Oracle® Communications Billing and Revenue Management

Billing Care Online Help



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Contents

About This Content

1 Getting Started with Billing Care

About the Billing Care User Interface 1
About Authorization 1
About the User Menu 2
About the Account Bar 2
About the Actions Menu 2
About the Home Section 3
About the Bills Graph 4
    Activity Series and Indicators 4
About the Bills Section 4
About Exporting Grid Contents 6
Using Keyboard Shortcuts 7
About Date and Time Formats 7
About Currency and Number Formats 10

2 Creating and Finding Accounts

Finding an Account 1
    Search Dialog Box 1
    Sorting Search Results 2
Creating an Account 2
    Configuring SIM Cards 7
Working with Subscription Groups 8

3 Account Information

Viewing and Changing Account Information 1
    Changing Customer Security Hints and Answers 2
Changing the Account Status 2
    Products and Account Status 3
    Hierarchical Groups and Account Status 3

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Working with Deferred Actions 3
Editing Deferred Actions 4
Executing Deferred Actions 4
Deleting Deferred Actions 5
Working with the Newsfeed 5
Displaying an Account's History 6
Finding Newsfeed Entries 6
Newsfeed 6
Working with Account-Level Notes 7
Creating an Account-Level Note 8
Adding Comments to a Note's Thread 8
Viewing Account-Level Notes 8
Notes Page 9
Working with Credit Limits, Credit Floors, and Thresholds 9
Setting up Credit Limit, Floor, and Thresholds 10
Credit Limit, Floor, and Thresholds Dialog Box 11
Finding a Bill 11
Finding a Specific Bill 12
Finding Bills by Date Range 13
Finding Last Generated Bills 13
Sorting Search Results 13
Viewing Bill Details 14
Viewing Refunded Bills 15
Viewing Account Balances 15
Noncurrency Balance Details Dialog Box 16
Balance Bucket Section 16
Credit Control Section 16
Viewing an Invoice 17
Working with Events 17
Working with an Account in Collections 18
Returning to the Landing Page 18

4 Purchases

About Offer Association IDs 1
Purchasing New Products and Services 1
Purchasing Add-On Products 3
Transitioning Bundles and Packages 4
Transitioning a Bundle for an Account 4
Transitioning and Configuring a Package for an Account 5

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5 Assets

About Assets 1
Working with Service-Focused Asset Cards 1
Viewing Asset Card Details 2
Filtering the Services for an Account 2
Filter Services Dialog Box 3
Terminating a Customer's Service 3
Inactivating a Customer's Service 4
Reactivating a Customer's Service 4
Managing SIM Card Details 4
Working with Assets in a Product-Focused Table 5
Viewing an Account's Products in a Table 5
Filtering the Offers for an Account 6
Filter Offers Dialog Box 7
Customizing an Offer's Rate 7
Inactivating Offers 8
Reactivating Offers 9
Terminating Offers 9
Terminating Bundles 10
Working with Contracts 10
Viewing a Contract's Terms 10
Modifying a Contract's Auto-Renewal Preferences 11
Canceling a Customer's Contract 11

6 Billing

Creating a Bill on Demand 1
Generating Corrective Bills 1
Viewing Corrective Bills 2
Produce Corrective Bill Dialog Box 2
Corrective Bill Trail Dialog Box 3

7 Batch Payments, Refunds, and Reversals

Importing a Batch Payment File 1
About Batch Payment File Directories 2
About Batch Payment File Names 2
Configuring Auto Processing of Batch Payment Files 2
Processing Payments in Foreign Currencies 2
Uploading Batch Payment Files to the Billing Care Server 3
Importing Batch Payment Files Manually Using Billing Care 3

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Viewing Imported File Status and Errors 4
About Batch Processing Errors 4
Reversing Failed Batch Payments 5
Viewing Batch Payment Processing History 5
Viewing Suspended Batch Payments 6
About Batch Payment Template Files 6
Creating, Editing, and Processing Payment, Refund, and Reversal Batches 7
Creating and Processing a Batch 7
Creating a Record in a Batch 8
Searching for Records to Add to a Batch 8
Search for Records Through Accounts 8
Search for Records Through Bills 9
Search for Payments in a Reversal Batch 9
Modifying a Record in a Batch 10
Allocating Payments to Bills or Items 10
Suspending a Payment in a Batch 10
Removing Suspension from a Payment in a Batch 11
Importing and Editing Batches Manually Using Billing Care 11
Validating a Batch 13
Exporting a Batch to a File 13
Submitting a Batch 14
Working with Batch Templates 14
Creating a Batch Template 15
Creating a Batch Template Based on an Existing Template 15
Editing a Batch Template 15
Viewing Existing Batch Templates 16
Deleting a Batch Template 16
Create Batch Page 16
Create or Edit Template Page 17
Search Dialog Box 18
Suspend Payment Dialog Box 19

8 Payments

Initiating a Payment 1
Making a Payment 1
Make a Payment Dialog Box 2
Viewing Payment Details 3
Payment Details Dialog Box 3
All Payments Dialog Box 4
Items Affected Dialog Box 5
Allocating Payments 5

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Allocating a Payment 5
Allocating a Payment to a Bill Unit or an Item 6
Allocate Payment Dialog Box 7
Reversing a Payment 7

9 Payment Browser

Available Actions by Payment Category 1
Finding a Payment 2
Export the Search Results 3
Make a Payment 3
Allocating a Suspended Payment 3
Allocating a Suspended Payment across Multiple Accounts 4
Adding Notes to a Payment 5
Moving an Active Payment to Suspense 5
Assigning Suspended Payments to Billing Care Users 6
Reversing a Payment in Payment Browser 6
Removing an Unallocated Payment from Suspense 7
Returning an Allocated Payment to Suspense 7
Returning All Distributions 8

10 Accounts Receivable

Working with Adjustments 1
Making a Currency Adjustment 2
Account Adjustment Dialog Box 2
Allocating Currency Adjustments 3
Allocating an Adjustment to a Specific Bill Unit or Specific Items 4
Allocate Adjustment Dialog Box 4
Adjusting a Bill 5
Bill Adjustment Dialog Box 5
Adjusting an Item 6
Item Adjustment Dialog Box 6
Adjusting an Event 7
Event Adjustment Dialog Box 8
Adjusting Multiple Events for an Account 9
Adjusting a Noncurrency Resource 10
Creating a Noncurrency Adjustment 10
Applying Filters for Sub-Balances in Balance Bucket 11
Modifying an Existing Sub-Balance 11
Modifying Credit Control Properties 12
Viewing Account Adjustment Details 13

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Account Adjustment Details Dialog Box 13
Viewing Item Adjustment Details 14
Viewing Event Adjustment Details 14
Viewing Bill Adjustment Details 14
Working with Disputes 15
Disputing a Bill 15
Dispute Bill Dialog Box 16
Disputing an Item 16
Dispute Item Dialog Box 16
Viewing Item Dispute Details 17
Disputing an Event 17
Dispute Event Dialog Box 18
Viewing Event Dispute Details 18
Working with Settlements 19
Settling a Bill Dispute 19
Settle Bill Dispute Dialog Box 20
Settling an Item Dispute 20
Settle Item Dispute Dialog Box 21
Settling an Event Dispute 21
Settle Event Dispute Dialog Box 22
Viewing Settled Bill Dispute Details 23
Settled Bill Dispute Detail Dialog Box 23
Viewing Settled Item Dispute Details 24
Settled Item Dispute Dialog Box 24
Viewing Settled Event Dispute Details 25
Settled Event Dispute Dialog Box 25
Working with Refunds 26
Refunding an Account 26
Refunding a Bill 27
Working with Write-Offs 27
Writing Off an Account 28
Write Off Account Dialog Box 29
Writing Off a Bill 29
Write Off Bill Dialog Box 30
Writing Off a Bill Item 30
Writing Off Bill Item Dialog Box 30
Viewing Write-Off Details 31
Viewing Write-Off Details from the Newsfeed 31
Viewing Write-Off Details from A/R Actions 31
Viewing Write-Off Details from the Service Charges Area 32
Reversing a Write-Off 32
Reverse Write Off Account Dialog Box 33

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Transferring Negative Balances to Another Bill 33

11 Organization Hierarchies

About Organization Hierarchies 1
Creating an Organization Hierarchy 1
About Account Hierarchy Types 2
Assigning Hierarchy Types to Accounts 2
Adding Child Accounts to an Organization Hierarchy 2
Adding a Parent Account to an Organization Hierarchy 3
Modifying the Hierarchy Relationships of Child Accounts 4
Modifying the Hierarchy Relationships of Parent Accounts 4
Removing a Child Account from an Organization Hierarchy 5
Viewing an Account's Organization Hierarchy 5

12 Event Browser

About Event Browser 1
Searching for Events in Event Browser 1
Clearing Event Search Criteria 2
Viewing Event Details in Event Browser 2
Adjusting Events in Event Browser 2
Disputing Events in Event Browser 3

13 Billing Hierarchies

About Billing Hierarchies 1
Creating a Billing Hierarchy 1
Adding Nonpaying Children to a Parent's Bill Unit 1
Removing Nonpaying Children from a Billing Hierarchy 2
Adding a Paying Parent for a Child's Bill Unit 3
Changing a Bill Unit's Parent Account 3
Returning a Bill Unit to an Account's Own Payment Method 4
Viewing Who Pays for a Bill 4
Changing the Billing Day of Month Asynchronously for Large Hierarchy 5

14 Wholesale Billing Hierarchies

About Wholesale Billing Hierarchies 1
Creating Wholesale Billing Hierarchies 1
Changing an Existing Bill Unit into a Wholesale Billing Parent 2
Adding Normal Bill Units to a Wholesale Billing Parent 2

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Adding Child Bill Units to a Wholesale Billing Parent 2
Viewing an Account's Position in a Wholesale Billing Hierarchy 3

15 Financial Setup

Working with Payment Methods 1
Adding a Payment Method 1
Financial Setup New Payment Method Pane 2
Editing a Payment Method 3
Financial Setup Edit Payment Method Page 3
Deleting a Payment Method 4
Adding Bill Units to an Account 4
New Bill Unit Pane 5
Editing a Bill Unit 6
Financial Setup Edit Bill Unit Page 6
Moving Services Between Bill Units 7
Changing a Bill Unit's Invoice Template 8
Assigning a Bill Unit for Payment by Another Account 8
Adding and Changing Basic Tax Information 8
Adding Tax Exemptions 8
Financial Setup Tax Setup Pane 9

