate Web Service** – On calling the C1-GetAccountRate business service through the C1-GetAccountRate web service, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Price Assignment ID
  - Effective Date
- **Fetch Rate for an Account through the C1-GetAccountRate Web Service** – On calling the C1-GetAccountRate business service through the C1-GetAccountRate web service, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Price Item (optional)
  - Effective Date

Note: At present, the system supports non SQI based flat rate schedules for rate calculation. It does not support SQI based flat, threshold, and step rate schedules for rate calculation.

C1-PriceAccount

The C1-PriceAccount business service is used to determine effective price item pricing for an account and persist calculated rates for price items whose price item type is set to **Rate**. It is invoked from the **Process Repricing Request and Persist Pricing for an Account (C1-REPC2)** batch. You need to manually execute this business service whenever you add a new account.

This business service invokes the C1-GetEffectivePricing business service when:

- **Request is Created in the CI_REPRC_REQ_DTL table Due to Change in the Account and Person Attributes** – While invoking the GetEffectivePricing business service, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Effective Date
- **Request is Created in the CI_REPRC_REQ_DTL table Due to Change in Price Assignment, Price List Assignment, and Price List Price Assignment** - While invoking the GetEffectivePricing business service, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Effective Date
  - Price Item

> **Note:**
>
> The effective date is set to the system date when the effective date is not passed to the C1-PriceAccount business service.
>
> If the parameters and their values are passed through the C1-PriceAccount business service, the effective price item pricing is searched using these parameter values which are passed through the business service. In such case, the business service will not derive the account, person, and product attributes from the system while searching for effective price item pricing.
>
> When the C1-GetEffectivePricing business service is invoked from the C1-PriceAccount business service, the **Show Default and Global Pricing** field is set to **Yes**.
>
> At present, the system supports only non SQI based flat rate schedules for rate calculation. It does not support SQI based flat, threshold, and step rate schedules for rate calculation.

Once the details are passed, the GetEffectivePricing business service fetches the effective price item pricing for the account with the exact match based on the specified criteria. For each effective price item pricing where price item type is set to Rate, the C1-PriceAccount business service invokes the C1-GetPricing business service and persist the calculated rate.

C1-GetPricing

The C1-GetPricing business service is only used for price items which are available for 'Only Pricing' and whose price item type is set to **RATE**. It invokes rates engine for an effective price item pricing assigned or inherited by an account. On invoking the C1-GetPricing business service, the following details are passed to the rates engine:

- Price Assignment ID
- Effective Date
- Consumption Start and End Date
- Account ID or Account Identifier Type, Account Identifier and Division
- Person ID or Person Identifier Type, Person Identifier
- Service Quantity for SQIs which are used as parameters in the pricing eligibility criteria
- Account, Person, and Product attributes which are used as parameters in the pricing eligibility criteria

The rates engine checks the eligibility criteria of a price component in the specified sequence using the account, person, and product attributes. If the eligibility criteria of a particular price component are met, the corresponding rate is passed to the rates engine for further calculations. The final computed rate is then sent as an output to the C1-GetPricing business service.

This business service is invoked from the Pricing Simulation screen, C1-PriceAccount business service, and the C1-GetPricing web service. When this business service is invoked from the Pricing Simulation screen and C1-PriceAccount business service, the system supports only non SQI based flat rate schedules for rate calculation. The SQI based flat, threshold, and step rate schedules are not supported for rate calculation. However, when this business service is invoked through the C1-GetPricing web service, the system supports both SQI and non SQI based rate schedules for rate calculation.

Note:

The effective date is set to the system date when the effective date is not passed to through C1-GetPricing business service.

The consumption start date and end date is set to the effective date when the start and end dates are not passed through the C1-GetPricing business service.

If the parameters and their values are passed through the C1-GetPricing business service, the rates engine checks the eligibility criteria against the parameter values which are passed through the business service. In such case, the business service will not derive the account, person, and product attributes from the system while checking the eligibility criteria.

C1-GetAllAssignedPricelist

The C1-GetAllAssignedPricelist business service is used to fetch price lists which are assigned to an account or a person. This business service is invoked or called from the C1-GetAllAssignedPricelist web service when you want to:

- **View Price Lists Assigned to an Account** – On viewing price lists assigned to an account, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Start and End Dates
  - Assignment Status
  - Historic flag set to No

  Once the details are passed, the business service fetches a list of price lists which are assigned to the account within the specified date range. Depending on the assignment status, the business service fetches active, proposed, rejected, and inactive price list assignments. If you do not specify the assignment status, the business service, by default, fetches active price list assignments.

- **View Historical Price List Assignments of an Account** – On viewing historical price list assignments of an account, the following details are passed to the business service:
  - Account ID or Account Identifier Type, Account Identifier and Division
  - Start and End Dates
  - Assignment Status
  - Historic flag set to Yes

Once the details are passed, the business service fetches a list of price list assignments which have expired and are no longer effective within the specified date range. Depending on the assignment status, the business service fetches active, proposed, rejected, and inactive historical price list assignments. If you do not specify the assignment status, the business service, by default, fetches active historical price list assignments.

- **View Price Lists Assigned to a Person** – On viewing price lists assigned to a person, the following details are passed to the business service:
    - Person ID or Person Identifier Type, Person Identifier
    - Start and End Dates
    - Assignment Status
    - Historic flag set to No

Once the details are passed, the business service fetches a list of price lists which are assigned to the person within the specified date range. Depending on the assignment status, the business service fetches active, proposed, rejected, and inactive price list assignments. If you do not specify the assignment status, the business service, by default, fetches active price list assignments.

- **View Historical Price List Assignments of a Person** – On viewing historical price list assignments of a person, the following details are passed to the business service:
    - Person ID or Person Identifier Type, Person Identifier
    - Start and End Dates
    - Assignment Status
    - Historic flag set to Yes

Once the details are passed, the business service fetches a list of price list assignments which have expired and are no longer effective within the specified date range. Depending on the assignment status, the business service fetches active, proposed, rejected, and inactive historical price list assignments. If you do not specify the assignment status, the business service, by default, fetches active historical price list assignments.

C1_PRICEASSIGN_SERVICE

The C1_PRICEASSIGN_SERVICE business service is used to define, edit, and override price item pricing assigned to an account or a person. It is also used to define and edit price item pricing assigned to a price list. This business service is invoked or called from the C1-PriceAssignment web service when you want to:

- **Define Price Item Pricing for an Account** – While defining a price item pricing for an account, the following details are passed to the business service:
    - Owner ID or Account ID or Account Identifier Type and Account Identifier
    - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter

- o TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria

- o Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero

- o Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate

- o Pricing Eligibility and Tiering Criteria

- **Edit Price Item Pricing of an Account** - While editing a price item pricing of an account, the following details are passed to the business service:

  - o Price Assignment ID

  - o Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter

  - o TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria

  - o Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero

  - o Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate

  - o Pricing Eligibility and Tiering Criteria

- **Override Price Item Pricing for an Account** – While overriding a price item pricing of an account, the following details are passed to the business service:

  - o Account ID or Account Identifier Type and Account Identifier

  - o Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter

  - o TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria

  - o Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero

  - o Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate

  - o Pricing Eligibility and Tiering Criteria

  - o Override Switch set to either Y or N

Note: If the **Override Switch** is set to **Y**, the system will automatically expire the account agreed pricing when the account agreed pricing without end date is overridden.

- **Define Price Item Pricing for a Person** – While defining a price item pricing for a person, the following details are passed to the business service:
    - Owner ID or Person ID or Person Identifier Type, Person Identifier
    - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter
    - TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria
    - Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero
    - Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate
    - Pricing Eligibility and Tiering Criteria
- **Edit Price Item Pricing of a Person** - While editing a price item pricing of a person, the following details are passed to the business service:
    - Price Assignment ID
    - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter
    - TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria
    - Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero
    - Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate
    - Pricing Eligibility and Tiering Criteria
- **Override Price Item Pricing for a Person** – While overriding a price item pricing of a person, the following details are passed to the business service:
    - Person ID or Person Identifier Type, Person Identifier
    - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter
    - TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria
    - Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero
    - Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate
    - Pricing Eligibility and Tiering Criteria
    - Override Switch set to either Y or N

> **Note:** If the **Override Switch** is set to **Y**, the system will automatically expire the account agreed pricing when the account agreed pricing without end date is overridden.

- **Define Price Item Pricing for a Price List -** While defining a price item pricing for a price list, the following details are passed to the business service:
  - Owner ID
  - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter
  - TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria
  - Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero
  - Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate
  - Pricing Eligibility and Tiering Criteria
- **Edit Price Item Pricing of a Price List** - While editing a price item pricing of a price list, the following details are passed to the business service:
  - Price Assignment ID
  - Price Item and Parameter Information, such as Price Item and Price Item Parameters or Variance Parameter
  - TFM Information, such as Ignore Transaction, Aggregation Schedule, Aggregation Transaction, and Rating Criteria
  - Pricing Information, such as Effective Start Date, Pricing Currency, Effective End Date, Pricing Status, Rate Schedule, Price Assignment Type, and Print Zero
  - Price Component Information, such as Price Component Sequence, Display, Price Component Description, and Rate
  - Pricing Eligibility and Tiering Criteria

Product

A bank may offer wide range of loan products (such as Car Loan, Personal Loan, House Loan, and so on) and a person may want to open the car loan account with the bank. Oracle Revenue Management and Billing Version 2.5.0.2.0 facilitate you to define a product and then map the product to an account. In this way, you can map the Car Loan product to the account, and thereby create a car loan account for the person.

You can also create a product class or group and then add products within the product class or group. In other words, you can define a product to product relationship. For example, you can create various products such as Loan, Car Loan, Personal Loan, Home Loan, and Mortgage Loan. Once these products are defined, you can associate the Car Loan, Personal Loan, Home Loan, and Mortgage Loan products to the Loan product. In this way, you can define product to product relationship for the Loan product. This helps you to create the product hierarchy in the system. You can also create a product bundle and then

add products within the product bundle. At present, the product bundle types are not shipped with ORMB. The implementation team can create the required product bundle types and build the custom logic for each product bundle type as per the business requirements.

A product can be associated with one or more divisions. You can map a product only to those accounts which belong to the division to which the product is associated. Each product will have its own interest rates or fees. These rates or fees are charged for services offered for the product. These services are defined as price items in the system. You can define pricing for these product related price items in a price list and then set it as a division-specific default price list for the product. In this way, you can maintain different interest rates and fees for each division and product combination. You can set either standard or promotional price list as the division-specific default price list for the product.

When you create an account and map it to a product, the division-specific default price list defined for the product is assigned to the account. The rate for price item pricing on the default price list will be persisted for the new account only when you manually execute the C1-PriceAccount business service.

You can define price item pricing based on the product attributes. For example, if there are two product s – Car Loan and Home Loan and you want to define interest rate for both these products, you can define a price item named Interest Rate and associate it with a parameter named Product. Once the price item is created, you can define the following for the account:

- Pricing for the Interest Rate price item based on the Product parameter where the parameter value is set to Car Loan

- Pricing for the Interest Rate price item based on the Product parameter where the parameter value is set to Home Loan

Pricing Simulation

Oracle Revenue Management and Billing enables you to simulate the effective price item pricing for an account on a given date based on various parameters. If the **Show Default and Global Pricing** field is set to **Yes**, effective pricing inherited from the following is listed in the search results:

- Product-specific default price list defined for the division, Default price list defined for division, or Global price list

You can specify parameters where the **Price Item** and/or **Pricing Eligibility Criteria** check box is selected. The parameters where the **Price Item** check box is selected are used while viewing effective price item pricing for an account. However, parameters where the **Pricing Eligibility Criteria** check box is selected are used for calculating rate while simulating pricing for rate type price items.

Pricing Simulation helps to determine the price item pricing that can be offered to the account if the account, person, or product attributes are changed.

For example, there is an account named A1 whose account type is set to **Current** and you want to simulate price item pricing for A1 using the parameter as **Account Type** and the parameter value as **Savings**, the system will search effective price item pricing with exact match on a given date. The price

item pricing is searched at all levels defined in the price assignment search algorithm (which is defined for the division to which the account belongs).

The basic details about the price item pricing, such as price item, variance parameter or price item parameters, effective start date, effective end date, rate schedule, and so on are listed in the search results. If the price item type is **Rate**, you can view further details by clicking the **Simulate** icon in the **Simulate** column. On viewing the simulated pricing for an account, the customer can decide whether he or she would like to change the account, person, or product attributes to avail the price item pricing.

