

Oracle® Revenue Management and Billing

Version 4.0.0.0.0

Chatbot User Guide

Revision 1.1

F61879-01

December 2022

Oracle Revenue Management and Billing Chatbot User Guide

F61879-01

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Preface

About This Document

This document will help you to understand how to use the Menu Based Chatbot introduced in Oracle Revenue Management and Billing.

Intended Audience

This document is intended for the following audience:

- End-Users
- System Administrators
- Consulting Team
- Implementation Team

Organization of the Document

The information in this document is organized into the following sections:

Section No.	Section Name	Description
Section 1	ORMB Chatbot	Provides an overview for the Chatbot feature. It explains how to access Chatbot in ORMB and how to get acquainted with the Chatbot window.
Section 2	Customer Information	Explains how to interact with the application and quickly fetch the customer information through Chatbot.
Section 3	Account Information	Explains how to interact with the application and quickly fetch the account information through Chatbot. It also explains how to view mini statement of an account through Chatbot.
Section 4	Bill Information	Explains how to interact with the application and quickly fetch the bill details through Chatbot. It also explains how to initiate the bill creation or cancellation process through Chatbot.
Section 5	Pricing Information	Explains how to interact with the application and quickly fetch the effective or agreed pricing of a customer or an account through Chatbot. It also explains how to fetch the details of a price list through Chatbot.
Section 6	Miscellaneous Data	Explains how to interact with the application and quickly fetch the status of a batch job or DBMS scheduler job.

Acronyms

The following acronyms are used in this document:

Acronym	Meaning
ORMB	Oracle Revenue Management and Billing
ODA	Oracle Digital Assistant

Related Documents

You can refer to the following documents for more information:

Document Name	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	Describes various features which are available for the financial services business. For example, customer registration, customer 360° view, invoicing group, pricing management, multi-currency accounts, currency conversion, construct based billing and settlement, trial billing, product lifecycle management, subscription billing, mass pricing update, accrual, foreign exchange gain loss, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, dispute request, upload request, earnings credit rate, payment agreement request, invoice request, deal management, etc. It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.
<i>Oracle Revenue Management and Billing Chatbot Configuration Guide</i>	Explains how to configure Chatbot in the Oracle Revenue Management and Billing On-Premise Solution and Oracle Revenue Management and Billing Cloud Service.

Conventions

The following conventions are used across the document:

Convention	Meaning
boldface	Boldface indicates graphical user interface elements associated with an action, or terms defined in the text.
<i>italic</i>	Italic indicates a document or book title.

Convention	Meaning
monospace	Monospace indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or information that an end-user needs to enter in the application.

Change Log

Revision	Last Update	Updated Section	Comments
1.1	13-Dec-2022	Section 4.1: Creating a Bill for an Account	Updated Information
		Section 4.3: Cancelling a Bill of an Account	Updated Information
		Section 6.1: Viewing the Status of a Batch Job	Updated Information

Contents

1.	ORMB Chatbot.....	1
1.1	Using Chatbot in ORMB.....	2
1.2	Getting Acquainted with the Chatbot Window.....	3
2.	Customer Information.....	6
2.1	Viewing the Customer Details Using the Customer ID.....	6
2.2	Viewing the Customer Details Using the Customer Name.....	10
3.	Account Information.....	16
3.1	Viewing the Account Details Using the Account ID.....	16
3.2	Viewing the Account Details Using the Main Customer's Name.....	20
3.3	Viewing the Statement of an Account.....	24
4.	Bill Information.....	30
4.1	Creating a Bill for an Account.....	30
4.2	Viewing the Details of a Bill.....	34
4.3	Cancelling a Bill of an Account.....	39
5.	Pricing Information.....	43
5.1	Viewing the Effective Pricing of a Customer.....	43
5.2	Viewing the Agreed Pricing of a Customer.....	52
5.3	Viewing the Effective Pricing of an Account.....	61
5.4	Viewing the Agreed Pricing of an Account.....	70
5.5	Viewing the Details of a Price List.....	79
6.	Miscellaneous Data.....	84
6.1	Viewing the Status of a Batch Job.....	84
6.2	Viewing the Status of a DBMS Scheduler Job.....	90

1. ORMB Chatbot

Oracle Revenue Management and Billing provides digital assistance to end-users using Oracle Digital Assistant (ODA). You can use the digital assistant, also known as detective Chatbot, to have conversational experiences with ORMB through text, chat, and voice interfaces. It allows you to interact with the ORMB application as if you are communicating with a real person.

We have introduced a Menu Based Chatbot in Oracle Revenue Management and Billing. The Menu Based Chatbot facilitates the user to choose from several options, presented in the form of menus and sub menus. It enables you to carry out the following set of functions with utmost ease:

- Viewing the details of a customer
- Viewing the details of an account
- Creating a bill
- Canceling a bill
- Viewing the latest bill details of an account
- Viewing the effective or agreed pricing information of a customer or an account
- Viewing the details of a price list
- Viewing the status of a batch job or DBMS scheduler job

It helps in simplifying the navigation process and provides enhanced user experience, thereby increasing the operational efficiency of the end-user.

1.1 Using Chatbot in ORMB

Pre-requisites:

To use the **Chatbot** feature in ORMB, you need to ensure that Chatbot is configured in Oracle Revenue Management and Billing (ORMB) using Oracle Digital Assistant (ODA). For more information on how to configure Chatbot in the Oracle Revenue Management and Billing On-Premise Solution and Oracle Revenue Management and Billing Cloud Service, refer to the *Oracle Revenue Management and Billing Chatbot Configuration Guide*.

Procedure:

To use the **Chatbot** feature:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0. Note that the **Chatbot** icon appears (as highlighted in the below image) in the lower-right corner of the ORMB screen.

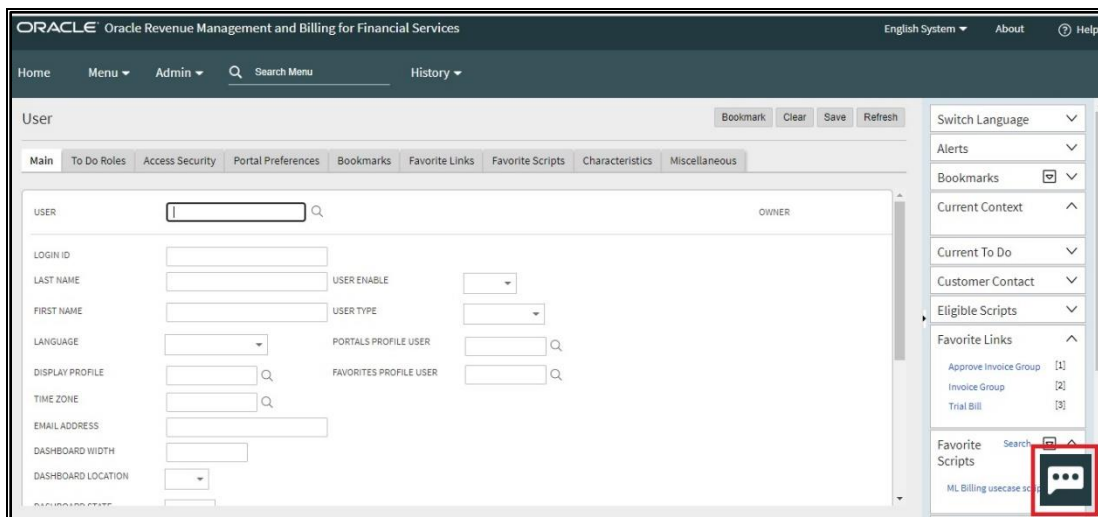


Figure 1: Chatbot Icon

2. Click the **Chatbot** icon. The **Chatbot** window appears with a list of ORMB-specific menu options.

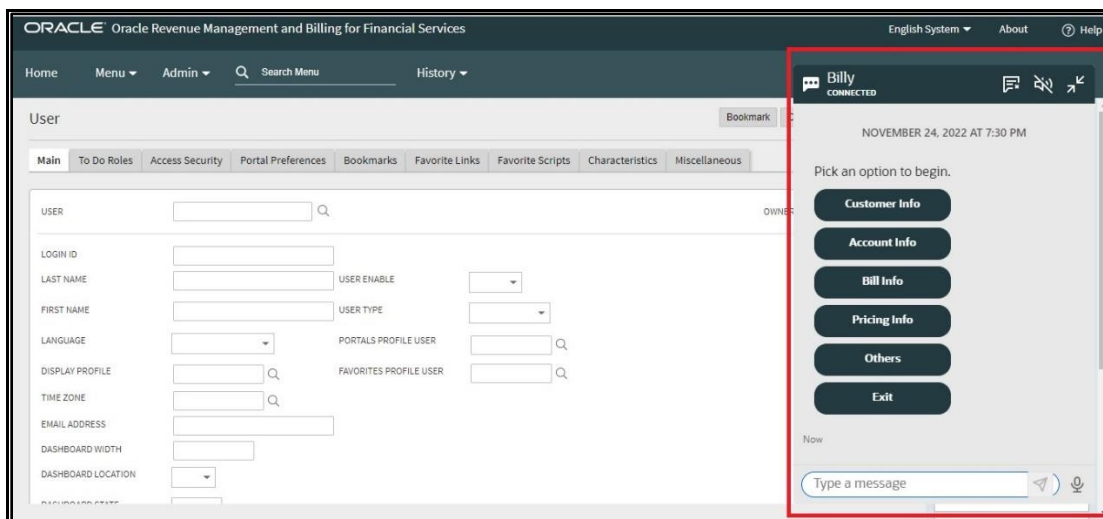











Figure 2: Chatbot Window

1.2 Getting Acquainted with the Chatbot Window

The **Chatbot** window contains the following icons:

Icon	Description
	Used to clear the conversation.
	Used to turn on the audio response.
	Used to close the Chatbot window.
	Used to specify the message.
	Used to send the message. Note: This icon is enabled when you type a value in the Message Box field.
	Used to convert the speech to text. Note: You need to allow the speech recognition software to access the microphone.
	Used to toggle to the Message Box field. Note: This icon is available when you are using the Speech to Text option.
	Used to view the next record.
	Used to view the previous record.

The **Chatbot** window contains the following menu and sub menu options:

Menu Option	Sub Menu Option Level 1	Sub Menu Option Level 2	Sub Menu Option Level 3	Sub Menu Option Level 4
Customer Info	Customer ID			
	Customer Name			
	Back to Main Menu			
	Exit			
Account Info	Account ID			
	Customer Name			

Menu Option	Sub Menu Option Level 1	Sub Menu Option Level 2	Sub Menu Option Level 3	Sub Menu Option Level 4
	Account Statement			
	Back to Main Menu			
	Exit			
Bill Info	Create Bill			
	Latest Bill Details	Account ID		
		Alternate Bill ID		
		Bill ID		
	Cancel Bill			
	Back to Main Menu			
	Exit			
Pricing Info	Customer ID	Effective Pricing	All Records	
			Price Item Based	Price Item Description
				Price Item Code
				Exit
		Exit		
		Agreed Pricing	All Records	
			Price Item Based	Price Item Description
				Price Item Code
	Exit			
	Account ID	Effective Pricing	All Records	
			Price Item Based	Price Item Description
				Price Item Code
				Exit
		Agreed Pricing	All Records	

Menu Option	Sub Menu Option Level 1	Sub Menu Option Level 2	Sub Menu Option Level 3	Sub Menu Option Level 4
			Price Item Based	Price Item Description
				Price Item Code
				Exit
			Exit	
	Price List			
	Back to Main Menu			
	Exit			
Others	Batch Job Status	Batch Code		
		Batch Description		
	DBMS Job Status	DBMS Batch Code		
	Back to Main Menu			
	Exit			
Exit				

Points to Note:

The **Exit** option is used to exit the conversation.

The **Back to Main Menu** option is used to return to the main menu options.

2. Customer Information

ORMB Chatbot enables you to interact with the application and quickly fetch the details of a customer using the Customer ID or Customer Name.

2.1 Viewing the Customer Details Using the Customer ID

To view the details of a customer using the customer ID:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

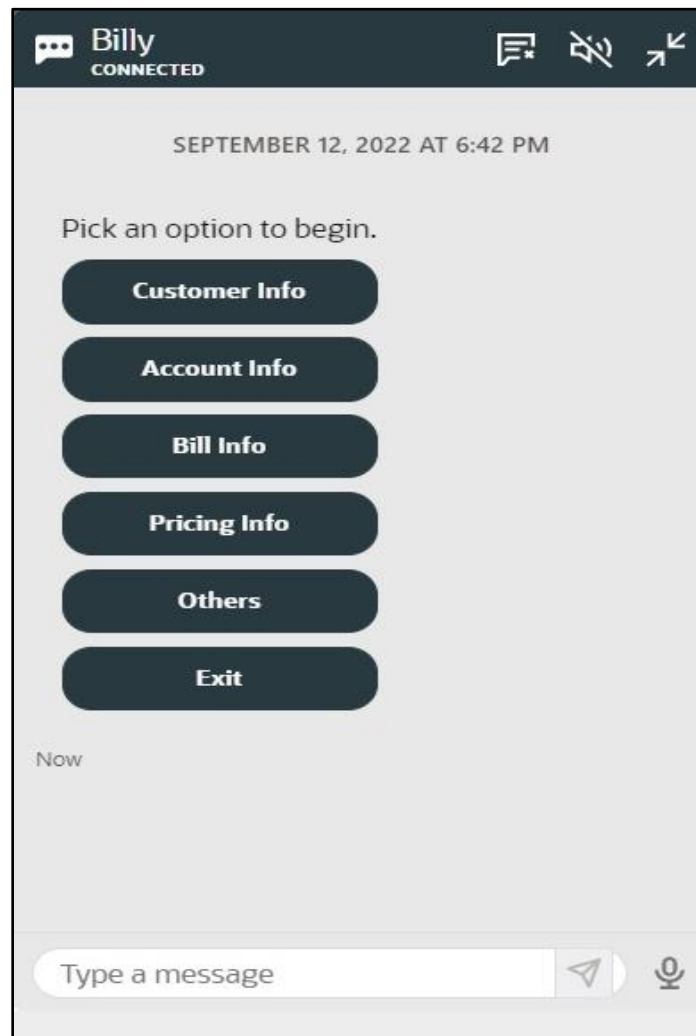


Figure 3: Main Menu

3. Click the **Customer Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

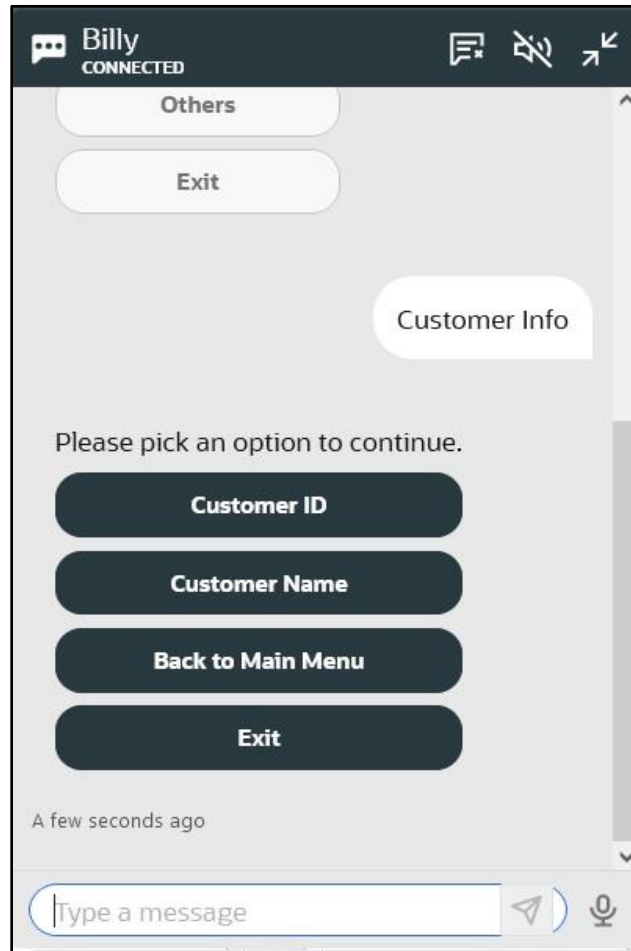


Figure 4: Customer Info Sub Menu

4. Click the **Customer ID** option from the **Customer Info** sub menu. A message appears prompting you to enter the customer ID, as shown in the following figure:

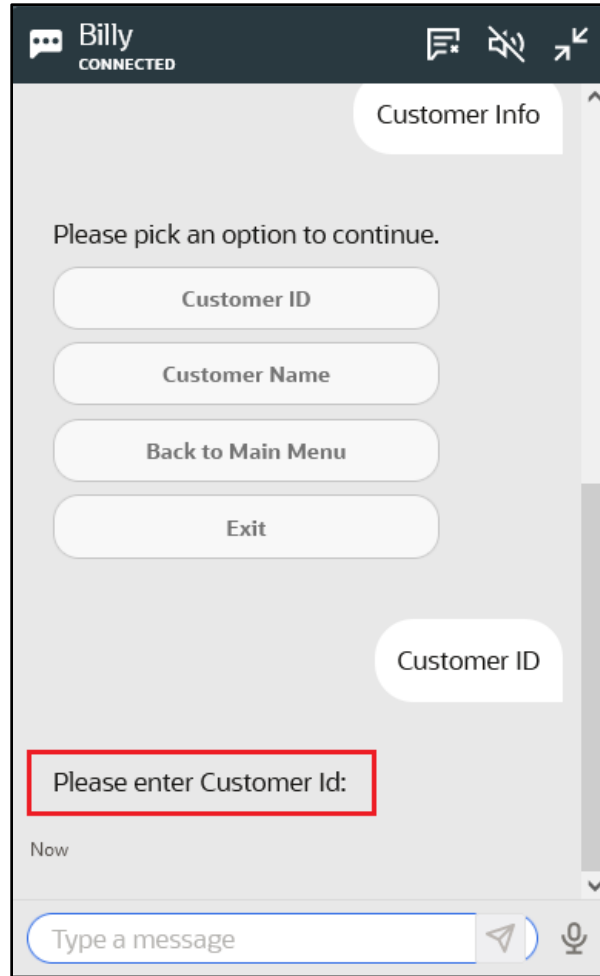


Figure 5: Message Prompt

5. Either manually type the customer ID or use the **Speech to Text** facility to enter the customer ID, as shown in the following figure:

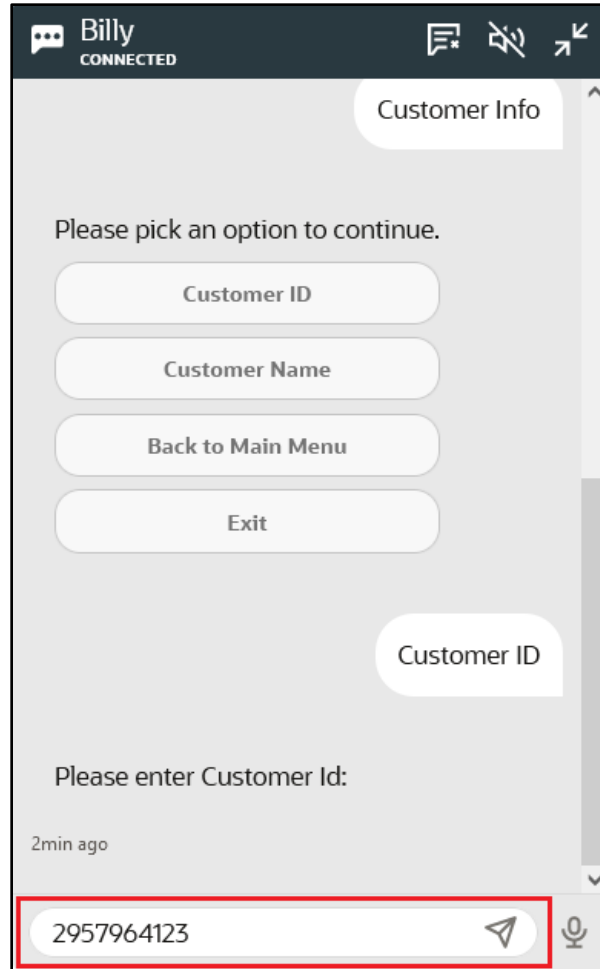


Figure 6: Type Message

6. Click the **Send Message** (📧) icon or press **Enter**. The details of the customer appear in the **Customer 360° Information** screen, as shown in the following figure:

Customer 360° Information: 2957964123;John,Write;Person Search Bookmark Refresh

Person Account Product and Pricing

Person Information

Main

PERSON INFORMATION 2957964123;John,Write;Person

PERSON TYPE Person

Contact Information

COUNTRY United States of America

ADDRESS 1 2, Central Avenue

ADDRESS 2 2nd Floor

ADDRESS 3 3rd Block

IN CITY LIMIT Yes

CITY San Jose

COUNTY USA

STATE California

POSTAL 94043

Person Identifiers

PERSON IDENTIFIER TYPE	PERSON IDENTIFIER
Social security number	232-22-6677

Phone Details

PHONE TYPE	PHONE NUMBER
Home	(408) 921-2222

Figure 7: Customer 360° Information Screen

2.2 Viewing the Customer Details Using the Customer Name

To view the details of a customer using the customer name:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

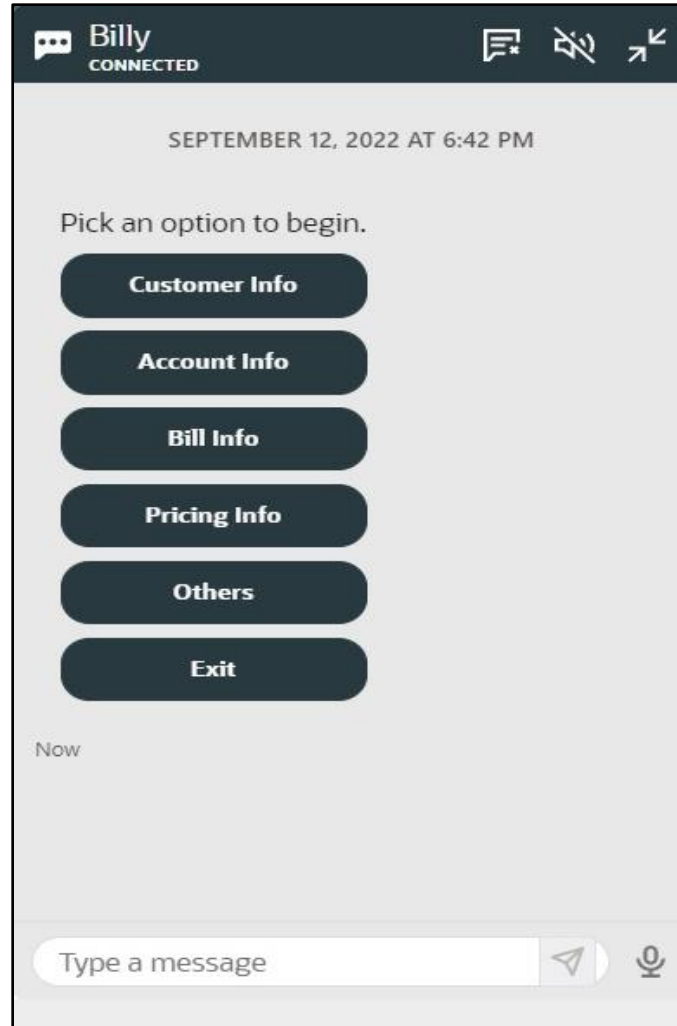


Figure 8: Main Menu

3. Click the **Customer Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

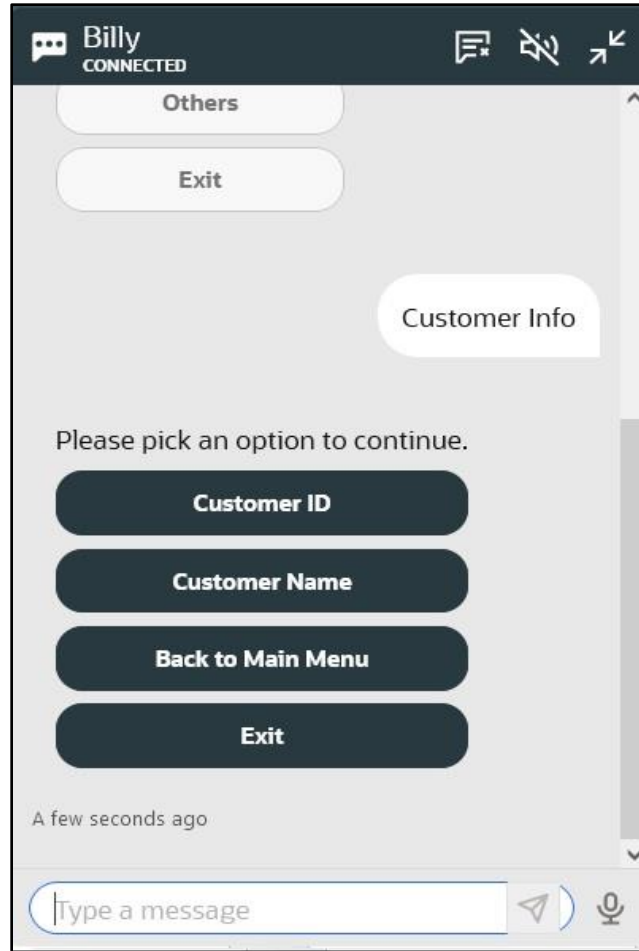


Figure 9: Customer Info Sub Menu

4. Click the **Customer Name** option from the **Customer Info** sub menu. A message appears prompting you to enter the customer name, as shown in the following figure:

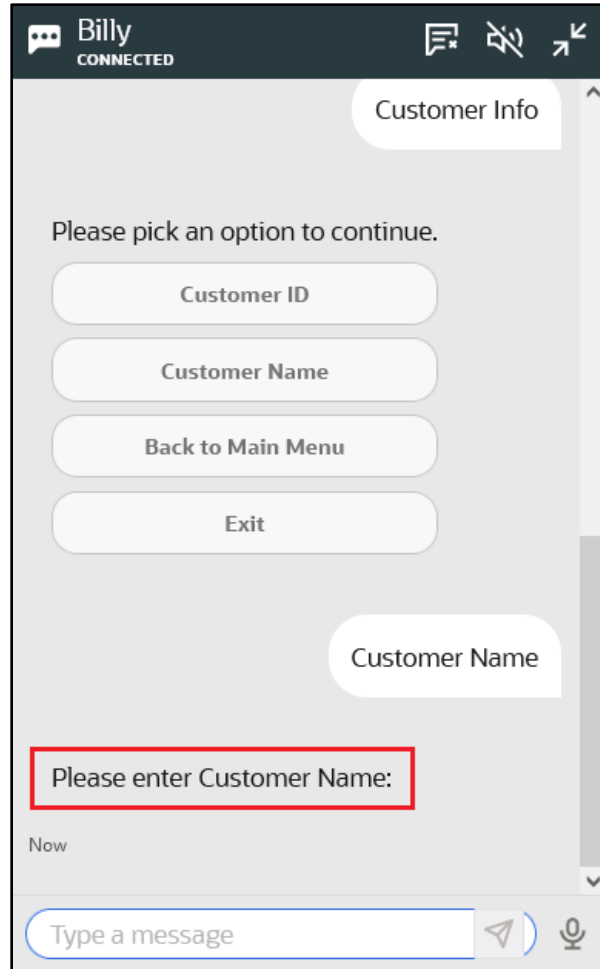


Figure 10: Message Prompt

5. Either manually type the customer name or use the **Speech to Text** facility to enter the customer name, as shown in the following figure:

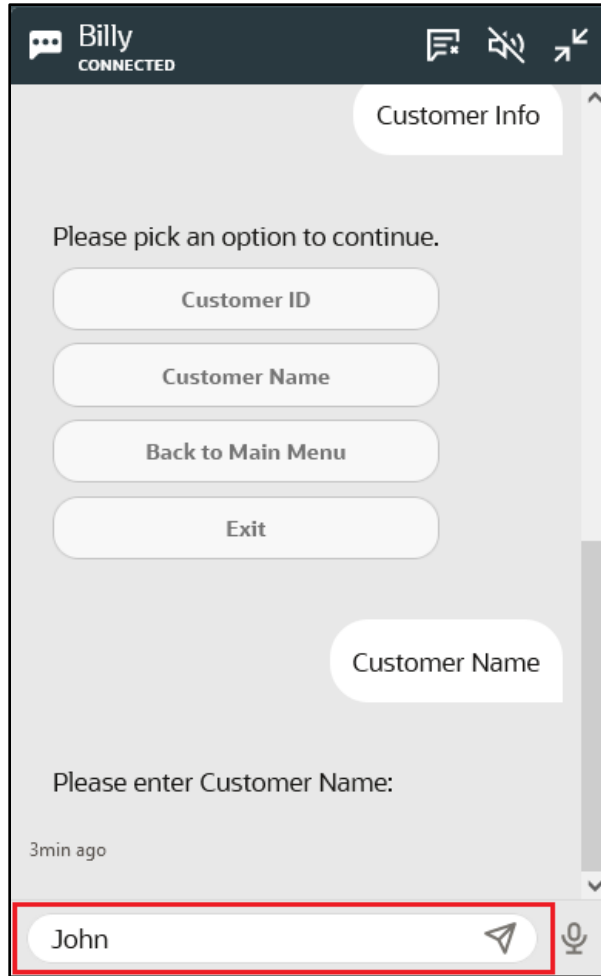


Figure 11: Type Message

6. Click the **Send Message** (📄) icon or press **Enter**. The **Customer 360° View** screen appears with a list of customers having the specified name, as shown in the following figure:

Customer 360° View Bookmark Refresh

Main

360° Search 🔍 📧 ^

SEARCH BY Person ▾

Expand Filters

FILTERS: NAME John

10 Results. Page 1 of 1 (10 records). Previous Next

		PERSON INFORMATION 📄	PERSON NAME	PRIMARY PERSON IDENTIFIER TYPE	PRIMARY PERSON IDENTIFIER
1	🔗	2891848865;John,Kerby;Person ☺	John,Kerby	Social security number	289-29-0920
2	🔗	2957964123;John,Write;Person ☺	John,Write	Social security number	232-22-6677
3	🔗	3216760863;JOHNson,Inc;Parent Customer ☺	JOHNson,Inc	Web user id	JOHN19
4	🔗	5484962746;Johnny, English;Person ☺	Johnny, English	Customer ID	demoperson
5	🔗	5661120991;john,Doe;Person ☺	john,Doe	Company registration number	c21517569

Figure 12: Customer 360° View Screen

Note: You can use the wildcard character (%) while specifying the customer name. If there is only one customer whose name matches the specified value, the system displays the details of the customer in the **Customer 360° Information** screen. However, if there are multiple customers whose name matches the specified value, the system displays the list of customers that meet the criteria in the **Customer 360° View** screen.