16 Sharing Groups

Working with Resource Sharing Groups 1
About Charge Sharing 1
Creating a New Charge Sharing Group 2
Modifying a Charge Sharing Group 2
Deleting a Charge Sharing Group 3
Adding Members to a Charge Sharing Group 3
Viewing the Membership List in a Charge Sharing Group 3
Searching for a Member in a Charge Sharing Group 4
Removing One or More Members from a Charge Sharing Group 4
Modifying a Member's Details 4
Modifying Priorities for Members of a Charge Sharing Group 5
New or Edit Charge Sharing Group Page 5
About Discount Sharing 5
Creating a Discount Sharing Group 6
Modifying a Discount Sharing Group 7
Deleting a Discount Sharing Group 7
Adding Members to the Discount Sharing Group 7
Viewing the Membership List in a Discount Sharing Group 8

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Searching for a Member in a Discount Sharing Group 8
Removing One or More Members from the Discount Sharing Group 9
Modifying a Member's Details 9
Modifying Priorities for Members of a Discount Sharing Group 10
New or Edit Discount Sharing Group Page 10
About Profile Sharing 10
Creating a Profile Sharing Group 11
Modifying a Profile Sharing Group 11
Deleting a Profile Sharing Group 12
Adding Members to the Profile Sharing Group 12
Removing One or More Members from the Profile Sharing Group 13
New or Edit Profile Sharing Group Page 13

17 Subscriber Preferences and Promotions

Viewing Profiles 1
Filter Services Dialog Box 1
Viewing and Adding Subscriber Preferences 2
Viewing Promotions for an Account and its Associated Services 2
Creating a Promotion 3
Editing a Promotion 3
Deleting a Promotion 4

18 Collections

About Collections 1
Finding an Account in Collections 1
Filtering Collections Results 2
Sorting Collections Results 3
Viewing a Bill Unit in Collections 3
Collections Details Page 4
Removing a Bill Unit from Collections 5
Adding a Collections Action to a Bill Unit 5
Add Action Dialog Box 6
Changing the Status or Due Date of a Collections Action 6
Edit Action Dialog Box 7
Viewing Actions History for a Bill Unit in Collections 7
Replacing a Bill Unit's Collections Scenario 7
Replace Scenario Dialog Box 8
Making a Payment for a Bill Unit in Collections 8
Assigning a Collections Agent 9
Working with Exempted Bill Units 10

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Exempting a Bill Unit from Collections 10
Exempt Bill Unit Dialog Box 10
Viewing Bill Units Exempted from Collections 10
Removing a Bill Unit from Exemption 11
Exempted Bill Units Dialog Box 11
Working with Promise-to-Pay Agreements 11
Configuring System-Managed Promise-to-Pay Agreements 12
Manually Configuring a Promise-to-Pay Agreement 13
Canceling a Promise-to-Pay Agreement 14
Promise to Pay Installment Details Dialog Box 15
About Collections Sharing 16
Creating a Collections Sharing Group 16
Viewing the Membership List in a Collections Sharing Group 17
Modifying a Collections Sharing Group 17
Deleting a Collections Sharing Group 17
Adding Members to the Collections Sharing Group 17
Removing a Member from the Collections Sharing Group 18
New or Edit Collections Group Page 18

19 Deposits

Working with Deposit Configurations 1
Creating a Deposit Specification Profile 1
Creating a Deposit Specification 3
Finding Deposit Specification Profiles or Deposit Specifications 4
Editing a Deposit Specification Profile or Deposit Specification 5
Working with Deposits 5
Creating Deposits 6
Create Deposit Wizard Details Page Reference 7
Viewing Deposits 7
Viewing Payment Details of a Deposit 8
Reversing Deposits 8
Transferring Deposits 8
Updating Deposits 9
Update Drawer 9
Making Deposit Payments 9
Converting Deposits to Prepayments 10
Requesting Deposit Refunds 11
Approving Deposit Refund Requests 11

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20 Installments

Working with Installment Specifications 1
- Creating Installment Specifications 1
- Finding Installment Specifications 2
- Editing an Installment Specification 2

Working with Installment Schedules 3
- Creating an Installment Schedule 3
- Viewing Installment Schedules 4
- Canceling an Installment Schedule 5

21 Notifications

About Notification Specifications 1

Creating a Notification Specification for Delivery Within A Day 2

Creating a Notification Specification for In-Advance Delivery 3

Creating a Notification Specification for Post-Event Delivery 4

Modifying a Notification Specification 6

Finding Notification Specifications 6

Create Notification Specification Wizard Reference 7
- Trigger Criteria Screen 7
- Delivery Details Screen 8
- Review Screen 9

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About This Content

Oracle Communications Billing Care Help is designed to assist you with performing tasks in the Billing Care user interface.

Audience

This guide is intended for all Billing Care users and system administrators.

See the documentation for those products for additional installation and configuration instructions.

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1

Getting Started with Billing Care

You can use Oracle Communications Billing Care to manage billing, payments, and accounts receivable for customer accounts. Billing Care provides an account view that contains functionality for performing account transactions as well as an interface for viewing and allocating suspended payments.

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

- About the Billing Care User Interface
- About Authorization
- About the User Menu
- About the Account Bar
- About the Actions Menu
- About the Home Section
- About the Bills Graph
- About the Bills Section
- About Exporting Grid Contents
- Using Keyboard Shortcuts
- About Date and Time Formats
- About Currency and Number Formats

About the Billing Care User Interface

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

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

About Authorization

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

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

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

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About the User Menu

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

To access the user menu:

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

About the Account Bar

When you open a customer account, the account page header at the top displays:

- **Account Name** (with status badge if applicable)
- **Account Number**
- **Company Name**

When you open a customer account, the account bar displays the following account information:

- **Contact Details:** Address and other contact information.
- **Security Details:** Security hint and security answer.
- **Collections:** If the account is in collections, displays the number of days past due, minimum payment due, last and next action scheduled, write-off or billing information, and links to all collection actions and collection views.
- **Hierarchy Details:** If the account is part of an organization hierarchy, displays hierarchy information, including number of days, hierarchy type (site, etc.), and organizational parent or child links.
- **Installments:** Shows the number of schedules on the account.
- **Deposits:** Displays the total deposits for the account.
- **(Optional)** The three-letter currency abbreviation is displayed per account or per bill unit for multi-bill unit accounts.

About the Actions Menu

The **Actions** menu lists the actions that can be performed on an account. Using this menu, you perform actions such as updating account information, creating payments, viewing accounts receivable, and setting up financial information such as taxation configuration.

Action	Description
Account	Click to update an account's profile or status. See "Account Information".

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Action	Description
Payments	Click to make a new payment or allocate existing payments. See "Payments". **Note**: For wholesale child accounts, **Payments** is not shown.
Installment Schedule	Click to view all installment schedules or create a new installment schedule. See "Installments".
Deposits	Click to view all deposits for the account or create a new deposit. See "Deposits".
Accounts Receivables	Click to perform currency adjustments, distribute existing adjustments, or write off an account. See "Accounts Receivable". **Note**: For wholesale child accounts, **Accounts Receivables** is not shown.
Hierarchy	Click to create or modify the relationship among accounts in the same company or organization. See "Organization Hierarchies".
Financial Setup	Click to create or update payment methods, configure bill units, or set up taxation. See "Financial Setup".
Sharing Groups	Click to create or modify sharing groups. See "Sharing Groups".

About the Home Section

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

Field	Description
Notes	Displays the number of notes that have been added to the account in the last 24 hours and in the last month. Select this section to view the notes. See "Working with Account-Level Notes".
Account History, All Bill Units, Bill Unit	Displays service, payment, and billing information for an account or for a bill unit if the account has multiple bill units. The Account History area or an individual Bill Unit area must be selected to make the Bills Graph area, the Balance area, and **Balance** and **News Feed** links appear. Depending on the age of the account and payment history, information about past due amounts, current amounts, and the bill in progress is shown here: • **Past Due**. Click to view past due items. • **Unallocated A/R**. Click to allocate. See "Allocating Currency Adjustments". • **Unallocated Payments**. Click to allocate. See "Allocating a Payment". **Note**: The bill in progress is not shown for wholesale billing hierarchies.
Make Payment	Click to make a payment on the account or bill unit. If the account has multiple bill units, select a bill unit to make this button appear. See "Making a Payment".
Show Bill Units	Click to see information about each bill unit if the account has multiple bill units. If an account has multiple bill units, you must select a bill unit to see the billing cycle, the Bills graph, and the Balances section.
Balances	Click to see a graphic overview of the account or the bill unit information and balances. The Bills graph displays information about bills, purchases, payments, A/R transactions, and customer interactions. See "About the Bills Graph" and "Viewing Account Balances".

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Field	Description
Newsfeed	Click to see a history of activity for the account and its bill units. You can view a listing of all events or only A/R transactions, payments, charges, or account changes. See "Working with the Newsfeed".

About the Bills Graph

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

- The horizontal axis represents billing periods, displaying the last 12 bills and the bill currently in progress.
- The vertical axis now shows activity counts (not specific account information or communications). Each point on the chart reflects the number of activities associated with a particular bill period.

Activity Series and Indicators

Account activities and statuses are now represented as distinct points or symbols grouped into series, making it easier to identify the type of interaction:

- **Inquiry and A/R Activity**: Includes payment- and accounts receivable–related actions such as payments, disputes, and inquiries.
- **Technical Problem**: Represents technical issues such as service outages or incomplete installations.
- **Notification**: Covers notification-related activities for the account.
- **CSR Alert**: Highlights customer service representative alerts.
- **Financial Setup**: Groups activities related to financial configuration or changes.
- **Subscriptions**: Includes activities related to subscription management.
- **Other**: Any activities not covered by the above categories. Bill status indicators (such as **Bills Overdue** or **Bill in Progress**) are also displayed as unique symbols within the graph.

The legend below the Bills graph provides up-to-date definitions for each series and indicator used. You can click on a symbol within the Bills graph to view more information about the associated bill or activity.

> **Note**
>
> Indicator symbols and activity series are automatically generated based on available data. Always refer to the legend for accurate, current definitions.

About the Bills Section

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

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

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

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

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

Field	Description
Switch Bills	Click to access other bills. If there is more than one bill unit, select the one you want to work with. The list displayed includes the bill in progress and the bills for the 12 past billing cycles. For child accounts in a hierarchy, the list includes the bills that are generated before and after moving the account into the hierarchy. Click the **Bill Search** link to search for an older bill that may not be available in the list. **Note**: The **Bill Search** link does not appear if the account contains less than 12 bills.
Actions	Use this menu for these bill-related activities: • **Make Payment** • **Move Payment to Suspense** • **Reverse Payment** • **Adjust Bill** • **Dispute Bill** • **Write Off Bill** • **Refund Bill** • **Produce Corrective Bill** • **Transfer Negative Balance** • **View Invoice PDF** The **Actions** menu appears once a bill is selected.
Bill Details	Use this field to find specific charges. Enter all or part of the service type, service ID, or device ID.