Enhancements

This section lists the enhancements made to the following features:

- Person
- Account
- Pricing Management
- Exchange Rate
- Auto Pay

Person

The following changes are made to the Person feature:

- You can now store the date of birth and the date when the person is created in Oracle Revenue Management and Billing.
- You can now store the usage amount and counter related information, such as average daily balance, average monthly balance, number of auto transfer transactions, and so on, for each person. The implementation team can use the **C1-PersonUsage** inbound web service to upload the effective dated usage amount and counter related information in the system. This information can then be used while defining pricing eligibility criteria in the system.
- A new screen named **Person View** is introduced which helps you to view the details of a person.

Account

The following changes are made to the Account feature:

- You can specify the product for which the account is created for the main customer. For example, a bank may offer wide range of loan products (such as Car Loan, Personal Loan, House Loan, and so on) and a person may want to open the car loan account with the bank. In such case, you can map the Car Loan product to the account, and thereby create a car loan account for the person.
- When you create an account and map it to a product, the division-specific default price list defined for the product is assigned to the account. The rate for price item pricing on the default price list will be persisted for the new account only when you manually execute the **C1-PriceAccount** business service.
- You can indicate whether the account is eligible for repricing when the account attributes (defined as parameters in the system) are changed. If an account is eligible for repricing, the rate for price items assigned to the account is recalculated and persisted when the account or its main customer attributes are changed.
- Repricing is not triggered on adding a new account. Therefore, you need to manually execute the **C1-PriceAccount** business service to calculate and persist the rate for the price items assigned to the account.

- You can now store the usage amount and counter related information, such as average daily balance, average monthly balance, number of auto transfer transactions, and so on, for each account. The implementation team can use the **C1-AccountUsage** inbound web service to upload the effective dated usage amount and counter related information in the system. This information can then be used while defining pricing eligibility criteria in the system.

- A new screen named **Account View** is introduced which helps you to view the details of an account.

Pricing Management

The following changes are made to the pricing management feature:

- In Oracle Revenue Management and Billing, you are able to define pricing for a price item based on multiple parameters. When a transaction is mapped to a price item, the price item, parameters and their values are used to determine the effective price item pricing. Until now, the system allowed you to define price item pricing based on the transaction attributes. Now, you can define price item pricing based on the person, account, product, and transaction attributes. Now, while defining a parameter, the system allows you to define the source entity to which the attribute belongs. The source entity can be either of the following:

  o Person

  o Account

  o Product

  o Transaction

  o Service Quantity Identifier

  o Algorithm

- Once you select the source entity, you can specify the source type for a parameter. The source types vary based on the source entity selected. On selecting the source entity as **Account** or **Person**, you can select the source type as **Field**, **Characteristic**, **Usage Amount**, or **Usage Counter**. However, on selecting the source entity as **Product**, you can select the source type as **Field** or **Characteristic**.

- Depending on the selected source type, you can select the field (i.e. the column of the entity table), characteristic type, usage amount type, or usage counter type which you want to define as a parameter in the system.

- The system allows you to define a Service Quantity Identifier as a parameter. You can also define a custom algorithm as a parameter.

- While defining a parameter, you need to select the following check boxes:

  o **Price Item** - If the **Price Item** check box is selected, you can associate the parameter with a price item and define pricing for the price item using the parameter.

  o **Pricing Eligibility Criteria** - If the **Pricing Eligibility Criteria** check box is selected, you can use the parameter while defining the pricing eligibility criteria.

- Now, while defining a price item, you can indicate whether the price item is available for pricing and billing or only for pricing. If the price item is available only for pricing, you can indicate the type of the price item. The valid values for the price item type are:

  o Rate (i.e. Interest Rate)

  o Fees

  By default, the type of the price item which is available for pricing and billing is set to **Fees**. If the type of a price item is **Rate**, the system calculates and persist the rate for the price item. The rate is persisted only for the price item pricing which is either assigned or inherited by an account.

- You can now define two types of price lists – **Standard** and **Promotional**. At present, there is no functionality associated with the price list type. The implementation team can use the price list type to define the custom logic as per the business requirements.

- The system enables you to specify the duration for which the price list is available for assignment to an account or a person. However, note that at present, the availability start and end dates are not used in the product while assigning a price list to an account or a person. If required, the implementation team can build the custom logic using the availability start and end dates.

- You can specify the period in days for which the price list is valid. It is used to calculate price list assignment validity end date while assigning the price list to an account or a person.

- Earlier, while assigning a price list to an account or a person, the price list assignment end date was supposed to be earlier than or equal to the price list effective end date. Now, if the validity period is specified for a price list, the price list assignment end date should be earlier than or equal to the following whichever is earlier:

  o Price list assignment validity end date (which is price list assignment start date + validity period)

  o Price list effective end date

- Earlier, the **Add Product Pricing**, **Edit Product Pricing**, and **Override Product Pricing** screens were used for defining, editing, and overriding a price item pricing, respectively. Now, only one screen named **Price Item Pricing** is available which helps to define, edit, and override a price item pricing.

- While defining a price item pricing, you can define multiple price components for each rate component. The system allows you to define pricing eligibility criteria along with the tiering criteria for each price component. If the pricing eligibility criteria is satisfied, the rate of the respective price component is persisted or used for the account or person during billing.

- You can define pricing eligibility criteria only using the parameters where the **Pricing Eligibility Criteria** check box is selected.

- You can define pricing eligibility criteria for rate components whose tiering type is set to **Flat**, **Threshold**, or **Step**.

- While defining multi parameter based price item pricing for an account, you can select those parameters where the source entity is set to **Transaction**.

- While defining multi parameter based price item pricing for a person, you can select those parameters where the source entity is set to **Account**, **Product**, and **Transaction**.

- While defining multi parameter based price item pricing for a price list, you can select those parameters where the source entity is set to **Account**, **Person**, **Product**, and **Transaction**.

- In the **Pricing (Account)** and **Pricing (Person)** screens, you can now filter the price item pricing using the parameter criteria. However, you can only use those parameters where the source entity is set to **Transaction**.

- A new field named **Show Default and Global Pricing** is added in the **Pricing (Account)** screen. If this field is set to **Yes**, effective price item pricing inherited from either of the following is listed in the **Effective Price Assignment** zone:

    o Product-specific default price list defined for the division

    o Default price list defined for division

    o Global price list

- A new field named **Show Default and Global Pricing** is added in the **Pricing (Person)** screen. If this field is set to **Yes**, effective price item pricing inherited from either of the following is listed in the **Effective Price Assignment** zone:

    o Default price list defined for division

    o Global price list

- Earlier, the details of effective price item pricing along with rate and tiering range were listed in the **Effective Price Assignment** zone. Now, only the basic details about the price item pricing, such as price item, variance parameter or price item parameters, effective start date, effective end date, rate schedule, and so on are listed in the **Effective Price Assignment** zone. On clicking the **View** icon, you can view all rate components of the price item pricing, its price components, tiering and pricing eligibility criteria defined for each price component. If the price item type is **Rate**, the system also displays the persisted rate and indicates the price components which contributed while calculating the rate.

Exchange Rate

The following changes are made to the exchange rate feature:

- Earlier, you were only able to define date based global and division-specific exchange rates. However, now, you can define date or date and time based global and division-specific exchange rates. The date based exchange rate means that the exchange rate is applicable throughout the day. However, the date and time based exchange rate means that the exchange rate is applicable from that date and time onwards. This helps to define different exchange rate for a different time period within a day.

- You can now maintain the source from where the exchange rate is received in the system.

- The **C1-ExchangeRate** and **C1_EXCHRATE_BO** business objects are shipped with the product. The **C1-ExchangeRate** business object is used while defining and editing date and time based exchange rates. However, the **C1_EXCHRATE_BO** business object is used while defining and editing date based exchange rates. Depending on whether you want to define date or date and time based exchange rates, you need to accordingly set the **Business Object** parameter in the Determine Business Object algorithm which is defined using the **F1-MOBO** algorithm type. Once

the parameter is defined in the Determine Business Object algorithm, you need to attach the algorithm to the **C1_EXCHRATE** maintenance object. The system will then accordingly display the fields while defining or editing an exchange rate.

- The system allows you to search both date and date and time based exchange rates defined in the system. If the **C1-ExchangeRate** business object is specified in the Determine Business Object algorithm, you must use the **Date/Time and Exchange Rate Source** option while searching for an exchange rate. However, if the **C1_EXCHRATE_BO** business object is specified in the Determine Business Object algorithm, you must use the **Date** option while searching for an exchange rate.

- You can define characteristics for date and time based exchange rates in the system.

- Earlier, you were able to attach date based currency conversion algorithms on a division. Now, depending on whether you want to use the date or date and time based exchange rate during currency conversion, you can attach the respective algorithms on a division. In addition to the existing date based currency conversion algorithms, the following date and time based currency conversion algorithms are shipped with the product:

Algorithm Type	Enables currency conversion during….	Algorithm Spot on which the respective algorithm must be attached…
C1_EXCRTBS	Bill Segment Generation, FT GL Creation for Bill Segments	Currency Conversion For Bill Segments
C1_EXCRTAD	Adjustment Creation, FT GL Creation for Adjustments	Currency Conversion For Adjustments
C1_EXCRTPY	Payment and Tender Creation, FT GL Creation for Payments	Currency Conversion For Payments
C1_EXCRTTFM	Transaction Aggregation	Currency Conversion For Transaction Feed Management

Note: Ideally, if you want to use date based exchange rates during currency conversion, then use date based currency conversion algorithms for all the above mentioned algorithm spots on the division. However, if you want to use date and time based exchange rates during currency conversion, then use date and time based currency conversion algorithms for all the above mentioned algorithm spots on the division.

- You can define the following parameters in the date and time based currency conversion algorithms:
    - Override Base Currency
    - Conversion Type
    - Search Order
    - Division Reverse Rate
    - Global Reverse Rate
    - Exchange Rate Override Algorithm
    - Exchange Rate Source

- If you want to use an exchange rate search mechanism other than the one defined in the date and time based currency conversion algorithm, you can attach a custom algorithm to fetch the date and time based exchange rate. A sample algorithm type named **C1_EXCRTOVRD** is shipped with the product. It is used to fetch the exchange rate which is available corresponding to the transaction in the **CI_TXN_DETAIL** table. The exchange rate is then used by the algorithm, which is created using the **C1_EXCRTTFM** algorithm type, to convert the transaction amount from the transaction currency to the pricing currency. If you want to fetch exchange rate from the **CI_TXN_DETAIL** table, you need to create an algorithm using the **C1_EXCRTOVRD** algorithm type and attach it to the **Exchange Rate Override Algorithm** parameter in the algorithm which is created using the **C1_EXCRTTFM** algorithm type.

- At present, time is not passed as input from any module (such as, payments, adjustments, billing, transaction feed management, and so on) during currency conversion. Therefore, even if you define date and time based exchange rates and use the date and time based currency conversion algorithms at the division level, the system will not search date and time based exchange rate when multiple exchange rates are available on the same day. The system will randomly pick an exchange rate on that day. The implementation team has to build the custom logic to pass or input time to the date and time based currency conversion algorithms in order to derive the appropriate exchange rate.

Automatic Payment

The following changes are made to the automatic payment feature:

- The system behaves in the following manner:

If the Autopay Creation Option field in the Billing tab of the Installation Options screen is set to…	Then…
Create At Bill Completion	The automatic payments are created, distributed, and frozen for the accounts during the bill completion.
Create On Extract Date	The automatic payments are created, distributed, and frozen for the accounts on the extract date.
Freeze Payment on Notification	The automatic payments are created and distributed for the accounts during the bill completion. However, the automatic payments are frozen or cancelled for the accounts once the review comments are received from the auto clearing house.

Now, you can override the **Create On Extract Date** and **Freeze Payment on Notification** options for a set of accounts so that automatic payments are frozen immediately during the bill completion.

- To override the autopay creation option, you need to do the following:

   o Define a characteristic type named **Override Auto Pay Creation Option** where the **Characteristic Entity** is set to **Account** and **Type of Char Value** is set to **Predefined Value**. Add two characteristic values to the characteristic type – **Yes** and **No**.

o   Define an algorithm named CM-APAY-CROP using the **C1-APAY-CROP** algorithm type and set the **Characteristic Type** parameter to **Override Auto Pay Creation Option**.

o   Attach the CM-APAY-CROP algorithm to the **Override Auto Pay Creation Option** algorithm spot of the required customer class.

o   Define the **Override Auto Pay Creation Option** characteristic for accounts which belong to the customer class where the CM-APAY-CROP algorithm is attached.

Now, if the **Override Auto Pay Creation Option** characteristic for an account is set to **Yes**, the system will freeze the automatic payments immediately for the account during the bill completion. However, if the **Override Auto Pay Creation Option** characteristic for an account is set to **No**, the system will freeze the automatic payments for the account depending on the autopay creation option defined in the system.