3. Account Information

ORMB Chatbot enables you to interact with the application and quickly fetch the details of an account using the account ID or the account's main customer name. It also helps to view mini statement for an account which contains the last five transactions of the account.

3.1 Viewing the Account Details Using the Account ID

To view the details of an account using the account ID:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

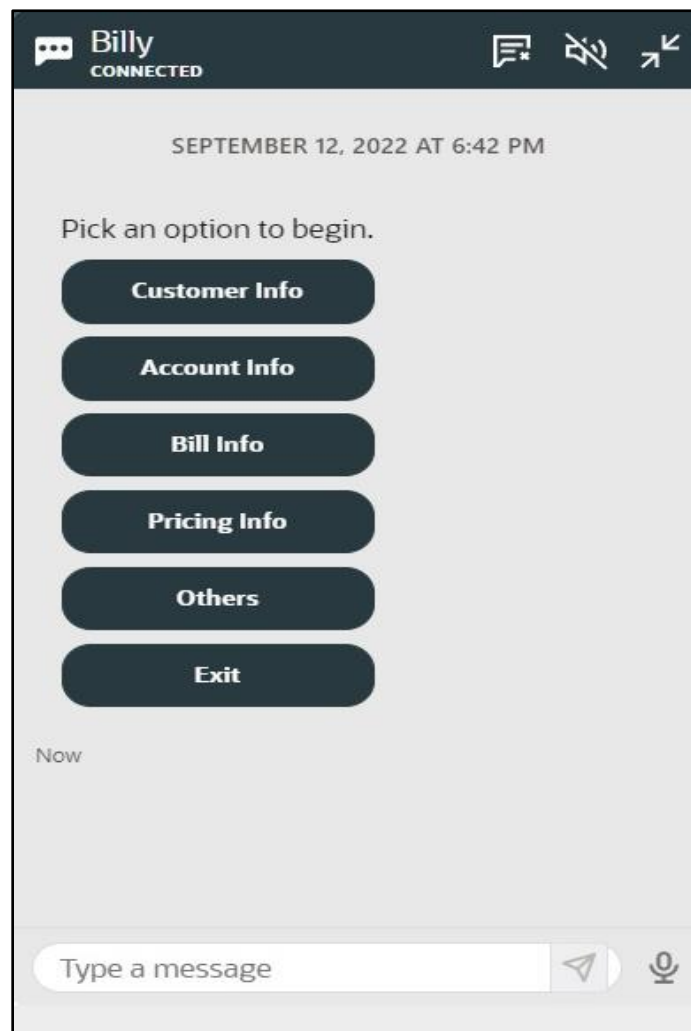


Figure 13: Main Menu

3. Click the **Account Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

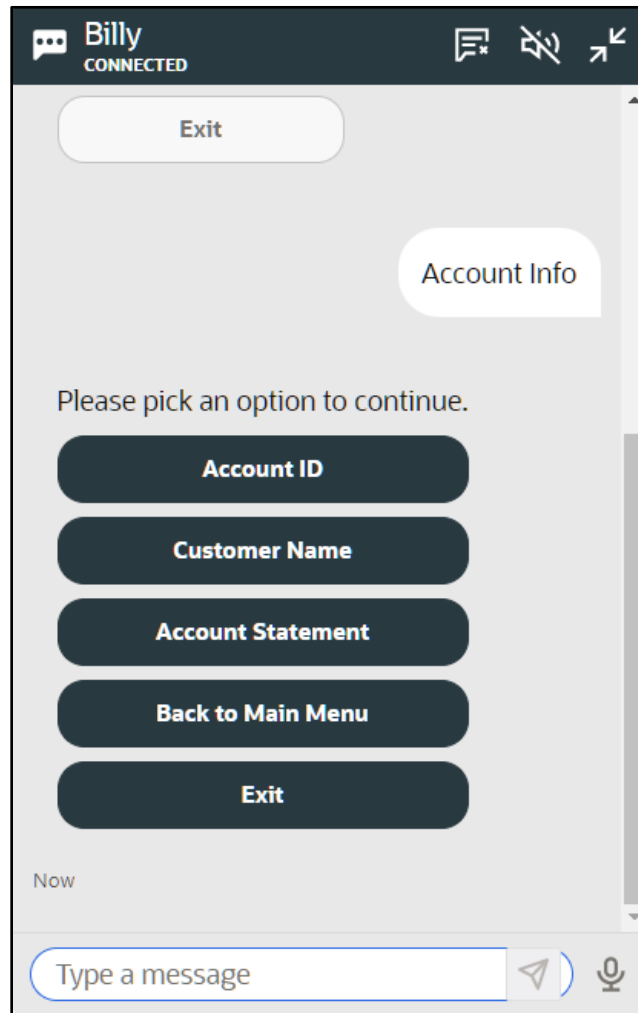


Figure 14: Account Info Sub Menu

4. Click the **Account ID** option from the **Account Info** sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:

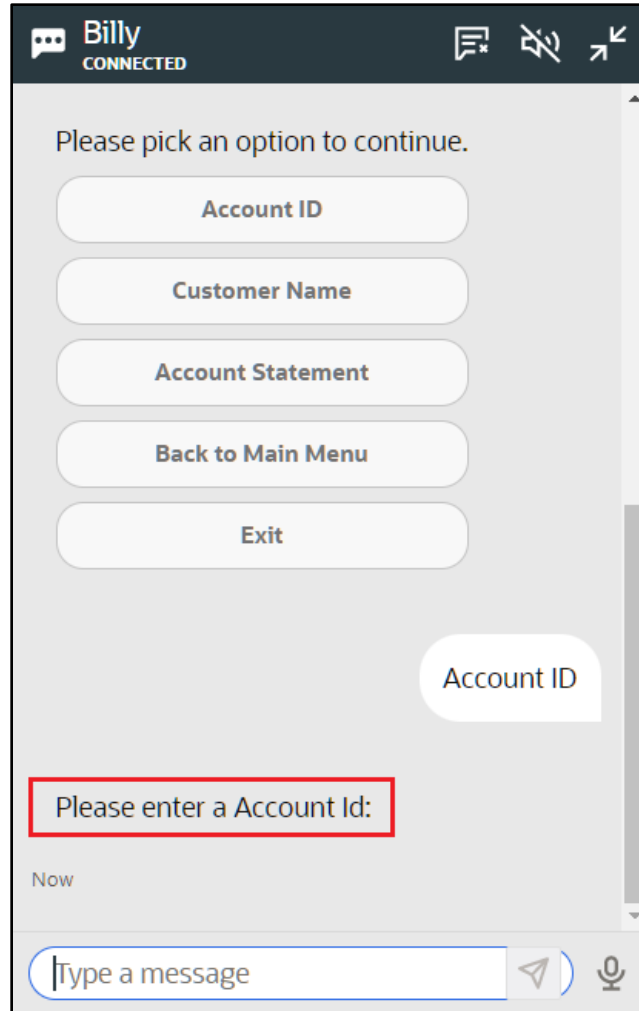


Figure 15: Message Prompt

5. Either manually type the account ID or use the **Speech to Text** facility to enter the account ID, as shown in the following figure:

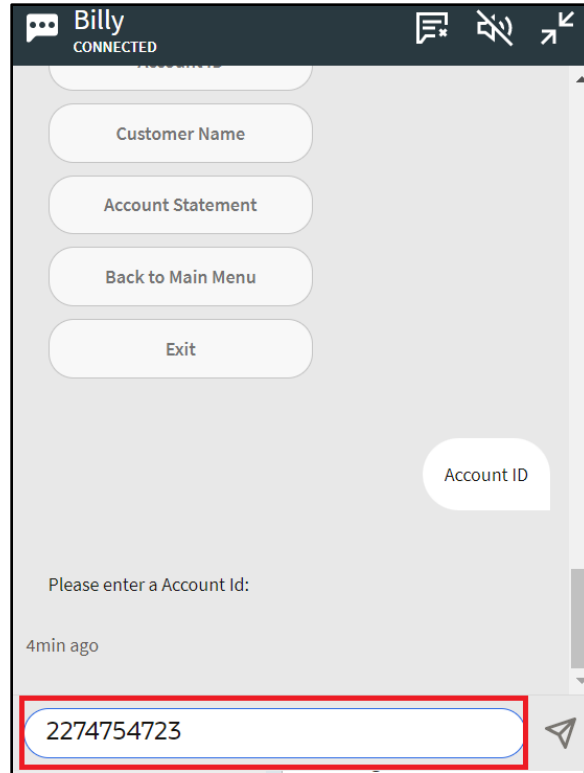


Figure 16: Type Message

6. Click the **Send Message** (📤) icon or press **Enter**. The details of the account appear in the **Customer 360° Information** screen, as shown in the following figure:

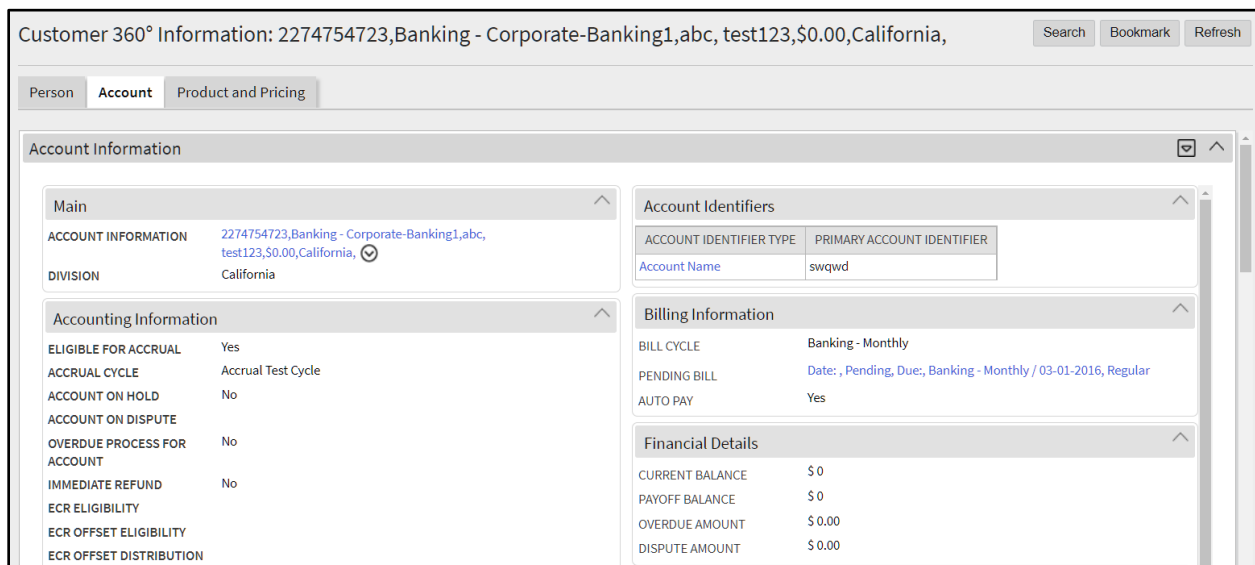


Figure 17: Customer 360° Information Screen

3.2 Viewing the Account Details Using the Main Customer's Name

To view the details of an account using the main customer's name:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

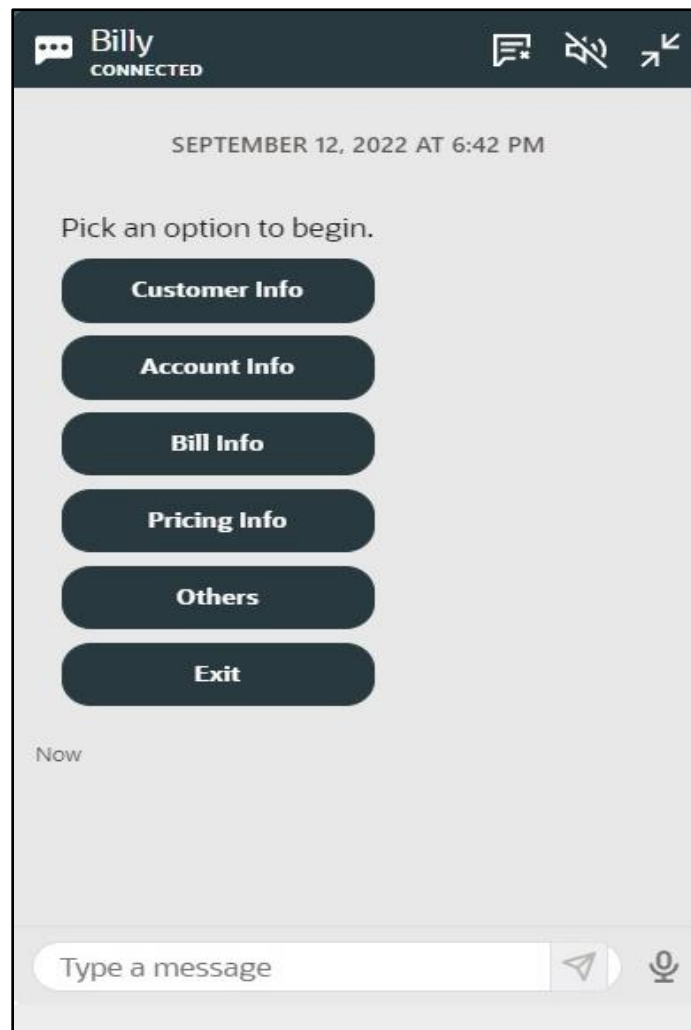


Figure 18: Main Menu

3. Click the **Account Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

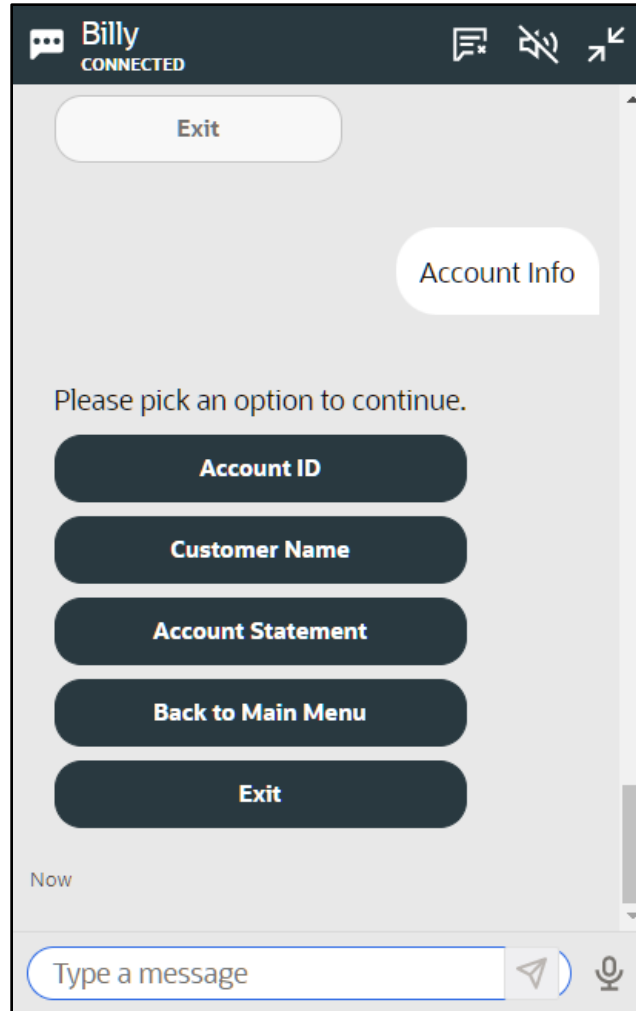


Figure 19: Account Info Sub Menu

4. Click the **Customer Name** option from the **Account Info** sub menu. A message appears prompting you to enter the main customer's name of the account whose details you want to view, as shown in the following figure:

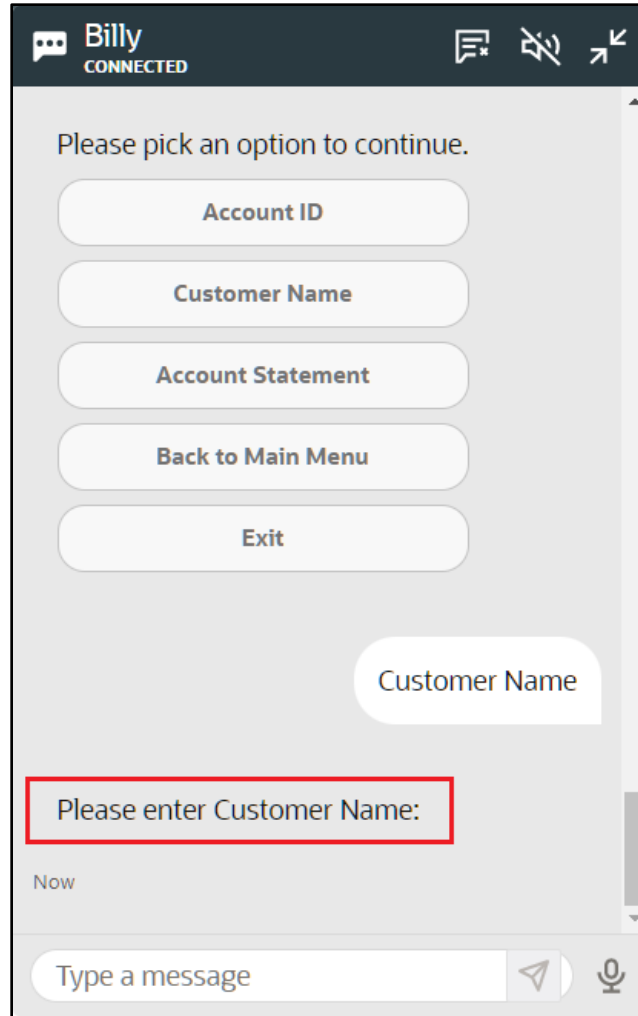


Figure 20: Message Prompt

5. Either manually type the main customer's name or use the **Speech to Text** facility to enter the main customer's name, as shown in the following figure:

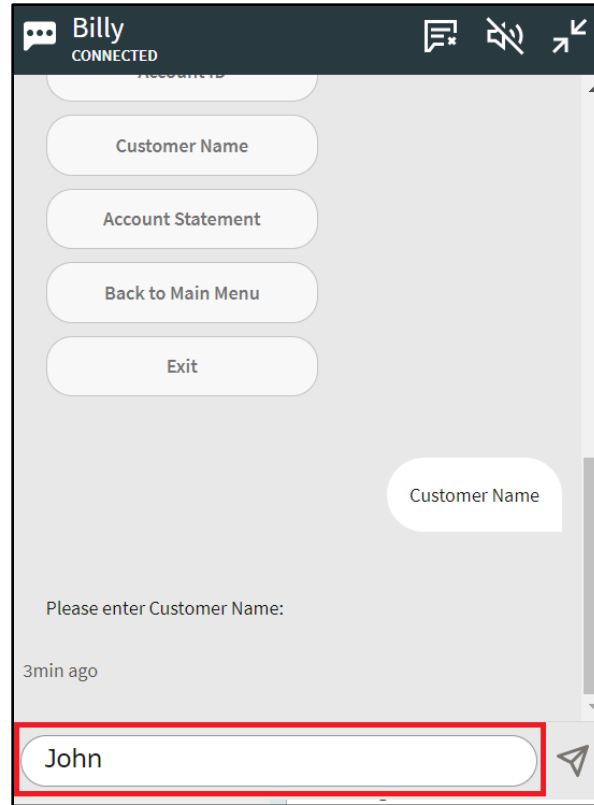


Figure 21: Type Message

- Click the **Send Message** (📤) icon or press **Enter**. The **Account Search** window appears with a list of accounts where the specified customer is the main customer, as shown in the following figure:

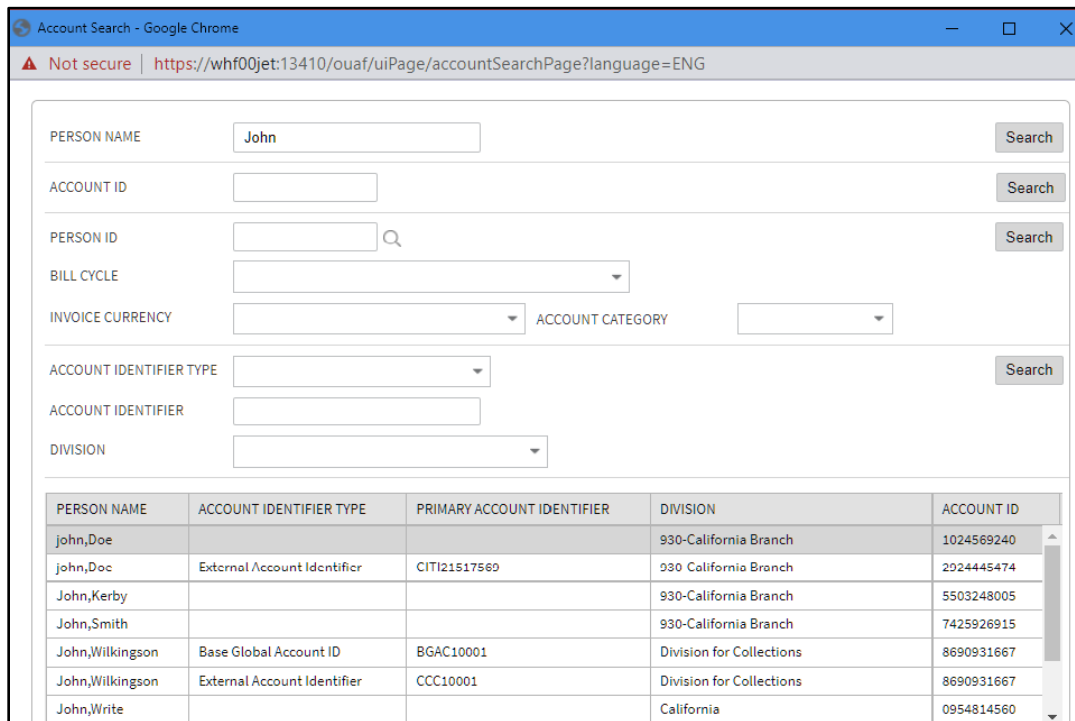


Figure 22: Account Search Window

Note: You can use the wildcard character (%) while specifying the customer name. If there is only one account of the customer, the system displays the details of the account in the **Account** screen. However, if there are multiple accounts of the customer, the system displays the list of accounts that meet the criteria in the **Account Search** window.