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Field	Description
My Charges	Shows the charges for the selected bill that are generated by the account. Click the charges in the following areas to view more information: • Account Charges • Account and Sharing Charges • Service Charges You can view an invoice from the details window. **Note**: For wholesale parent accounts, the **Charge Sharing** link is shown under **My Charges**. Click the **Charge Sharing** link to view the consolidated amount due for the wholesale billing hierarchy.
Charges from Other Accounts	Shows the charges for the selected bill that are generated by other accounts. Click the charges in the following areas to view more information: • Account Charges • Account and Sharing Charges • Service Charges You can view an invoice from the details window. **Note**: For wholesale parent accounts, the **Charges from Other Accounts** area is not displayed.

About Exporting Grid Contents

The following Billing Care account information grids contain data that can be exported to CSV files:

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

To export grid data to CSV:

1. View the grid in Billing Care.
2. Click **Export**.

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3. Save the file.

Using Keyboard Shortcuts

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

Action	Shortcut
Move focus to the next field or element from top to bottom and left to right.	**Tab**
Move focus to the previous field or element, from bottom to top and right to left.	**Shift + Tab**
Click a link, a button, or a command on a menu.	**Enter** or **Spacebar**
In a table, move to the next row. In a drop-down list, move to the next item in the list.	**Down Arrow**
In a table, move to the previous row. In a drop-down list, move to the previous item in the list.	**Up Arrow**
Move from a menu item to its parent menu in the **Actions** menu, right to left.	**Left Arrow**
Open a submenu from a menu item in the **Actions** menu, left to right.	**Right Arrow**
Select the **Allocate** column in a table for allocating payments or adjustments.	**Ctrl + Enter**
Move a selected service from one bill unit to another.	**Ctrl + X**, use **Tab** to move to the target bill unit, then **Ctrl + V**.

About Date and Time Formats

Date and time formats are standardized across the Billing Care user interface. The format for dates matches the locale-specific standard. The time uses the 24-hour format, such as 13:00:00 for 1p.m.

Table 1-1 lists the locale-specific standards for date and time formats.

Table 1-1 Supported Date and Time Formats

Locale	Supported Date and Time Formats
English (en-US)	• MMM DD, YYYY HH:mm:SS • MMM DD, YYYY • MMM DD • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).

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Table 1-1 (Cont.) Supported Date and Time Formats

Locale	Supported Date and Time Formats
Russian (ru)	• DD MMM YYYY HH:mm:SS • DD MMM YYYY • DD MMM • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).
French (fr)	• DD MMM YYYY HH:mm:SS • DD MMM YYYY • DD MMM • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).
Japanese (ja)	• YYYY/MM/DD HH:mm:SS • YYYY/MM/DD • MM DD • HH:mm:SS where: • MM is months in digits. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is minute of the hour (0 – 59). • SS is the seconds (0 – 59).
Italian (it)	• DD MMM YYYY HH:mm:SS • DD MMM YYYY • DD MMM • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).

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Table 1-1 (Cont.) Supported Date and Time Formats

Locale	Supported Date and Time Formats
Portuguese (pt-BR)	• DD MMM YYYY HH:mm:SS • DD MMM YYYY • DD MMM • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).
Korean (ko)	• YYYY. MM. DD. HH:mm:SS • YYYY. MM. DD. • MM DD • HH:mm:SS where: • MM is months in digits. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is minute of the hour (0 – 59). • SS is the seconds (0 – 59).
Chinese (zh-CN)	• YYYY MM DD HH:mm:SS • YYYY MM DD • MM DD • HH:mm:SS where: • MM is months in digits. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is minute of the hour (0 – 59). • SS is the seconds (0 – 59).
Spanish (es-ES)	• DD MMM YYYY HH:mm:SS • DD MMM YYYY • DD MMM • HH:mm:SS where: • MMM is the abbreviation for the month name. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is the minute of the hour (0 – 59). • SS is the seconds (0 – 59).

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Table 1-1 (Cont.) Supported Date and Time Formats

Locale	Supported Date and Time Formats
Chinese Traditional (zh-TW)	• YYYY MM DD HH:mm:SS • YYYY MM DD • MM DD • HH:mm:SS where: • MM is months in digits. • DD is the day of the month. • YYYY is the 4-digit year. • HH is the hour of the day (0 – 23). • mm is minute of the hour (0 – 59). • SS is the seconds (0 – 59).

About Currency and Number Formats

Billing Care standardizes currency and number formats across the UI. Monetary amounts, percentages, and quantities follow locale-specific standards.

The decimal separator, grouping separator, placement of the currency symbol or currency code, and spacing can vary by locale. For example, a currency symbol or currency code can appear before or after the amount.

Locales can use different formats for negative currency amounts. For example, some locales use parentheses for accounting values, while others use a minus sign.

Table 1-2 shows examples of the default number and currency formatting for each supported locale.

Table 1-2 Examples of Number Formatting for Supported Locales

Language	Locale	Positive Amount Without Symbol	Negative Amount Without Symbol	Positive Amount with Currency Symbol	Negative Amount with Currency Symbol	Positive Amount with Currency Code	Negative Amount with Currency Code
English	en-US	1,234.56	(1,234.56)	$1,234.56	($1,234.56)	USD 1,234.56	(USD 1,234.56)
Spanish	es	1.234,56	-1.234,56	1.234,56 US$	-1.234,56 US$	1.234,56 USD	-1.234,56 USD
French	fr	1 234,56	(1 234,56)	1 234,56 $US	(1 234,56 $US)	1 234,56 USD	(1 234,56 USD)
Italian	it	1.234,56	-1.234,56	1.234,56 USD	-1.234,56 USD	1.234,56 USD	-1.234,56 USD
Japanese	ja	1,234.56	(1,234.56)	$1,234.56	($1,234.56)	USD 1,234.56	(USD 1,234.56)
Korean	ko	1,234.56	(1,234.56)	US$1,234.56	(US$1,234.56)	USD 1,234.56	(USD 1,234.56)

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Table 1-2 (Cont.) Examples of Number Formatting for Supported Locales

Language	Locale	Positive Amount Without Symbol	Negative Amount Without Symbol	Positive Amount with Currency Symbol	Negative Amount with Currency Symbol	Positive Amount with Currency Code	Negative Amount with Currency Code
Portuguese (Brazil)	pt-BR	1.234,56	-1.234,56	US$ 1.234,56	-US$ 1.234,56	USD 1.234,56	-USD 1.234,56
Russian	ru	1 234,56	-1 234,56	1 234,56 $	-1 234,56 $	1 234,56 USD	-1 234,56 USD
Chinese (Simplified)	zh-CN	1,234.56	(1,234.56)	US$1,234.56	(US$1,234.56)	USD 1,234.56	(USD 1,234.56)
Chinese (Traditional)	zh-TW	1,234.56	(1,234.56)	US$1,234.56	(US$1,234.56)	USD 1,234.56	(USD 1,234.56)

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2

Creating and Finding Accounts

You can find existing accounts in Oracle Communications Billing Care by using its search function, and you can create new customer accounts using its account function.

To create and find accounts, see the following topics:

- Finding an Account
- Creating an Account
- Working with Subscription Groups

Finding an Account

To find an account:

1. Click **Search**.

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

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

4. Click **Search**.

   Billing Care displays search results on the right side of the Search dialog box. You can enter more criteria to refine the search if there are many results. You can also sort the search results. See "Sorting Search Results".
5. Select an account, and click **Open**.

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

   Billing Care displays the selected account.

Search Dialog Box

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

Search supports the searching of accounts of a service having multiple aliases.

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

The search is not case-sensitive.

> **Tip**
>
> - Use an asterisk (*) as a wildcard to match any missing characters at the start, middle, or end of words or numbers.
> - Scroll down to view recently accessed accounts.

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

Sorting Search Results

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

If you sort results by:	The second sort is:	And the third sort priority is:
Account Number	Last Name	First Name
Last Name	First Name	Account Number
First Name	Last Name	Account Number
Company Name	Last Name	First Name

Creating an Account

To create a new account:

1. From the Home page, click **New Account**.

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The **Profile** screen appears.

2. Enter the following information for the new account:

Field	Description
Contacts	Account contact information. Provide one or more contacts for the new account.
Security	Security question and response. Provide a secure question to verify the new account's owner during future interactions.
Customer Type	Select the customer type for the new account.
Language	Select the default language for the new account. Billing Care sets the default language based on your browser locale.
Organization Hierarchy Type	(Optional) Select the organization hierarchy type. See "About Account Hierarchy Types" for more information.
Monitor Group Balance	Select the check box to make this account the owner of a payment responsible real-time credit enforcement (PR_RTCE) balance monitor group. This allows the account to track the total rolled-up balance for all members in the PR_RTCE group in real-time. See "About Balance Monitoring Groups" in *BRM Managing Customers* for more information.

3. Click **Continue**.

   The **Select** screen appears with the list of available packages. You can filter the list by service type, tags, and contract period.

4. Select the package that your customer wants to purchase.

5. Click **Continue**.

   The **Configure** screen appears.

6. Under **Services**, select a service.

7. Do one of the following:

   - For non-telco services: Enter a service identifier in the **Service Identifier** field. The service identifier can be any text. It is a unique identifier that connects the customer to the service instance that the customer owns. For example, it could be an email address or a personal ID number. Customers use the service identifier as their login name for the service.
   - For telco services: The associated SIM card and number details are displayed. To search and associate a SIM card and primary number with a service, see "Configuring SIM Cards".

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

   > **Note**
   >
   > Backdate account creation is hidden if the selected package has terms and deliverable-based revenue recognition is enabled.

9. Under **Bundles**, click a bundle to configure the credit limit check. Select one of the following values:

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- **Override credit limit**: The credit limit will be overridden
- **Prorate based on credit limit**: Prorated until the credit limit is reached
- **Enforce credit limit**: The transaction will fail if the credit limit check fails

By default, **Enforce credit limit** is selected.

10. (Optional) Under **Products** and **Discounts**, click an offer to change the customer's purchase charges, such as by:
    - Changing the purchase activation or deactivation dates.
    - Decreasing the customer's monthly fee through discounts or overrides.
    - Changing the length of the grace period. Customers can reactivate and extend their expired product if they repurchase it within the grace period.
11. (Optional) In the Purchase section, configure the **Offer Association ID** for products and discounts that must be associated.

    The **Offer Association ID** field appears below **Override purchase fee**.

    Use the Offer Association ID field as follows:
    - For a product, from the **Offer Association ID** list, select an ID that is already used by a discount or product in the same service on the current Configure screen, or enter a new ID.
    - For a discount, turn on **Enable Offer Association** if it is not already on. Then, from the **Offer Association ID** list, select an ID that is already used by a product in the same service on the current Configure screen, or enter a new ID.
    - To leave the product or discount unassociated, leave **Offer Association ID** set to **Not Set**.