User Interface (UI) Level Changes

The following table lists changes made to the existing screens in Oracle Revenue Management and Billing:

Screen Name (in 2.5.0.2.0)	Changes
Account	The following changes are made to this screen: • The **Eligible for Repricing** and **Product** fields are added in the **Main** tab. • A new tab named **Usage Amount/Counter** is added to this screen.
Person	The following changes are made to this screen: • The **Date of Birth** and **Person Since Date** fields are added in the **Main** tab. • A new tab named **Usage Amount/Counter** is added to this screen.
Parameter	The following changes are made to this screen: • The **Code** field is renamed to **Parameter** in the **Search Parameter** zone. • The **Source Entity** and **Source Type** fields are added in the **Search Parameter** zone. • The **Code** column is renamed to **Parameter** in the **Search Parameter** zone. • The **Source Entity** and **Source Type** columns are added in the **Search Parameter** zone.
Parameter (Used for Viewing, Adding, Editing, and Copying)	The following changes are made to this screen: • The **Source Entity**, **Source Type**, and **Source Type Code** fields are added to this screen. • The **Parameter Available For** section is added to this screen. It contains two check boxes – **Price Item** and **Pricing Eligibility Criteria**.

Screen Name (in 2.5.0.2.0)	Changes
Price List	The following changes are made to this screen: • The **Manage Price Lists** menu option in the **Pricing Management** menu is renamed to **Price List**. • The **Manage Price Lists** screen is renamed to **Price List**. • The **Price List Type**, **Availability Start Date**, and **Availability End Date** fields are added in the **Search Price List** zone. • The **Price List Type**, **Availability Start Date**, and **Availability End Date** columns are added in the **Search Price List** zone. • A new zone named **Price List Price Items** is added to this screen.
Price List (Used for Adding)	The following changes are made to this screen: • The **Add Price List** screen is renamed to **Price List**. • The **Price List Type**, **Availability Start Date**, **Availability End Date**, and **Validity Period (in Days)** fields are added in the **Main** tab.
Price List (Used for Editing)	The following changes are made to this screen: • The **Edit Price List** screen is renamed to **Price List**. • The **Price List Type**, **Availability Start Date**, **Availability End Date**, and **Validity Period (in Days)** fields are added in the **Main** tab.
Price List (Used for Viewing)	The following changes are made to this screen: • The **Price List Type**, **Availability Start Date**, **Availability End Date**, and **Validity Period (in Days)** fields are added to this screen.

Screen Name (in 2.5.0.2.0)	Changes
Price List Price Item Assignments	The following changes are made to this screen: • The **Manage Product Assignments to Price Lists** screen is renamed to **Price List Price Item Assignments**. • The **Price List Products** zone is renamed to **Price List Price Items**. • The **PA Usage Flag** column in the **Price List Price Items** zone is renamed to **Price Assignment Usage**. • The **PA Type Flag** column in the **Price List Price Items** zone is renamed to **Price Assignment Type**. • The **Search Products** zone is renamed to **Search Price Item**. • The **Search Price Assignment to Copy** zone is renamed to **Search Price Assignment**. • The **CCY(P)** column in the **Search Price Assignment** zone is renamed to **Pricing Currency**.
Copy Price List	The following changes are made to this screen: • The **Price List Products** zone is renamed to **Price List Price Items**. • The **PA Usage Flag** column in the **Price List Price Items** zone is renamed to **Price Assignment Usage**. • The **PA Type Flag** column in the **Price List Price Items** zone is renamed to **Price Assignment Type**. • The **Price List Type**, **Availability Start Date**, **Availability End Date**, and **Validity Period (in Days)** fields are added in the **Copy Price List** zone.
Price List Assignment (Account)	The following changes are made to this screen: • The **Party** zone is renamed to **Account Information**. • The **Price List Products** zone is renamed to **Price List Price Items**. • The **Search Price List to Assign** zone is renamed to **Search Price List**. • The **Account Information** column in the **Search Price List** zone is renamed to **Account ID**.

Screen Name (in 2.5.0.2.0)	Changes
Price List Assignment (Person)	The following changes are made to this screen: • The **Price List Assignment (Customer)** screen is renamed to **Price List Assignment (Person)**. • The **Party** zone is renamed to **Person Information**. • The **Price List Products** zone is renamed to **Price List Price Items**. • The **Search Price List to Assign** zone is renamed to **Search Price List**. • The **Account Information** column in the **Search Price List** zone is renamed to **Account ID**.
Price Item	The following changes are made to this screen: • The **Manage Products** menu option in the **Pricing Management** menu is renamed to **Price Item**. • The **Manage Products** screen is renamed to **Price Item**. • The **Search Products** zone is renamed to **Search Price Item**. • The **Unit of Measure** field is removed from the **Search Price Item** zone. • The **Available For** and **Price Item Type** fields are added in the **Search Price Item** zone. The **Price Item Type** field appears only when you select the **Only Pricing** option from the **Available For** list. • The **Bundled** field is renamed to **Bundle**. • The **Unit of Measure** column is removed from the **Search Price Item** zone. • The **Available For** and **Price Item Type** columns are added in the **Search Price Item** zone.

Screen Name (in 2.5.0.2.0)	Changes
Price Item (Used for Adding)	The following changes are made to this screen: • The **Add Product** screen is renamed to **Price Item**. • The **Product** tab is renamed to **Main**. • The **Product Parameters** tab is renamed to **Parameters**. • The **Bundled** field is renamed to **Bundle**. • The **Available For** and **Price Item Type** fields are added to this screen. The **Price Item Type** field appears only when you select the **Only Pricing** option from the **Available For** list. • The **Contract Type** field appears only when you select the **Pricing and Billing** option from the **Available For** list.
Price Item (Used for Editing)	The following changes are made to this screen: • The **Edit Product** screen is renamed to **Price Item**. • The **Product** tab is renamed to **Main**. • The **Product Parameters** tab is renamed to **Parameters**. • The **Bundled** field is renamed to **Bundle**. • The **Available For** and **Price Item Type** fields are added to this screen. The **Price Item Type** field appears only when the **Available For** field is set to **Only Pricing**. • The **Contract Type** field appears only when the **Available For** field is set to **Pricing and Billing**.
View Price Item	The following changes are made to this screen: • The **View Product** screen is renamed to **View Price Item**. • The **Product** tab is renamed to **Main**. • The **Bundled** field is renamed to **Bundle**. • The **Available For** and **Price Item Type** fields are added to this screen. The **Price Item Type** field appears only when the **Available For** field is set to **Only Pricing**. • The **Contract Type** field appears only when the **Available For** field is set to **Pricing and Billing**.

Screen Name (in 2.5.0.2.0)	Changes
Price Item Relationship Maintenance	The following changes are made to this screen: • The **Product Relationship Maintenance** screen is renamed to **Price Item Relationship Maintenance**. • The **Product Information** zone is renamed to **Price Item Information**. • The **Bundled** field is renamed to **Bundle** in the **Price Item Information** zone. • The **Assigned Products** zone is renamed to **Assigned Price Items**.
Add/Edit Price Item Relationship	The following changes are made to this screen: • The **Add/Edit Product Relationship** screen is renamed to **Add/Edit Price Item Relationship**. • The **Parent Product** field is renamed to **Parent Price Item**.
Copy Bundle	The following changes are made to this screen: • The **Bundled** field is renamed to **Bundle** in the **Bundle Information** zone. • The **Available For** and **Price Item Type** fields are added in the **Bundle Information** zone. • The **Product Division** zone is renamed to **Price Item Division**. • The **Search Products to Assign** zone is renamed to **Search Price Item to Assign**. • The **Copy Assigned Product** zone is renamed to **Copy Assigned Price Item**. • The **Assign Products** field is renamed to **Assign Price Item** in the **Copy Assigned Price Item** zone.
Person to Person Relationship Type Sequence	The following changes are made to this screen: • The **Search Person Relationship Type Sequence for Product** zone is renamed to **Search Person Relationship Type Sequence for Price Item**.
Person Relationship Type Sequence for Division and PriceItem (Used for Adding, Editing, and Viewing)	The following changes are made to this screen: • The **Person Relationship Type Sequence for Division and Product** screen is renamed to **Person Relationship Type Sequence for Division and PriceItem**.

Screen Name (in 2.5.0.2.0)	Changes

Price Item Pricing	The following changes are made to this screen:
	
	• The **Add Product Pricing** screen is renamed to **Price Item Pricing**. This screen will be henceforth used for defining, editing, and overriding a price item pricing.
	
	• The screen is completely redesigned and the fields are categorized into the following sections:
	    ○ Price Item and Parameter Information
	    ○ TFM Information
	    ○ Pricing Information
	
	• A grid is added in the **Price Item and Parameter Information** section where you can specify the parameters while defining multi parameter based price item pricing.
	
	• The **Sequence Number** and **Tiering Type** columns are removed. Instead, the **RC Info** column is added which contains the concatenated string consisting of rate component's sequence number and tiering type.
	
	• The **Price Component Details** section is added corresponding to the **RC Info** column. It allows you to define multiple price components for each rate component. It contains the following columns:
	    ○ Price Component Sequence
	    ○ Display
	    ○ Price Component Description
	    ○ Rate
	    ○ Eligibility Tier Details
	
	• On clicking the icon in the **Eligibility Tier Details** column, the **Tiering Criteria** and **Pricing Eligibility Criteria** grids appear.
	
	• The **Tiering Criteria** grid appears only when the tiering type of the rate component is either **Threshold** or **Step**.

Screen Name (in 2.5.0.2.0)	Changes
Pricing (Account)	The following changes are made to this screen: • The **Party Information** zone is renamed to **Account Information**. • The **Parent Customer** field in the **Effective Price Assignment** zone is renamed to **Parent Person**. • The **Show Default and Global Pricing**, **Parameter**, and **Parameter Value** fields are added in the **Effective Price Assignment** zone. • The **Rate** column is removed from the **Effective Price Assignment** zone. • The **View** column is added to the **Effective Price Assignment** zone. • The **Start Date** and **End Date** columns are renamed to **Effective Start Date** and **Effective End Date**, respectively. • The **CCY(P)** column in the **Effective Price Assignment** and **Search Price Assignment** zones is renamed to **Pricing Currency**. • The **Parent Customer** column in the **Effective Price Assignment** zone is renamed to **Parent Person**. • The **Search Products to Assign** zone is renamed to **Search Price Item**. • The **Search Price Assignment to Copy** zone is renamed to **Search Price Assignment**. • The **Post Processing - Product Based** option in the **Price Assignment Type** list is renamed to **Post Processing - Price Item Based**.

Screen Name (in 2.5.0.2.0)	Changes
Pricing (Person)	The following changes are made to this screen: • The **Pricing (Customer)** screen is renamed to **Pricing (Person)**. • The **Party Information** zone is renamed to **Person Information**. • The **Parent Customer** field in the **Effective Price Assignment** zone is renamed to **Parent Person**. • The **Show Default and Global Pricing**, **Parameter**, and **Parameter Value** fields are added in the **Effective Price Assignment** zone. • The **Rate** column is removed from the **Effective Price Assignment** zone. • The **View** column is added to the **Effective Price Assignment** zone. • The **Start Date** and **End Date** columns are renamed to **Effective Start Date** and **Effective End Date**, respectively. • The **CCY(P)** column in the **Effective Price Assignment** and **Search Price Assignment** zones is renamed to **Pricing Currency**. • The **Parent Customer** column in the **Effective Price Assignment** zone is renamed to **Parent Person**. • The **Search Products to Assign** zone is renamed to **Search Price Item**. • The **Search Price Assignment to Copy** zone is renamed to **Search Price Assignment**. • The **Post Processing - Product Based** option in the **Price Assignment Type** list is renamed to **Post Processing - Price Item Based**.

Screen Name (in 2.5.0.2.0)	Changes
Exchange Rate	The following changes are made to this screen: • The **Manage Exchange Rates** menu option in the **Pricing Management** menu is renamed to **Exchange Rate**. • The **Manage Exchange Rates** screen is renamed to **Exchange Rate**. • The **Edit Exchange Rate** and **Create Exchange Rate** zones are removed from this screen. • The **Search By** list is added in the **Search Exchange Rate** zone. It contains two options – **Date/Time and Exchange Rate Source** and **Date**. • The **Effective Start Date/Time**, **Effective End Date/Time**, and **Exchange Rate Source** fields are added in the **Search Exchange Rate** zone. These fields appear only when you select the **Date/Time and Exchange Rate Source** option from the **Search By** list. • The **Start Date** and **End Date** fields are renamed to **Effective Start Date** and **Effective End Date**, respectively. These fields appear only when you select the **Date** option from the **Search By** list. • The **Exchange Rate ID**, **Inverse Rate**, **Edit**, and **Delete** columns are added in the **Search Exchange Rate** zone. • The **Exchange Rate Source**, **Effective Start Date/Time**, and **Effective End Date/Time** columns are added in the **Search Exchange Rate** zone. These columns appear only when you select the **Date/Time and Exchange Rate Source** option from the **Search By** list. • The **Start Date** and **End Date** columns are renamed to **Effective Start Date** and **Effective End Date**, respectively. These columns appear only when you select the **Date** option from the **Search By** list. • The **Add** link is added in the upper-right corner of the **Search Exchange Rate** zone.