- Click the record of an account whose details you want to view. The **Account** screen appears with the details of the account, as shown in the following figure:

The screenshot displays the 'Account' screen in Oracle Revenue Management and Billing. At the top, there are navigation buttons: 'Bookmark', 'Previous Item', 'Next Item', 'Delete', 'Clear', 'Save', and 'Refresh'. Below these are tabs for 'Main', 'Auto Pay', 'Persons', 'Financial Balances', 'Bill Messages', 'C & C', 'Characteristics', 'Account Identifiers', 'Alerts', 'Budget', 'Deposits', and 'Usage Amount/Counter'. The main content area shows the account details for 'ACCOUNT ID 8690931667'. The account name is '8690931667, Customer Class for Collections, External Account Identifier: CCC10001, John, Wilkingson, \$100.00, Division for Collections, ACCOUNT ID 8690931667'. The details are organized into two columns:

CUSTOMER CLASS	Customer Class for Collections	DIVISION	Division for Collections
SET UP DATE	10-01-2011	INVOICE CURRENCY	United States Dollars
PROTECT DIVISION	<input type="checkbox"/>	ACCESS GROUP	*** System Default
MANAGEMENT GROUP	<input type="text"/>	ACCOUNT CATEGORY	Usage Account
IMMEDIATE REFUND	<input type="checkbox"/>		

Figure 23: Account Screen

3.3 Viewing the Statement of an Account

To view the statement of an account:

- Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
- Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

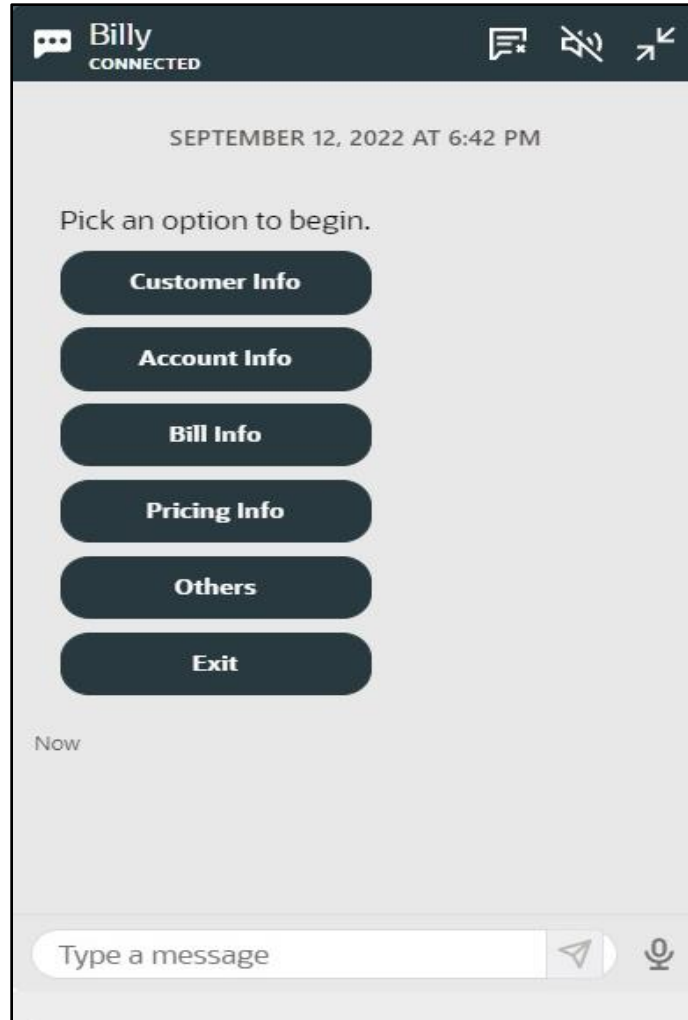


Figure 24: Main Menu

3. Click the **Account Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

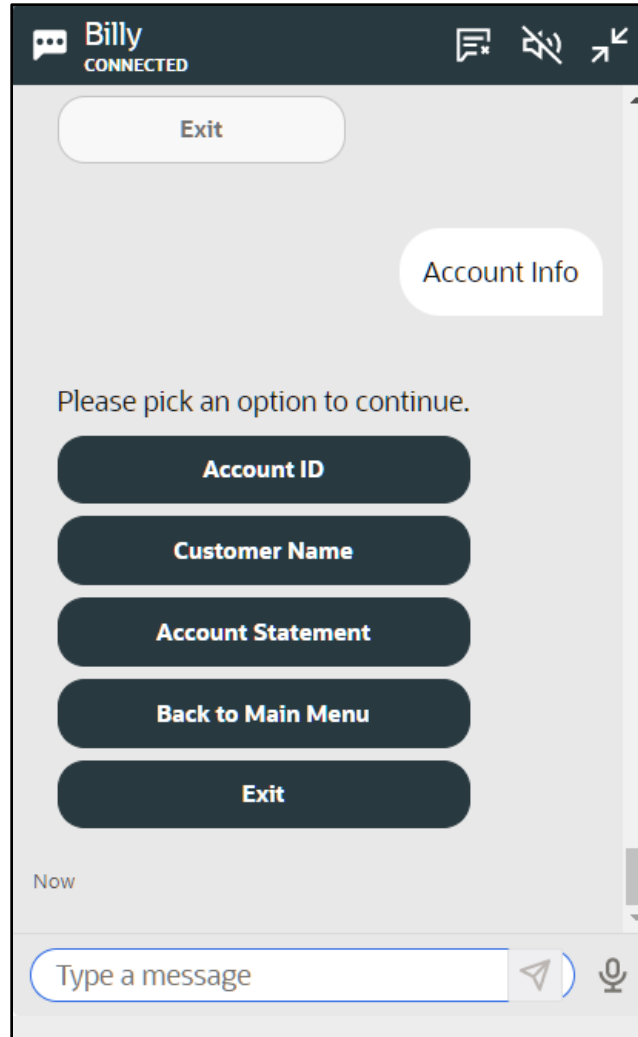


Figure 25: Account Info Sub Menu

4. Click the **Account Statement** option from the **Account Info** sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:

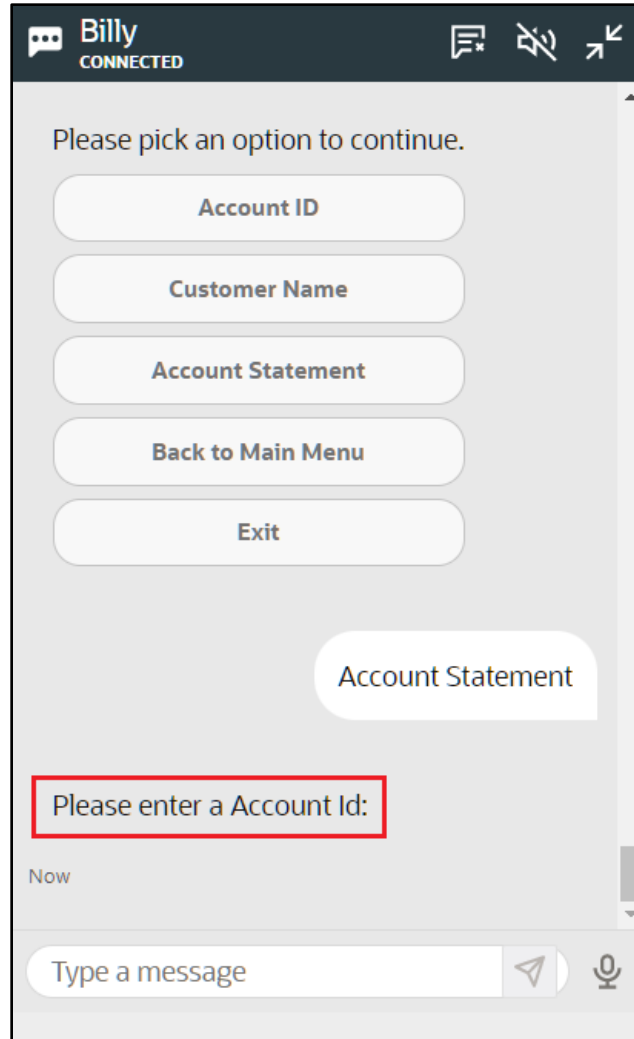


Figure 26: Message Prompt

5. Either manually type the account ID or use the **Speech to Text** facility to enter the account ID, as shown in the following figure:

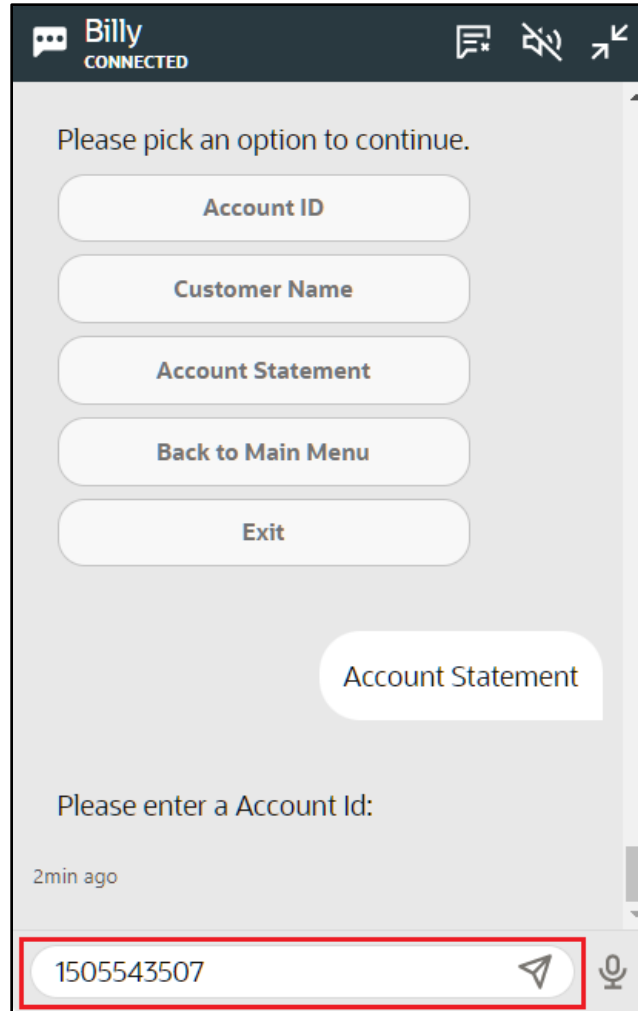


Figure 27: Type Message

6. Click the **Send Message** (📧) icon or press **Enter**. You can view the last five financial transactions of the account in the **Chatbot** window, as shown in the following figure:

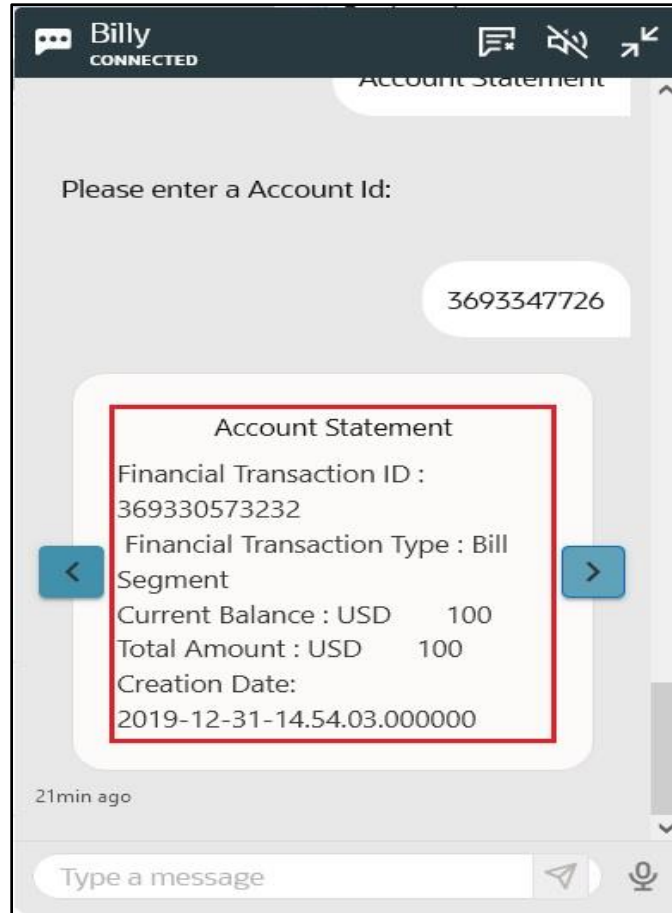


Figure 28: Account Statement

You can navigate between the financial transactions by clicking the **Next** (➤) and **Previous** (➤) icons in the **Chatbot** window. The following details of a financial transaction are listed in the **Chatbot** window:

Field Name	Field Description
Financial Transaction ID	Displays the financial transaction ID.
Financial Transaction Type	Indicates the type of financial transaction. The valid values are: <ul style="list-style-type: none"> • Adjustment • Adjustment Cancellation • Bill Segment • Bill Cancellation • Pay Segment • Pay Cancellation
Current Balance	Displays the current balance of the account.
Total Amount	Displays the total financial transaction amount.
Creation Date	Displays the date when the financial transaction was created.

4. Bill Information

ORMB Chatbot facilitates automation of few steps which are required while creating or cancelling a bill. It enables you to interact with the application and quickly fetch the details of the latest bill of an account using the account ID. It also enables you to interact with the application and quickly fetch the details of a particular bill using the bill ID or alternate bill ID.

4.1 Creating a Bill for an Account

To create a bill for an account:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

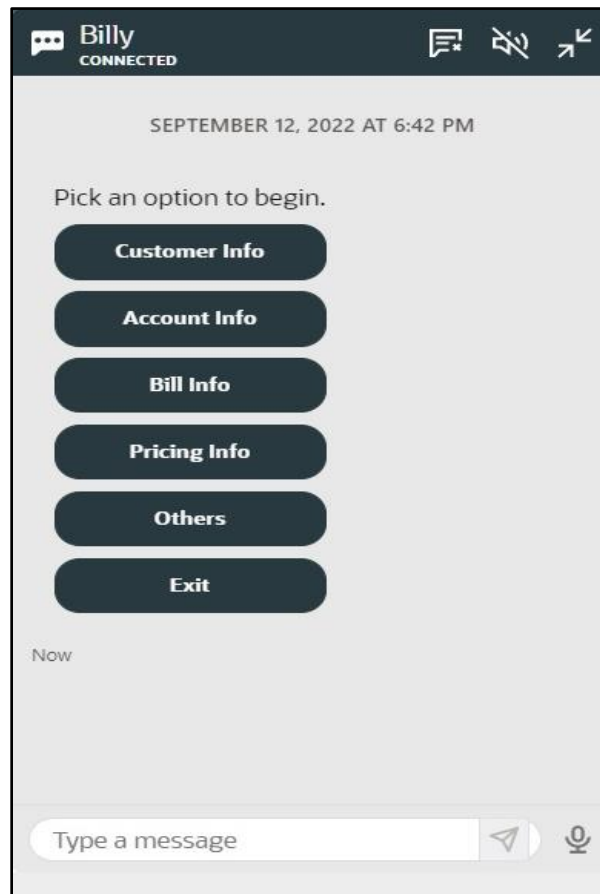


Figure 29: Main Menu

3. Click the **Bill Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

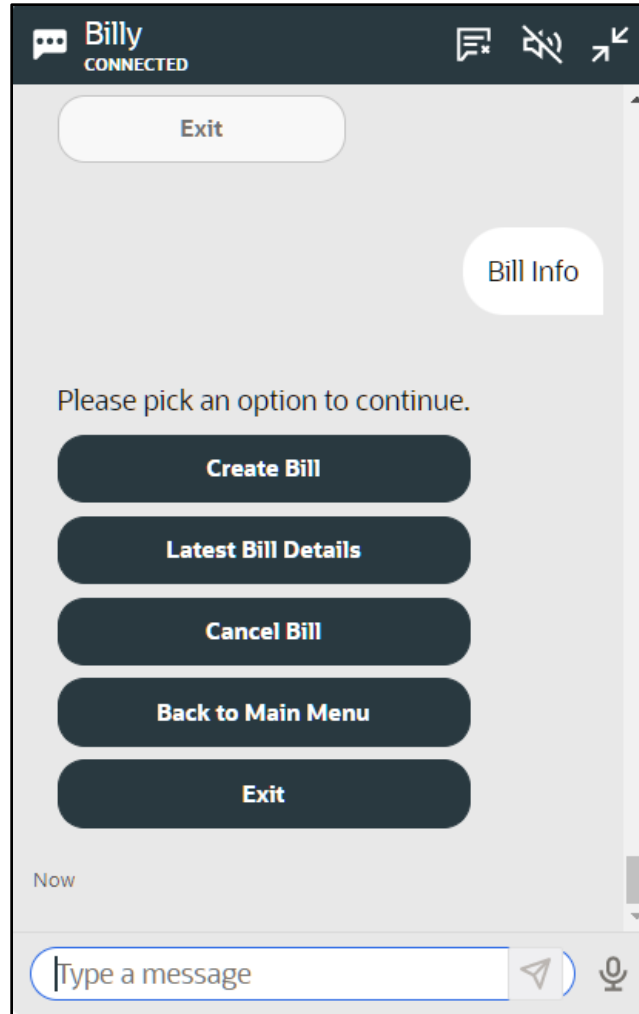


Figure 30: Bill Info Sub Menu

4. Click the **Create Bill** option from the **Bill Info** sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:

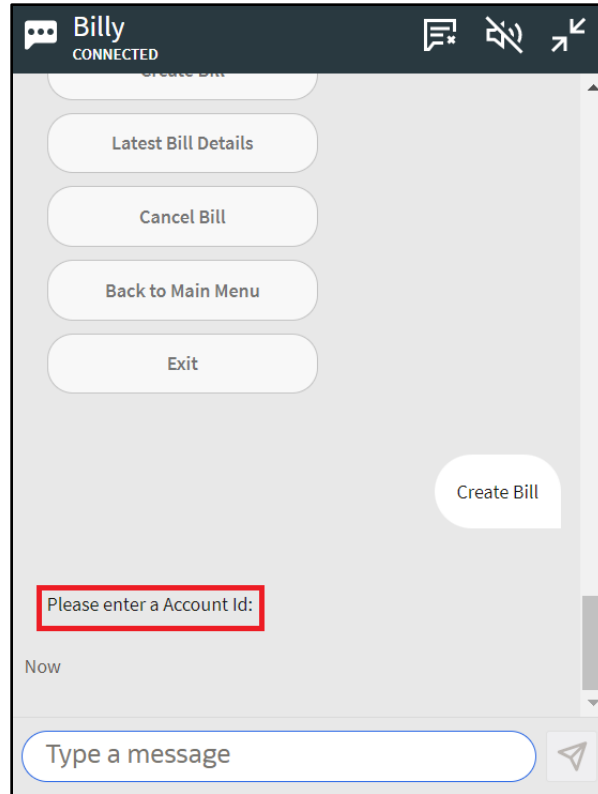


Figure 31: Message Prompt

5. Either manually type the account ID or use the **Speech to Text** facility to enter the account ID, as shown in the following figure:

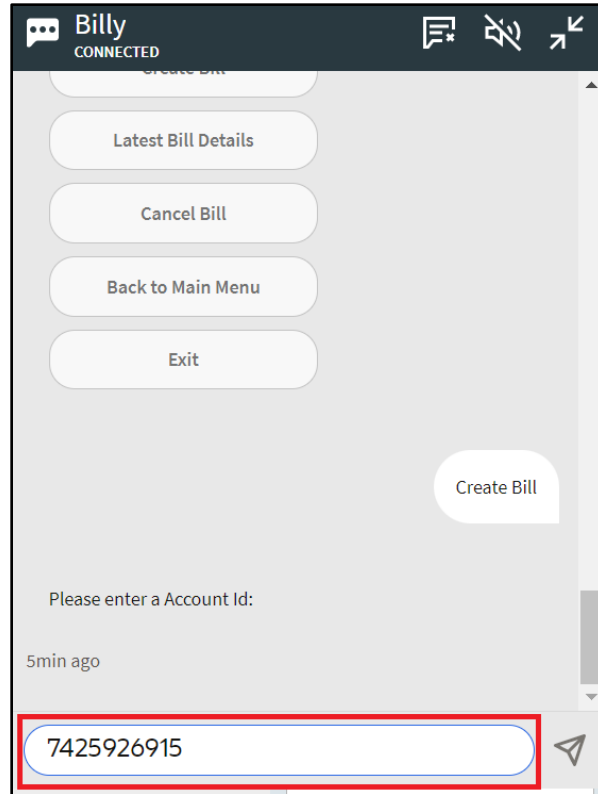


Figure 32: Type Message

6. Click the **Send Message** (📤) icon or press **Enter**. The **Bill** screen appears along with the **Generate** window, as shown in the following figure:

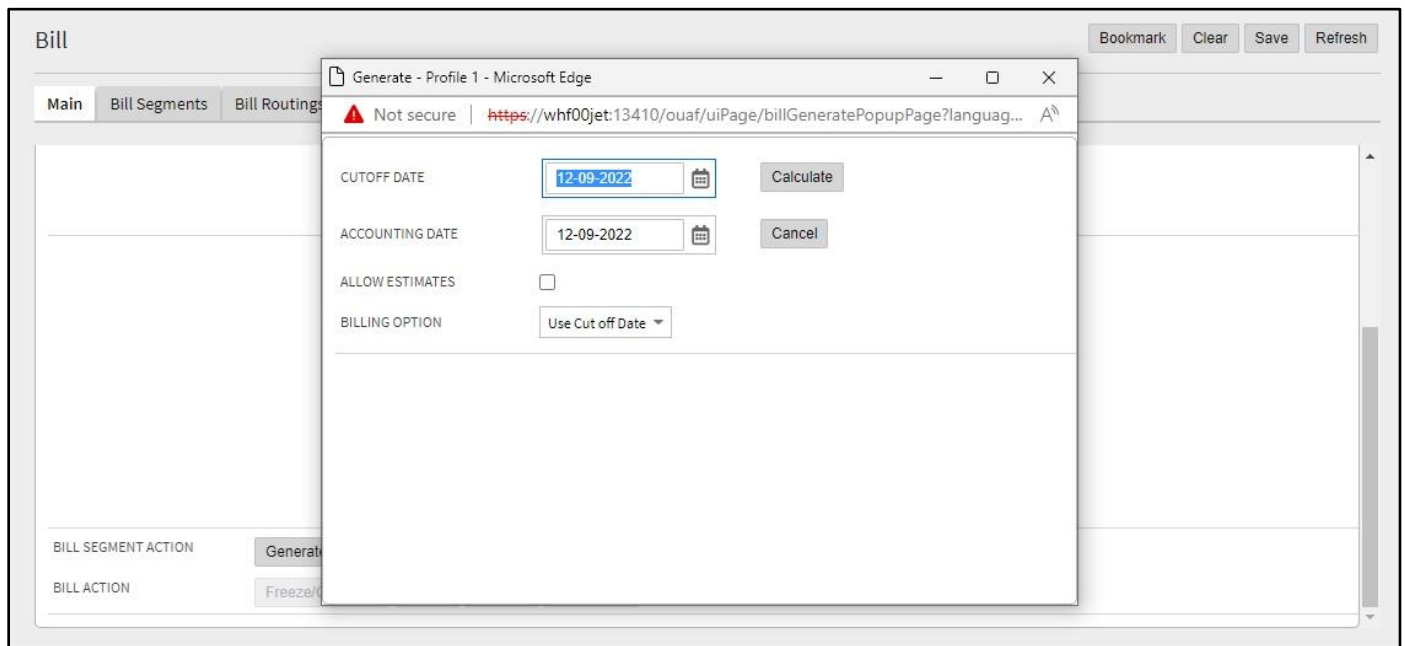


Figure 33: Bill Generate Window

7. Enter the required accounting and cutoff dates and click **Calculate**. The bill is generated for the account.

4.2 Viewing the Details of a Bill

To view the details of a bill:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

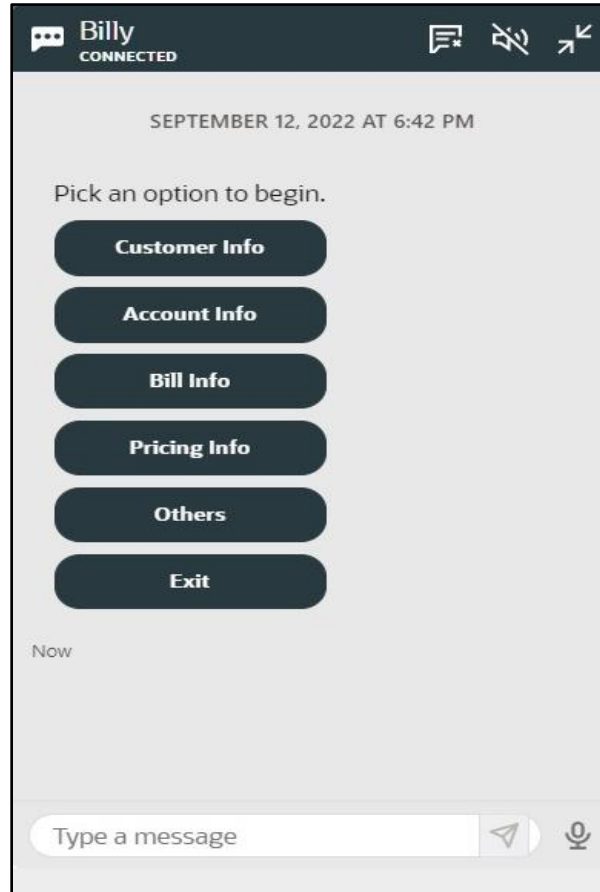


Figure 34: Main Menu

3. Click the **Bill Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

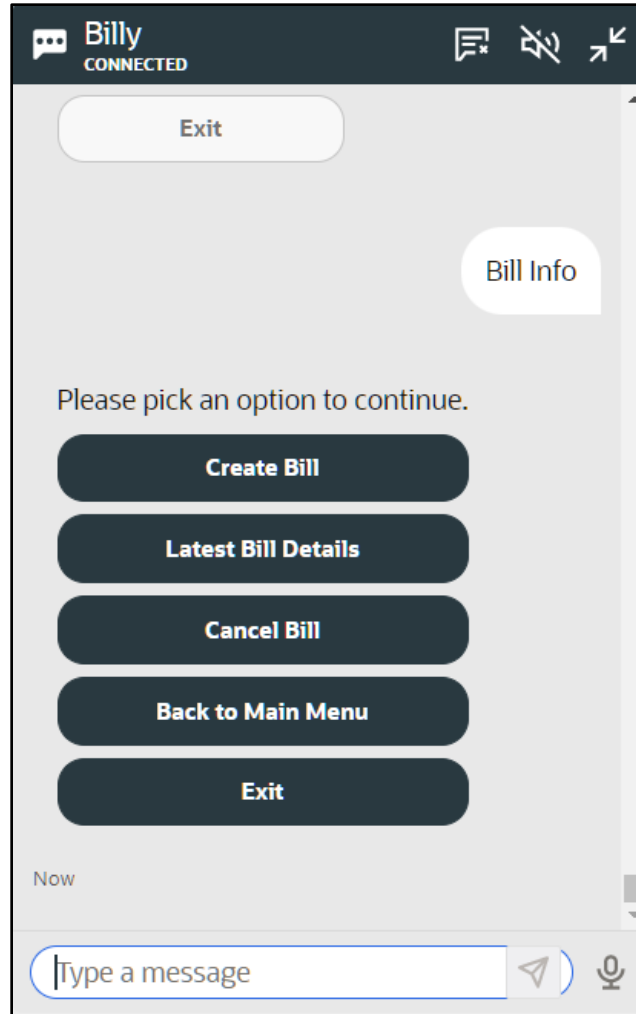


Figure 35: Bill Info Sub Menu

4. Click the **Latest Bill Details** option from the **Bill Info** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

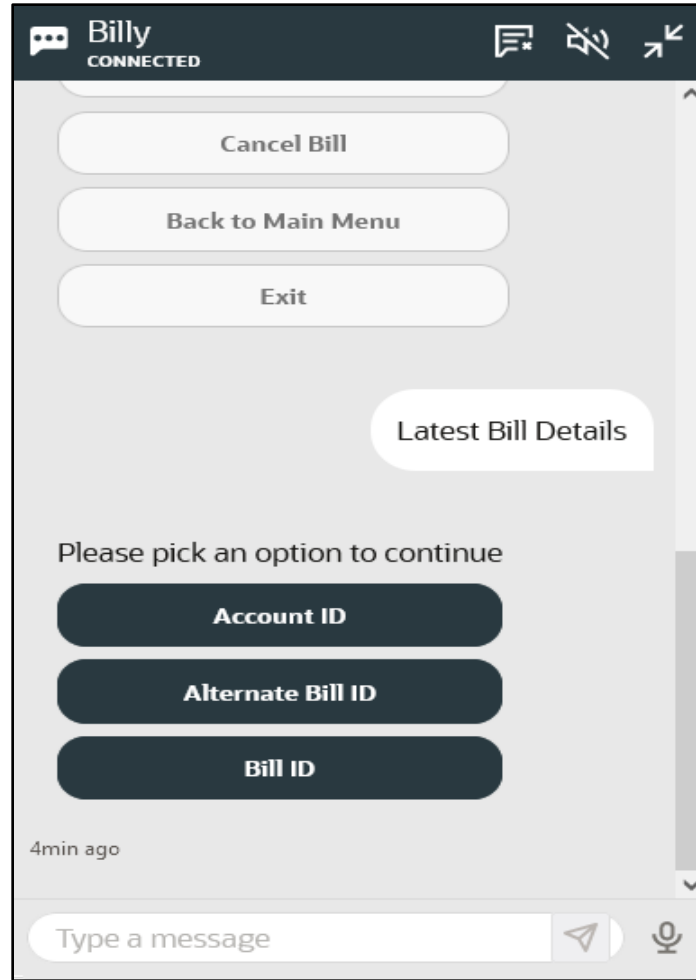


Figure 36: Latest Bill Details Sub Menu

5. Do either of the following:

If you want to view the bill details of an account using...	Then...
Account ID	a. Click the Account ID option from the Latest Bill Details sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:
Alternate Bill ID	a. Click the Alternate Bill ID option from the Latest Bill Details sub menu. A message appears prompting you to enter the alternate bill ID.
Bill ID	a. Click the Bill ID option from the Latest Bill Details sub menu. A message appears prompting you to enter the bill ID.