    During account creation, only IDs entered on the current Configure screen are available because the account does not yet have subscribed products, subscribed discounts, or discount sharing memberships.
12. Select a reason for the purchase and enter notes if required.
13. Under Products, click a product to override the charges.
14. (Optional) Under **Recurring (cycle)**, configure the cycle and billing attributes for the selected product's recurring charge.

> **Note**
>
> These attributes and their available values appear only if you configure them for a product in PDC during design time.

Table 2-1 lists the available attributes and the values you can choose from.

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Table 2-1 Cycling and Billing Attributes

Attribute Name	Description
Cycle Charge Type	Specifies the type of recurring charge applied for the billing cycle. Possible values are: • **Cycle Forward**: Applies a recurring charge in advance. • **Cycle Arrear**: Applies a recurring charge to the previous month, with the balance impact for the charge applied at the end of the accounting cycle. • **Cycle Forward Arrear**: Applies a recurring charge to the previous month, with the balance impact for the charge applied at the beginning of the accounting cycle.
Cycle Unit	Specifies the length of one recurring cycle. For example, if you want to bill the customer every 1 month, select **Months**. Possible values are: • **Days** • **Months** • **Years**
Cycle Frequency	Specifies the length of one recurring cycle. For example, if you want to bill the customer every 1 month, enter **1**.
Cycle Alignment	Specifies whether to align the recurring charge cycle with the billing date or the purchase date. Possible values are: • **Billing** • **Purchase**
Billing Type	Specifies the type of billing process applied. Possible values are: • **Regular Billing** • **In Advance Billing** • **Deferred Billing**
In Advance Billing Unit	Displayed only if **In Advance Billing** is selected for **Billing Type**. Specifies the time period for which billing is calculated in advance. Possible values are: • **Days** • **Months**
In Advance Billing Frequency	Displayed only if **In Advance Billing** is selected for **Billing Type**. Specifies how many units of the in-advance billing unit duration should be billed in advance. Set this to a positive integer.

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Table 2-1 (Cont.) Cycling and Billing Attributes

Attribute Name	Description
Deferred Billing Unit	Displayed only if **Deferred Billing** is selected for **Billing Type**. Specifies the time period for which billing is deferred. Possible values are: • **Days** • **Months**
Deferred Billing Frequency	Specifies how many units of the in-arrear (deferred) billing unit duration should be billed as deferred. Displayed only if **Deferred Billing** is selected. Set this to an integer. **Note**: Billing Care stores the integer value as negative.

15. Click **Continue**.

    The **Terms** screen appears with details about the contract's commitment period, early termination policy, and renewal behavior.

> **Note**
>
> The **Terms** screen is disabled if a package or plan does not have subscription terms associated with it.

16. Review the terms associated with the selected package and then click **Continue**.

    The **Pay** screen appears.

17. Select a payment type.

    If the payment method is not defined, select **No Payment Method**.

18. Do one of the following:

    - For **New Credit Card** (credit card), enter card number, CVV2/CID details, card expiration details, name, address, and billing details.
    - For **New Direct Debit** (debit card), enter bank number, account number, account type, name, address, and billing details.
    - For **New Invoice**, enter the invoice payment method ID, delivery method, email, name, address, and billing details.
    - For **New SEPA**, enter SEPA-related information, such as the International Bank Account Number (IBAN), Bank Identifier Code (BIC), Unique Mandate Reference information, type of payment, date of signing, mandate signed place, creditor's ID and other details, debtor's ID and reference details, mandate contract description, address, and billing details.

19. To add one or more bill units, click **Manage how individual resources are paid**.

    A bill unit is a group of one or more bills. Because each bill unit has its own payment settings and produces one invoice, your customers can control the number of invoices they receive and the payments they make for their account.

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The screen displays the customer's bill units.

20. Click **Add Bill Unit** to add another bill unit.

    The details of the default bill unit appear on the page. You can add new bill units from this page. The bill units that are added are available in the **Pay** screen.

    This page also displays the services from the selected plan. The services are grouped by the balance group and are identified by the service type. You can drag and drop the balance groups from one bill unit to another.

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

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

21. Click **Finish** to create a new account.

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

Configuring SIM Cards

To find and associate a SIM card and primary number with a service, do this from the **Configure** screen of the Account Creation wizard:

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

   A search dialog box appears.

2. Do the following:

   a. (Optional) Enter a **Description**.

   b. (Optional) To search for a specific SIM card, enter search criteria. You can search by SIM number, IMSI number, network element, or status.

   c. Click **Search**.

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

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

      The selected SIM number is associated with the service.

3. To select and associate a number, click **Search**.

   A search dialog box appears.

4. Do the following:

   a. (Optional) Select **Primary number** if the number to be associated is a primary number.

   b. (Optional) Enter a **Description**.

   c. (Optional) To search for a specific number, enter a search criteria. You can search by number, number category, network element, vanity, or status.

   d. Click **Search**.

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

   e. Select a number and click **Associate**.

      The selected number is associated with the service.

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Working with Subscription Groups

You can group services by subscription and allow sharing of resources among them. You can also perform collective administrative operations for the entire group, such as activating or canceling services or making them inactive.

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

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

Billing Care allows you to purchase services that are grouped in a plan. See "Purchasing Add-On Products" for more information about purchasing products and services.

Related Tasks

Creating an Account

Purchasing Add-On Products

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3

Account Information

You can view and change your customers' account information by using Oracle Communications Billing Care.

To work with accounts and perform some basic tasks, see the following topics:

- Viewing and Changing Account Information
- Changing the Account Status
- Working with Deferred Actions
- Working with the Newsfeed
- Working with Account-Level Notes
- Working with Credit Limits, Credit Floors, and Thresholds
- Finding a Bill
- Viewing Bill Details
- Viewing Refunded Bills
- Viewing Account Balances
- Viewing an Invoice
- Working with Events
- Working with an Account in Collections
- Returning to the Landing Page

Viewing and Changing Account Information

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

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

To view or change account information, do any of the following:

1. From the **Actions** menu, select **Account**, and then select **Account Profile**.

   The Account Profile dialog box appears.

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

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

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

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

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

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

5. In **Security**, enter new text to change the hint or answer.

   For more information, see "Changing Customer Security Hints and Answers".

6. For **Customer Type**, select a new value.
7. For **Language**, select a new value.
8. For **Organization Hierarchy Type**, select a new value.
9. For **Monitor Group Balance**, select the check box to enable this account to be the owner of a payment responsible real-time credit enforcement (PR_RTCE) balance monitoring group.
10. Click **Save**.

See "Financial Setup" for information on updating payment, bill unit, or tax information.

Related Tasks

Working with Payment Methods

Changing Customer Security Hints and Answers

To change customer security hints and answers:

1. From the **Actions** menu, select **Accounts**, and then select **Account Profile**.

   The Account Profile dialog box appears.

2. In the Security section, enter new text to change the hint or answer.
3. To delete a hint and answer pair, click the minus icon.
4. Click **Save**.

Changing the Account Status

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

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

- Products and Account Status
- Hierarchical Groups and Account Status

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To change the account status:

1. From the **Actions** menu, click **Account status**.

   The Account Status dialog box appears.
2. From the **Status** list, select an account status.
3. Do one of the following:
   - Keep the default **Effective immediately**.
   - Select **Defer the action until**, and enter the date.
   - Select **Backdate the action to**, and enter the date.
4. From the **Account Status Change** list, select the reason.
5. (Optional) Enter a note.
6. Click **Save**.

Products and Account Status

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

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

Individual products and services can be made inactive or terminated without affecting an account's other products and services. See "Working with Assets in a Product-Focused Table" for more information about making products inactive or removing them from a customer's account.

Hierarchical Groups and Account Status

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

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

Working with Deferred Actions

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

To work with the deferred actions:

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

   The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:
   - The **Deferred Actions** link in the Account banner tile.

     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.

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- The Subscriptions cards.

2. (Optional) From the **Type** list, select the type of deferred action you want to perform. By default, **All** is selected.
3. (Optional) From the **Status** list, select one of the options. By default, **Pending** is selected.
4. Select the deferred action to perform any of the following actions. These actions are available based on the user privileges:
   - **Edit**: Allows you to reschedule the deferred action.
   - **Execute**: Allows you to execute the action. When you execute, if the execution is successful, the status of the action changes to **Done**. If the execution fails, the status of the action changes to **Error**.
   - **Delete**: Allows you to remove the deferred action.

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

Editing Deferred Actions

To edit deferred actions:

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

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

   The Deferred Actions dialog box appears. You can also navigate to the Deferred Actions dialog box from:
   - The **Deferred Actions** link in the Account banner tile.

     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.
   - The subscriptions cards.
2. Select the account or service level deferred action.
3. Click the pencil icon.
4. In the **Scheduled** field, enter a date or select a date from the calendar.
5. Click **Save**.

Executing Deferred Actions

To execute deferred actions:

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

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

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- The **Deferred Actions** link in the Account banner tile.

  This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.

- The Subscriptions cards.

2. Select the account or service level deferred action.
3. Click the execute icon.

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

After the execution, the Pending status changes to:

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

Deleting Deferred Actions

To delete deferred actions:

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

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

   - The **Deferred Actions** link in the Account banner tile.

     This link includes only the number of pending deferred actions. This link is visible only when the pending deferred actions are available.

   - The Subscriptions cards.

2. Select the account or service level deferred action.
3. Click the delete icon.

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

Working with the Newsfeed

The Newsfeed shows a chronological list of activity for an account, such as the purchases made, the payments submitted, and the disputes opened.

You can do the following with the newsfeed:

- View the history of all activity for an account and its bill units.
- Filter the list of newsfeed entries to show only accounts receivable (A/R) actions, payments, charges, or account-level changes.
- Search for newsfeed entries by bill number or payment ID.

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

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Displaying an Account's History

To display an account's history in the newsfeed:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, click the **Home** tab.
3. Select the **Account History** area and then click the **Newsfeed** link.

   The Newsfeed appears on the right. All newsfeed entries for the account are listed by default.

Finding Newsfeed Entries

To find entries in the newsfeed by bill number or payment ID:

1. On the account page, click the **Home** tab.
2. Do one of the following, depending on the bill unit configuration of the account:
   - If the account has a single bill unit, in the **Account History** section, click **Newsfeed**.
   - If the account has multiple bill units, under **All Bill Units** on the left, click the bill unit you want to view, and then select **Newsfeed**.

   The Newsfeed appears on the right, displaying all newsfeed entries by default.
3. In the **Filter** dialog box:
   - To list entries for a specific Bill Unit, select the Bill Unit from the **Bill Unit** list.
   - To list only the entries for a specific category, select one or more categories in the **Category** field.
   - To search by bill number or payment ID, enter the value in the **Name** field.
4. Click **Update**.