Screen Name (in 2.5.0.2.0)	Changes
Rate Definition	The following changes are made to this screen: • The **Manage Rate Definitions** menu option in the **Pricing Management** menu is renamed to **Rate Definition**. • The **Manage Rate Definitions** screen is renamed to **Rate Definition**. • The **Select Rate Schedule to Define Rate** zone is renamed to **Rate Schedule Components**. • The **Sequence Number** column in the **Rate Schedule Components** zone is renamed to **Rate Component Sequence**. • The **Sequence Number** field in the **Create/Edit Rate Definition** zone is renamed to **Rate Component Sequence**.
Tiering Criterion	The following changes are made to this screen: • The **Manage Tiering Criteria** menu option in the **Pricing Management** menu is renamed to **Tiering Criterion**. • The **Manage Tiering Criteria** screen is renamed to **Tiering Criterion**. • The **Tiering Criteria** zone is renamed to **Tiering Criterion List**. • The **Tiering Criteria** column in the **Tiering Criterion List** zone is renamed to **Tiering Criterion**. • The **Tiering Criteria** field in the **Create Tiering Criterion** zone is renamed to **Tiering Criterion**.

Database Level Changes

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) that are newly added in Oracle Revenue Management and Billing Version 2.5.0.2.0, refer to the Appendix A : New Objects in the Oracle Revenue Management and Billing V2.5.0.2.0 Database section in *Oracle Revenue Management and Billing Database Administrator's Guide*.

Supported Platforms

The following table lists the operating system and application server combinations on which Oracle Revenue Management and Billing Version 2.5.0.2.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Windows 7[1], 8.1 (Internet Explorer 11.x)	AIX 7.1 TL1 (64-bit)	POWER 64-bit	WebSphere 8.5 (64-bit)	Oracle 12.1.0.2
	Oracle Linux 6.x and 7.x (64-bit)	x86_64	WebLogic 12.1.3.0 (64-bit)	Oracle 12.1.0.2
	Red Hat Enterprise Linux[2] 6.x and 7.x (64-bit)	x86_64	WebLogic 12.1.3.0 (64-bit)	Oracle 12.1.0.2
	Windows Server 2012 R2 (64-bit)	x86_64	WebLogic 12.1.3.0 (64-bit)	Oracle 12.1.0.2

Note: We strongly recommend you to install Oracle Revenue Management and Billing (ORMB) on Windows platform only for non-production activities, such as User Acceptance Testing (UAT), development setup, and so on.

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[1] Oracle will not provide any support for Windows XP from 2014.
[2] Oracle Revenue Management and Billing is tested and certified on Oracle Linux 6.x and 7.x. Oracle Linux is 100% userspace-compatible with Red Hat Enterprise Linux, and therefore Oracle Revenue Management and Billing is supported on Red Hat Enterprise Linux.

Technical Recommendations

To improve the overall batch performance on Windows, AIX, and Linux platforms, we recommend you to make changes in the following files:

File Name	Change From	Change To
hibernate.properties	hibernate.c3p0.timeout = 300	hibernate.c3p0.timeout = 600
threadpoolworker.sh	MEM_ARGS="-Xms512m -Xmx1024m -XX:MaxPermSize=768m"	MEM_ARGS="-Xms512m -Xmx4096m -XX:MaxPermSize=768m"

Supported Upgrades

At present, we support upgrade from Oracle Revenue Management and Billing Version 2.5.0.1.0 to 2.5.0.2.0. For more information on how to upgrade, refer to the following documents which are available on OTN:

- *Oracle Revenue Management and Billing Version 2.5.0.2.0 Upgrade Guide*

- *Oracle Revenue Management and Billing Version 2.5.0.2.0 Upgrade Path Guide*

For upgrading from any other version of Oracle Revenue Management and Billing other than 2.5.0.1.0, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.

Technology Upgrade

The following versions of software are supported in this release of Oracle Revenue Management and Billing:

- Windows 8.1 (Client)

- Windows Server 2012 R2 (64-bit)

- WebLogic 12.1.3.0 (64-bit)

- Java 1.8 for Linux and Windows operating systems

- Oracle Database Server 12.1.0.2

- Oracle Database Client 12.1.0.2

And, the following version of software and browser are not supported in this release of Oracle Revenue Management and Billing:

- AIX 6.1 TL5 (64-bit)

- Internet Explorer 9.x and 10.x

- Google Chrome 43.x

- Firefox 31.x ESR

- Oracle Linux and Red Hat Enterprise Linux 5.8

- Windows Server 2008 R2 (64-bit)

- WebLogic 10.3.6.0.8 (64-bit)

- WebLogic 12.1.2 (64-bit)

- Oracle Database Server 11.2.0.4 and 12.1.0.1

- Oracle Database Client 11.2.0.1

Deprecation Notices for ORMB Version 2.5.0.2.0

This section describes items that are deprecated in this release or planned for deprecation in a future release of Oracle Revenue Management and Billing. It contains the following topics:

- [Deprecated Functionality in This Release](#)
- [Deprecation Planned for Future Releases](#)

Deprecated Functionality in This Release

The following features are deprecated in this release:

- **Configuration Lab** - This has been superseded by the Configuration Migration Assistant (CMA) functionality.

- **Archiving Engine (COBOL based)** – This has been superseded by the Information Lifecycle Management (ILM) functionality.

Deprecation Planned for Future Releases

The following features are scheduled to be removed in a future release of Oracle Revenue Management and Billing:

- **TOU (Variance Parameter) Based Pricing** – We strongly recommend you to use the multi parameter based pricing feature instead of the TOU based pricing feature.

- **Billable Charge Creation Using UOM** – At present, there is one-to-one relationship between UOM and product. Therefore, you are able to create a billable charge using either UOM or product. In a future release, the system will not allow you to search product pricing using UOM. Therefore, we strongly recommend you to create pass through or service quantity based billable charges using product code.

- **Legacy mechanism to upload pass through billable charges using the BCU1 and BCU2 batches** - We have introduced the On Demand **Billing feature which allows you to upload both pass through and rate based billable char**ges. We strongly recommend you to start using the On Demand Billing feature for uploading pass through and rate based billable charges.

- **XAI Inbound Services** - This has already been superseded by the Inbound Web Services functionality. For more information on migrating from XAI to IWS, please refer to *Migrating from XAI to IWS Oracle Utilities Application Framework* (Doc ID 1644914.1) on [My Oracle Support](#).

The following table lists the objects which will be deprecated in the next release of Oracle Revenue Management and Billing:

Object Type	Object Name
Algorithm Type	C1_CURALG, FTFREZBSEG, FTFREZFTGLEX, C1-MDOV-BILL, C1-MDOV-BSEG, C1-MDOV-ONSA, SA_DERV_POPC
Feature Configuration	C1_EX_ROUND
Option Types	Currency Conversion Algorithm and Payment Distribution To-Do (from the **C1_MLTCURACC** feature configuration)
Table Columns	FILE_NAME, UPLD_FLTY_CD, and ACCESS_GRP_CD columns from the CI_BCHG_HSTG table
Batch Control	GLASSIGN
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW
Business Service	C1-EffectivePricing, C1_PriceParmBS
	Note: Instead of using the **C1-EffectivePricing** business service, use the **C1-GetEffectivePricing** business service to view the data on the **Pricing (Account)** and **Pricing (Person)** screens. Similarly, instead of using the **C1_PriceParmBS** business service, use the **C1_PRICE_PARM** business object to add, edit, copy, and delete a parameter.
Service Program	EFFPRCSERVICE, C1_PRICEPARM

Therefore, henceforth, we strongly recommend you not to use these objects in any custom implementation.

ORMB V2.5.0.2.0 Patches

Oracle Financial Services Revenue Management and Billing Version 2.5.0.2.0 and Oracle Insurance Revenue Management and Billing Version 2.5.0.2.0 patches are available for the following platforms:

- Microsoft Windows (64-bit)
- IBM AIX on POWER Systems (64-bit)
- Red Hat Enterprise Linux or Oracle Linux (64-bit)

Each patch includes multiple zip files. You can download the following patches from My Oracle Support:

- **22964611 - RMB V2.5.0.2.0 – Banking –** You can use this patch for all three platforms. This patch contains the following zip files:
  - o   FW-V4.3.0.1.0-MultiPlatform
  - o   RMB-V2.5.0.2.0-MultiPlatform
  - o   RMB-V2.5.0.2.0-FW-PREREQ-MultiPlatform
  - o   RMB-V2.5.0.2.0-Oracle-Database-MultiPlatform
- **22964584 - RMB V2.5.0.2.0 – Insurance –** You can use this patch for all three platforms. This patch contains the following zip files:
  - o   FW-V4.3.0.1.0-MultiPlatform
  - o   RMB-V2.5.0.2.0-MultiPlatform
  - o   RMB-V2.5.0.2.0-FW-PREREQ-MultiPlatform
  - o   RMB-V2.5.0.2.0-Oracle-Database-MultiPlatform

To download the patch:

1. Login to My Oracle Support. The **My Oracle Support** page appears.
2. Click the **Patches & Updates** tab. The **Patches and Updates** tab appears.
3. In the **Patch Search** section, click the **Search** tab. The **Search** tab appears.
4. Click the **Product or Family (Advanced)** link.
5. Enter **Oracle Financial Services Revenue Management and Billing** in the **Product is** field.
6. Select the **Oracle Financial Services Revenue Management and Billing 2.5.0.2.0** option from the **Release is** list.
7. Click **Search**. The **Patch Search** page appears. It contains a list of patches which are available for the selected product release.
8. Click the **Patch Name** link corresponding to the patch that you want to download. The patch details appear in the right pane of the **Patch Search** page.
9. Click **Download**. The **File Download** dialog box appears.
10. Click the **Save** icon corresponding to the zip file name link. A message appears confirming whether you want to open or save the zip file.
11. Select the **Save as** option from the **Save** drop-down list. The **Save As** dialog box appears.

12. Browse to the location where you want to download the patch and then click **Save**. The patch is downloaded on your local machine.

Product Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF). You can download Oracle Revenue Management and Billing release specific documentation library (for example, Oracle Revenue Management and Billing Version 2.5.X.X.X Documentation Library) using the following URL:

http://www.oracle.com/technetwork/indexes/documentation/fsgbu-1364781.html

Bug Fixes

The following table lists the bugs that are fixed in this release:

Bug Number	Copy of	Description
22964407	22950197	UI ISSUES IN CONTRACT SCREEN
22856751	22833809	GBS INVOICE FREEZE GL USING FX RATE AS OF GL/FREEZE DATE RATHER THAN LAST DAY OF
22856580	22651337	NO RECORD FOUND ERROR WHEN THE SUBMITTER ATTEMPTS TO APPROVE A FILE
22848072	22505930	POST PROCESSING BILL SEGMENT THROWS ERROR ON RE-BILL ACTION
22842532	22665151	APPLYRATEDATA.GETBILLSEGMENTPERIODSTART() RETURNING INCORRECT DATE
22753060	22534072	EFFECTIVE PRICING UI IS NOT SHOWING ANY RESULTS FOR CONVERTED DATA
22746889	22218890	ISSUE WITH C1-ODET PROCESS LOCKING UP TO DO ENTRY TABLE
22745764	22463137	GLASSGN1 NOT SHOWING CORRECT RESULTS IN BATCH RUN STATISTICS (DB)
22740251	22515680	REVERT CACHING CHANGES FOR CI_SA IN CIPCSVAI - CONTRACT STATUS FLAG IS INVALID
22740237	22564121	AMOUNT DISPLAYED IN THE FINANCIAL INFORMATION DOES NOT MATCH WITH THE TOTAL GENE
22739468	22602821	DUPLICATE RECORD IN BANKING CONTROL CENTRAL SCREEN IF MULTIPLE IDENTIFIER EXISTS
22739076	22202965	{INFO}ERROR IN CREATING REFUND REQUEST ON ACCOUNTS WITHOUT A PERSON ADDRESS
22738836	22616781	PAYMENT APPROVAL ISSUE - SQL ERROR CODE 999999994 IN MODULE CIPPXCER:SQ10A
22738753	22625350	PROD:CANCELING ANY PAYMENT MADE BEFORE UPGRADE THROWS COBOL ERROR
22737681	22474086	USER UNABLE TO SEE ALL PRICE APPROVAL LOGS IF MAKER /CHECKER LANGUAGES DIFFERENT
22731012	22152955	CURRENCY CONVERSION DOES NOT WORK PROPERLY WHEN USING C1-BILLSEG
22730548	22638249	TENDER IS CANCELLED WITH CANCEL BUTTON IN PAYMENT EVENT SUMMARY SCREEN