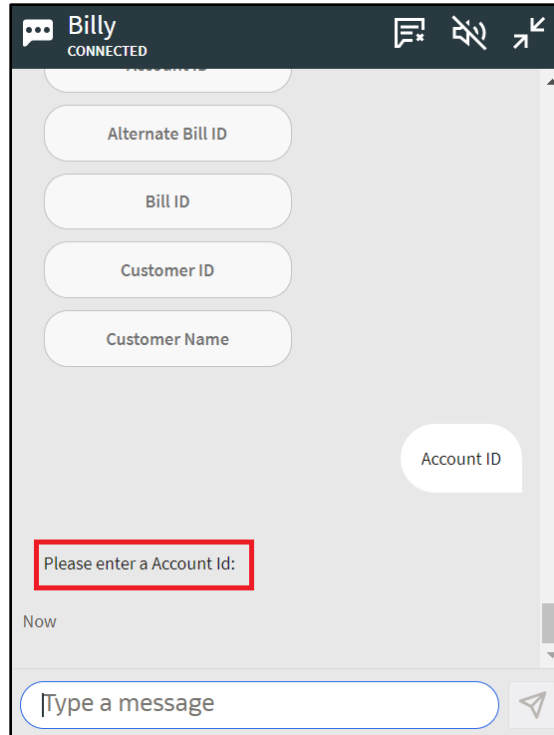


Figure 37: Message Prompt

- 6. Either manually type or use the **Speech to Text** facility to enter the account ID, alternate bill ID, or bill ID depending on the option selected, as shown in the following figure:

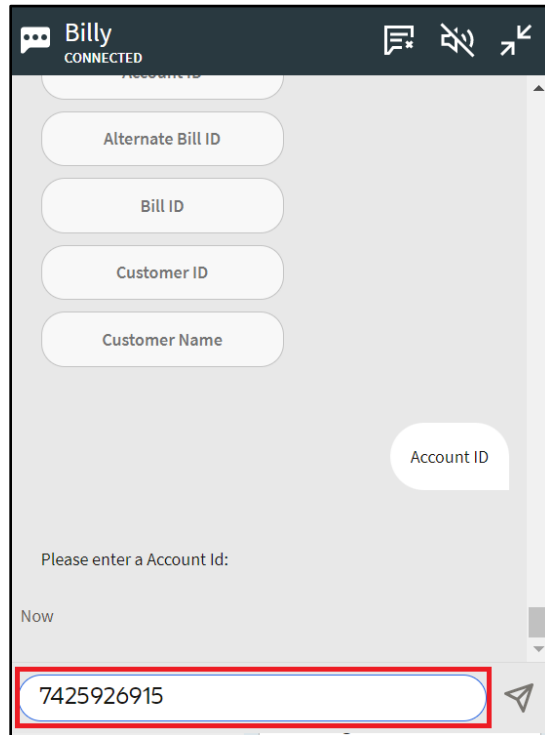


Figure 38: Type Message

7. Click the **Send Message** (📩) icon or press **Enter**. The details of the latest bill of the account are listed in the **Chatbot** window, as shown in the following figure:

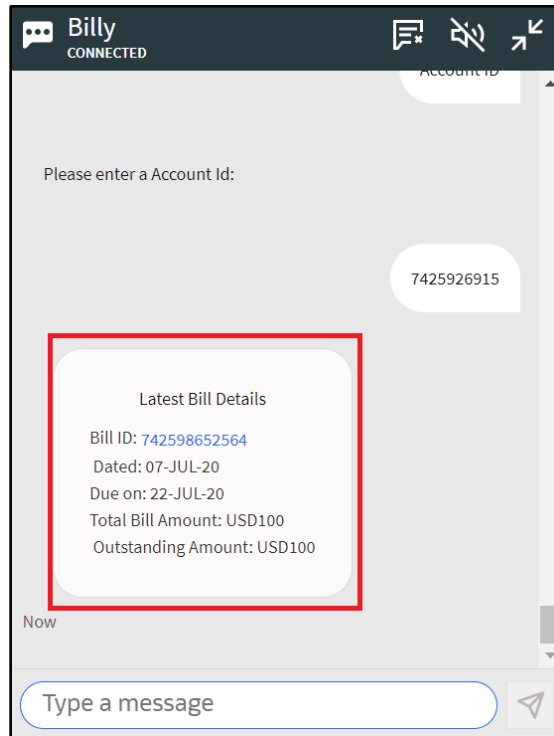


Figure 39: Latest Bill Details

The following details of a bill are shown in the **Chatbot** window:

Field Name	Field Description
Bill ID	Displays the bill ID.
Dated	Displays the date when the bill is completed.
Due On	Displays the date when the bill is due for payment.
Total Bill Amount	Displays the total bill amount.
Outstanding Amount	Displays the outstanding amount (i.e. unpaid amount) of the bill.

4.3 Cancelling a Bill of an Account

To cancel a bill of an account:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

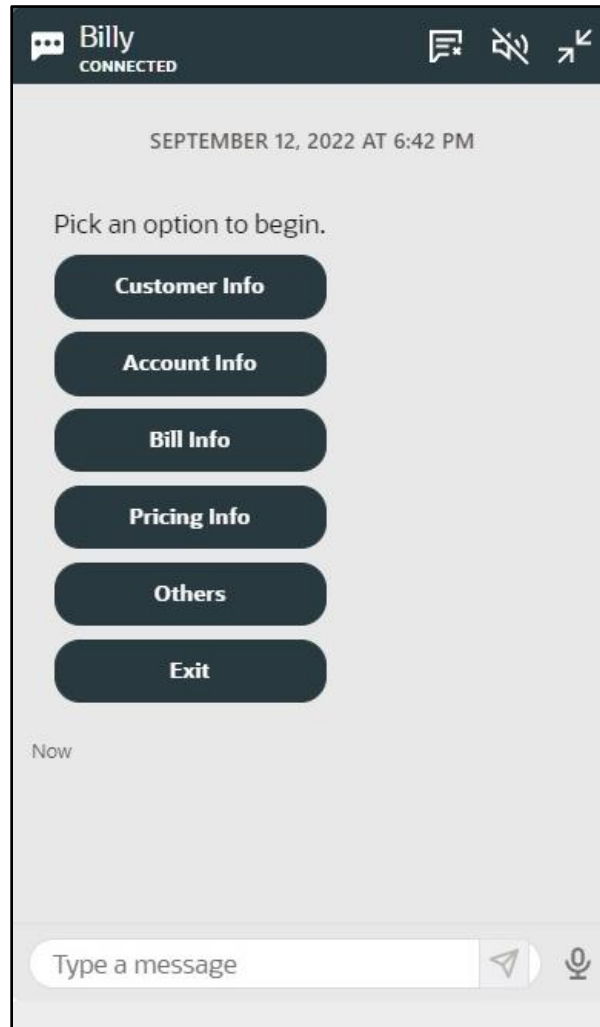


Figure 40: Main Menu

3. Click the **Bill Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

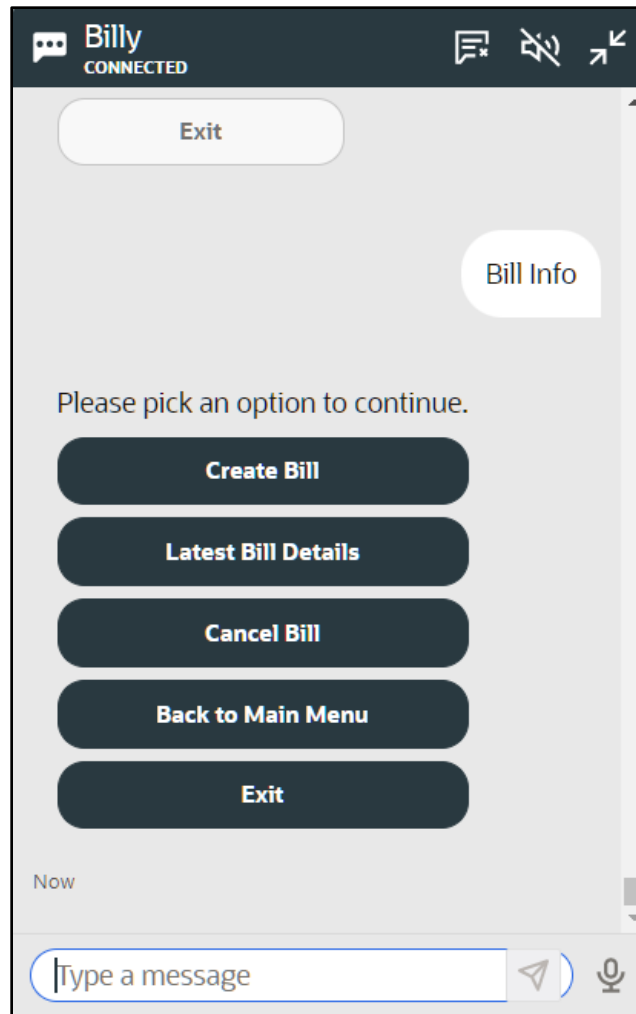


Figure 41: Bill Info Sub Menu

4. Click the **Cancel Bill** option from the **Bill Info** sub menu. A message appears prompting you to enter the bill ID, as shown in the following figure:

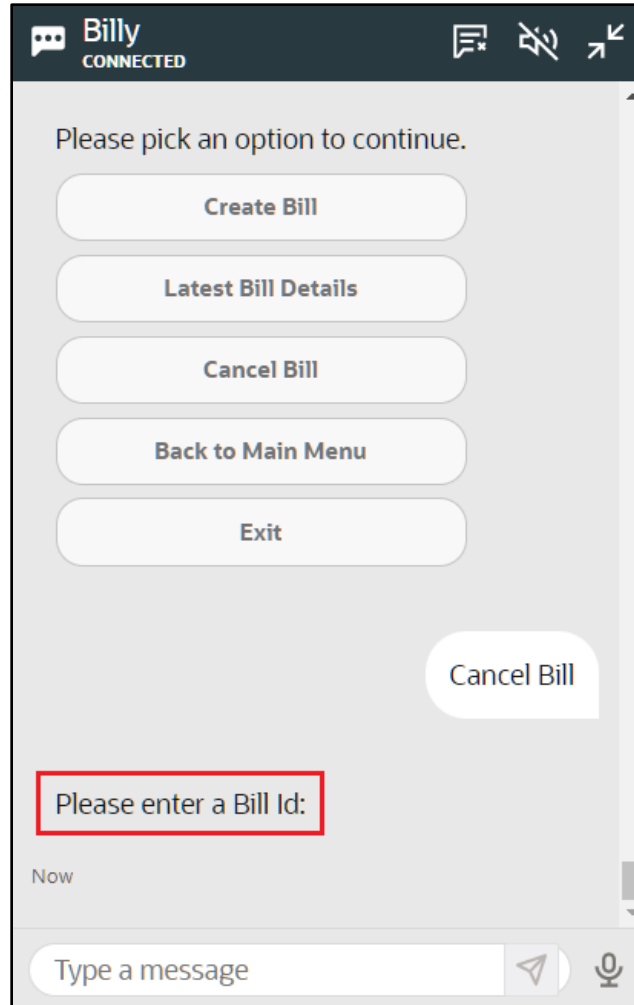


Figure 42: Message Prompt

5. Either manually type the bill ID or use the **Speech to Text** facility to enter the bill ID, as shown in the following figure:

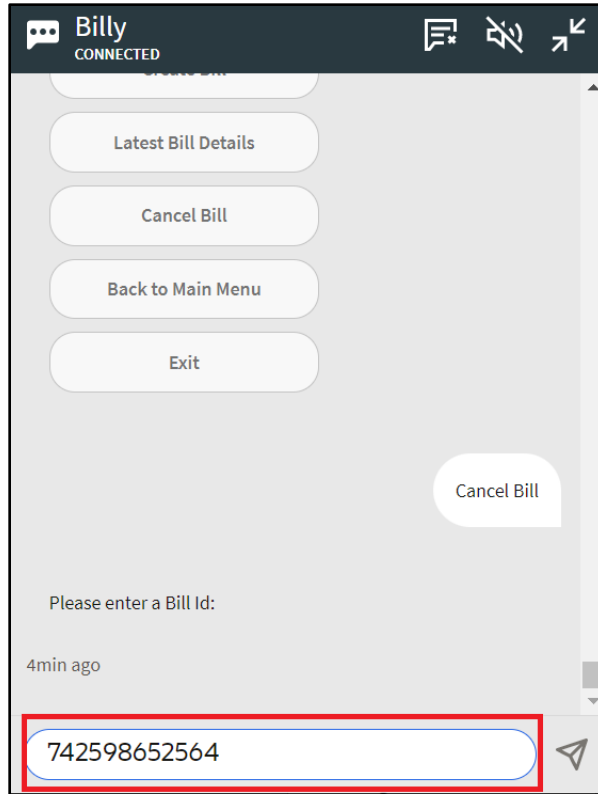


Figure 43: Type Message

6. Click the **Send Message** (📤) icon or press **Enter**. The **Bill** screen appears along with the **Cancel Frozen Bill Segments** window, as shown in the following figure:

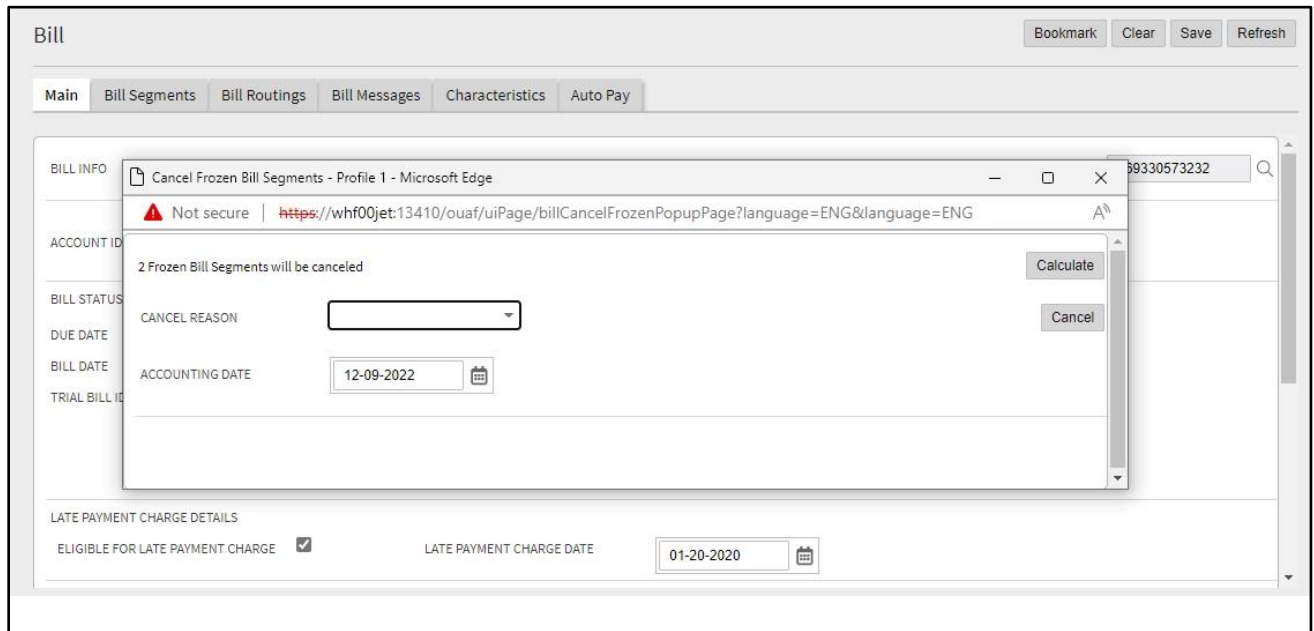


Figure 44: Cancel Frozen Bill Segments Window

7. Select the cancel reason from the respective list then click **Calculate**. All bill segments of the bill are canceled.

5. Pricing Information

ORMB Chatbot facilitates automation of few steps which are required while viewing the effective or agreed pricing of a customer or an account. It also enables you to interact with the application and quickly fetch the details of a price list.

5.1 Viewing the Effective Pricing of a Customer

To view the effective pricing of a customer:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

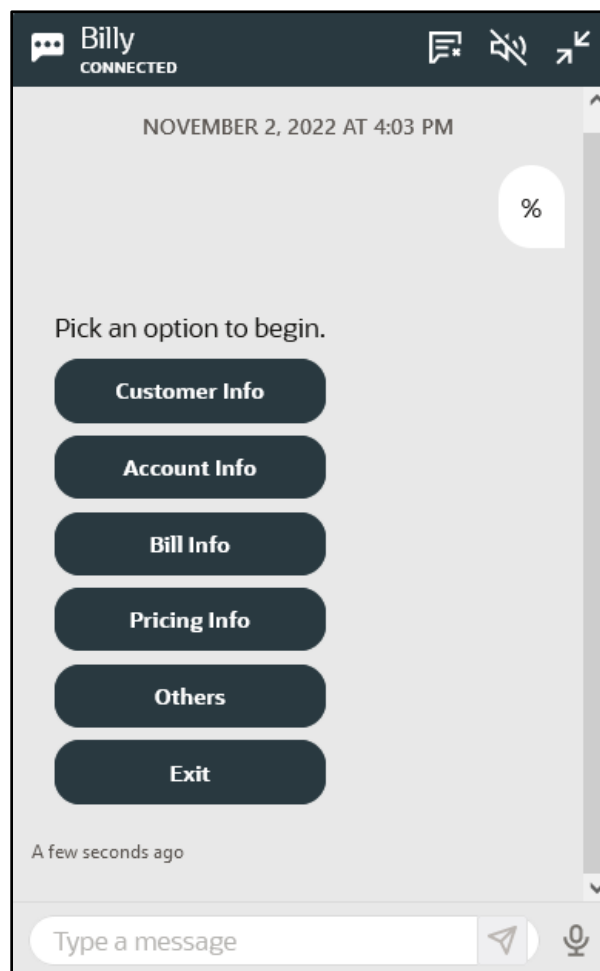


Figure 45: Main Menu

3. Click the **Pricing Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

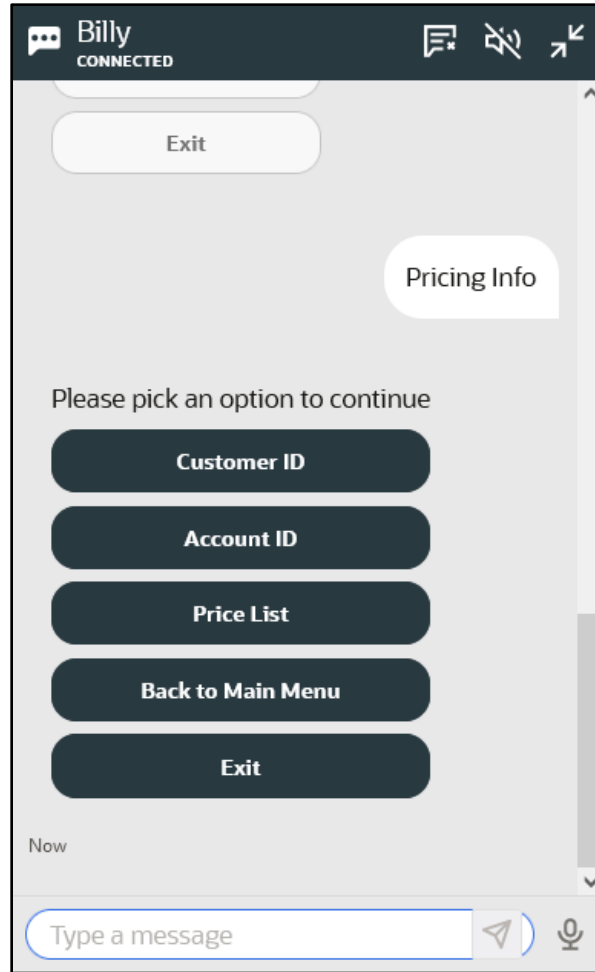


Figure 46: Pricing Info Sub Menu

4. Click the **Customer ID** option from the **Pricing Info** sub menu. A message appears prompting you to enter the customer ID, as shown in the following figure:

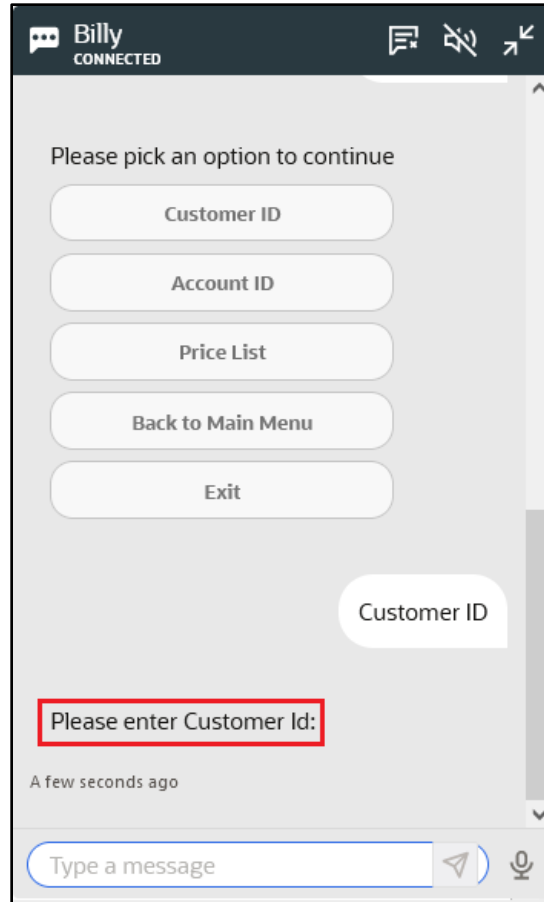


Figure 47: Message Prompt

5. Either manually type the customer ID or use the **Speech to Text** facility to enter the customer ID, as shown in the following figure:

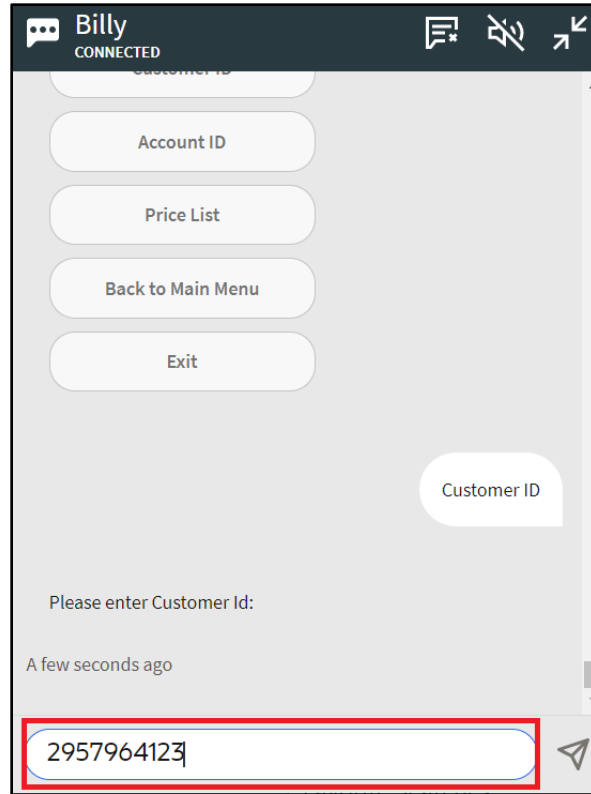


Figure 48: Type Message

6. Click the **Send Message** () icon or press **Enter**. The **Chatbot** window appears with a set of options, as shown in the following figure:

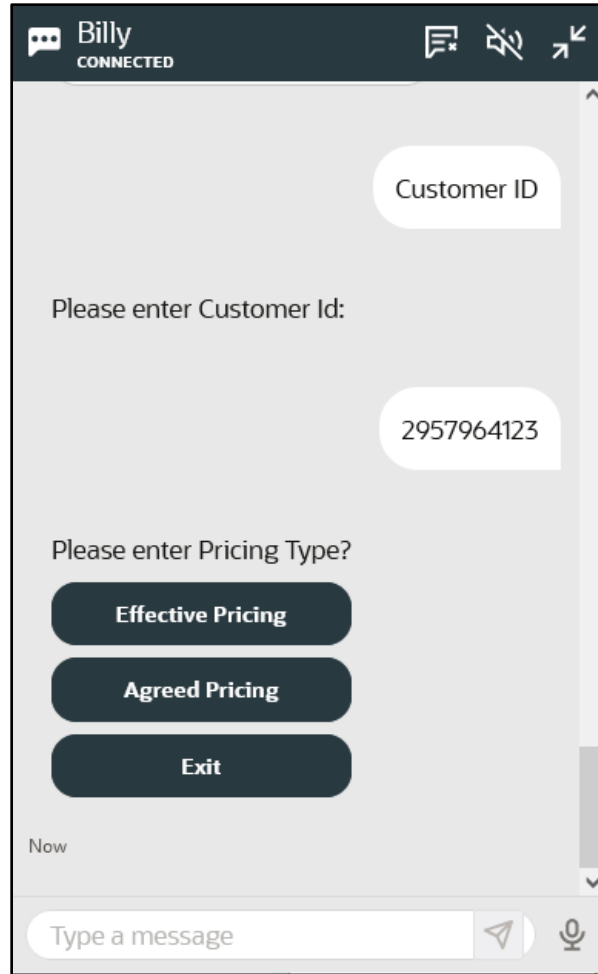


Figure 49: Pricing Type Sub Menu

7. Click the **Effective Pricing** option from the **Pricing Type** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

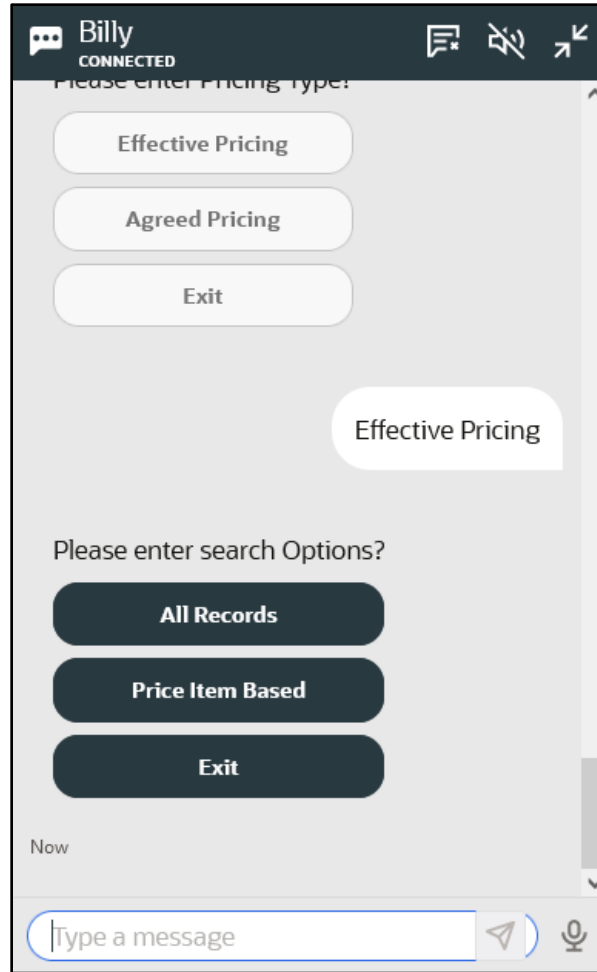


Figure 50: Effective Pricing Sub Menu

8. Do either of the following:

If you want to view...	Then...
All effective pricing of a customer	a. Click the All Records option from the Effective Pricing sub menu. The Pricing (Person) screen appears where you can view the effective pricing of all price items or price item bundles assigned to the customer (either directly or through the customer hierarchy).
Effective pricing of a particular price item or price item bundle assigned to a customer	a. Click the Price Item Based option from the Effective Pricing sub menu. The Chatbot window appears with a set of options, as shown in the following figure:

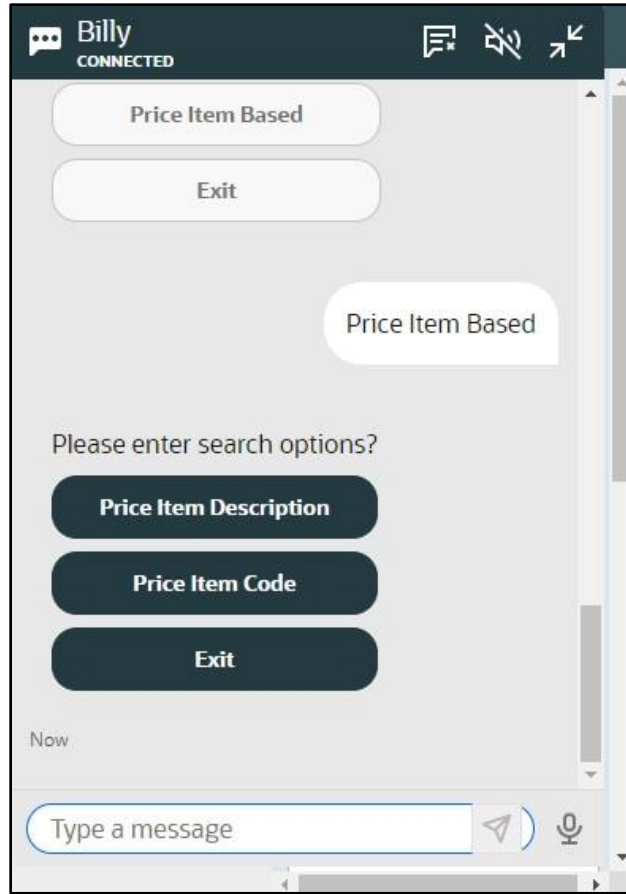



Figure 51: Effective Pricing Search Sub Menu

9. Do either of the following:

If you want to search using...	Then...
Price Item Code	<ol style="list-style-type: none"> a. Click the Price Item Code option from the Effective Pricing Search sub menu. A message appears prompting you to enter the price item code. b. Either manually type the price item code or use the Speech to Text facility to enter the price item code. c. Click the Send Message () icon or press Enter. The Pricing (Person) screen appears where you can view the effective pricing of the price item assigned to the customer.
Price Item Description	<ol style="list-style-type: none"> a. Click the Price Item Description option from the Effective Pricing Search sub menu. A message appears prompting you to enter the price item description, as shown in the following figure:

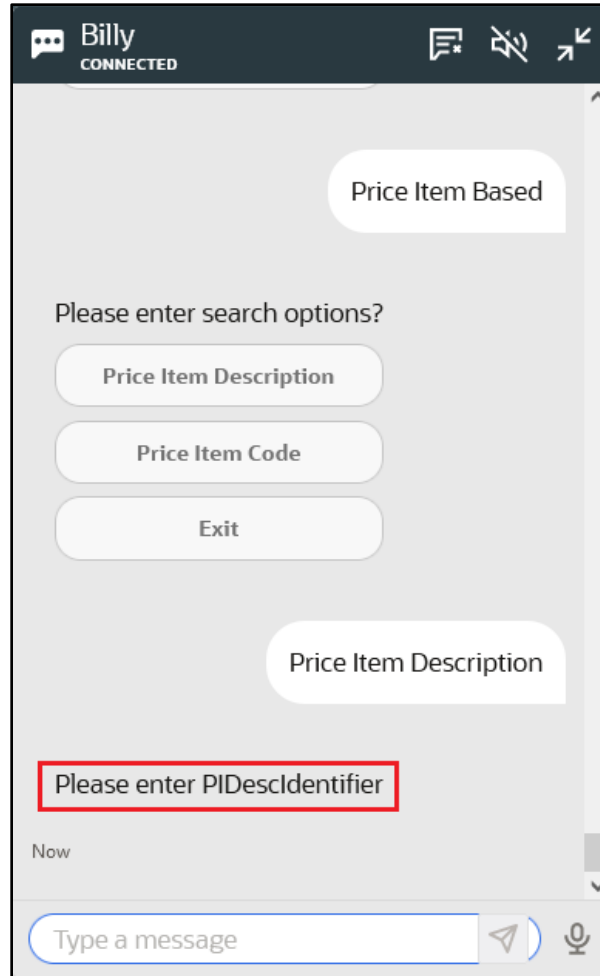


Figure 52: Message Prompt

10. Either manually type the price item description or use the **Speech to Text** facility to enter the price item description, as shown in the following figure:

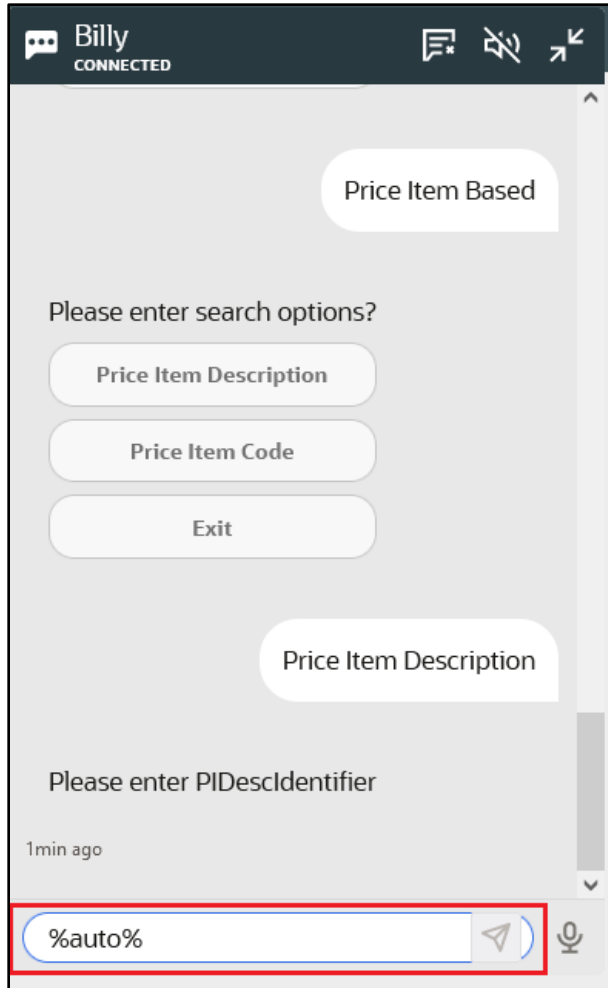


Figure 53: Type Message

11. Click the **Send Message** (📧) icon or press **Enter**. The **Pricing (Person)** screen appears where you can view the effective pricing of the price items (that meet the search criteria) assigned to the customer.

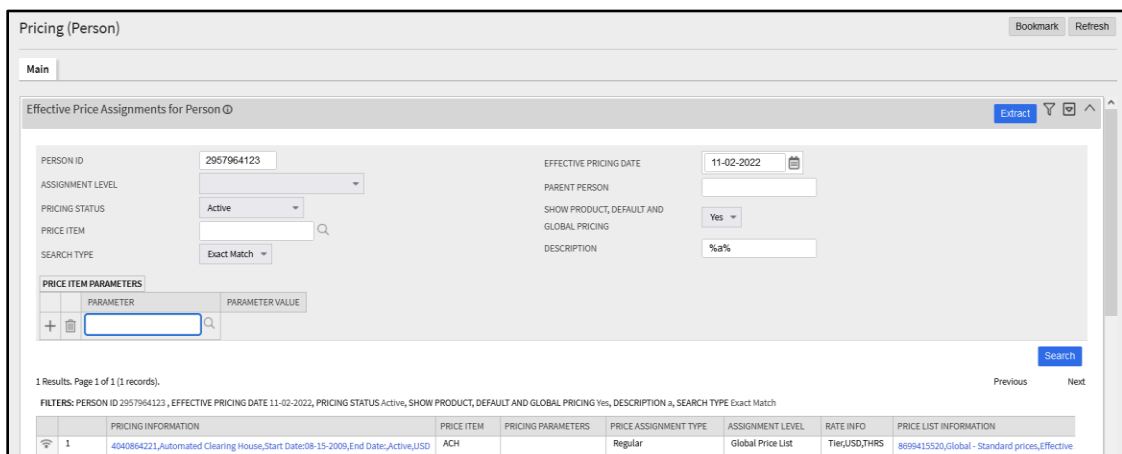


Figure 54: Pricing (Person) Screen

5.2 Viewing the Agreed Pricing of a Customer

To view the agreed pricing of a customer:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

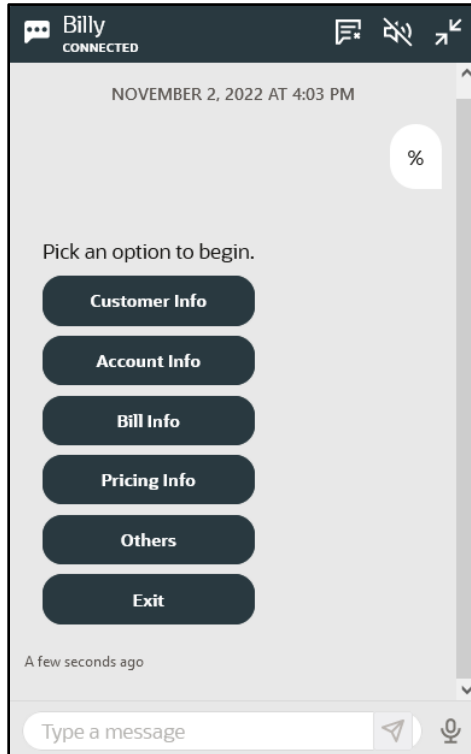


Figure 55: Main Menu

3. Click the **Pricing Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

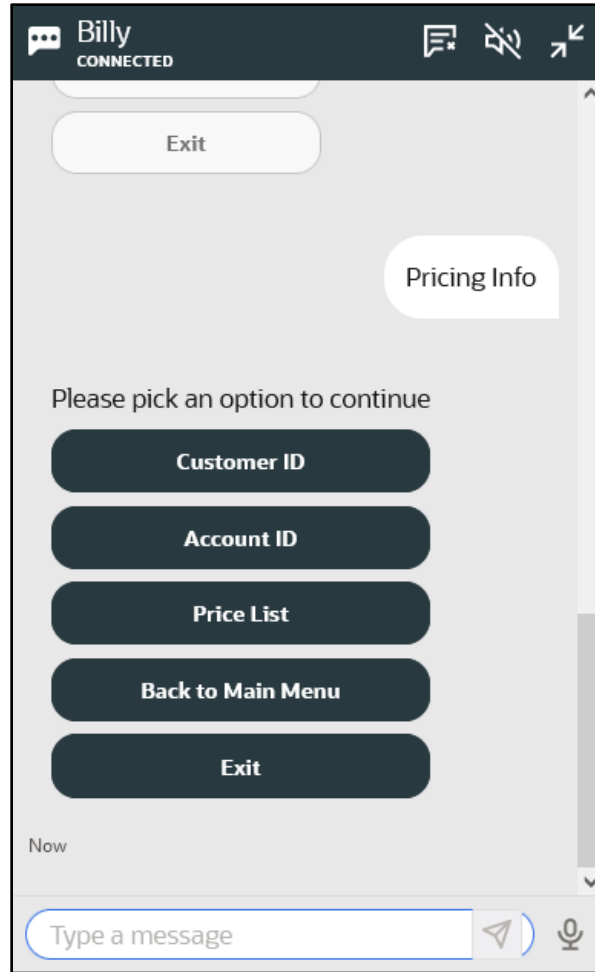


Figure 56: Pricing Info Sub Menu

4. Click the **Customer ID** option from the **Pricing Info** sub menu. A message appears prompting you to enter the customer ID, as shown in the following figure:

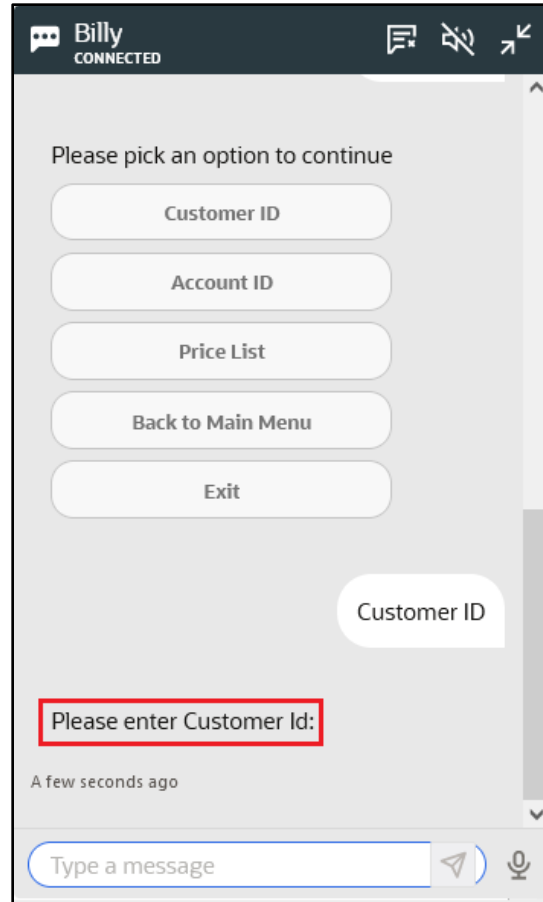


Figure 57: Message Prompt

5. Either manually type the customer ID or use the **Speech to Text** facility to enter the customer ID, as shown in the following figure:

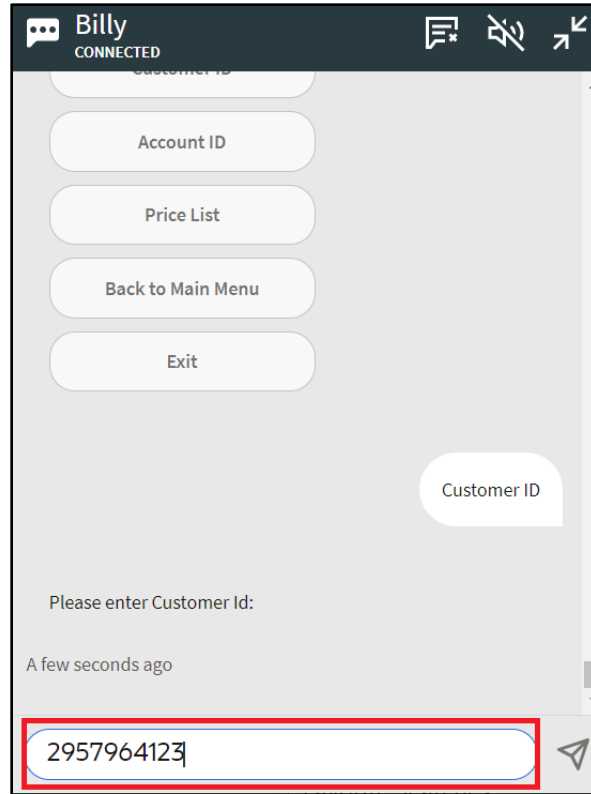


Figure 58: Type Message

6. Click the **Send Message** (📧) icon or press **Enter**. The **Chatbot** window appears with a set of options, as shown in the following figure:

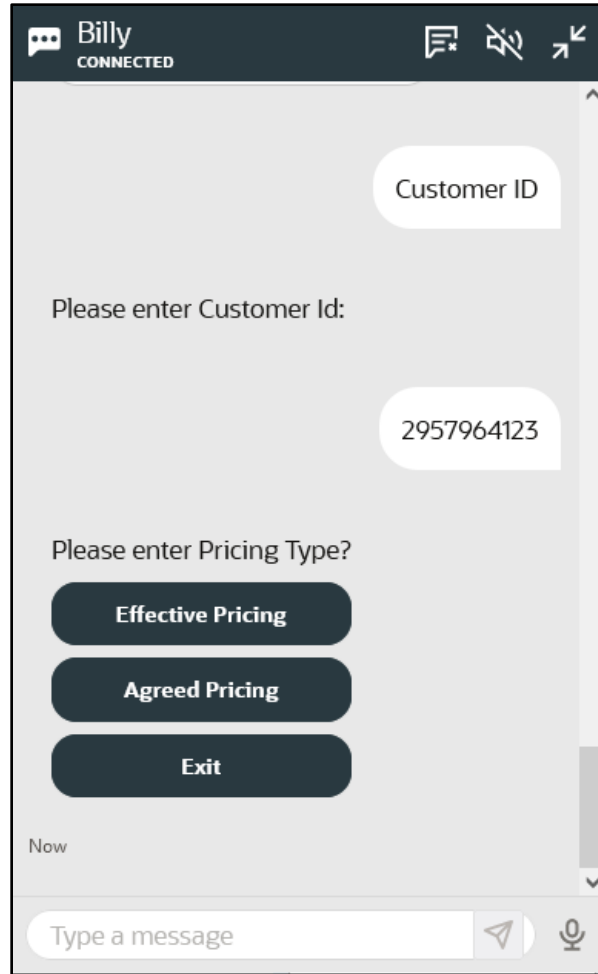


Figure 59: Pricing Type Sub Menu

7. Click the **Agreed Pricing** option from the **Pricing Type** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

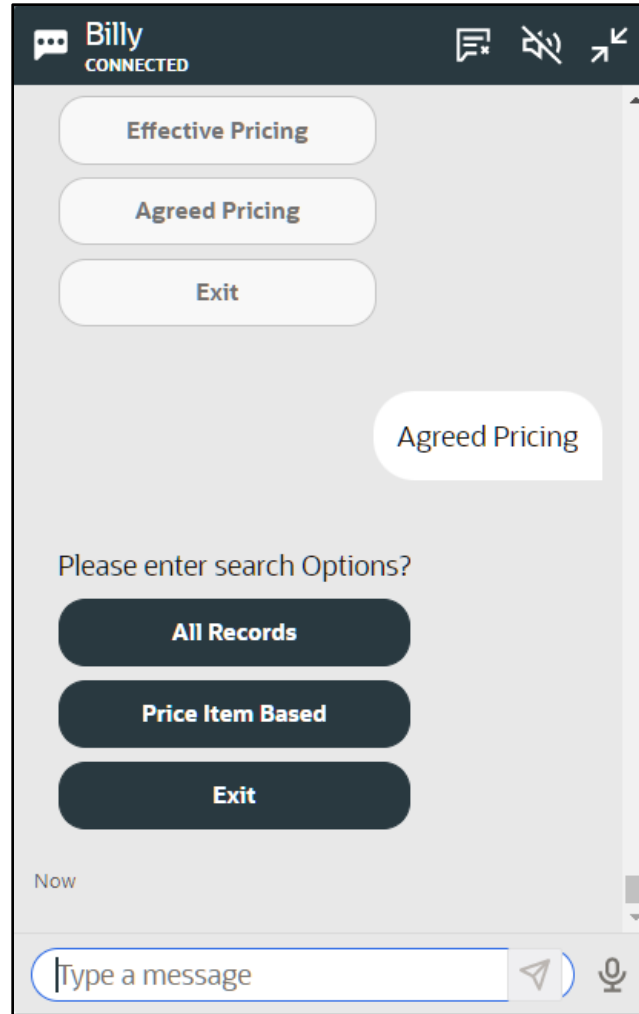


Figure 60: Agreed Pricing Sub Menu

8. Do either of the following:

If you want to view...	Then...
All agreed pricing of a customer	a. Click the All Records option from the Agreed Pricing sub menu. The Pricing (Person) screen appears where you can view all agreed pricing of the customer.
Agreed pricing of a particular price item or price item bundle assigned to a customer	b. Click the Price Item Based option from the Agreed Pricing sub menu. The Chatbot window appears with a set of options, as shown in the following figure:

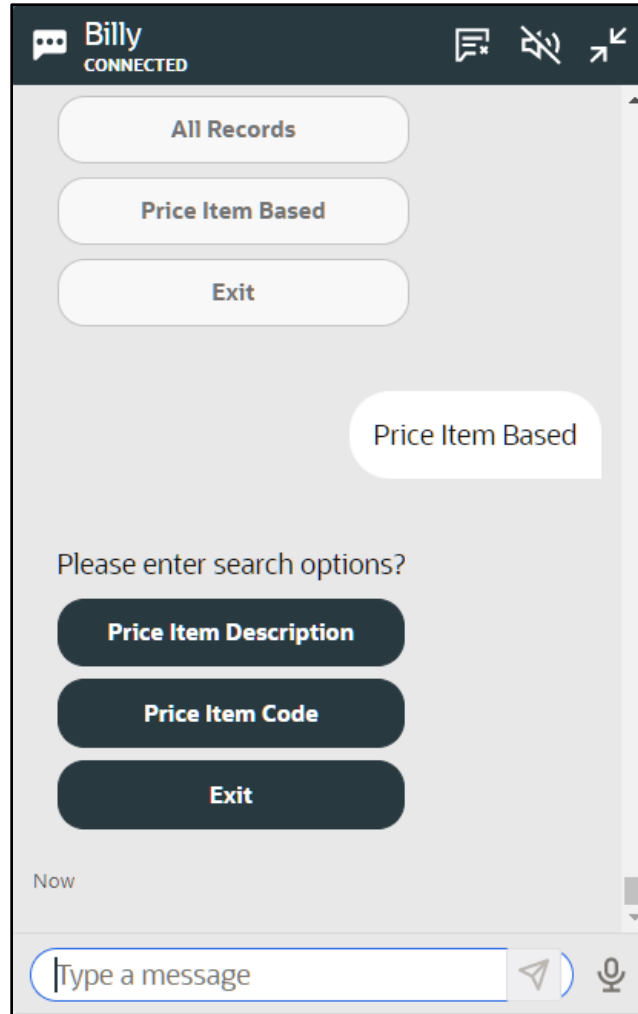


Figure 61: Agreed Pricing Search Sub Menu

9. Do either of the following:

If you want to search using...	Then...
Price Item Code	a. Click the Price Item Code option from the Agreed Pricing Search sub menu. A message appears prompting you to enter the price item code. b. Either manually type the price item code or use the Speech to Text facility to enter the price item code. c. Click the Send Message (📩) icon or press Enter . The Pricing (Person) screen appears where you can view the agreed pricing of the price item assigned to the customer.
Price Item Description	a. Click the Price Item Description option from the Agreed Pricing Search sub menu. A message appears prompting you to enter the price item description, as shown in the following figure:

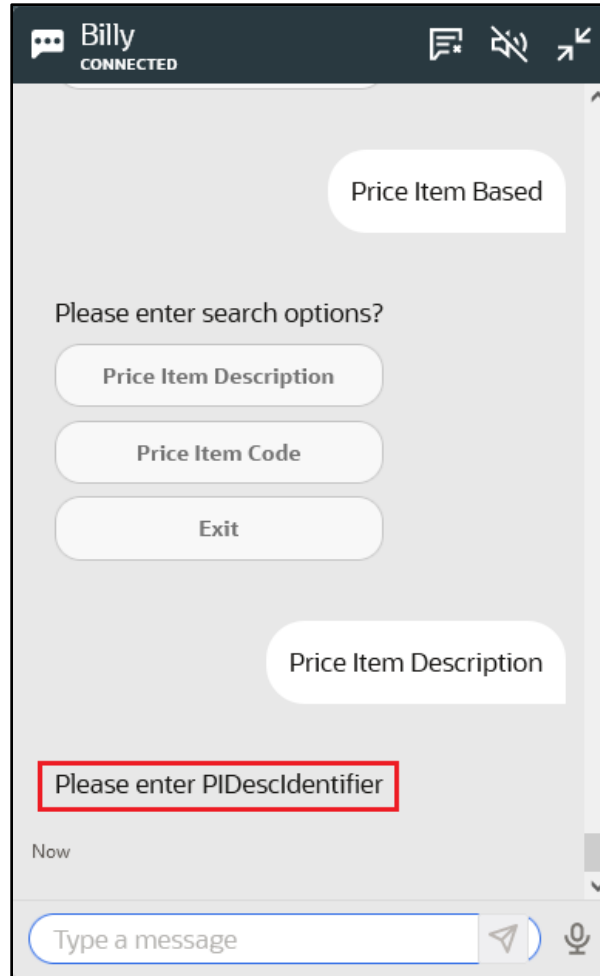


Figure 62: Message Prompt

10. Either manually type the price item description or use the **Speech to Text** facility to enter the price item description, as shown in the following figure:

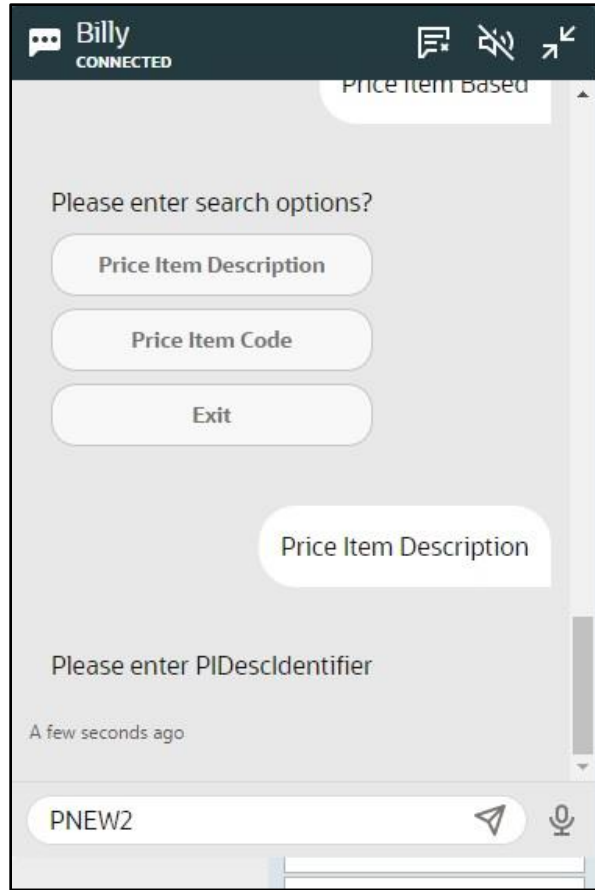


Figure 63: Type Message

11. Click the **Send Message** (📤) icon or press **Enter**. The **Pricing (Person)** screen appears where you can view the agreed pricing of the price item assigned to the customer.