   The Newsfeed displays the results that match your filter.

> **Tip**
>
> To clear the search criteria, click the **Clear Filter** icon.

Newsfeed

The Newsfeed provides the history for an account and its bill units in list form.

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Field	Description
Filter	Opens a dialog to refine Newsfeed entries. In the dialog box, you can: • Select a **Bill Unit** to narrow down results. • Choose one or more **Categories**: – **A/R**: Includes currency adjustments, adjustment allocations, noncurrency adjustments, open disputes, closed disputes, refunds, write-offs, and collections. – **Payments**: Includes payments, payment allocations, payment method changes, payment reversals, when a payment for the account is moved to suspense, and when a suspended payment is allocated to the account. – **Charges**: Includes bill issued, bill became overdue, one-time charges, recurring charges, purchase, purchase canceled, corrective bill issued, and bill issued mid-cycle. – **Account**: Includes name or contact information changes, service status changes, and services attached (for example, a SIM card) or detached from the account. Also, bill unit created, bill unit deleted, billing frequency changed, billing day change, billing type change are included. When an account status change or service status change is scheduled in the future, it is listed as a deferred action. When a product, discount, or custom service status changes, the Newsfeed is also updated and reflects the changes. • Enter a **Bill Number** or **Payment ID** in the Name field to search for a specific entry.
Date	The date the activity occurred.
Icon	Indicates the type of activity. For example, a shopping cart icon indicates a purchase, and a dollar sign indicates a payment.
Type	For the category, the particular types of entries. Click a link to access details about the entry and, depending on the type, comment or perform a related action.
Amount	If the type involves currency, the amount appears.
Details	Summary of the entry.
Show More	If there are more than 50 records, this button appears.

> **Note**
>
> You can sort the Newsfeed entries by **Date**, **Type**, and **Amount** by clicking the column headers.

Working with Account-Level Notes

Account-level notes consolidate all comments that CSRs have entered for an account, allowing you to easily track and view all interactions that have occurred with your customers.

Each note includes the name of the CSR that posted it, the date that it was entered, the note's comments, and any follow-up comments in the note's thread.

You can do the following with account-level notes:

- Add a note to an account

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- Add follow-up comments to a note's thread
- View the notes and follow-up comments associated with an account

To maintain the integrity of account-level notes, you cannot modify or delete any note or follow-up comment. You also cannot post an empty note or follow-up comment. Billing Care generates an error message if you attempt to post one.

Creating an Account-Level Note

To create an account-level note:

1. On the account page, click the **Home** tab.
2. Click the **Notes** area.

   The **Notes** page appears on the right. See "Notes Page" for details.
3. In the Notes header bar, click the **New** button.
4. Enter your comments.

> **Note**
>
> Ensure that your comments are correct before proceeding. You cannot edit or delete a note after it is posted.

5. Click **Post**.

   Your note is added.

Adding Comments to a Note's Thread

To add a comment to a note's thread:

1. On the account page, click the **Home** tab and then select the **Notes** area.

   The **Notes** page appears on the right. See "Notes Page" for details.
2. Select the note and then click **Comment**.
3. Enter your comments.

> **Note**
>
> Ensure that your comments are correct before proceeding. You cannot edit or delete a comment after it is posted.

4. Click **Post**.

   Your comment is added to the note's thread.

Viewing Account-Level Notes

The **Notes** page lists all notes that have been posted to an account, listed from the newest to the oldest.

The **Notes** page shows the following for each note:

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- The name of the CSR who posted the note.
- The date the note was posted.
- The number of comments associated with the note. This number includes the original note plus any follow-up comments.

  A number is displayed only when the note contains follow-up comments.
- The first three lines of the note's comments.

You can select a note to view its full contents.

To view the notes for an account:

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

   The **Notes** area displays the number of notes created in the past 24 hours and in the past two months. If the account does not have any notes, it displays **No recent notes**.
2. Select the **Notes** area.

   The **Notes** page appears on the right. See "Notes Page" for details.

Notes Page

The **Notes** page lists all notes that CSRs have entered for an account.

Field	Description
New	Click this button to add a note to an account.
Comment area	The note's comments.
Post	Click this to post your note or follow-up comment.
Cancel	Click this to cancel your note or follow-up comment.
Name	The name of the CSR who entered the note or follow-up comment.
Date	The date the note or a follow-up comment was posted.
	The number of comments associated with the note. This number includes the original note plus any follow-up comments. This icon appears only when a note contains a thread.
	Click this to add a follow-up comment to a note's thread.

Working with Credit Limits, Credit Floors, and Thresholds

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

You set a credit limit to control the charges or noncurrency resources that a customer can accumulate. You can also configure a credit limit to be ignored.

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

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

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If you set a credit floor, a notification event is generated when the credit limit threshold is reached. If you do not set a credit floor, no notification event is generated. For currency resources, the credit floor is 0. The credit floor can be either static or dynamic (determined by the granted amounts from the sub-balances that are valid for the current cycle for the resource).

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

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

Setting up Credit Limit, Floor, and Thresholds

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

1. On the account page, click the **Home** tab.
2. In the Account History area, click **Balances**.

   If the account or bill unit has multiple balances for multiple services, the **Balance** list appears; otherwise, the single balance appears.
3. Select the resource for which you want to set the credit limit, credit floor, and credit thresholds.
4. Enter or select the values for the following:
   - **Limit allowed**. (Optional) To set a credit limit, enter a value. To keep the credit limit as unlimited, leave it empty.
   - **Dynamic Floor**. (Optional) If selected, the credit floor will be determined dynamically, and the value for **Floor** cannot be set.
   - **Floor**. (Optional) Enter a lower credit limit amount for the balance. This value cannot be greater than the Fixed value. If you do not enter a value, the text box displays the value as Not Set.
   - **Fixed Thresholds**. (Optional) Enter the fixed threshold value at which to send the notification to customers. This value must be between the floor and the credit limit.
   - **Thresholds**. (Optional) Select the desired percentage value. This value must be between the floor and the credit limit.
   - **Outstanding amount due to insufficient credit**. Displays the amount the customer currently owes beyond the credit limit.
   - **Credit limit check**. Select whether to enforce or override the credit limit.
   - **Roll Up Credit Limit**. (Optional) Select this option to add this account's credit limit to the parent's bill unit in a payment responsible real-time credit enforcement balance monitor group.

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> **Note**
>
> This field appears only when this bill unit is a child member of a payment responsible real-time credit enforcement balance monitor group.

> **Tip**
>
> You can change validity dates for noncurrency resources.

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

5. Click **OK**.

Credit Limit, Floor, and Thresholds Dialog Box

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

Field	Description
Limit allowed	Enter the credit limit to control the charges or noncurrency resources a customer can accumulate. This value can be negative.
Dynamic Floor	Select this option to enable the dynamic credit floor. This determines the credit floor using the granted amounts from the sub-balances that are valid for the current cycle for the resource (for example, minutes).
Floor	Enter the lower credit limit amount for the balance. This value can be a negative value, but it cannot be greater than the fixed value.
Fixed Thresholds	Enter the value at which you want the notification event to be generated.
Thresholds	Select a percentage at which you want the notification event to be generated.
Outstanding amount due to insufficient credit	Displays the amount the customer currently owes beyond the credit limit. For example, if the customer's bill is $500 and you set **Limit Allowed** to $300, this field displays $200.
Credit limit check	Select whether to enforce or override the credit limit. Values are: • **Override credit limit**: The credit limit will be overridden • **Enforce credit limit**: The transaction will fail if the credit limit check fails The default value is **Enforce credit limit**.
Roll Up Credit Limit	Select this option to add this account's credit limit to the parent's bill unit in a payment responsible real-time credit enforcement balance monitor group. **Note:** This field appears only when this bill unit is a child member of a payment responsible real-time credit enforcement balance monitor group.

Finding a Bill

To find a bill (including refunded bills):

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

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The bill in progress appears by default.

After the billing cycle completes, charges and other billing-related items of the wholesale child accounts in the hierarchy are rolled up to the wholesale parent bill unit, and the total due for this period in the wholesale child accounts shows 0.

The **Bills** tab of the wholesale parent account shows the last generated bill. If it is the first billing cycle and wholesale child bills are in progress, the **No bills to display** message appears in the Bills **tab** of the wholesale parent account.

2. To select another bill by its date, click **Switch Bills**.

   The bill in progress and up to 12 billing cycles are listed. You can view the bills that are generated before and after moving the account to the hierarchy.

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

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

Related Tasks

Making a Payment

Adjusting a Bill

Refunding a Bill

Finding a Specific Bill

To find a specific bill:

1. Click **Search**.

   The Search dialog box appears.

2. From the **Search** list, select **Bills**.

   The Bill Information dialog box appears. See "Search Dialog Box" for more information.

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

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

4. Click **Search**.
5. Billing Care displays search results on the right side of the Search dialog box.
6. Select a bill, and click **Open Bill**.

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

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Billing Care displays the selected bill.

Finding Bills by Date Range

To find bills by date range:

1. Click **Search**.

   The Search dialog box appears.
2. From the **Search** list, select **Bills**.

   The Bill Information dialog box appears.
3. In the date range, select the **From** and **To** date range in which you want to view bills.
   a. Select the number of bills in a billing cycle.
   b. Select the **From** and **To** date range in which to view bills.

   > **Note**
   >
   > Select the **Bills with zero balance** option to view bills without any balance.
4. Click **Search**.

Finding Last Generated Bills

To find the last generated bills:

1. Click **Search**.

   The Search dialog box appears.
2. From the **Search** list, select **Bills**.

   The Bill Information dialog box appears. See "Search Dialog Box" for more information.
3. In the **Last** field, enter the number of last generated bills that you want to search. By default, 1 appears. You can search a maximum of 25 last generated bills.

   > **Note**
   >
   > Select the **Bills with zero balance** option to view bills without any balance.
4. Click **Search**.

Sorting Search Results

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

You can sort the following columns:

- Bill Number
- Cycle Start Date
- Days Overdue

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- Billed Amount
- Balance Due

Viewing Bill Details

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

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

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

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

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

   > **Note**
   >
   > Once the bill is generated for a wholesale child account, you cannot perform the following actions:
   >
   > - Bill adjustment
   > - Bill write-off
   > - Item adjustment
   > - Item dispute
   > - Item write-off
   >
   > You cannot perform these actions for a wholesale child account, irrespective of billing:
   >
   > - Account adjustment
   > - Account write-off
   > - Bill information write-off
   > - Payments
   > - Refunds
3. View events related to a charge by clicking on the charge amount link. Clicking a charge amount displays all the events included in the charge.