Bug Number	Copy of	Description
22709816	*22571550*	PRICELIST ASSIGNMENT APPROVAL DISPLAY ISSUE
22697806	*22629933*	CI_POLICY_LOG.SRCH_CHAR_VAL COLUMN NOT POPULATED FOR POLICY OBJECT
22670920	*22501639*	TFM CREATING RECORDS IN EXCEPTION TABLE WITH NO MESSAGE_CODE
22670897	*22451671*	MISSING BILLABLE CHARGE LINE CHARACTERISTICS
22670849	*22493424*	TFM IN 2.4.0.1 NOT PICKING UP PRICING BASED ON TXNVP BATCH BUSINESS DATE
22670784	*22328501*	LONG RUNNING DISAGGREGATION CYCLE
22670708	*22358466*	CALCULATION AMOUNT NOT ADDED DURING AGGREGATION
22669953	*22353057*	UDF_NBR FIELDS NOT BEING ACCEPTED AS AGGREGATION PARAMETER
22669795	*22316504*	DISAGGREGATION REQUEST REMAINING IN PENDING DURING C1-DARSU
22171613	*22124404*	ACTIVATE AUTOPAY (ACTVTAPY) NOT ASSIGNING BATCH CODE OR BATCH NUMBER
21489158	*-*	THE EFFECTIVE PRICING UI DOES NOT SUPPORT TIERS MORE THAN 30
21246206	*-*	PRICING FOR ALL PRODUCTS SHOULD BE DISPLAYED IN PRICE LIST SCREEN
17732862	*-*	ADJUSTMENT UPLOAD PROGRAM SHOULD VALIDATE CURRENCY ON ADJUSTMENT CONTROL STAGING
23029614	*21392947*	NEED GUIDANCE ON USAGE OF TFM TABLE FIELDS IN RATE CALCULATIONS
23021201	*21783300*	BILL IS BEING GENERATED FOR A FROZEN PERIOD FOR THE STANDALONE ACCOUNT
23016572	*22706247*	PRICE ASSIGNMENTS DO NOT SAVE DUE TO INVALID DATE VALUE --1
23016410	*22164426*	DUPLICATE VALUE ERROR DURING PAYMENT TRANSFER
23016396	*22163870*	CUSTOMER CONTACT ALGORITHM NOT TRIGGERED
23016363	*22005211*	ISSUES RELATED TO BILL TOLERANCE ALGORITHM
23014788	*22766334*	COUNTRY IS NOT GETTING SAVED IN DATABASE IF ADDRESS LINE 1 IS EMPTY
23082485	*23040647*	BILL SEGMENT NOT FOUND IN QUOTE SCREEN WHEREAS IT IS PRESENT IN THE TABLE

Bug Number	Copy of	Description
23080730	*22977472*	DISTRIBUTE AND FREEZE DATE NOT CONSIDERED IN APAYRA BATCH PROCESS
23060662	*22713071*	ANALYST USER IS ABLE TO APPROVE ONDEMAND FILE IN UPGRADED ENVIRONMENT
23105021	*23039368*	OVERDUE EVENTS - "DAYS AFTER" VALUE IS CALCULATING INCORRECT DATE
23045035	*22834137*	INCORRECT MESSAGE IS DISPLAYED WHEN USER TRY TO GENERATE A BILL IN ON DEMAND
23031593	*22812982*	C1-RRADJ REVENUE RECOGNITION - GENERATE SECONDARY ADJUSTMENTS. DURATION GROWING
23028277	*23012419*	TFM C1-TXNIP PERFORMANCE ISSUE FOR PARTIALLY DISAGGREGATED TRANSACTIONS
23016382	*22026335*	POST-PROCESSING ALGORITHM NOT BEING CALLED FOR FIRST PROSPECTIVE BILL SCENARIO
23016353	*21824124*	BILL SEGMENTS GOT DELETED AND NOT REGENERATED FOR RECURRING BILLABLE CHARGES
23016279	*21610552*	MULTIPLE BILL DISPLAY FOR AN ACCOUNT WITH DIFFERENT MAIN AND MAIL CUSTOMER
23016234	*21619373*	SEGMENT IS GOT FREEZE FROM BATCH EVEN IF EXCHANGE RATE NOT AVAILABLE FOR GL EXT
23015901	*22645600*	PRICELIST ASSIGNMENT APPROVAL ID GET DISPLAYED ON OTHER (CUSTOM/BASE) UI
23014377	*22344618*	UOM GENERATION FAILS IN MULTI THREADED ENVIRONMENT
23013822	*22833831*	OVERRIDE APPROVAL SCREEN NOT DISPLAY CORRECTLY WHEN THERE IS MORE THAN TWO PRIC

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 2.5.0.2.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

- [Banking](#)

- [Insurance](#)

- [Documentation](#)

Banking

Issue	TRANSACTION AGGREGATION: INCORRECT RESULTS WHEN BATCHES NOT EXECUTED IN SEQUENCE
Description	During the transaction aggregation process, you need to execute batches in the specified order (as stated in the user manual). If you do not follow the sequence, erroneous results may occur.
Workaround	None

Issue	THE FEED MANAGEMENT BATCHES CANNOT RUN CONCURRENTLY
Description	You cannot execute the transaction feed management batches concurrently.
Workaround	None

Issue	SEARCH RESULT FOR EXCHANGE RATE NOT DISPLAYED CORRECTLY
Description	Searching for the lowest precision rate (0.00000000000000001 /0.00000000000000011/0.00000000000000023) from the **Search Exchange Rate** zone results in displaying the rate in exponential format "IE -18".
Workaround	None

Issue	**VALIDATION RULES FOR ADHOC CHARACTERISTIC TYPES ARE NOT TRIGGERED IN THE MANAGE PRODUCTS, MANAGE PRICE LISTS, ADD PRODUCT PRICING, OVERRIDE PRODUCT PRICING, AND EDIT ASSIGNED PRICING SCREENS**
Description	When you associate adhoc characteristic types with a product, price list, and a price assignment, validations defined for adhoc characteristic types are not triggered in the **Manage Products**, **Manage Price Lists**, **Add Product Pricing**, **Override Product Pricing**, and the **Edit Assigned Pricing** screens.
Workaround	None

Issue	**UNABLE TO CHANGE THE DIVISION STATUS FROM ACTIVE TO RETIRED**
Description	When the approval workflow functionality is enabled, the status of a division will not get changed from **Active** to **Retired**.
Workaround	None

Issue	**LOCALIZATION ISSUE WHEN MAKER AND CHECKER CHOOSE DIFFERENT LANGUAGES**
Description	When a maker and checker operate in different languages, a maker cannot see the approved transactions.
Workaround	Maker should login with a language that checker is using to see the approved transactions.

Issue	**PRE-VALIDATION ERROR MSG FOR INVOICING GROUP EVEN IF PRE-VALIDATION IS OFF**
Description	If you set the **Pre-validation** flag for both the groups (that is, **C1IGADD** and **C1IGUPD**) to **N**, the validation will still be triggered before the approval workflow request is created.
Workaround	None

Issue	ACCOUNT IDENTIFIER MANDATORY SWITCH NOT WORKING
Description	If the **Account Identifier Required** option type of the **C1_ACCTINFO** feature configuration is set to **Y**, you will not be able to use the **Add Account and Start Service** feature available in the **Person** screen.
Workaround	None

Issue	BILLABLE CHARGE – PRICING INFO TAB, PRODUCT AND SUB-UOM DESCRIPTION IS NOT SHOWN
Description	When you specify the product and TOU (issue currency) code in the **Pricing Information** tab of the **Billable Charge** screen, the description of the product and TOU does not appear corresponding to the respective fields.
Workaround	None

Issue	CHARS GENERATED ON BILL SEGMENTS EVEN IF C1_EX_ROUND FEATURE CONFIG IS SET TO NO
Description	The **Exchange Rate** characteristic type appears in the **Bill Segment Calc Line Characteristics** screen even if the **Feature Config for Conversion** option type of the **C1_EX_ROUND** feature configuration is set to **N**. This happens only when the bill segment creation algorithms are created using the **BS-CRE-PRICE** and **C1-GENBSEGPA** algorithm types.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the **Foreign Key Value** and **File Location Value** characteristic types. These screens only support the **Adhoc Value** and **Predefined Value** characteristic types.
Workaround	None

Issue	**GETTING SERVER ERROR WHILE DELETING A DIVISION (ASSOCIATED WITH A PRODUCT)**
Description	The system does not allow you to delete a division which is associated with a product (even if the division is not yet used in the system).
Workaround	In such case, you can first remove the product from the division and then delete the division.

Issue	**MESSAGE DOES NOT APPEAR ON CLICKING BUTTONS IN LIST OF PRICE ASSIGNMENTS ZONE**
Description	On approving, rejecting, or canceling one or more price assignment requests (at once) from the **List of Price Assignments** zone, the appropriate message does not appear when you click the **Accept Changes**, **Return to Submitter**, or the **Revert to Original** button.
Workaround	None

Issue	**VIEW RULE TYPE SCREEN - PERFORMANCE ISSUE**
Description	If you define a transaction record type with the maximum accounts to be charged set to 5, maximum products to be mapped set to 10, and the maximum product parameters set to 15 and view the details of the rule type, you might experience delay in loading the **View Rule Type** screen.
Workaround	None

Issue	**C1-TXCNC BATCH GETS EXECUTED SUCCESSFULLY EVEN IF C1-TXNCU BATCH FAILS**
Description	When you execute the C1-TXNCU batch with either of the following parameters during the cancellation process, an error occurs: • Transaction Source • Division If you further execute the C1-TXCNC batch during the cancellation process, the status of all transactions in the feed is changed to Cancelled (CNCL). But, in this case, the SQIs on the billable charges are not accurate.
Workaround	None

Issue	**ERROR WHEN NUMBER OF RECORDS FOR PAGINATION IN ODB SCREENS SET TO 50 OR ABOVE**
Description	A warning message appears when you set the **Number of Records Per Page** field to 50 or above in the **Usage Data** or **View Bill Data** screen.
Workaround	You can avoid this warning message by editing the registry. Using a Registry Editor, such as Regedt32.exe, open the following key: 1. HKEY_CURRENT_USER\Software\Microsoft\Internet Explorer\Styles If the **Styles** key is not present, create a new key named **Styles**. Then, create a new DWORD value named **MaxScriptStatements** under this key, and set its value to **0xFFFFFFFF** to avoid the warning message.

Issue	**INCORRECT RESULTS IF BUNDLE USED INSTEAD OF PRODUCT IN RATIO OR PHANTOM BUNDLE**
Description	If you use a bundle instead of a product in a ratio or phantom bundle, service quantity is aggregated incorrectly, and thus the bill amount is inaccurate.
Workaround	None

Issue	**TIERED PRICING - 0 VALUE IN THE TO FIELD IS CONVERTED TO 9999999999999999999.99**
Description	While defining a tiering range, if you specify zero (0) in the **To** field, the value is automatically getting converted to 9999999999999999999.99.
Workaround	None

Issue	**ERRONEOUS RESULTS WHEN BILLABLE CHARGES ARE VOLUMINOUS & SESSION TIMEOUT IS LOW**
Description	While billing, you may notice erroneous results when the default session timeout is low and the number of billable charges of an account are high.
Workaround	In such case, we recommend you to generate the bill through a batch process instead of generating the bill through the **Bill** screen.

Issue	**INAPPROPRIATE SEARCH RESULTS IF SEARCH CRITERIA CONTAINS SPECIAL CHARACTERS**
Description	If the search criteria contains a special character such as underscore (_), percentage (%), ampersand (&), or asterisk (*), the search results may not be appropriate.
Workaround	None

Issue	**CONDITIONAL APPROVAL WORKFLOW CANNOT BE USED WHILE COPYING A PRICE LIST**
Description	The system allows you to define conditional approval workflow for business objects. However, at present the conditional approval workflow cannot be used while copying a price list.
Workaround	None

Issue	**BILLS GENERATED FOR THE MEMBER ACCOUNT AND NOT FOR THE MASTER ACCOUNT**
Description	If you add a contract to a member account after the account is added to the master account, the system will not duplicate the newly added contract at the master level. Therefore, in such scenarios, billable charges related to the newly added contract will be billed to the member account and not to the master account.
Workaround	You need to ensure that no new contracts are added to the member account after the account is added to the master account.