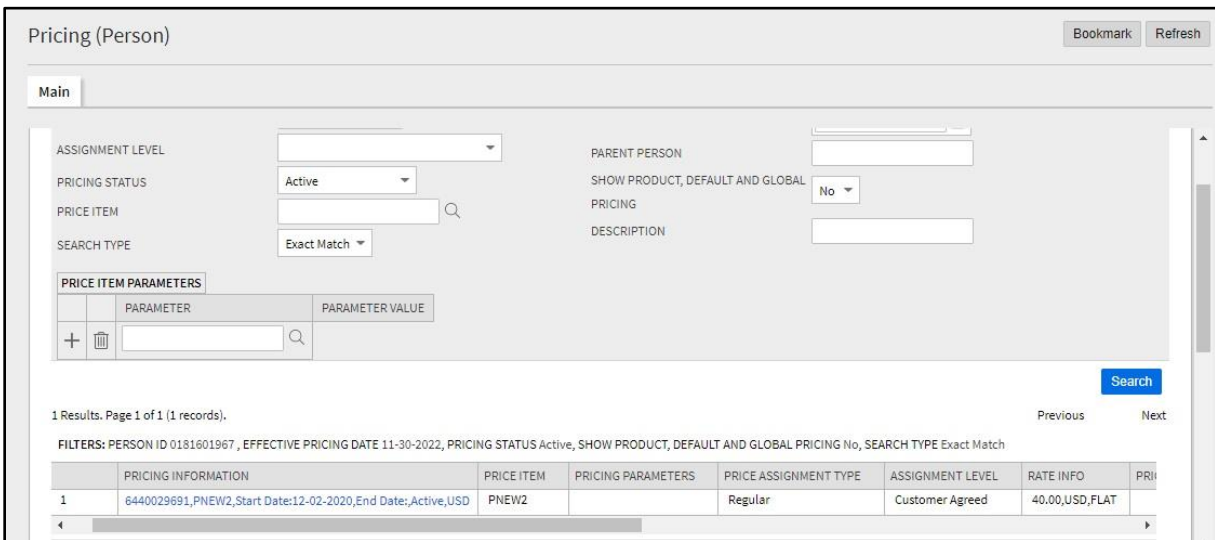


Figure 64: Pricing (Person) Screen

5.3 Viewing the Effective Pricing of an Account

To view the effective pricing of an account:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

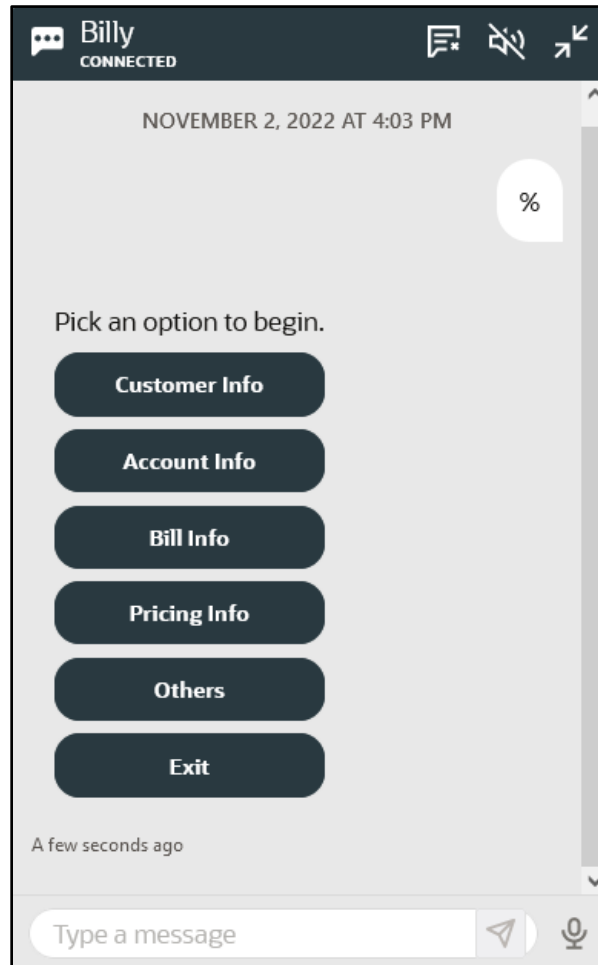


Figure 65: Main Menu

3. Click the **Pricing Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

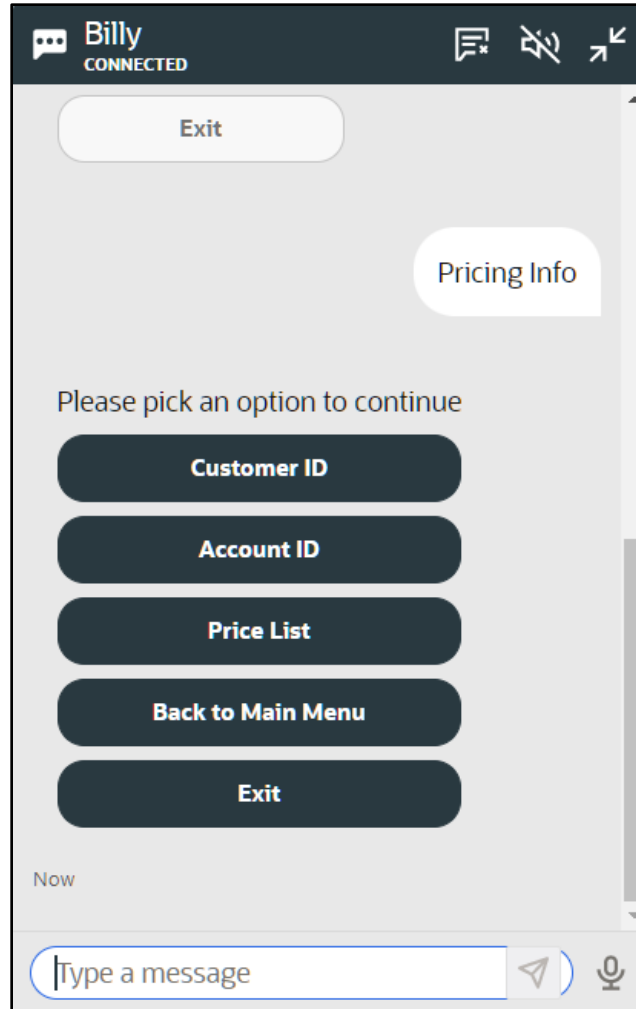


Figure 66: Pricing Info Sub Menu

4. Click the **Account ID** option from the **Pricing Info** sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:

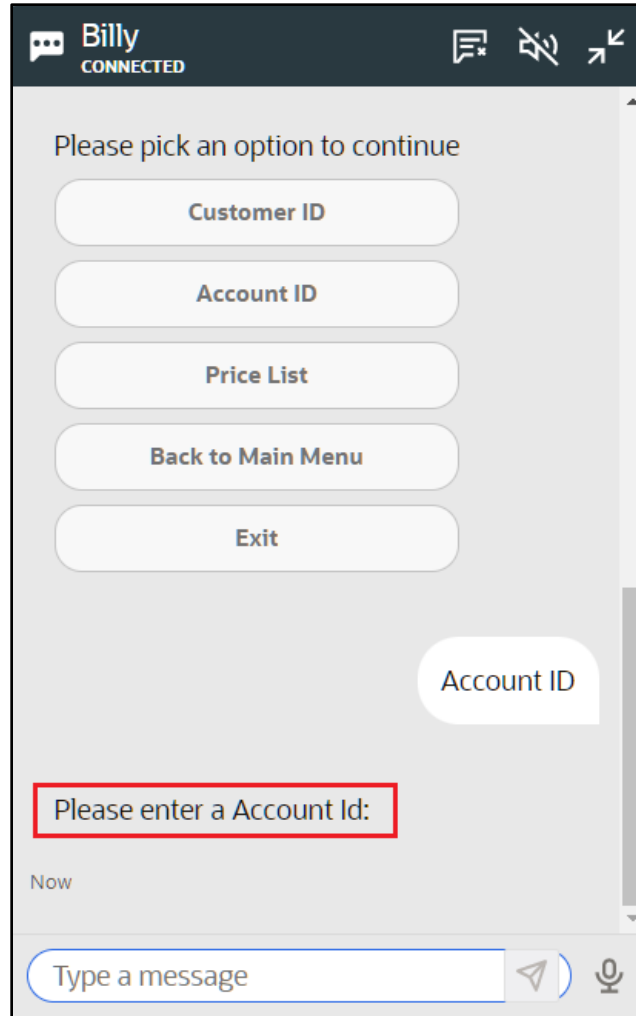


Figure 67: Message Prompt

5. Either manually type the account ID or use the **Speech to Text** facility to enter the account ID, as shown in the following figure:

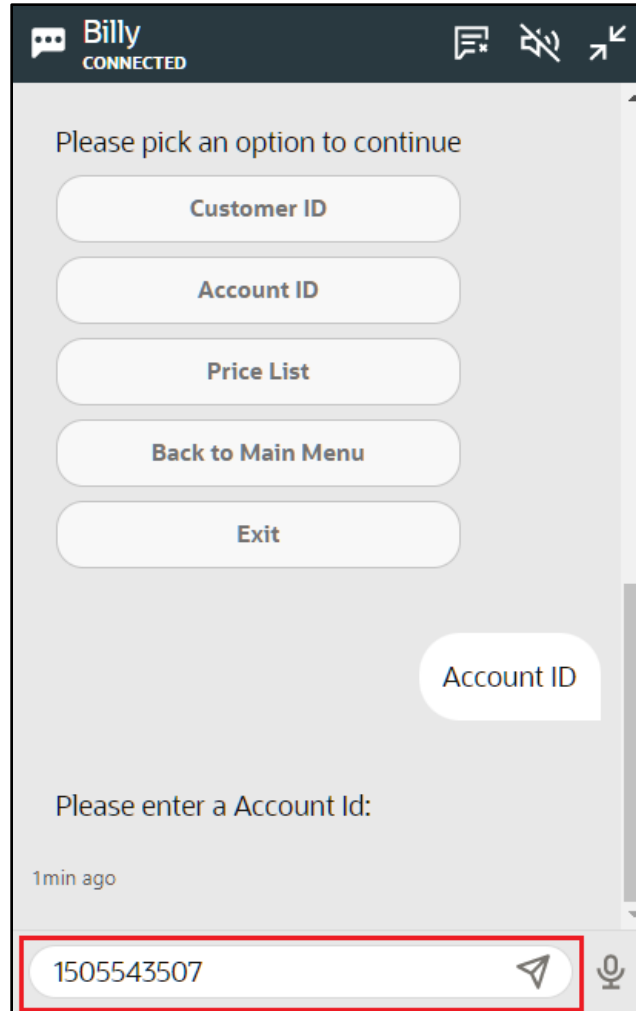


Figure 68: Type Message

6. Click the **Send Message** (📧) icon or press **Enter**. The **Chatbot** window appears with a set of options, as shown in the following figure:

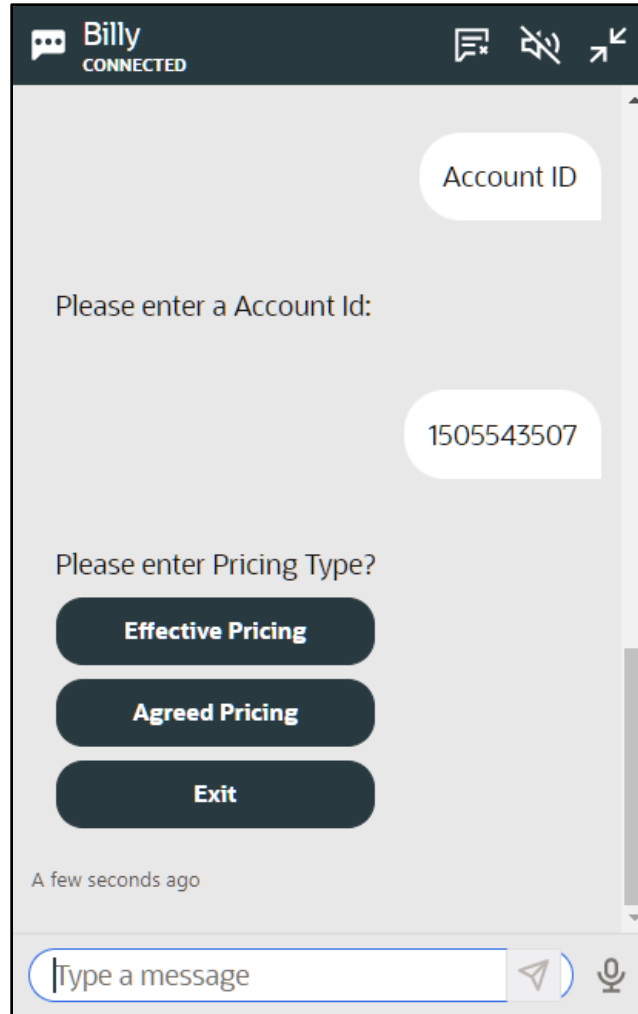


Figure 69: Pricing Type Sub Menu

7. Click the **Effective Pricing** option from the **Pricing Type** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

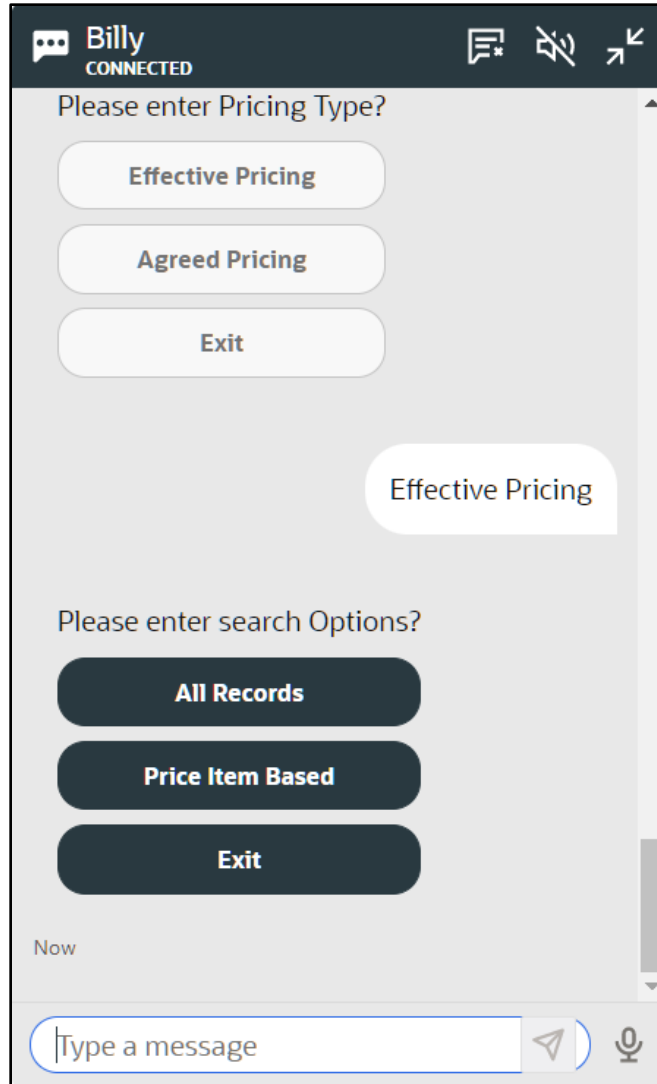


Figure 70: Effective Pricing Sub Menu

8. Do either of the following:

If you want to view...	Then...
All effective pricing of an account	a. Click the All Records option from the Effective Pricing sub menu. The Pricing (Account) screen appears where you can view the effective pricing of all price items or price item bundles assigned to the account (either directly or through the customer hierarchy).
Effective pricing of a particular price item or price item bundle assigned to an account	a. Click the Price Item Based option from the Effective Pricing sub menu. The Chatbot window appears with a set of options, as shown in the following figure:

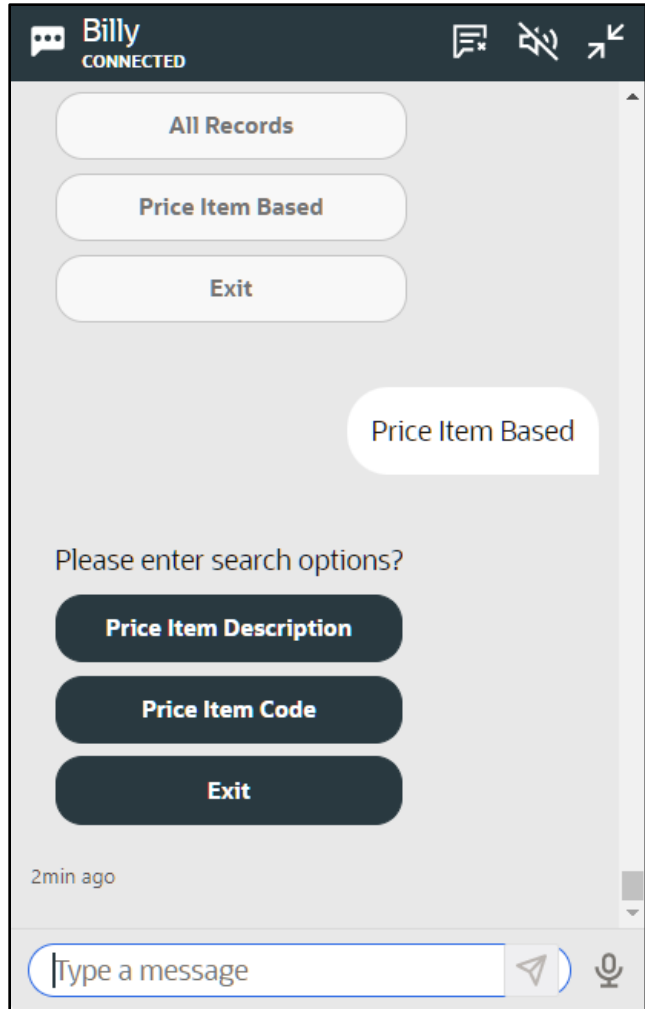


Figure 71: Effective Pricing Search Sub Menu

9. Do either of the following:

If you want to search using...	Then...
Price Item Code	a. Click the Price Item Code option from the Effective Pricing Search sub menu. A message appears prompting you to enter the price item code. b. Either manually type the price item code or use the Speech to Text facility to enter the price item code. c. Click the Send Message (📩) icon or press Enter . The Pricing (Account) screen appears where you can view the effective pricing of the price item assigned to the account.
Price Item Description	a. Click the Price Item Description option from the Effective Pricing Search sub menu. A message appears prompting you to enter the price item description, as shown in the following figure:

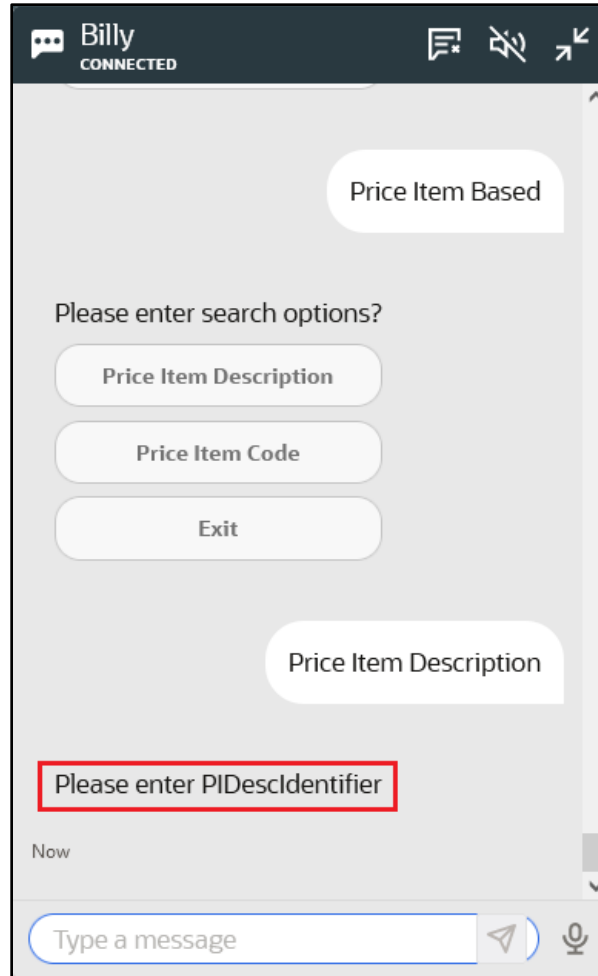


Figure 72: Message Prompt

10. Either manually type the price item description or use the **Speech to Text** facility to enter the price item description, as shown in the following figure:

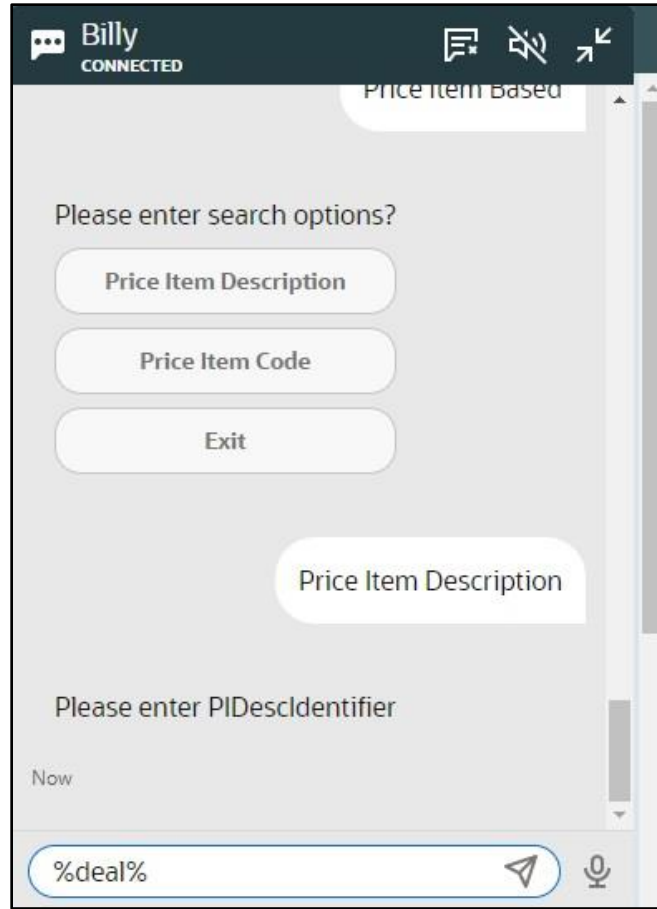


Figure 73: Type Message

11. Click the **Send Message** (📤) icon or press **Enter**. The **Pricing (Account)** screen appears where you can view the effective pricing of the price items (that meet the search criteria) assigned to the account.