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4. Click **Show Charge Changes** to view individual charge change details, such as one-time discounts.
5. To view a bill's invoice, click **View Invoice**.
6. (Optional) To adjust a bill item charge, click the charge's action menu and select **New Adjustment**.

Related Tasks

Finding a Bill

Adjusting an Item

Refunding a Bill

Viewing Refunded Bills

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

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

Related Tasks

Refunding a Bill

Viewing Account Balances

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

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

To view the balances for an account:

1. On the account page, click the **Home** tab, and then select the Account History area or the area for the bill unit whose balances you want to view.

   If the account or bill unit has multiple balances, the **Balance** list appears; otherwise, a single balance appears.
2. In the **Balances** list, select the services whose balances you want to view.

   The names of the services and the related balances appear below the list.
3. (Optional) Click a noncurrency balance to view further details.

Related Tasks

Adjusting a Noncurrency Resource

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Noncurrency Balance Details Dialog Box

Use the Noncurrency Balance Details dialog box to view the credit limit settings and sub-balances in a noncurrency resource.

- Balance Bucket Section
- Credit Control Section

Balance Bucket Section

Use the **Balance Bucket** section to view the details of the existing sub-balances and make adjustments.

Field	Description
Filter	Click to filter the sub-balances by validity period and status.
New adjustment	Click to create a new adjustment. See "Non-Currency Adjustment Dialog Box" for details.
Valid From	Displays the starting validity date of a sub-balance.
Valid To	Displays the ending validity date of a sub-balance.
Original Balance	Displays the original balance amount when a sub-balance was created.
Current Balance	Displays the current balance amount.
Status	Displays whether a sub-balance is currently active, expired, or available in the future.
Action (ellipsis) menu	Select one of the following: • **Adjust bucket**: To adjust an existing sub-balance. • **Change validity**: To change the validity end date for a sub-balance.
Summary	Displays a summary of all sub-balances in the Balance Bucket table.

Credit Control Section

Use the **Credit Control** section to view the credit control properties for the noncurrency balance element. You can click **Edit** to change any settings.

Field	Description
Edit	Click to update the credit control settings.
Limit allowed	Enter the credit limit to control the charges or noncurrency resources a customer can accumulate. This value can be negative.
Dynamic Floor	Select this option to enable the dynamic credit floor. This determines the credit floor using the granted amounts from the sub-balances that are valid for the current cycle for the resource (for example, minutes).
Floor	Enter the lower credit limit amount for the balance. This value can be a negative value, but it cannot be greater than the fixed thresholds value. This can be set only if the **Dynamic Floor** field is not selected.
Fixed Thresholds	Enter the value at which you want the notification event to be generated. This value must be between the floor and the credit limit.

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Field	Description
Thresholds	Select a percentage at which you want the notification event to be generated. This value must be between the floor and the credit limit.
Credit limit check	Select whether to enforce or override the credit limit. Values are: • **Override credit limit**: The credit limit can be overridden. • **Enforce credit limit**: The transaction fails if the credit limit check fails. This is the default.

Viewing an Invoice

To view an invoice:

1. Select a bill.

   For more information, see "Finding a Bill".
2. In the Bills section with a bill open, do one of the following:
   - From the **Actions** menu, select **View Invoice PDF**.
   - Under My Charges or under Charges from Other Accounts, select the charges to view, and click **View Invoice**.

Working with Events

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

To view events:

1. On the account page, click the **Bills** tab.
2. Locate the bill you want to review. If you have multiple bills, you can use the **Switch Bills** option or search by Bill ID to find the correct bill.
3. Under **Bill Details**, in the **Service Charges** area, select the relevant service link.
4. In the Service Charges area of the **Bills** section, select a service.

   The **Charges by service** page appears, listing each charge description and amount.
5. Click an amount to view event-level details for that charge.

   The **Events** dialog appears, containing a list of events in the charge.
6. In the Events dialog box, you can:
   - **Filter events** using the **Filter** button. You can filter results based on event effective time and event start time.
   - Select columns to display by clicking the columns icon.
   - **Sort events** by different columns such as Start Date, End Date, Effective Date, or other available fields.
   - **Export** the list of events as needed.
7. (Optional) To adjust or dispute events:
   - Select the desired events using the checkboxes.
   - Click **Adjust Selected** or **Dispute Selected** to open the relevant dialog box.
   - Fill in the adjustment or dispute details, then save your changes.

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8. Click Close to exit the events dialog box.

> **Tip**
>
> You can view event adjustment details by clicking on **Show Charge Changes**.

Related Tasks

Adjusting an Event

Working with an Account in Collections

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

- View the two next scheduled actions.
- View the number of days the account is past due and the amount that is owed.

  Click to see the details of all past due items.
- View the minimum payment required to stop the collections process.

  Click to make a payment.
- View all collections actions and bill units in collections.

  Click the **View in collections** link to view the bill units in collections.

  If more than two actions are scheduled, the **All Collections Actions** link appears. Click this link to view each action's scheduled actions, notes, and history.

Related Tasks

Making a Payment

Returning to the Landing Page

To close the account view and return to the Billing Care landing page, click **Close** at the top right of the page.

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4

Purchases

You can purchase products and services using the **Purchase** menu in Oracle Communications Billing Care.

To purchase products, services, and add-on products, see the following topics:

- About Offer Association IDs
- Purchasing New Products and Services
- Purchasing Add-On Products
- Transitioning Bundles and Packages

About Offer Association IDs

An offer association ID associates a discount offer with a product offer so that the discount applies only to that product at run time. Billing Care displays the **Offer Association ID** field when a product or discount can be associated with another offer during account creation, service purchase, add-on bundle purchase, package transition, or rate customization.

Assign the same offer association ID to both the product and the discount. For example, if a product and a discount both use an offer association ID of 10, the discount is associated with that product.

Depending on the workflow and the selected service, the Offer Association ID list can include the following groups:

- **Unsaved drafts**: IDs entered for another product or discount on the current Configure screen and not yet saved.
- **From subscribed offers**: IDs already set on subscribed products or discounts that the account owns.
- **From sharing**: IDs from discount offers shared with the account or service by a discount sharing group owner.

In review mode, Billing Care displays **Not Set** when an offer has no offer association ID.

Purchasing New Products and Services

To purchase new products and services for an account:

1. Open an account. See "Finding an Account" for more details.
2. Click the **Purchase** menu, and select **New Service**.
3. Select the package that your customer wants to purchase.
4. Click **Continue**.

   The **Configure** page appears.
5. Under **Service Configuration**, enter a service identifier for each service.

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6. To schedule the package purchase to a date earlier than the current date, select **Backdate Package Purchase** and in the field **Backdate purchase to**, click the calendar icon to set the date. By default, the current date is selected.

> **Note**
>
> - If you purchase a service, you cannot select the backdate if the chosen date is before the account's effective date and last status change.
> - If you purchase a bundle, you cannot select the backdate if the date selected is prior to the account's effective date, the account or service's status change, or the service's effective date.
> - The backdate option is not visible when deliverable-based revenue recognition is enabled, and the package is associated with a subscription term.

7. Under **Bundle**, click a bundle to configure the credit limit check. Select one of the following values:
   - **Override credit limit**: the credit limit will be overridden
   - **Prorate based on credit limit**: prorated until the credit limit is reached
   - **Enforce credit limit**: the transaction will fail if the credit limit check fails

   By default, **Enforce credit limit** is selected.
8. (Optional) Under **Products** and **Discounts**, click an offer to change the customer's purchase charges, such as by:
   - Changing the purchase activation or deactivation dates.
   - Decreasing the customer's monthly fee through discounts or overrides.
   - Changing the length of the grace period. Customers can reactivate and extend their expired product if they repurchase it within the grace period.
   - Associating a discount offer with a product offer by using an offer association ID.

     See "About Offer Association IDs" for more information.

   For more information on cycling and billing attributes, see Table 2-1.
9. Click **Terms**.

   The **Terms** screen displays details about the contract's commitment period, early termination policy, and renewal behavior.

> **Note**
>
> The **Terms** screen is disabled if no subscription terms are associated with the package.

10. Click **Pay**.

    The **Pay** screen appears.
11. Click **Add Bill Unit** to add Bill Units.

    The details of the existing bill units appear on the page. You can add new bill units from this page. The added bill units are available in the **Pay** screen.

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

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

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

12. Click **Finish**.

Purchasing Add-On Products

To purchase additional products for an account:

1. Find the account. See "Finding an Account" for more information.
2. Click the **Purchase** menu, and select **Add to a service**.
3. Select a bundle and then click **Configure**.

   The **Configure** screen appears.

   > **Note**
   >
   > If you add a telco service, see "Configuring SIM Cards".

4. To schedule the bundle purchase to a date earlier than the current date, select **Backdate Bundle Purchase** and in the field **Backdate purchase to**, click the calendar icon to set the date. By default, the current date is selected.

   > **Note**
   >
   > - You cannot select the backdate if the date selected is prior to the account's effective date, the last status change date of the account or service, or the service's effective date.
   > - The backdate option is disabled for systems configured for deliverable-based revenue recognition.
   > - The backdate option is not visible when deliverable-based revenue recognition is enabled, if the package is associated with a subscription term.

5. (Optional) Under **Products** and **Discounts**, click an offer to change the customer's purchase charges, such as by decreasing the customer's monthly fee, customizing the purchase options including activation, recurring fees, usage dates, and offer association ID.
6. (Optional) In the Purchase section, configure the **Offer Association ID** to associate a product offer with a discount offer. See "About Offer Association IDs" for more information.
7. Click **Terms**.

   The **Terms** screen details the bundle's commitment period, early termination policy, and renewal behavior.

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> **Note**
>
> The **Terms** screen is disabled if no subscription terms are associated with the package.

8. Click **Finish**.

Transitioning Bundles and Packages

> **Note**
>
> You cannot transition bundles or packages that are associated with subscription terms.

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

Only a few transition types, such as **Upgrade** and **Downgrade**, appear by default. There could be more types based on your system configuration.

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

When a target package contains products and discounts that support offer association, the Configure page uses the same **Offer Association ID** behavior as purchase flows. See "About Offer Association IDs" for more information.

You can perform the following types of transitions:

- Transitioning a Bundle for an Account
- Transitioning and Configuring a Package for an Account

Transitioning a Bundle for an Account

To transition a bundle for an account:

1. Select an account. See "Finding an Account" for more information.
2. Click the **Purchase** menu, and select **Bundle Transition**.

   The Bundle Transition page appears.
3. Select the **Source** bundle you want to transition from and click **Continue**.
4. From the **Transition Type** list, select a type of transition, such as **Upgrade** or **Downgrade**.
5. Select a **Target** to transition to.
6. Select a reason for purchase.
7. (Optional) Enter a note.
8. Click **Finish**.