Issue	**TRANSACTIONS WITH SAME TRANSACTION ID CAN BE PROCESSED ON TWO DIFFERENT DATES**
Description	Now, due to table partitioning, the system can process transactions with the same transaction ID on two different processing dates. If your data upload interface doesn't generate unique transaction IDs, this might result in erroneous results at a later stage.
Workaround	To avoid any such erroneous results, we recommend you to use the unique transaction ID generation sequence named RMB_CI_TXN_DETAIL_SEQ shipped with ORMB.

Issue	**SEARCH RESULT DISPLAYS TRANSACTION LEGS ON SEARCHING INPD & COMP TRANSACTIONS**
Description	In the **Transaction Details** screen, when you search for the **INPD** transactions, the **Search Results** section should display transactions which are in the **INPD** status. However, at present, all legs of the **INPD** transactions are displayed in the **Search Results** section. Similarly, when you search for the **COMP** transactions, the **Search Results** section should display transactions which are in the **COMP** status. However, at present, all legs of the **COMP** transactions are displayed in the **Search Results** section.
Workaround	None

Issue	**MULTIPLE POST PROCESSING BILL SEGMENTS CREATED ON A BILL HAVE SAME CONTRACT ID**
Description	There might be situations when two or more post processing bill segments are generated on a bill and each post processing bill segment is created for a different contract. In such case, the contract ID stamped on the post processing bill segments must be different. However, at present, the system stamps the same contract ID in all post processing bill segments on the bill.
Workaround	None

Issue	**INCORRECT RESULTS IF DISAGGREGATION BATCHES NOT EXECUTED IN SEQUENCE**
Description	During the transaction disaggregation process, you must execute the following batches in the specified order: 1. Identify Affected Transactions (C1-IAENT) 2. Process Non Aggregated Transactions (C1-PDTXN) 3. Clean Up (C1-TXNCU) 4. Update Disaggregation Request Status (C1-DARSU) Otherwise, erroneous results might occur.
Workaround	None

Issue	**PERFORMANCE ISSUE WHILE EXECUTING THE C1-DARSU BATCH WHEN REQUEST_TYPE_FLG=PERS**
Description	The system takes long time to change the disaggregation request status when the disaggregation request is created for a person.
Workaround	None

Issue	**AGGREGATION DOESN'T WORK IF DISAGG, ROLLBACK, & CANCELLATION EXECUTED IN BETWEEN**
Description	If you execute the disaggregation, cancellation, and rollback process in between the aggregation process, the system will not allow you start the aggregation process once again.
Workaround	None

Issue	**POST PROCESSING SEGMENT NOT GENERATED IF THE PP MAX VALUE IS SET TO ZERO (0)**
Description	If the maximum value is set to zero (0) while defining pricing for a product have price assignment type as post processing, the system does not generate the post processing segments for such products.
Workaround	None

Issue	**TWO CONCURRENT RUNS WHICH DERIVE SAME DIVISION FOR TRANSACTIONS DOES NOT WORK**
Description	If you execute a batch concurrently with two different divisions (for example, D1 and D2), the erroneous results might occur when transactions in both the runs derive the same division, account, and/or product combination.
Workaround	None

Issue	**ERROR OCCURS WHEN YOU DISPLAY BILL FOR A PRODUCT THAT BELONGS TWO RELATIONSHIPS**
Description	If a product is added to two or more product to product relationships using the relationship type as Service, the system error occurs when you display bill for the product using Documaker. For example, if P3 is added in the P1 and P2 product relationship using the relationship type as Service, an error occurs when you display bill for P3 using Documaker.
Workaround	None

Issue	**C1-IAENT BATCH IN ERROR IF THERE ARE UNBILLED BILLABLE CHARGES**
Description	If there are any billable charges in the **Billable** status for accounts whose transactions are performed before the Disaggregate Transactions From Date, an error occurs while executing the **Identify Affected Transactions (C1-IAENT)** batch.
Workaround	None

Issue	**PAGINATION - UNABLE TO EXTRACT RECORDS OF ANY OTHER PAGE OTHER THAN FIRST PAGE**
Description	If you use the Export to Excel functionality on any screen where pagination is used, the system should extract the records of the page where you have navigated. However, the system always extracts the records on the first page in the Excel format. Therefore, at present, you cannot extract records of any other page other than first page in the Excel format.
Workaround	To resolve this issue, you need to apply the framework single fix which is available for BUG 20856028 - PAGINATION: DOES NOT EXPORT ENTIRE RECORDS RATHER EXPORTS PAGE RECORD ONLY.

Issue	**ERROR OCCURS IN CASE OF AN IGA SCENARIO WHILE EXECUTING THE C1-PNDBL BATCH**
Description	There might be situations when you add an account to an invoicing group after a bill is generated for the account using the new billing batches (i.e. C1-PNDBL, C1-BSGEN, and C1-BLPPR). In such scenario, an error occurs when you execute the C1-PNDBL batch once again to bill charges of the member account on the master account. Similarly, an error occurs when you generate the bill for the account which was earlier billed through the master account using these billing batches.
Workaround	None

Issue	**ACTIVE CONSTRUCTS DETERMINED ON CUT-OFF DATE INSTEAD OF CHARGES START & END DATE**
Description	The system determines the active construct based on the cut-off date and bills the usage accounts' charges through an invoice account which is defined in the active construct. It does not determine the active construct based on the billable charge's start and end dates.
Workaround	None

Issue	**BILL SEGMENTS CREATED BUT FTS NOT CREATED WHEN ACCOUNTING CALENDAR NOT DEFINED**
Description	There might be situations when you generate bill segments for a pending bill which is created for a bill cycle whose accounting date either falls within the closed accounting calendar or does not fall within any accounting calendar. In such scenarios, the bill segments are generated, but the financial transactions are not created for the bill segments. An error occurs when you view such bills, whose financial transactions are not created, through the **Bill** screen.
Workaround	None

Issue	**UNABLE TO DEFINE ACCOUNT CATEGORY WHEN ACCOUNT IS CREATED USING PERSON SCREEN**
Description	The system allows you to create an account for a person by selecting the **Add Account and Start Service** check box in the **Person** screen. In such case, you cannot define category for the account because the **Account Category** field in the **Account** screen is disabled.
Workaround	None

Issue	**STATUS OF ALL LEGS CHANGED TO ERROR IF EXCHANGE RATE NOT AVAILABLE FOR ONE LEG**
Description	If a transaction has multiple legs and the system could not find exchange rate for one of the leg while executing the C1-TXNSQ batch, the status of the transaction and all its transaction legs is changed to **Error**.
Workaround	None

Issue	**INCORRECT RESULTS APPEAR WHEN UNDERSCORE CHARACTER IS USED IN SEARCH CRITERIA**
Description	If you use the underscore (_) character in the search criteria, the system does not search strings with the underscore character. Instead, the system interprets the underscore (_) character as a wildcard character.
Workaround	None

Issue	**MULTIPLE ISSUES ON SCREENS AND ZONES WHERE PAGINATION IS USED**
Description	There are various issues on the screens and zones where pagination is used. For example, the buttons and icons do not appear in the F1-DE-MULQRY zones, paging keys are trimmed, and so on.
Workaround	To resolve these pagination related issues, you need to apply framework single fixes which are available for the following bugs: • 20302717 - PAGINATION PANEL SHOWING INCORRECT VALUE FOR TOTAL PAGES AND CUSTOM ICONS DO NOT • 20261532 - PAGINATION PANEL IS BEING DISPLAYED ON ORASEARCH OPERATION • 20113520 - BUTTON AND ICON DOESN'T APPEAR FOR PAGINATION IN F1-DE-MULQRY ZONES • 19941127 - PAGINATION FEATURE NOT WORKING FOR SUBQUERIES USED IN ZONE SQL • 19163528 - PAGINATION : PAGING KEY GETS TRIMMED AND RETURNS NO RESULTS

	• 18965501 - PAGINATION : ALL THE PAGES DISPLAY SAME SET RECORDS WHEN EQUAL OPERATOR IS USED
	• 18953690 - PAGINATION: ROW SERIAL NUMBERS RESET WHEN WE SORT COLUMN, AFTER "NEXT" CLICK
	• 18887503 - PAGINATION DOCUMENTATION NEEDS MORE DETAIL
	• 18639253 - PAGINATION - MISSING ICON, PAGE LABEL AND PAGE SIZE
	• 18491431 - DATA EXPLORER PAGINATION IS NOT CONSIDERING THE SQL COUNT LIMIT ZONE PARAMETER
	• 18399979 - PAGINATION - CRASHING IF PAGING COLUMN IS NOT DISPLAYED
	• 18399934 - PAGINATION - NOT WORKING FOR DESCENDING SORT
	• 20864137 - PAGINATION DOES NOT WORK PROPERLY WHEN PORTAL HAS MULTIPLE BROADCAST ZONES

Issue	**CONTRACT TYPE IS HARDCODED IN PAYMENTS ZONE OF REMITTANCE SUMMARY SCREEN**
Description	The **Payments** zone in the **Remittance Summary** screen should lists the overpayments which are made against the contract types listed in the **C1_CMO** feature configuration. However, at present, the EXCSCRED contract type is hardcoded in the **Payments** zone. Therefore, irrespective of the contract types defined in the **C1_CMO** feature configuration, the system lists only those overpayments which are made against the contracts of the EXCSCRED contract type.
Workaround	None

Issue	**PAYMENT AMOUNT IS INCORRECT WHEN PAYMENTS HAVE FROZEN & OVERPAYMENT PAY SEGMENTS**
Description	If the payments have both frozen and overpayment pay segments, the payment amount displayed corresponding to the overpayment and frozen payment in the **Payments** zone of the **Remittance Summary** screen is incorrect. The system displays the total payment amount instead of displaying the overpayment and frozen pay segment amount.

Workaround	None

Issue	**ERROR OCCURS WHEN BIND VARIABLES USED IN IN AND NOT IN CLAUSES WITHOUT BRACKETS**
Description	If a template is used in a construct for selecting usage accounts, billable charges, or adjustments where bind variables are used in the IN and NOT IN clauses without brackets, an error occurs when you bill an account through such construct.
Workaround	We recommend you to use bind variables within brackets in the IN and NOT IN clauses while defining a template.

Issue	**USAGE ACCOUNT'S ADHOC CHARGES BILLED ON USAGE ACCOUNT AND NOT ON INVOICE ACCOUNT**
Description	If there are any adhoc billable charges for a usage account which is billed through an invoice account, at present, you can bill these adhoc billable charges only on the usage account and not through the invoice account.
Workaround	None

Issue	**UNABLE TO CREATE BILLS FOR AN ACCOUNT USING A CONSTRUCT FROM THE BILL SCREEN**
Description	At present, the **Bill** screen does not allow you to create bills for an account using a construct. You can generate bills for an account using a construct only through the batch process.
Workaround	None

Issue	**C1-ADUP1 BATCH DOES NOT SUPPORT MULTI-CURRENCY ACCOUNTS FEATURE**
Description	An error occurs while executing the C1-ADUP1 batch when the adjustment currency is different from the account's invoice currency. This is because, at present, the C1-ADUP1 batch does not support the Multi-Currency Accounts feature.

Workaround	None

Issue	**ABLE TO CREATE BILLABLE CHARGES FOR AN INVOICE ACCOUNT**
Description	Ideally, the system should not allow you to create billable charges for an invoice account. At present, there is no restriction, and therefore you can create billable charges for an invoice account which are billed through the invoice account.
Workaround	None

Issue	**PARTIAL DATA UPLOADED WHEN USAGE RECORD HAS MORE THAN FIVE PASS THROUGH CHARGES**
Description	If you upload a usage record which has more than five pass through charges (for example, Bill Line 1, Bill Line 2, …., Bill Line 8), at present, the system uploads the details of only five pass through charges (i.e. till Bill Line 5). The details of Bill Line 6, Bill Line 7, …., and Bill Line 8 are not uploaded.
Workaround	None

Issue	**LENGTH OF UDF_CHAR_X IS 50 IN THE TFM ODI PACKAGE AND 60 IN THE DATABASE**
Description	In the ORMB database, the maximum size of the UDF_CHAR_1, UDF_CHAR_2, …., UDF_CHAR_50 columns is set to 60 characters. However, while uploading the transaction data via ODI, you can specify maximum 50 and not 60 characters in the CSV file.
Workaround	None

Issue	**UNABLE TO EDIT A FILE GROUP FROM THE ON DEMAND BILLING SCREEN**
Description	On clicking the link in the **File Group** column, the **Add/Edit File Group** screen appears where you can edit the details of the file group. However, at present, the **Add/Edit File Group** screen does not appear. Therefore, you are not able to edit a file group.