Pricing (Account) Bookmark Refresh

Main

Effective Price Assignments for Account ① Extract 🔍 📧 ^

7 Results. Page 1 of 1 (7 records). Previous Next

Expand Filters

FILTERS: ACCOUNT ID 7048377292 , EFFECTIVE PRICING DATE 11-30-2022, PRICING STATUS Active, SHOW PRODUCT, DEFAULT AND GLOBAL PRICING No, SEARCH TYPE Exact Match

	PRICING INFORMATION	PRICE ITEM	PRICING PARAMETERS	PRICE ASSIGNMENT TYPE	ASSIGNMENT LEVEL	RATE INFI
1	1170018419,Deal Approval 7,Start Date:01-01-2015,End Date:Active,USD	DLAPPR7		Regular	Account Agreed	50.00 ^
2	3850018418,Deal Approval 6,Start Date:01-01-2010,End Date:Active,USD	DLAPPR6		Regular	Customer Agreed	400.0
3	9090018416,Deal Approval 4,Start Date:01-01-2010,End Date:Active,USD	DLAPPR4		Regular	Account Price List	15.00
4	9090018417,Deal Approval 5,Start Date:01-01-2010,End Date:Active,USD	DLAPPR5		Regular	Account Price List	200.0
5	4230018012,Deal Approval 1,Start Date:01-01-2010,End Date:Active,USD	DLAPPR1		Regular	Customer Price List	100.0
6	4230018013,Deal Approval 2,Start Date:01-01-2010,End Date:Active,USD	DLAPPR2		Regular	Customer Price List	200.0 v

Figure 74: Pricing (Account) Screen

5.4 Viewing the Agreed Pricing of an Account

To view the agreed pricing of an account:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

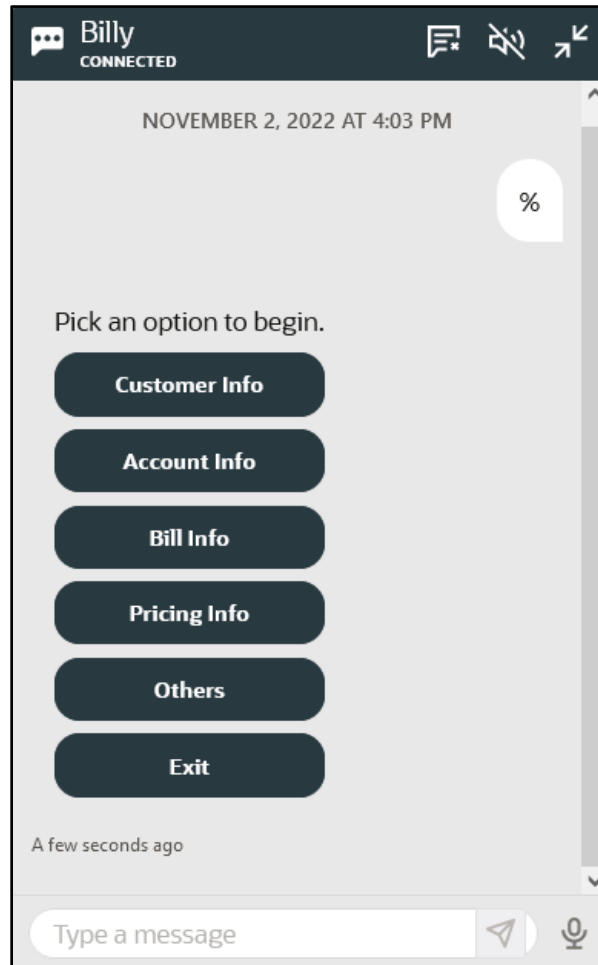


Figure 75: Main Menu

3. Click the **Pricing Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

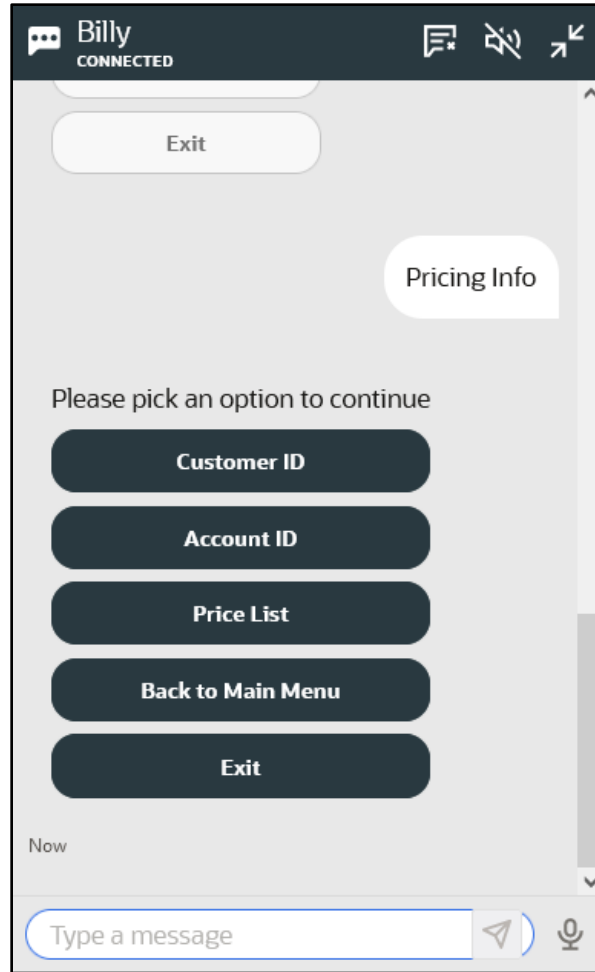


Figure 76: Pricing Info Sub Menu

4. Click the **Account ID** option from the **Pricing Info** sub menu. A message appears prompting you to enter the account ID, as shown in the following figure:

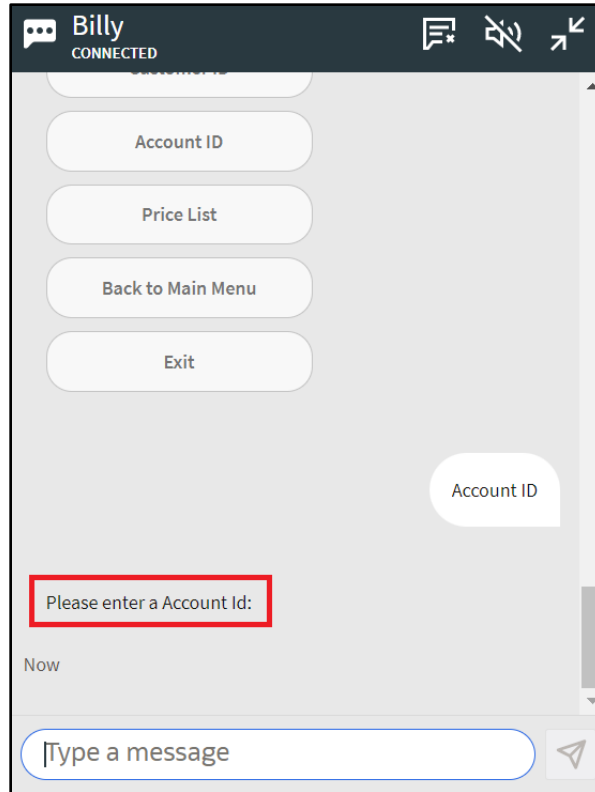


Figure 77: Message Prompt

5. Either manually type the account ID or use the **Speech to Text** facility to enter the account ID, as shown in the following figure:

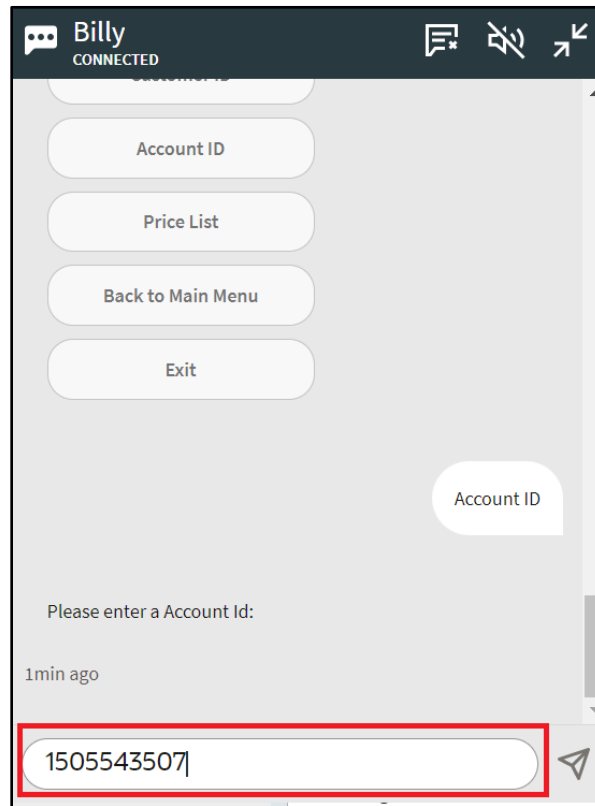


Figure 78: Type Message

6. Click the **Send Message** (📤) icon or press **Enter**. The **Chatbot** window appears with a set of options, as shown in the following figure:

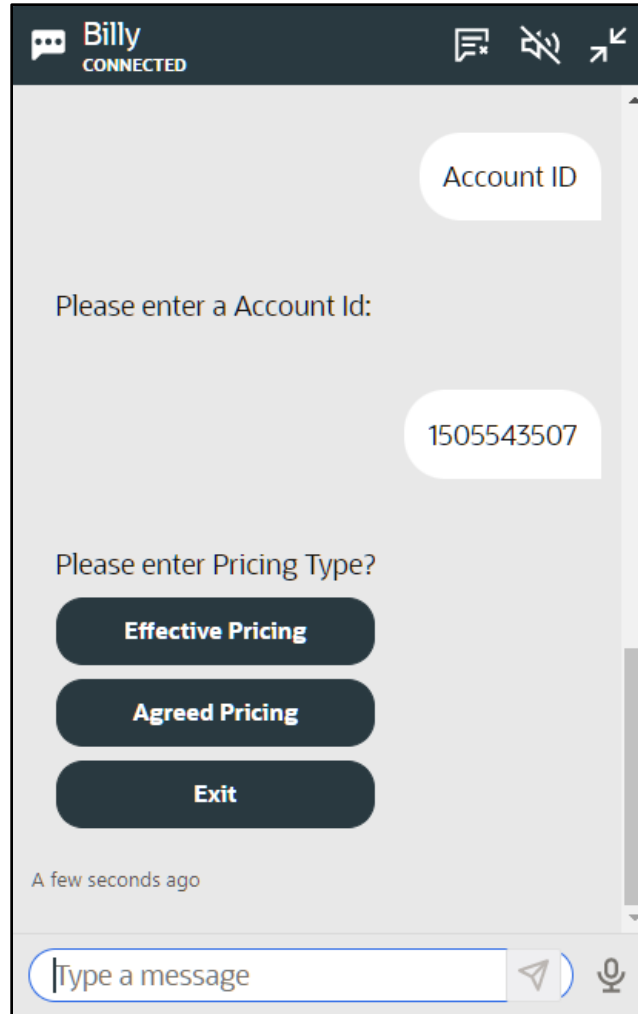


Figure 79: Pricing Type Sub Menu

7. Click the **Agreed Pricing** option from the **Pricing Type** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

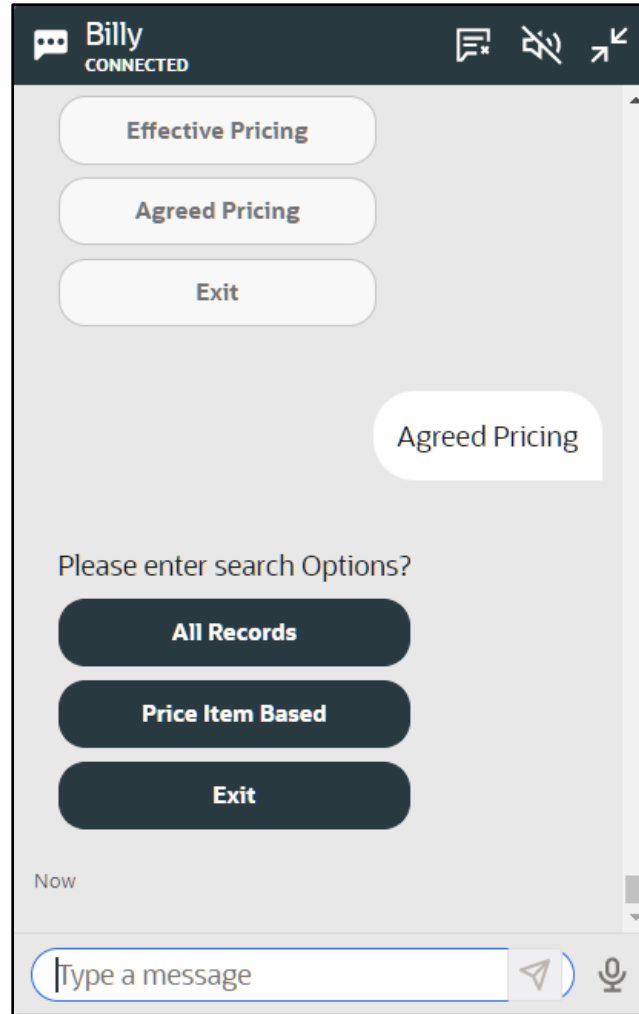


Figure 80: Agreed Pricing Sub Menu

8. Do either of the following:

If you want to view...	Then...
All agreed pricing of an account	a. Click the All Records option from the Agreed Pricing sub menu. The Pricing (Account) screen appears where you can view all agreed pricing of the account.
Agreed pricing of a particular price item or price item bundle assigned to an account	a. Click the Price Item Based option from the Agreed Pricing sub menu. The Chatbot window appears with a set of options, as shown in the following figure:

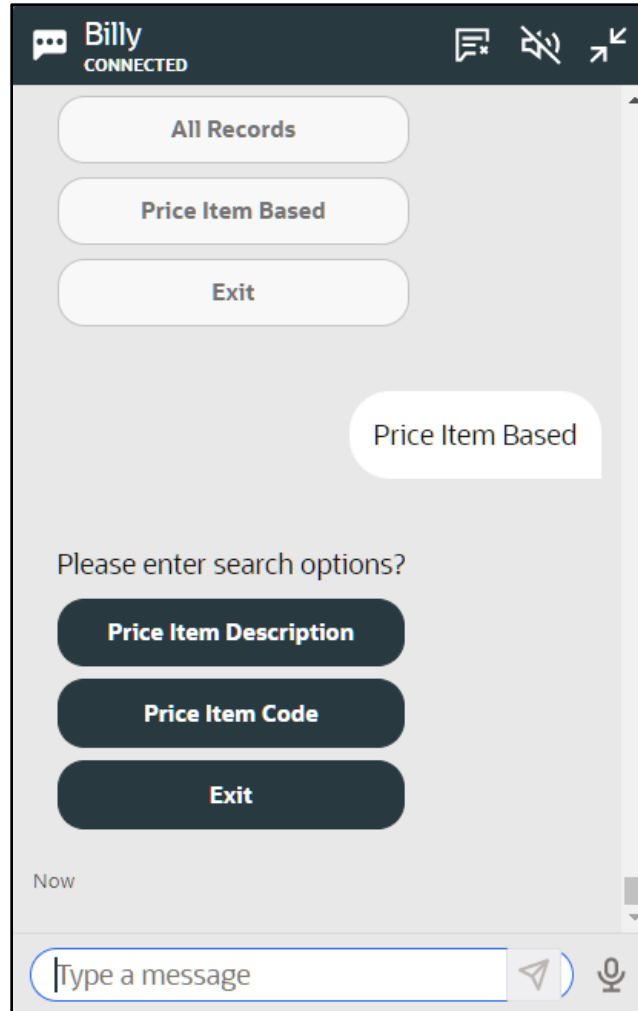



Figure 81: Agreed Pricing Search Sub Menu

9. Do either of the following:

If you want to search using...	Then...
Price Item Code	<ul style="list-style-type: none"> a. Click the Price Item Code option from the Agreed Pricing Search sub menu. A message appears prompting you to enter the price item code. b. Either manually type the price item code or use the Speech to Text facility to enter the price item code. c. Click the Send Message () icon or press Enter. The Pricing (Account) screen appears where you can view the agreed pricing of the price item assigned to the account.
Price Item Description	<ul style="list-style-type: none"> a. Click the Price Item Description option from the Agreed Pricing Search sub menu. A message appears prompting you to enter the price item description, as shown in the following figure:

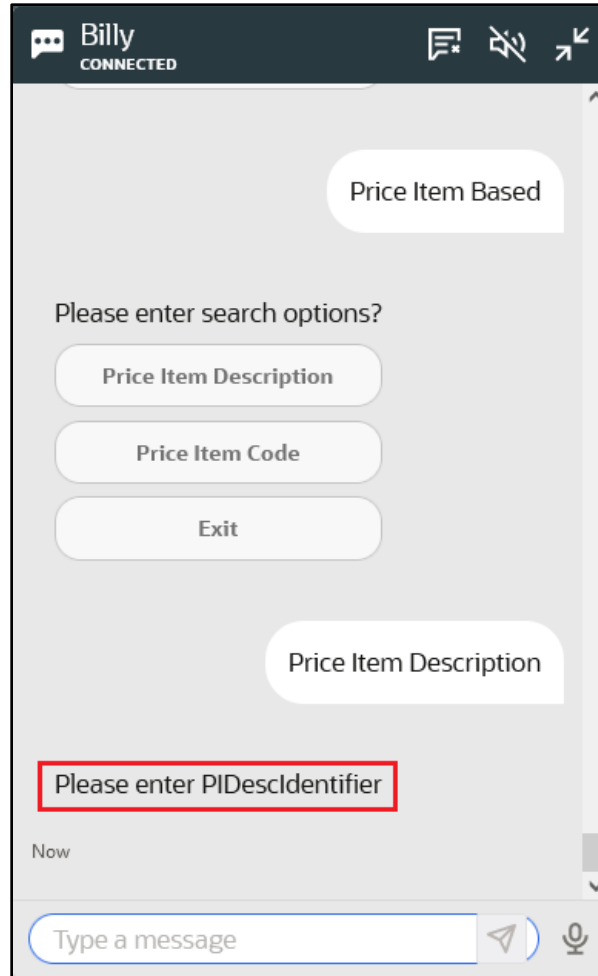


Figure 82: Message Prompt

10. Either manually type the price item description or use the **Speech to Text** facility to enter the price item description, as shown in the following figure:

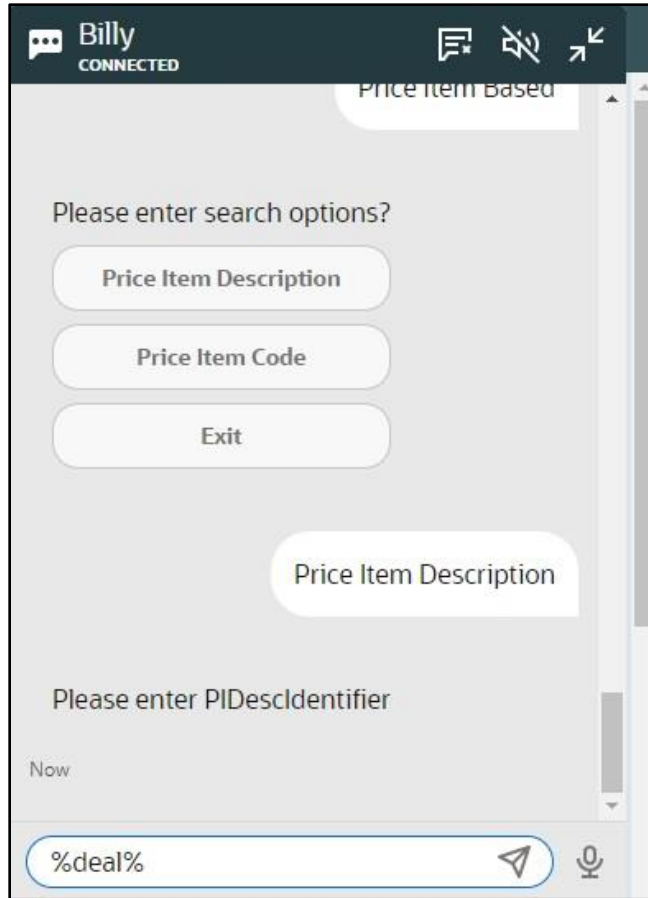


Figure 83: Type Message

11. Click the **Send Message** (📩) icon or press **Enter**. The **Pricing (Account)** screen appears where you can view the agreed pricing of the price items (that meet the search criteria) assigned to the account.

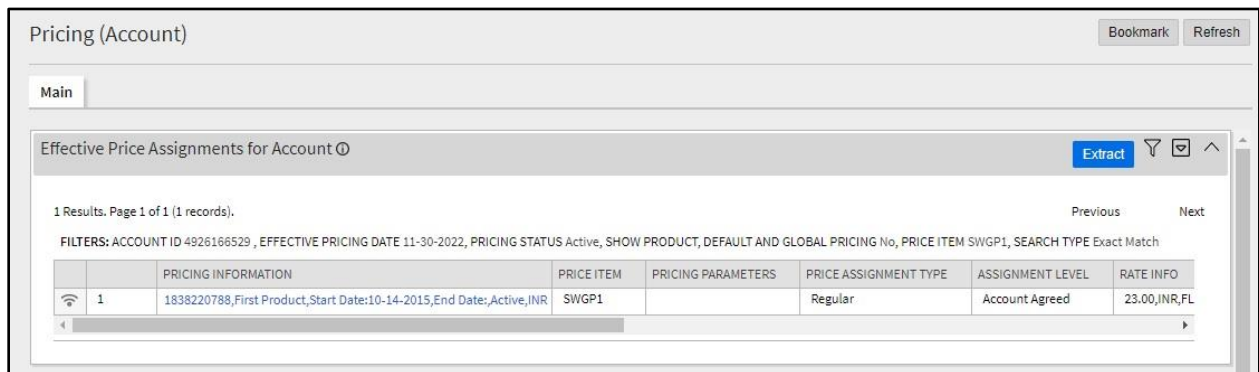


Figure 84: Pricing (Account) Screen

5.5 Viewing the Details of a Price List

To view the details of a price list:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

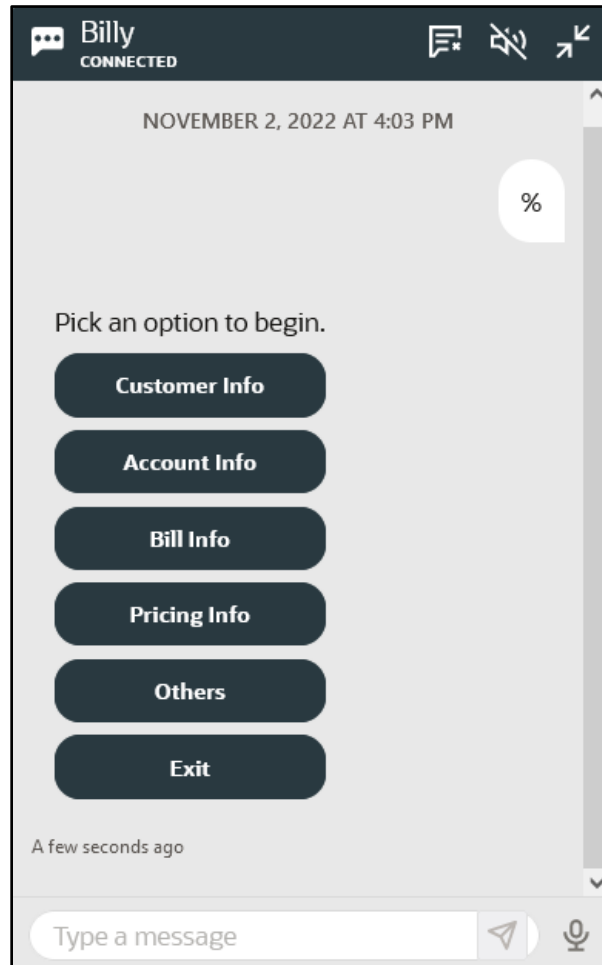


Figure 85: Main Menu

3. Click the **Pricing Info** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

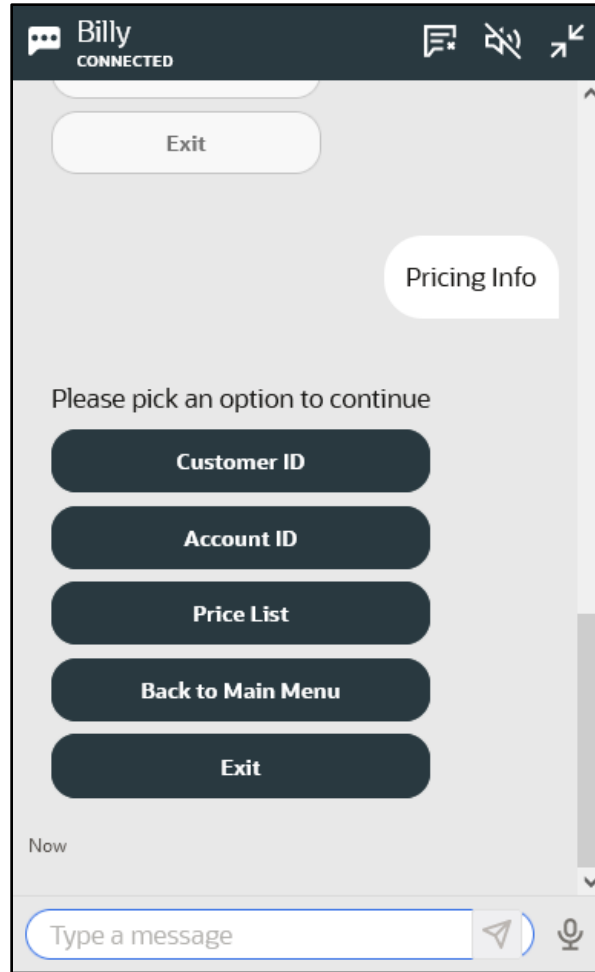


Figure 86: Pricing Info Sub Menu

4. Click the **Price List** option from the **Pricing Info** sub menu. A message appears prompting you to enter the price list description, as shown in the following figure:

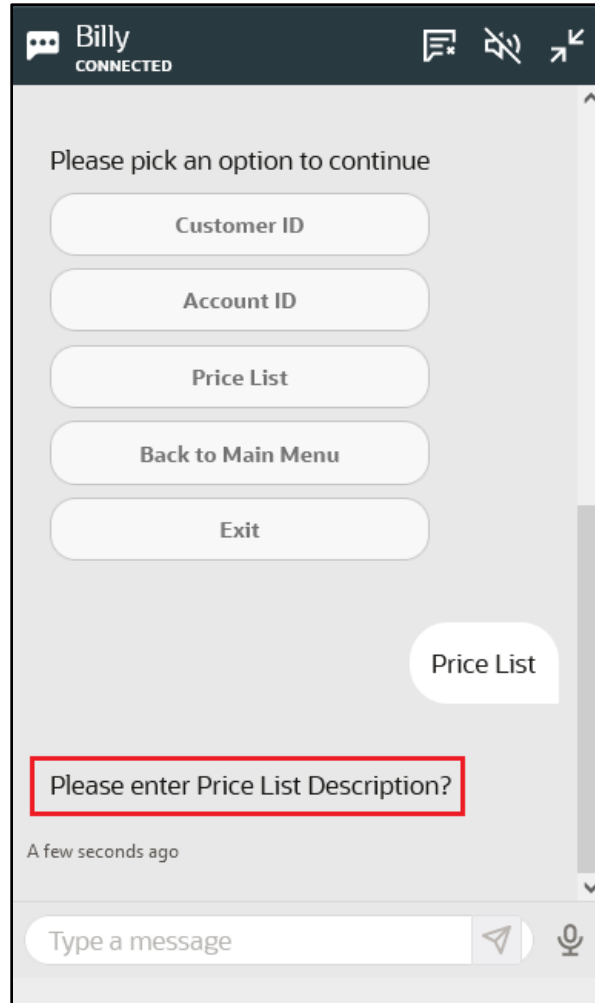


Figure 87: Message Prompt

5. Either manually type the price list description or use the **Speech to Text** facility to enter the price list description, as shown in the following figure:

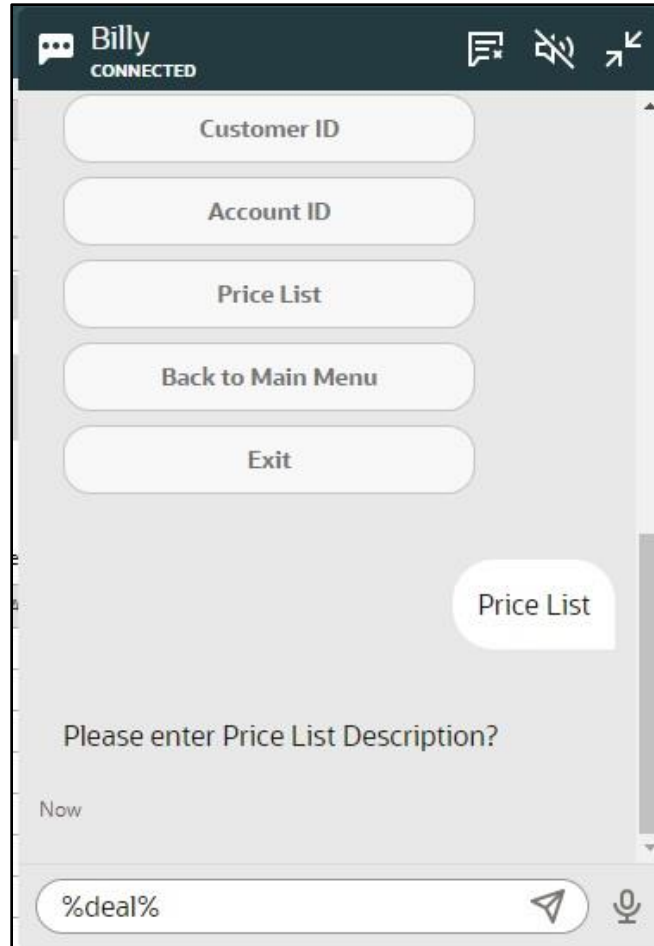


Figure 88: Type Message

- Click the **Send Message** (📄) icon or press **Enter**. The **Price List** screen appears with a list of price lists that meet the search criteria.