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Transitioning and Configuring a Package for an Account

To transition and configure a package for an account:

1. Find the account. See "Finding an Account" for more information.
2. Click the **Purchase** menu, and select **Package Transition**.

   The Bundle Package Transition page appears.
3. Select the **Source** package you want to transition from and click **Continue**.
4. From the **Transition Type** list, select a type of transition, such as **Upgrade** or **Downgrade**.
5. Select a target package to transition to.
6. Set the required fields in the **Bundle**, **Purchase**, **Recurring (cycle)**, **Services**, **Usage**, and **Offer Association ID** sections.

   To associate a product offer with a discount offer, assign the same **Offer Association ID** to both offers. See "About Offer Association IDs" for more information.
7. Select a reason for purchase.
8. (Optional) Enter a note.
9. Click **Finish**.

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5

Assets

You can manage an account's assets, such as the services and charge offers owned, by using the **Assets** area of Oracle Communications Billing Care.

To work with account assets, see the following topics:

- About Assets
- Working with Service-Focused Asset Cards
- Working with Assets in a Product-Focused Table
- Working with Contracts

About Assets

The **Assets** page shows the services and related offers a customer owns. You can display the assets in a services-focused, product-focused, or contracts view.

- In the services-focused view, Billing Care displays each service the customer owns in an asset card. By default, the cards are organized by purchase date with the most recently purchased service on top, but you can change the organization. You can expand the cards to show more details and use the menu to perform actions, such as terminating services or making them inactive. See "Working with Service-Focused Asset Cards".
- In the product-focused view, Billing Care displays each product the customer owns in a table. You can change the amount of detail shown by adding or removing columns in the table. You can also sort the contents by column and perform actions, such as making offers inactive or reactivating them. See "Working with Assets in a Product-Focused Table".
- In the contracts view, Billing Care displays each contract's subscription terms in an asset card. The terms define the commitment periods and options for canceling and renewing the subscription. A contract's terms apply to all required bundles in the contract. Any added optional bundles have their own independent terms. See "Working with Contracts".

You can toggle between the views by selecting **Services**, **Offers**, or **Contracts** at the top right of the **Assets** page.

Working with Service-Focused Asset Cards

To work with assets in service-focused asset cards, see the following topics:

- Viewing Asset Card Details
- Filtering the Services for an Account
- Terminating a Customer's Service
- Inactivating a Customer's Service
- Reactivating a Customer's Service
- Managing SIM Card Details

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Viewing Asset Card Details

Billing Care displays details about the products and subscriptions a customer owns in asset cards. Each asset card contains information about one product or subscription. The top of the card shows overview information, such as:

- The name of the package that the customer purchased
- The number of deferred actions, if any
- The date when the customer purchased the package
- The date when the service takes effect

The asset card displays a **View Contract** button if the service is associated with a subscription term.

For Telco services, it also displays details about the SIM card, phone number, and all aliases.

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

To view asset card details:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, click the **Home** tab and then click the **Assets** area.

   Asset cards appear on the right.
3. On the top right, click **Services**.
4. Click the ••• menu icon of the respective asset card and then select **Show Asset Details**.

   The asset details are displayed.

> **Note**
>
> For asset cards with multiple alias lists, all the alias lists and login details are displayed.

Filtering the Services for an Account

You can narrow the list of services displayed by using the filter.

To filter the services displayed in the service-focused asset cards:

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

   Asset cards appear on the right.
2. On the top right, click **Services**.

   A group of service-focused assets appears on the right.

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3. Click **Filter**.

   The Filter Services dialog box appears. See "Filter Services Dialog Box".

4. Select the criteria by which to filter assets, such as by service type, service status, or service ID.

5. Click **Update**.

   Billing Care displays the filtered results.

Filter Services Dialog Box

Use the Filter Services dialog box to narrow the list of services displayed in the service-focused asset cards.

Field Name	Description
Bill Unit	Select the name of the bill unit to display. Select **All** to display all bill units. **Note:** The **Bill Unit** drop-down list is visible only when an account has multiple bill units.
Service Type	Select the type of service to display, such as IP or GPRS.
Service Status	Select one or more service statuses to display: **Active**, **Inactive**, or **Closed**.
Include Sub-Services	Select this to view the selected service and its sub-services.
Service ID	Select one or more service IDs to display.
Clear Filter	Click to remove all criteria you entered into the dialog box.
Update	Click to display all assets that meet your filter criteria.
Cancel	Click to exit the dialog box without applying your changes.

Terminating a Customer's Service

When you terminate a service, Billing Care terminates all offers associated with the service. It also applies any applicable early termination fees to the customer.

If the service is a parent service, Billing Care also terminates child services in the hierarchy.

> **Note**
>
> A service cannot be terminated if it is associated with a subscription term.

To terminate a customer's service:

1. On the account page, click the **Home** tab and then click the **Assets** area.

   Asset cards appear on the right.

2. On the target card, click ••• and select **Terminate Service**.

3. The card expands to show a **Terminate Service** area.

4. (Optional) To set the termination in the past or future, enter or select a **Termination Date**.

5. Click **Terminate Service**.

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Inactivating a Customer's Service

You can temporarily disable a service for a customer by making it inactive. The customer will not be able to use the service, but it can be reactivated if the customer wants to use it again.

If the service is for a parent, Billing Care also inactivates any child services in the hierarchy.

To make a customer's service inactive:

1. On the account page, click the **Home** tab and then click the **Assets** area.

   Asset cards appear on the right.

2. On the target card, click and select **Inactivate Service**.
3. The card expands to show an **Inactivate Service** area.
4. (Optional) To change the inactivation date, enter or select an **Inactivation Date**.
5. Click **Inactivate Service**.

Reactivating a Customer's Service

You can reactivate a customer's service. If the service is for a parent, Billing Care also reactivates any child services in the hierarchy.

To reactivate a customer's service:

1. On the account page, click the **Home** tab and then click the **Assets** area.

   Asset cards appear on the right.

2. On the target card, click and select **Reactivate Service**.
3. The card expands to show a **Reactivate Service** area.
4. (Optional) To change the reactivation date, enter or select a **Reactivation Date**.
5. Click **Reactivate Service**.

Managing SIM Card Details

If your customer purchased a Telco service plan, the Asset card will include details about its associated SIM card and telephone number.

To change the SIM card and number:

1. In an Asset card, click the

   menu icon and then select **Show Asset Details**. See "Viewing Asset Card Details".

   The card displays the SIM card and phone number associated with the service.

2. Click **Edit**.
3. To assign a new SIM card to the service, do this:
   a. In the SIM card section, click the Search icon:

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A search pop-up appears.

b. Select a status from the drop-down list: **New** or **Released**.

c. Click **Search**.

The search returns a maximum of 50 results by default.

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

The selected SIM card is associated with the service.

4. To assign a new phone number to the service, do this:

a. In the Number section, click the Search icon:



A search pop-up appears.

b. Select **Primary number** if it will be a primary number.

c. Select a status from the drop-down list: **New** or **Unassigned**.

d. Click **Search**.

The search returns a maximum of 50 results by default.

e. Select a number and then click **Associate**.

The selected phone number is associated with the service.

5. Click **Save and Close** to apply your changes.

Working with Assets in a Product-Focused Table

To work with assets in a product-focused table, see the following topics:

- Viewing an Account's Products in a Table
- Filtering the Offers for an Account
- Customizing an Offer's Rate
- Inactivating Offers
- Reactivating Offers
- Terminating Offers
- Terminating Bundles

Viewing an Account's Products in a Table

You can view details about the products an account owns in tabular format. The table includes information such as:

- The name of the plan and deal the customer purchased
- The name of the service associated with the plan
- The name of the product or discount the customer purchased
- The name of the bill unit associated with the plan (displayed only if the customer has multiple bill units)

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- The date when the customer purchased the plan
- The status of the product or discount
- The quantity of the product or discount owned

You can add or remove the columns displayed in the table.

A row includes the **View Contract** task if the product is associated with a subscription term.

By default, Billing Care displays products according to their expiration date, from those expiring first to those expiring last, but you can change how the rows are sorted.

To view an account's offers in a table:

1. On the account page, click the **Home** tab.
2. Click the **Assets** area.

   Asset cards appear on the right.
3. On the top right, click **Offers**.

   The list of offers owned by the account appears in a table on the right. You can sort the offers using the up or down arrows next to the column names.
4. To add or remove columns from the table, do the following:
   a. On the top right of the table, click

      The Columns dialog box appears.
   b. Select the check box next to each column to display.
   c. Click **Update**.

      The table lists the offers with the columns you selected.

Filtering the Offers for an Account

You can narrow the list of offers owned by an account by using the filter.

To filter the offers displayed in the product-focused table:

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

   Asset cards appear on the right.
2. On the top right, click **Offers**.

   A list of product-focused assets appears in a table on the right.
3. Click **Filter** above the table.

   The Filter Offers dialog box appears. See "Filter Offers Dialog Box".
4. Select the criteria by which to filter assets, such as by date, service type, or service status.
5. Click **Update**.

   The product-focused table displays the filtered results.

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Filter Offers Dialog Box

Use the Filter Offers dialog box to narrow the list of offers displayed in the table.

Field Name	Description
Bill Unit	Select the name of the bill unit to display. Select **All** to display all bill units. **Note:** The **Bill Unit** drop-down list is visible only when an account has multiple bill units.
Service ID	Select the service ID to display.
Service Type	Select the type of service to display, such as GSM or GPRS.
Service Status	Select one or more service statuses to display: **Active**, **Inactive**, or **Closed**.
Offer Name	Select the name of the offer to display.
Offer Status	Select one or more offer statuses to display: **Active**, **Inactive**, or **Closed**.
Include Sub-Services	Select this check box to list services and all of their sub-services.
Offer Purchase Date	Select the qualifier for the purchase date: **On**, **Before**, **After**, or **Between**. In the **Date** field, select or enter the date. For example, to show assets created prior to June 15, you would select **Before** and then select June 15 from the **Date** calendar.
Update	Click to display all assets that meet your filter criteria.
Cancel	Click to exit the Filter Offers dialog box without applying your changes.
Clear Filter	Select this to clear all filters.

Customizing an Offer's Rate

You can customize an offer your customer owns in the following ways:

- Modify the discount amount or percentage
- Override the amount of the purchase or recurring fee
- Change the length of the grace period
- View, set, change, or remove the offer association ID that associates a discount offer with a product offer

To customize an offer's rate:

1. View a product-based list of assets owned by the account. See "Viewing an Account's Products in a Table".
2. Select the row of the asset you want to customize.
3. Click the following menu icon at the end of the row:

4. From the menu, select **Review Customized Rates**.

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The row expands to show the customization details, including the current fees, dates, and discounts.