Workaround	None

Issue	**UNABLE TO VIEW THE XAI UPLOAD STAGING DETAILS IN THE XAI DYNAMIC UPLOAD SCREEN**
Description	When you search and select an XAI upload staging record in the **XAI Upload Search** window, the details of the XAI upload staging record do not appear in the **XAI Dynamic Upload** screen. Instead, the home page appears.
Workaround	None

Issue	**ERROR OCCURS ON CLICKING SHOW CONTEXT MENU CORRESPONDING TO DOWNLOAD STAGING ID**
Description	An error (indicating invalid menu entry) occurs when you click the **Show Context Menu** icon corresponding to the **Download Staging ID** field in the **XAI Download Staging** screen.
Workaround	None

Issue	**GRAPH DOES NOT APPEAR IN THE MULTI-CANCEL/REBILL SCREEN**
Description	At times, the graph does not appear in the **Multi-Cancel/Rebill** screen when you access the application using Internet Explorer.
Workaround	None

Issue	**ADJUSTMENT CREATED WHEN CONTRACT ID IS VALID, BUT ACCOUNT IDENTIFIER IS INVALID**
Description	If you upload an adjustment data file with a record where the contract ID is valid, but the account ID or account identifier is invalid, the system creates the adjustment against the contract. Ideally, the system should not create the adjustment until and unless the contract ID, account ID, account identifier type, and account identifier are valid.
Workaround	None

Issue	ABLE TO GENERATE A BILL FOR A SETTLEMENT ACCOUNT FROM THE BILL SCREEN
Description	Ideally, the system should not allow you to generate a bill for a settlement account. However, at present, you can generate a bill for a settlement account from the **Bill** screen.
Workaround	None

Issue	ADJUSTMENT CREATED AGAINST PREVIOUS BILL IS NOT CONSIDERED DURING TRIAL BILLING
Description	If you create an adjustment against the previous completed bill, the adjustment is not presented on the next bill during trial billing. This open item accounting feature is not supported during trial billing.
Workaround	None

Issue	POST PROCESSING BILL SEG AMT PRORATED IF BILLABLE CHARGE PERIOD EXCEEDS 2 YEARS
Description	If a billable charge period is 2 years or above and post processing bill segment is generated based on the billable charge, the post processing bill segment amount is prorated during bill generation.
Workaround	None

Issue	REOPEN BUTTON DISABLED WHEN C1-BILLSETT ALGORITHM ATTACHED ON CUSTOMER CLASS
Description	If you attach an algorithm of the C1-BILLSETT algorithm type on the **Bill Completion** system event of the account's customer class, at present, you will not be able to reopen a bill.
Workaround	None

Issue	**TRANSFER ADJUSTMENT TYPE PROPERTY SUPERSEDE ORIGINAL ADJUSTMENT TYPE PROPERTY**
Description	If you create an adjustment on a usage account and bill it through an invoice account, the transfer adjustment is created on the invoice account. While creating a transfer adjustment, the system uses the open item accounting properties, such as Impact Next Bill Balance, defined on the transfer adjustment type. It does not uses the open item accounting properties defined on the original adjustment type.
Workaround	None

Issue	**WRONG ERROR MESSAGE APPEARS WHILE DOING PARTIAL NEGATIVE PAYMENT**
Description	If you do a partial payment against a negative (i.e. credit) bill from the **Payment Request** screen, the payment is created in the **Error** status. However, the error message shown against the payment is wrong. Ideally, the error message should be "For a Negative payment in case of a Credit bill, Payment amount must match Bill amount". However, at present, the following error message is displayed: "Sum of Distributed Amounts does not equal the Payment Amount for Payment <Payment ID>"
Workaround	None

Issue	**THE PAYMENT REQUEST SCREEN DOES NOT SUPPORT MULTIPLE TENDERS**
Description	At present, the system does not support multiple tenders when you create a payment from the **Payment Request** screen.
Workaround	None

Issue	**ADJ NOT BILLED ON INVOICE ACCOUNT IF TRANSFER ADJ TYPE NOT ADDED IN ADJ PROFILE**
Description	If the adjustment must be billed through an invoice account and the transfer adjustment type is not added in the adjustment profile which is attached to the contract type, the system does not creates the transfer adjustment on the invoice account. Instead, the system bills the adjustment on the usage account.
Workaround	None

Issue	**INCORRECT EXCHANGE RATE USED WHILE CREATING TRANSFER ADJUSTMENT ON INVOICE A/C**
Description	If the adjustment currency is different from the invoice account's currency, the system creates the transfer adjustment on the invoice account. However, at present, the exchange rate used during currency conversion is not picked up correctly.
Workaround	None

Issue	**PRICELIST ASSIGNMENT IN REJECTED STATUS APPEARS IN ASSIGNED PRICE LISTS ZONE**
Description	On rejecting a proposed price list assignment, the rejected price list assignment must not appear in the **Assigned Price Lists** zone of the **Price List Assignment (Account)** or **Price List Assignment (Person)** screen. However, at present, the rejected price list assignment appears in the **Assigned Price Lists** zone.
Workaround	None

Issue	**ABLE TO ADD A RELATIONSHIP TYPE MULTIPLE TIMES IN THE C1_PER_REL FEATURE CONFIG**
Description	At present, the system does not prevent you to add a relationship type multiple times in the C1_PER_REL feature configuration. Ideally, there should be a system validation to handle this issue.

Workaround	None

Issue	**MULTIPLE PARENTS WITH SAME PERSON-PERSON RELATIONSHIP TYPE SHOULD NOT BE ALLOWED**
Description	At present, the system allows you to define multiple parents with the same relationship type for an overlapping date range. This can lead to erroneous results while searching for effective pricing at the parent customer level.
Workaround	We recommend you to define multiple parents with the same relationship type for a different date range.

Issue	**UNABLE TO SAVE MULTIPLE CHARACTERISTICS FOR A PRICE ASSIGNMENT**
Description	While defining characteristics for a price assignment, you can specify multiple characteristics in the screen, but only one characteristic is saved in the application.
Workaround	None

Issue	**UNABLE TO SCROLL LEFT TO VIEW TABS ON THE LEFT IN THE DIVISION SCREEN**
Description	The **Scroll Left** icon is not available in the **Division** screen. Therefore, you will not be able to scroll left if you are on the extreme right tab in the screen.
Workaround	None

Issue	**POP-UP WINDOW NOT DISPLAYED PROPERLY WHEN YOU MOUSE OVER DETAILED DESCRIPTION**
Description	In the **Batch Control** screen, a pop-up window appears when you move the mouse over the **Detailed Description** field. At present, the data is not properly displayed in the pop-up window.
Workaround	None

Issue	QUERY ZONE - HORIZONTAL SCROLL BAR SCROLLS THE SEARCH CRITERIA FIELDS
Description	The Query zone allows you to search for an object. At present, whenever you search in the Query zone and use the Horizontal Scroll Bar, the search criteria fields are also scrolled to the left along with the search results.
Workaround	None

Issue	ICONS AND LINKS ARE SCROLLED TO THE LEFT ON SCROLLING HORIZONTALLY IN THE ZONE
Description	When you scroll the data in the zone to the left using the Horizontal Scroll Bar, the icons (such as Filters, Explorer Zone Menu) and links (such as Add, Edit) that appear in the upper right corner of zone are also scrolled to the left.
Workaround	None

Issue	COLUMN HEADER ROW IS NOT FREEZED OR LOCKED IN THE SEARCH RESULTS SECTION OR GRID
Description	The column header row is not freezed or locked in the **Search Results** section or grid across the application. Therefore, the column header row is not visible whenever you scroll down to view the records.
Workaround	None

Issue	ERROR OCCURS WHILE APPROVING AN ACCOUNT WHEN APPROVAL WORKFLOW IS ON
Description	If the approval workflow is configured for the Account business object, the approval workflow request is created when you define or edit an account. At present, when the approver approves the approval workflow request, the following error occurs: "Unable to handle lists maintaining two child tables- list ACCT_PER"
Workaround	None

Issue	**PERFORMANCE ISSUE - SOME SCREENS TAKE LONG TIME TO LOAD**
Description	In Oracle Revenue Management and Billing Version 2.5.0.2.0, the following screens take long time to load: • Manage Products • Manage Price Lists • Add Product Pricing • Edit Product Pricing • Override Product Pricing • Pricing (Account) • Pricing (Person) • Parameter • Feed Management Dashboard • View Billed Transactions • Transaction Details • Approve • Resolve • Modify • Approve Price Assignment • Modify Price Assignment • Resolve Price Assignment • Usage Data Processing • On Demand Billing • Payment Event Summary
Workaround	None

Issue	**UNABLE TO ADD COMMENTS ON CLICKING RETURN TO SUBMITTER OR REVERT TO ORIGINAL**
Description	While rejecting or cancelling the approval workflow request raised for a product (from the **Approve Product** screen), the background of the **Rejection/Cancellation Comment** field is black. Therefore, unable to view the comments (if any) added while rejecting or cancelling the approval workflow request.
Workaround	None

Issue	**PERFORMANCE ISSUE ON CHANGING THE SEARCH BY FILTER OPTION**
Description	If you change the filter option from the **Search By** list, the system takes long time to load the respective query zone. You may observe this issue in many screens where the multi-query zone is used.
Workaround	None

Issue	**PROPOSED PRICE LIST PRICING NOT AVAILABLE ON THE EFFECTIVE PRICING SCREENS**
Description	If you assign a proposed price list to a person, the product pricing defined on the price list is not inherited from person or parent person. Therefore, such product pricing is not visible in the **Pricing (Account)** and **Pricing (Person)** screens. In addition, such product pricing is not used during the billing process.
Workaround	None

Issue	**EFFECTIVE PRICING NOT VISIBLE IF C1_PER_REL HAS INVALID PERSON RELATIONSHIP TYPE**
Description	If you set the **Check on Feature Configuration** parameter in an algorithm which is created using the **C1-CUSRLALGT** algorithm type to **A** and add an invalid person relationship type in the **C1_PER_REL** feature configuration, the effective pricing is not inherited properly as expected.
Workaround	None

Issue	**UNABLE TO SEARCH EXCHANGE RATES USING THE END DATE FIELD**

Description	In the **Manage Exchange Rates** screen, the search results are not displayed when you search using the **End Date** field.
Workaround	None

Issue	**GRANDFATHERING NOT WORKING IN CASE OF GLOBAL AND DEFAULT PRICE LIST**
Description	When you define a product pricing in a global or default price list which is applicable only to the new customers, the product pricing is not used during the billing process. Instead, the incorrect product pricing is picked up during the billing process.
Workaround	None

Issue	**RECORDS IN THE ADJUSTMENT DATA FILE NOT UPLOADED IN THE SPECIFIED SEQUENCE**
Description	When you upload the records of an adjustment data file, the records are not uploaded in the sequence in which they are listed in the CSV file.
Workaround	None

Issue	**PAYMENT/TENDER SEARCH- COLUMN HEADERS INCORRECT WHEN SEARCH FILTER IS CHANGED**
Description	If you search using a particular filter option in the **Payment/Tender Search** screen, the search results are displayed accordingly. Then, if you change the search filter and criteria, the search results are displayed accordingly, but the column headers are not updated.
Workaround	None

Issue	ERROR LOG FILES GENERATED ON EXECUTING BILLING AND C1-BLPPR BATCHES
Description	In ORMB 2.5.0.2.0, the error log file is generated even when the following batches are executed successfully and bills are completed: • BILLING • C1-BLPPR
Workaround	None

Issue	FIELD ALIGNMENT ISSUE ON BUSINESS OBJECT BASED GENERATED UI MAPS
Description	You may observe that the algorithm description is not properly aligned corresponding to the **Algorithm** field in the following screens: • Upload Request Type • Upload Adjustment Data File
Workaround	None

Issue	MANUAL DISTRIBUTION NOT WORKING IN THE PAYMENT SCREEN
Description	On saving, the distributed amount is reset to zero when you manually distribute the tender amount among the unpaid bills in the **Payment** screen.
Workaround	None

Issue	ERROR OCCURS ON EXECUTING BILLOPEN IF IN CLAUSE CONTAINS MULTIPLE BIND VARIABLES
Description	If you have used template in a construct where IN clause has multiple bind variables, an error occurs while executing the **Construct Based - Pending Bill Generation (BILLOPEN)** batch.
Workaround	None

Issue	**ELIGIBLITY CRITERIA ROW IS SKIPPED IF LEFT HAND SIDE PARAMETER IS NOT SPECIFIED**
Description	If the left hand side parameter is not specified in an eligibility criteria row while defining or editing a price item pricing, the eligibility criteria row is skipped and not saved in the system.
Workaround	None

Issue	**PARAMETERS NOT DELETED AUTOMATICALLY WHEN EFFECTIVE START OR END DATE IS CHANGED**
Description	If you change the effective start or end date while defining or editing a price item pricing, the selected parameters are not automatically deleted. You need to manually delete the existing parameters and specify the parameters which are effective during the specified date range.
Workaround	None