Price List Add Bookmark Refresh

Main

Search Price List 🔍

SEARCH BY Price List Details ▾

Expand Filters

FILTERS: PRICE LIST DESCRIPTION deal, PRICE LIST TYPE Standard

31 Results. Page 1 of 1 (31 records). Previous Next

	PRICE LIST INFORMATION	STATUS	EFFECTIVE START DATE	EFFECTIVE END DATE	AVAILABIL
1	0063727680,AN_DEAL_PL4,Effective Start Date:01-01-2019,Effective End Date:,Standard	Active	01-01-2019		
2	0108812981,Reshma Test Deal availability checked,Effective Start Date:05-20-2020,Effective End Date:,Standard	Active	05-20-2020		05-20-
3	0244104975,Deal_ParamPL,Effective Start Date:05-01-2020,Effective End Date:,Standard	Active	05-01-2020		05-01-
4	0837170913,DealPrerana,Effective Start Date:05-01-2020,Effective End Date:,Standard	Active	05-01-2020		05-01-
5	1490857657,DEAL_TEST_PL_KSA,Effective Start Date:04-13-2017,Effective End Date:,Standard	Active	04-13-2017		
6	1771933982,DEAL_TEST_PL_KSA1,Effective Start Date:04-13-2017,Effective End Date:,Standard	Active	04-13-2017		
7	2000907823,DEAL_PL_2000,Effective Start Date:01-01-2019,Effective End Date:,Standard	Active	01-01-2019		
8	2110934122,DEAL_PL3,Effective Start Date:01-01-2019,Effective End Date:,Standard	Active	01-01-2019		

Figure 89: Price List Screen

7. In the **Search Results** section, click the link in the **Price List Information** column corresponding to the price list whose details you want to view. The **Price List** screen appears with the details of the price list.

6. Miscellaneous Data

ORMB Chatbot enables you to interact with the application and quickly view the following:

- Last five job status of a particular batch
- Status of a DBMS scheduler job

6.1 Viewing the Status of a Batch Job

To view the status of a batch job:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

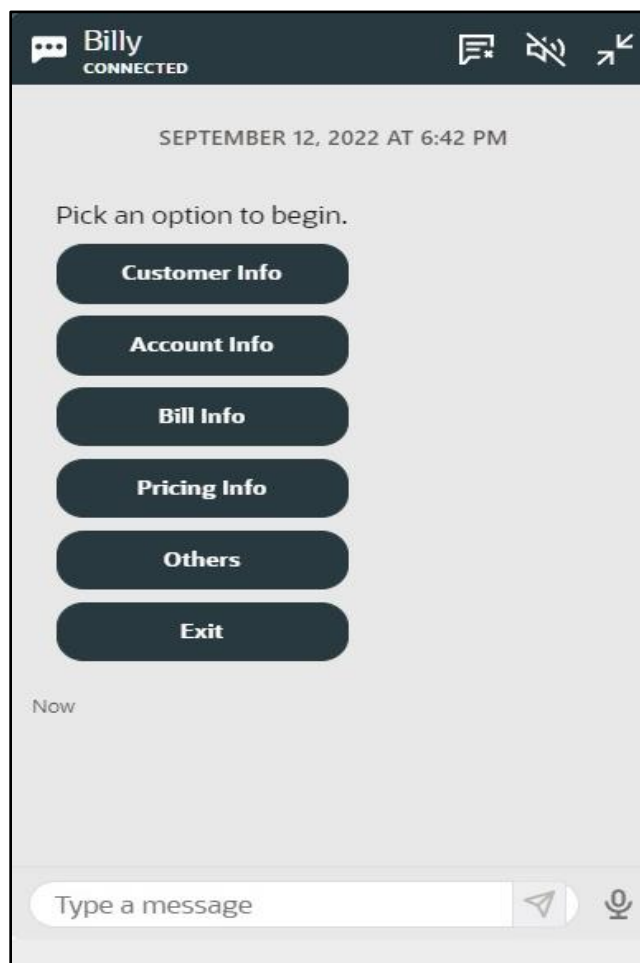


Figure 90: Main Menu

3. Click the **Others** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

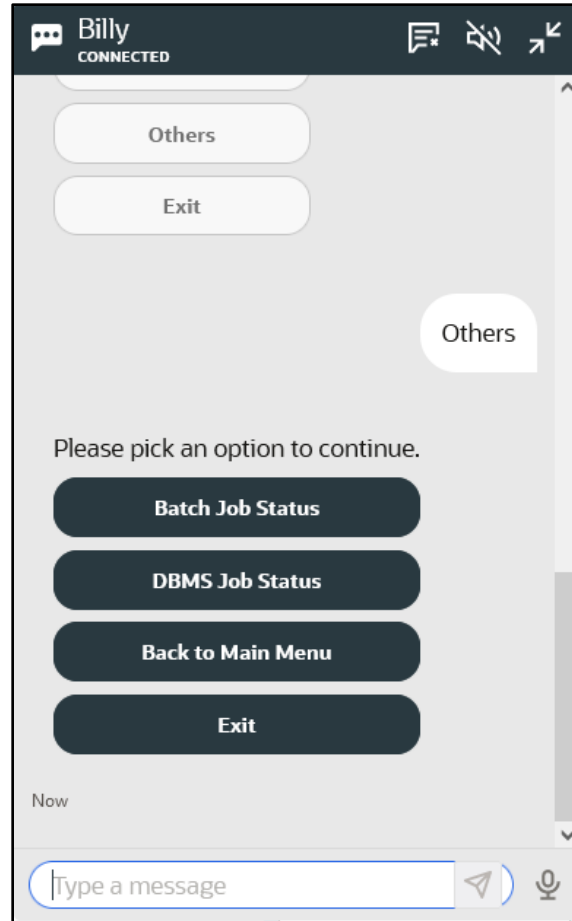


Figure 91: Others Sub Menu

4. Click the **Batch Job Status** option from the **Others** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

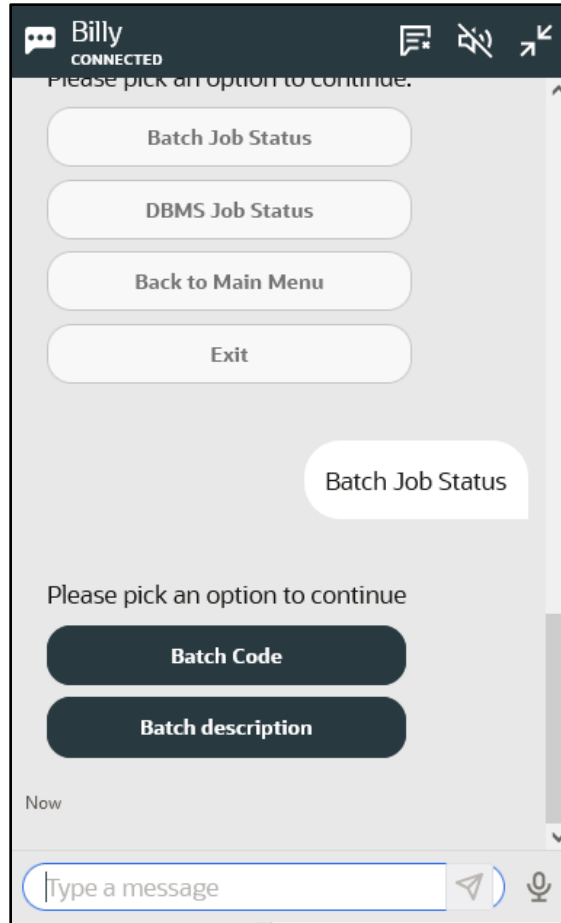


Figure 92: Batch Job Status Sub Menu

5. Do either of the following:

If you want to search using...	Then...
Batch Code	b. Click the Batch Code option from the Batch Job Status sub menu. A message appears prompting you to enter the batch code, as shown in the following figure:
Batch Description	c. Click the Batch Description option from the Batch Job Status sub menu. A message appears prompting you to enter the batch description.

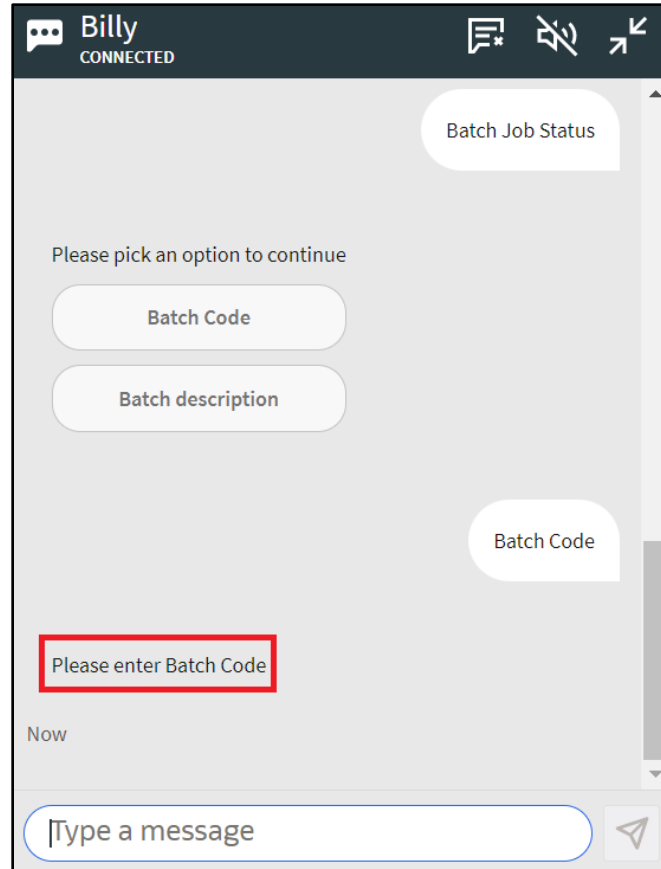


Figure 93: Message Prompt

6. Either manually type or use the **Speech to Text** facility to enter the batch code or batch description depending on the option selected, as shown in the following figure:

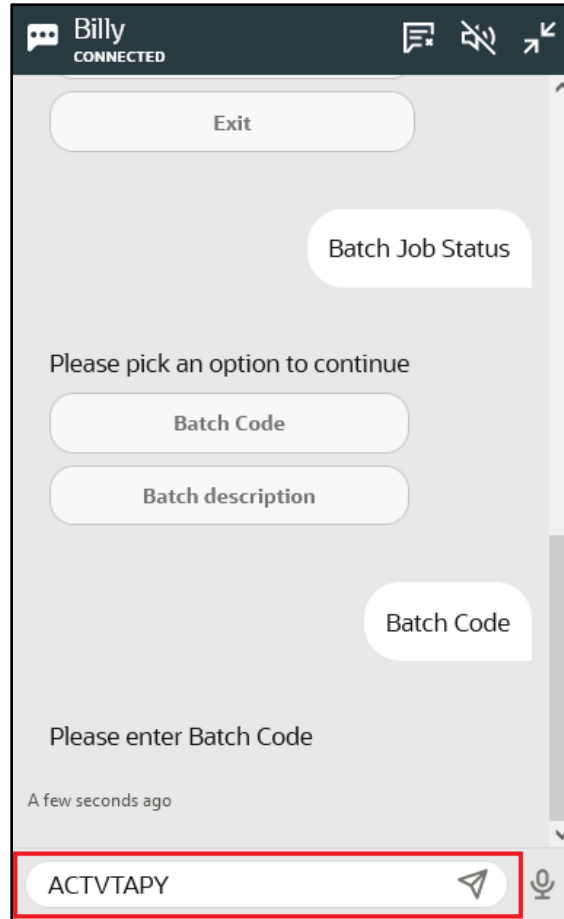



Figure 94: Type Message

7. Click the **Send Message** () icon or press **Enter**. You can view the details of last five jobs of the specified batch in the **Chatbot** window, as shown in the following figure:

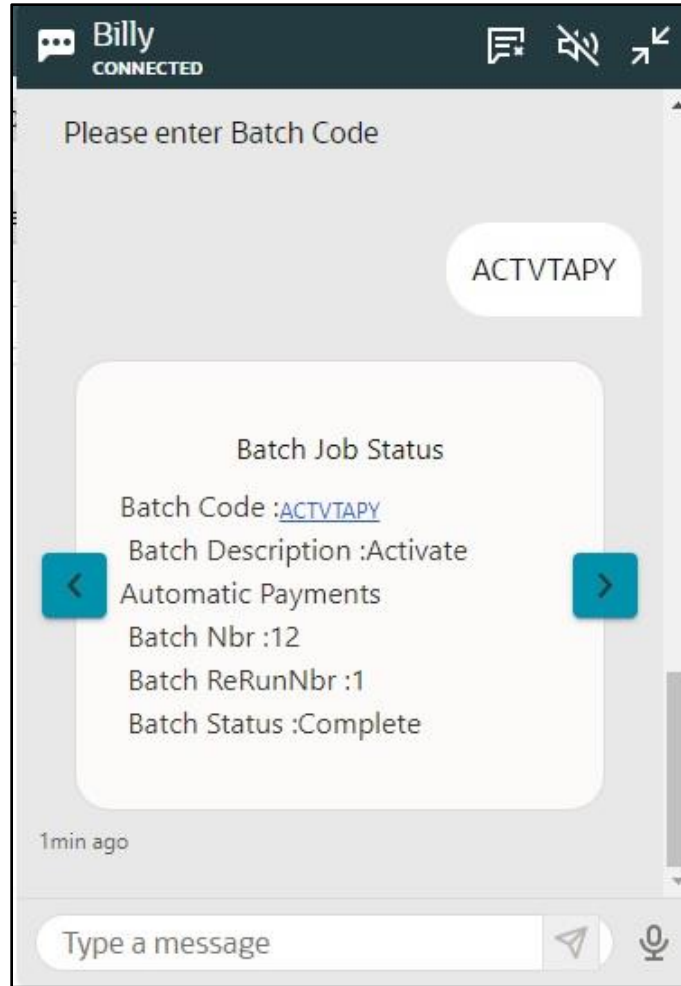




Figure 95: Batch Job Status

You can navigate between the batch jobs by clicking the **Next** () and **Previous** () icons in the **Chatbot** window. The following details of a batch job are listed in the **Chatbot** window:

Field Name	Field Description
Batch Code	Indicates the batch whose job details are displayed.
Batch Description	Displays the description of the batch.
Batch Nbr	Displays the batch job number.
Batch ReRunNbr	Displays the batch job rerun number.
Batch Status	Indicates the status of the batch job. The valid values are: <ul style="list-style-type: none"> • Canceled • Ended • Pending Cancel • Pending • Started

6.2 Viewing the Status of a DBMS Scheduler Job

To view the status of a DBMS scheduler job:

1. Login to Oracle Revenue Management and Billing Version 4.0.0.0.0.
2. Click the **Chatbot** (🗨️) icon in the lower-right corner of the screen. The **Chatbot** window appears with a set of options, as shown in the following figure:

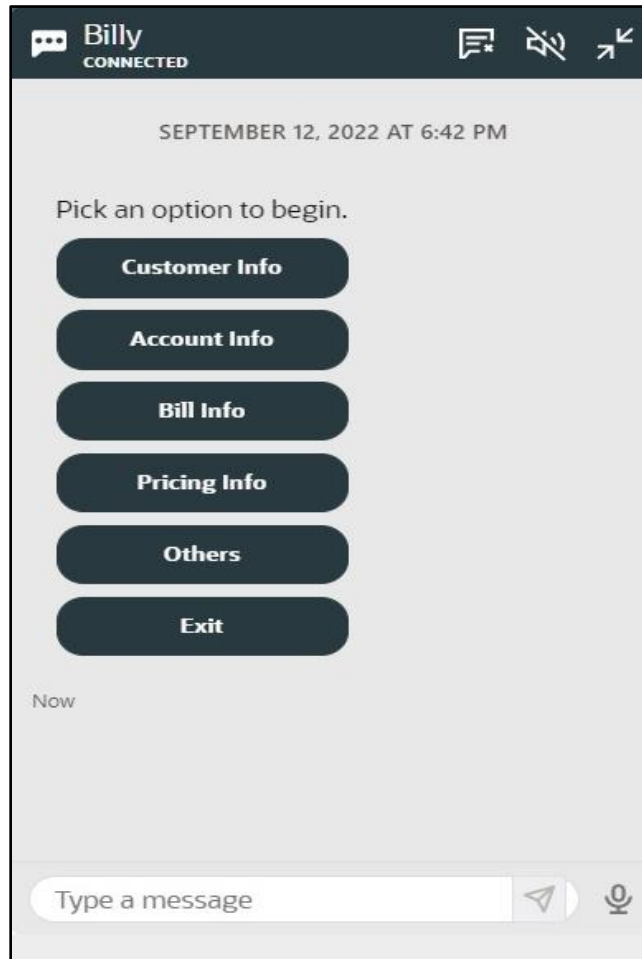


Figure 96: Main Menu

3. Click the **Others** option from the Main Menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

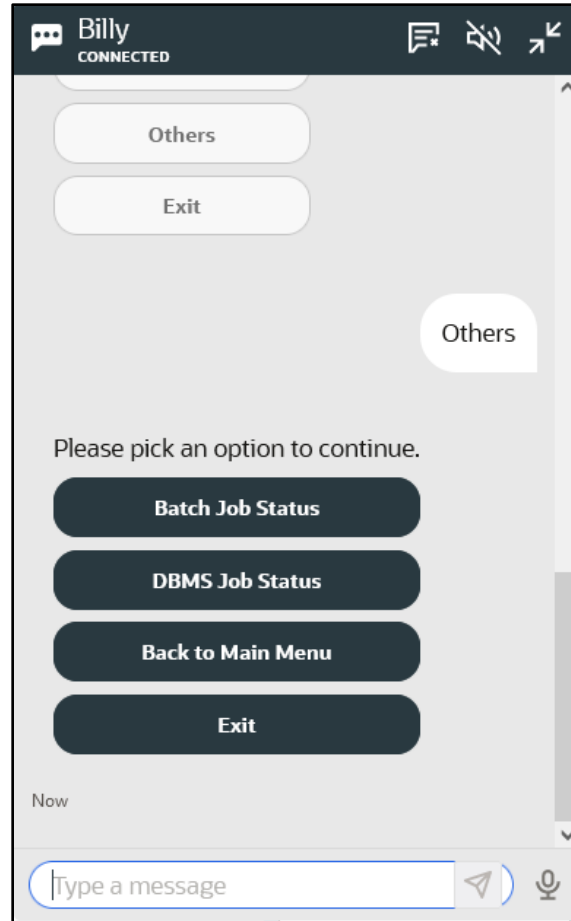


Figure 97: Others Sub Menu

4. Click the **DBMS Job Status** option from the **Others** sub menu. The **Chatbot** window appears with a set of options, as shown in the following figure:

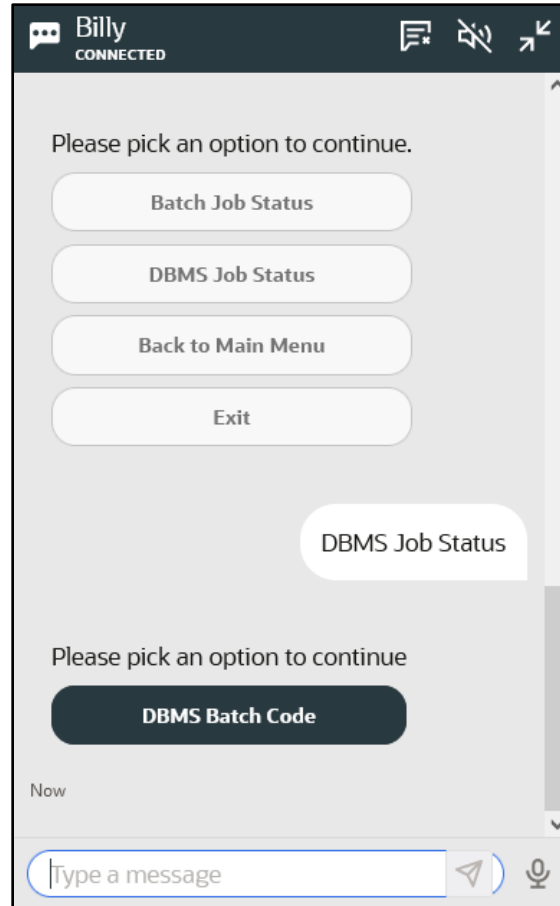


Figure 98: DBMS Job Status Sub Menu

5. Click the **DBMS Batch Code** option from the **DBMS Job Status** sub menu. A message appears prompting you to enter the DBMS scheduler job name, as shown in the following figure:

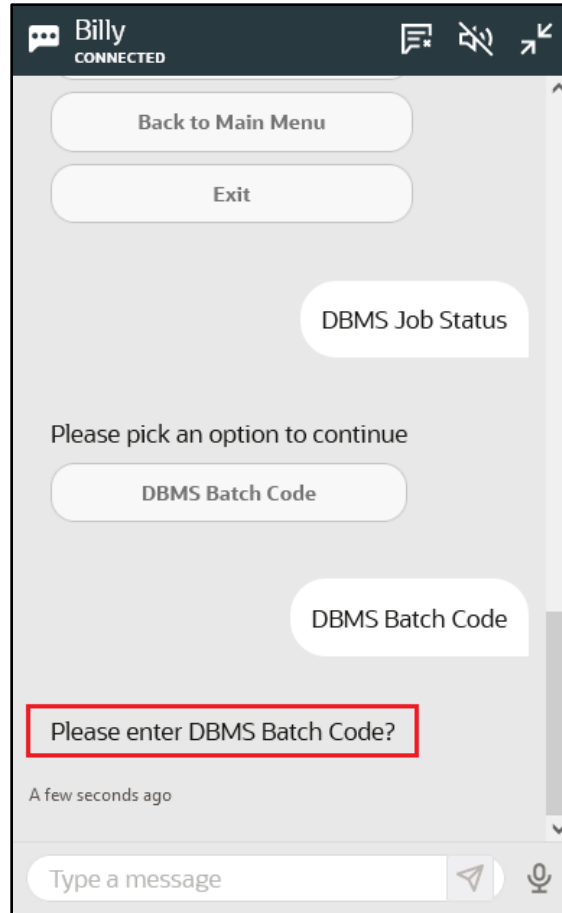


Figure 99: Message Prompt

6. Either manually type the DBMS scheduler job name or use the **Speech to Text** facility to enter the DBMS scheduler job name, as shown in the following figure:

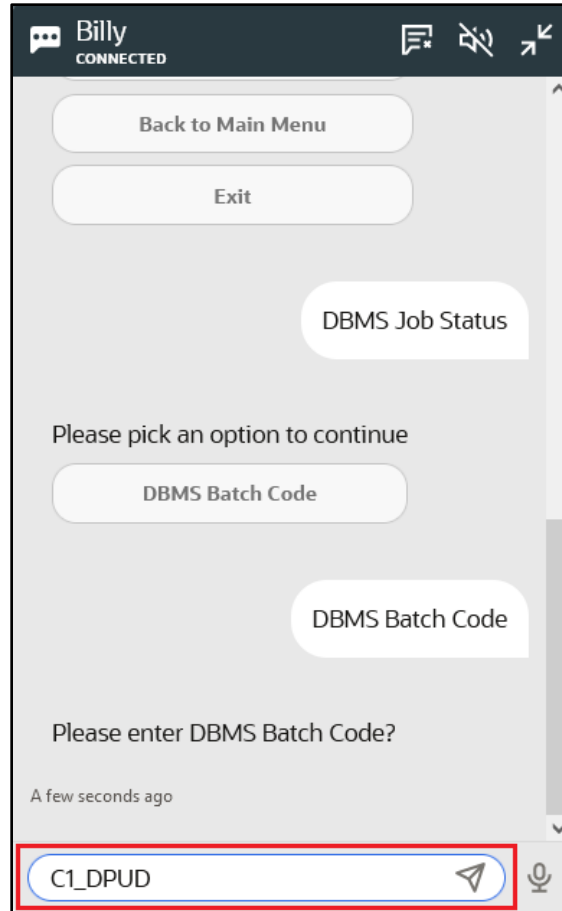



Figure 100: Type Message

7. Click the **Send Message** () icon or press **Enter**. The status of the DBMS scheduler job appears in the **Chatbot** window, as shown in the following figure:

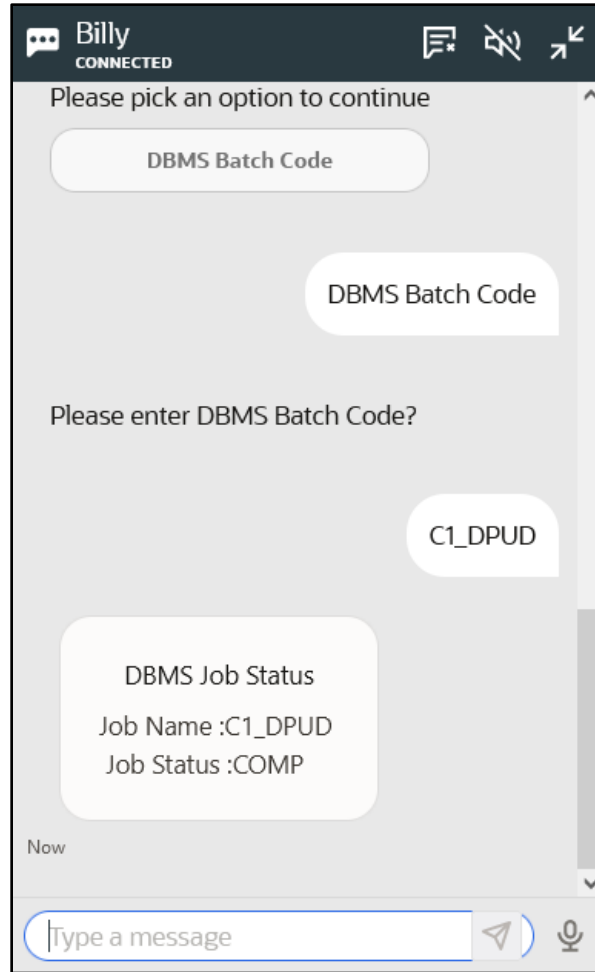


Figure 101: DBMS Scheduler Job Status

The following details of a DBMS scheduler job are listed in the **Chatbot** window:

Field Name	Field Description
Job Name	Displays the name of the DBMS scheduler job.
Job Status	Indicates the status of the DBMS scheduler job. The valid values are: <ul style="list-style-type: none"> Completed In Progress