Issue	**POST-PROCESSING BILL SEGMENT NOT REGENERATED WHEN YOU CLICK THE GENERATE BUTTON**
Description	An error occurs when you click the **Generate** button in the **Bill Segment** screen while regenerating the post-processing bill segment which is present on the pending bill.
Workaround	None

Issue	**SEARCH FIELDS ARE CASE-SENSITIVE IN THE PREDEFINED CHARACTERISTIC SEARCH WINDOW**
Description	If you select a predefined characteristic type, the **Search** icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. At present, the search criteria fields in the **Predefined Characteristic Search** window are case-sensitive.
Workaround	None

Issue	**ASSIGNPRICELIST SERVICE DOES NOT UPDATE CHARACTERISTIC IF EFFECTIVE DATE EDITED**
Description	If you update a characteristic for a price list assignment through the ASSIGNPRICELIST business service, the system will update the existing characteristic when the characteristic value is changed. However, when the characteristic type or effective date is changed for a characteristic, the existing characteristic is not updated. Instead, a new characteristic is defined for the price list assignment through the ASSIGNPRICELIST business service.
Workaround	None

Issue	**ABLE TO ADD VALUES TO THE LOOKUP FIELDS WHERE CUSTOM IS SET TO NO**
Description	The system should not allow you to add values to the lookup fields where the **Custom** option is not selected. But, at present, the system allows you to add values to the lookup fields irrespective of whether the **Custom** option is selected or not.
Workaround	None

Issue	**WRONG CURRENCY CONVERSION ALGORITHM IS USED WHILE EXECUTING THE C1-REPC2 BATCH**
Description	While executing the **C1-REPC2** batch, the system should use the currency conversion algorithm attached to the **Currency Conversion For Bill Segments** algorithm spot of the division. Instead, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the division.
Workaround	None

Issue	**RATE CALCULATED INCORRECTLY WHEN EXCHANGE RATE IS CHANGED DURING PRICING PERIOD**
Description	At present, the rate is calculated and persisted using the exchange rate which is effective on the price item pricing effective start date. Therefore, the persisted rate shown on the **Pricing (Account)** screen might be incorrect when the exchange rate is different on the date when the results are fetched on the **Pricing (Account)** screen.
Workaround	None

Issue	**RATE PERSISTED INCORRECTLY WHEN CONFIGURATION CHANGED BEFORE EXECUTING C1-REPC2**
Description	If you change the configuration, such as the person to person relationship type sequence defined in the C1_PER_REL feature configuration, the currency conversion algorithms attached on the division, and so on before executing the C1-REPC2 batch, the rate might be calculated and persisted incorrectly on executing the C1-REPC2 batch. In such scenario, you need to execute the F1-FLUSH batch before executing the C1-REPC2 batch.
Workaround	None

Issue	**BEST FIT PRICING NOT FETCHED WHEN PRICING IS FILTERED USING PARAMETER CRITERIA**
Description	When you filter the price item pricing based on the parameter criteria in the **Pricing (Account)** and **Pricing (Person)** screens, the exact match appears in the search results. At present, the best fit match is not displayed in the search results.
Workaround	None

Issue	**ELIGIBILITY CRITERIA FOR EACH PRICE COMPONENT IS NOT EXPORTED IN THE CSV FILE**
Description	When you export the price item pricing from the **Pricing (Account)** and **Pricing (Person)** screens, the eligibility criteria defined for each price component is not exported in the CSV file.
Workaround	None

Issue	**ENTRY NOT CREATED IN THE CI_REPRC_ENTITY_DTL TABLE ON EDITING A PRICE LIST**
Description	If you edit the details of a price list which is assigned to an account or a person, an entry is not created in the CI_REPRC_ENTITY_DTL table. In other words, the repricing is not triggered on editing the details of a price list which is already assigned to an account or a person.
Workaround	None

Issue	**RATE NOT PERSISTED FOR PRICING WHICH IS INHERITED DUE TO PRICE LIST HIERARCHY**
Description	At present, the system does not persist rate for the price item pricing which is inherited from the price list hierarchy.
Workaround	None

Issue	**ENTRY NOT CREATED IN CI_REPRC_REQ_DTL TABLE ON EDITING USAGE AMOUNT OR COUNTER**
Description	If you edit the amount and counter related information, such as average daily balance, average monthly balance, number of auto transfer transactions, and so on, of an account or a person, an entry is not created in the CI_REPRC_REQ_DTL table.
Workaround	None

Issue	**UNABLE TO DEFINE PARAMETER FOR FIELDS WHICH BELONG TO CHILD TABLES**
Description	At present, the system does not list the fields of child tables in the **Source Type Code** field when you select the source entity as Account, Person, or Product while defining a parameter. Therefore, you cannot define a parameter for child table' fields and as a result, repricing is not triggered when you change the value of any child table' field. For example, when you change the main customer of an account, repricing is not triggered because the MAIN_CUST_SW field belongs to the child table named CI_ACCT_PER table for which you cannot define a parameter in the system.
Workaround	None

Issue	**RATE NOT PERSISTED ON PRICE ASSIGNMENT DATE WHEN C1-PRICEACCOUNT INVOKED MANUALLY**
Description	When you manually execute the C1-PriceAccount business service for an account, rate is calculated and persisted for the price item pricing available on the default and global price list on the date when the C1-PriceAccount business service is invoked. Ideally, the rate must be calculated and persisted on the price item pricing effective start date.
Workaround	None

Issue	**BILL AMOUNT IS COMING POSITIVE RATHER THAN NEGATIVE**
Description	While rounding the bill amount with the precision of 13,2 (for example, 9999999999999.99), the system truncates the negative sign and saves the bill amount in positive.
Workaround	None

Issue	**PERSISTED DATA NOT GETTING REFRESHED ON EDITING PRICE ASSIGNMENT**
Description	On editing a price item pricing, the rate is not properly recalculated and persisted when the details of a price component, such as rate, eligibility criteria, and so on are changed.

Workaround	None

Issue	**ADJUSTMENTS & BILL SEGMENTS CANCELLED WHEN WRITE OFF OR REFUND REQUEST PROCESSED**
Description	At present, you can cancel refund and write off adjustments and bill segments against which you have created refund or write off adjustments in the system. Ideally, when the refund and write off request is in the **Processed** status, the system should not allow you to cancel the respective refund and write off adjustments and bill segments against which you have created refund or write off adjustments.
Workaround	None

Insurance

Issue	**OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 2.5.0.2.0**
Description	In this release, the new policy data model is introduced. The old policy data model which is accessible to the INADMIN user group is no longer operational. The old insurance features, such as Insurance Control Central, Deferred Revenue Recognition, Account Current, Pay Plan, Group Billing, and List Bill Reconciliation are not tested and verified with the new policy data model.
Workaround	None

Issue	**PERFORMANCE ISSUE WHILE CREATING DEFERRED REVENUE RECOGNITION SCHEDULE**
Description	If there are large number of bill segments and adjustments for which deferred revenue recognition schedule must be generated, the system takes long time to generate deferred revenue recognition schedules.
Workaround	None

Issue	VALIDATION FOR FIDUCIARY CONTRACT MISSING DURING RECONCILIATION
Description	While changing the status of the reconciliation object to Ready To Pay, the system does not validate whether fiduciary contract exists for the group account.
Workaround	You need to ensure that group customer has fiduciary contract associated with the account through which payments can be made for the list bills.

Issue	TWO BILL SEGMENTS GENERATED WHEN REASON CODE EFFECTIVE DATE IS SAME AS BILL SEGMENT START DATE
Description	When you select the Update option from the Reason Code list and specify the reason code effective date same as the bill segment start date, the system creates two bill segments – one with prorated billed amount and another with prorated reported amount. Ideally, the system should only create one bill segment with prorated reported amount.
Workaround	None

Issue	UNABLE TO DISTRIBUTE THE REMAINING PAYMENT MANUALLY
Description	If you have distributed partial payment automatically through the **Payment by Transaction** screen, the system does not allow you to distribute the remaining payment manually.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the **Foreign Key Value** and **File Location Value** characteristic types. These screens only support the **Adhoc Value** and **Predefined Value** characteristic types.
Workaround	None

Issue	CHARACTERISTIC TYPES ARE NOT FILTERED BASED ON THE REASON CODE
Description	While editing the reconciliation object line, the characteristic types are not filtered based on the reason code that you have selected. Currently, it lists all characteristic types where the characteristic entity is set to **Reason Code**.
Workaround	None

Issue	RECONCILIATION DOESN'T WORK PROPERLY FOR PASS THROUGH BILLABLE CHARGES
Description	In the sample case workflow, the system checks whether the difference between the reported and billed amounts is within the tolerance limit. If so, the system must change the status of the reconciliation object line to **WD-Match**. However, at present, in case of pass through billable charges, the system changes the status of the reconciliation object line to **Manual** instead of **WD-Match**.
Workaround	None

Issue	ERROR OCCURS WHEN YOU RESOLVE A RECONCILIATION OBJECT LINE FROM THE CASE SCREEN
Description	The system allows you to manually resolve a reconciliation object line from the **Case** screen and change the status of the reconciliation object line to **Manual Match**. At present, an error occurs when you click the **Manual Match** button in the **Case** screen.
Workaround	None

Documentation

Issue	"ERROR 500--INTERNAL SERVER ERROR" - ONLINE HELP IS NOT WORKING
Description	At present, an error occurs when you access online help for the following screens: • Account Collection Summary • Account Current • Billing and Settlement Hierarchy • Charge Type • COBOL Program • Collection Control Central • Contract Relationship Type • Contract Type - Charge Type Mapping • Contract Type - Pay Plan Template Mapping • Deferred Revenue Recognition Schedule • Extendable Lookup • External Statement • FK Validation Summary • Invoice Frequency • Membership • Pay Method • Pay Plan Template • Policy • Policy (P&C) • Policy Cancellation Reason • Policy Person Role • Policy Type • Promise To Pay • Promise To Pay Cancel Reason • Reason Code • Reconciliation Object • Reconciliation Object Line Status • Unit of Measure

	• Web Service Adapter
Workaround	None

Issue	**ONLINE HELP NOT AVAILABLE FOR SOME SCREENS OR TABS**
Description	At present, the online help is not available for the following screens: • Bucket Configuration • Collection Type • Loan • Request • Request Type (where Owner is Base) In addition, the online help is not available for the following tabs: • Rate Schedule – SQ Rule Tab • Workflow Process Template – Main Tab
Workaround	None

Issue	**INDEX ENTRIES NOT DEFINED FOR THE BANKING AND INSURANCE MODULES**
Description	At present, index entries are not defined for all topics in the Banking and Insurance modules.
Workaround	None

Issue	**DOCUMENTATION IS NOT AVAILABLE FOR THE POLICY FEATURE INTRODUCED IN 2.4.0.0.0**
Description	At present, documentation is not available for the Policy feature which is newly introduced in 2.4.0.0.0.
Workaround	For assistance, please contact Oracle Support.

Issue	**ORACLE UTILITIES APPLICATION FRAMEWORK BOOK APPEARS IN SPLHELP**
Description	At present, the Oracle Utilities Application Framework book appears in the left pane when you launch the SPLHelp. The framework content is already included in the Oracle Revenue Management and Billing book. However, when you access the online help for any framework screen, the topic from the Oracle Utilities Application Framework book is opened. Ideally, it should open the topic from the Oracle Revenue Management and Billing book.
Workaround	None

Issue	**TOPIC NOT DRILLED DOWN IN LEFT PANE WHEN ONLINE HELP IS LAUNCHED FOR ANY SCREEN**
Description	When you launch the online help (from AIX environment) for any screen, the content appears in the right pane. But, the topic is not drilled down in the left pane.
Workaround	None

Issue	**2.4.0.1.0 BILL TOLERANCE AND CONSTRUCT RELATED CHANGES NOT REFLECTED IN BANKING USER GUIDE**
Description	At present, the Bill Tolerance and Construct related changes which were incorporated in 2.4.0.1.0 are not yet reflected in the 2.5.0.2.0 Banking User Guide which is available on OTN.
Workaround	None

Issue	**CONTENT ADDED IN STEPRESULT AND INFO TAGS IS DISPLAYED IN BOLD**
Description	At present, the content added within the STEPRESULT and INFO tags is displayed in bold in the online help. This behavior is observed in Oracle Help and not in SPLHelp.
Workaround	None

Issue	**COMMENTS NOT COPIED IN MAIL WHILE SUBMITTING FEEDBACK TO THE DOCUMENTATION TEAM**
Description	The feedback entered in the **Comments** text box is not copied to the mail while submitting the feedback form in Oracle Help.
Workaround	You will have to manually add the comments in the e-mail before sending the feedback to the documentation team.

Technical Support

For any technical support, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.