For the offer association ID:

- If an ID is set, Billing Care displays it.
- If offer association is enabled but no ID is set, Billing Care displays **Not Set**.
- For a discount, if offer association is disabled and the setting was not overridden during purchase, Billing Care does not display the **Offer Association ID** field.

5. Click **Edit**.

   The Customize Rates area appears.

6. Modify the offer's fees, discounts, grace period, or offer association ID.

   Use the **Offer Association ID** field as follows:

   - To associate the offer with an existing product or discount in the same service, select an ID under **From subscribed offer**.
   - To associate a product with a discount shared by a discount sharing group owner, select an ID under **From sharing**.
   - To create a new association, enter a new **Offer Association ID**.
   - To remove an association, select **Not Set**.

   For a discount, turn on **Enable Offer Association** if it is not already on. If **Enable Offer Association** is unavailable, the discount cannot be associated with a product.

7. Click **Save and Close**.

Inactivating Offers

You can make an offer temporarily unavailable to a customer by making it inactive. The customer will not be able to use the offer, but it can be reactivated if the customer wants to use it again.

To make a customer's offer inactive:

1. View a product-based list of assets owned by the account. See "Viewing an Account's Products in a Table".
2. Select the row of the asset you want to make inactive.
3. Click the following menu icon at the end of the row:

4. From the menu, select **Inactivate Offer**.

   The row expands to include the action's details.

5. (Optional) To inactivate the offer in the past, select **Backdate Inactivation** and enter or select a date.
6. Click **Inactivate**.

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Reactivating Offers

You can reactivate a customer's offer.

To reactivate a customer's offer:

1. View a product-based list of assets owned by the account. See "Viewing an Account's Products in a Table".
2. Select the row of the asset you want to reactivate.
3. Click the following menu icon at the end of the row:

4. From the menu, select **Reactivate Offers**.

   The row expands to include the action's details.
5. (Optional) To set the offer reactivation in the past, select **Backdate Reactivation** and then enter or select a date.

   By default, the reactivation date is set to today.
6. Click **Reactivate**.

Terminating Offers

You can terminate a customer's offer immediately or backdate it to an earlier date.

> **Note**
>
> - After an offer is terminated, it cannot be reactivated. The customer must repurchase the offer to use it again.
> - You cannot terminate a product if it is associated with a subscription term.

To terminate a customer's offer:

1. View a product-based list of assets owned by the account. See "Viewing an Account's Products in a Table".
2. Select the row of the asset you want to terminate.
3. Click the following menu icon at the end of the row:

4. From the menu, select **Terminate Offer**.

   The row expands to include the action's details.
5. (Optional) To set the offer termination in the past, select **Backdate Termination** and then enter or select a date.

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By default, the termination date is set to today.

6. Click **Terminate**.

Terminating Bundles

When you terminate a bundle, Billing Care also terminates all associated offers. You can terminate a customer's bundle immediately or backdate it to an earlier date.

> **Note**
>
> After a bundle is terminated, it cannot be reactivated. The customer must repurchase the bundle to use it again.

To terminate a customer's bundle:

1. View a product-based list of assets owned by the account. See "Viewing an Account's Products in a Table".
2. Select the row of the asset you want to terminate.
3. Click the following menu icon at the end of the row:

4. From the menu, select **Terminate Bundle**.

   The row expands to include the action's details.
5. (Optional) To set the bundle termination in the past, select **Backdate Termination** and enter or select a date.

   By default, the termination date is set to today.
6. Click **Terminate**.

Working with Contracts

To work with contracts after customers have purchased them, see the following topics:

- Viewing a Contract's Terms
- Modifying a Contract's Auto-Renewal Preferences
- Canceling a Customer's Contract

Viewing a Contract's Terms

You can view details about the subscription terms associated with a customer's contract in several ways.

To do so, click the **Home** tab, click **Assets**, and then do one of the following from the **Assets** page:

- Click **Contracts** on the top right.

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- Click **Services** on the top right and then click **View Contract** on the appropriate asset card.
- Click **Offers** on the top right and then select the offer that you want to view the contract details for. Click the following menu icon at the end of the row:

Select **View Contract** from the menu list. After the row expands, click **Show Details**.

An asset card displays the term's details, such as the commitment period, the minimum contract length, the penalty fees for early termination, and the auto-renewal options.

By default, Billing Care sorts the contracts using these rules in order:

1. By the contract's status, with the terminated contracts displayed last.
2. By the contract's end date in ascending order.
3. By the contract's start date in ascending order.
4. In alphabetical order of the term's name.

Modifying a Contract's Auto-Renewal Preferences

To modify the auto-renewal preferences for a customer's contract:

1. View the appropriate contract's terms. See "Viewing a Contract's Terms".
2. Select the appropriate asset card.
3. To automatically renew the contract at the end of its commitment period, do this:
   a. Click the menu icon of the respective asset card. Then, select **Enable Auto-renew**.

      A renewal options window shows when the terms will renew and end.
   b. If the renewal terms are correct, click **Enable Auto-renew**.
4. To prevent the contract from automatically renewing at the end of its commitment period, do this:
   a. Click the menu icon of the respective asset card. Then, select **Disable Auto-renew**.

      A disable options window appears.
   b. Click **Disable Auto-renew**.

Canceling a Customer's Contract

Your customers can cancel their contract early if it is allowed by the contract's terms. When contracts are canceled, BRM cancels all bundles, offers, and services in the contract and applies any early termination fees.

To cancel a customer's contract:

1. Open the appropriate contract's subscription terms. See "Viewing a Contract's Terms".

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2. From the appropriate asset card, click the menu icon of the respective asset card and then select **Terminate Contract**.

   The asset card expands to show a **Terminate Contract** area.

3. To backdate the cancellation, click **Backdate Termination** and select or enter the appropriate date.

4. Click **Terminate**.

   The asset card displays **Terminated** along with the cancellation date. Any early termination fees are automatically applied to the customer's current bill.

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6
Billing

You can use Oracle Communications Billing Care to create bills on demand and corrective bills for your customers.

To work with billing, see the following topics:

- Creating a Bill on Demand
- Generating Corrective Bills

Creating a Bill on Demand

Use Bill Now to create a bill on demand for a customer's unbilled items.

To create a bill using Bill Now:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, click the **Bills** section.
3. Click **Bill Now**.
4. Click **OK**.

Generating Corrective Bills

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

You can generate and view corrective bills for a selected bill from the Bills section.

To generate a corrective bill:

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

   The Bill in progress appears by default.

   > **Note**
   >
   > An invoice must be generated for the bill before modifying the bill. A corrective bill can only be generated if an invoice for the bill has been generated.

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

   The bill in progress and any other bills, up to 12 billing cycles, are listed.
3. Select the required bill.
4. From the **Actions** menu in the Bills section, select **Produce Corrective Bill**.

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The Produce Corrective Bill dialog box appears. See "Produce Corrective Bill Dialog Box" for details.

5. From the **Invoice Format** list, select an invoice format. By default, the **Detail** format is selected.
6. From the **Invoice Type** list, select an invoice type. By default, the **Invoice Correction Letter** type is selected.
7. From the reason list, select a reason.
8. (Optional) Enter a note.
9. Click **OK**.

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

> **Note**
>
> Once a corrective bill is generated, the News Feed displays the **Corrective Bill Issued**.

Viewing Corrective Bills

To view corrective bills:

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

   The Bill in progress appears by default.
2. (Optional) To select another bill, click **Switch Bills**.

   The bill in progress and any other bills, up to 12 billing cycles, are listed.
3. Select the required corrected bill.
4. Click **Corrective Bill Trail**.

> **Tip**
>
> You can also view the corrective bills from the Bills chart in the Home tab or from the A/R News Feed.

   The Corrective Bill Trail dialog box appears. See "Corrective Bill Trail Dialog Box" for details.

   This dialog box displays a series of corrective bills for the selected bill with the details, such as my charges, A/R actions (Billed and Unbilled), payment applied, and total due. The notes panel displays all the notes that are entered for the bill.
5. (Optional) To view the invoice for the bill, click **View Invoice**.
6. (Optional) Click **Comment** and enter a comment.

Produce Corrective Bill Dialog Box

Use the Produce Corrective Bill dialog box to produce corrective bills.

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Field	Description
Invoice Format	Select one of the following invoice formats: • **Detail**. The Detail format for a corrective invoice includes all the detail on the adjustment for the corrected item along with all the events. • **Summary**. The Summary format for a corrective invoice includes all the detail on the adjustment for the corrected item.
Invoice Type	Select one of the following invoice types: • **Invoice Correction Letter**. An Invoice Correction Letter contains only the changes from the original bill, that is, the corrected items and corrected events. Select **Invoice Correction Letter** when you wish to create a Credit Note. • **Replacement Invoice**. A Replacement Invoice includes all the items or events from the original bill along with the corrected amounts. Select **Replacement Invoice** when you wish to create a duplicate invoice or regenerate an invoice.
Select a reason	Select a reason.
Notes	(Optional) Enter notes.
Comment	(Optional) Click and enter a comment.

Corrective Bill Trail Dialog Box

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

Field	Description
My charges	The charges for the bill.
A/R actions	The A/R actions (including Billed and Unbilled) for the bill.
Payment applied	The payment applied for a specific bill.
Total Due	The amount that is due for the bill.
Comment	(Optional) Click and enter a comment.

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7

Batch Payments, Refunds, and Reversals

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

You can also create and process batches for payments, refunds, and reversals in Billing Care. Using this method, you can also import files and manually edit and process them. You can create and edit templates for processing batches as well.

For more information, see the following topics:

- Importing a Batch Payment File
- About Batch Payment Template Files
- Creating, Editing, and Processing Payment, Refund, and Reversal Batches
- Working with Batch Templates
- Create Batch Page
- Create or Edit Template Page
- Search Dialog Box
- Suspend Payment Dialog Box

Importing a Batch Payment File

You can upload payment files created externally either by placing them in the appropriate directory or by uploading them manually

The following sections contain information about methods of creating or importing a batch payment file:

- About Batch Payment File Directories
- About Batch Payment File Names
- Configuring Auto Processing of Batch Payment Files
- Processing Payments in Foreign Currencies
- Uploading Batch Payment Files to the Billing Care Server
- Importing Batch Payment Files Manually Using Billing Care
- Viewing Imported File Status and Errors
- Reversing Failed Batch Payments
- Viewing Batch Payment Processing History
- Viewing Suspended Batch Payments

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About Batch Payment File Directories

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

- *BatchFile_home*/**unprocessed** contains unprocessed files
- *BatchFile_home*/**processed** contains processed files
- *BatchFile_home*/**processing** contains processing files
- *BatchFile_home*/**error** contains files with processing failures

where *BatchFile_home* is the **Batch Payment Files Location** that was entered during installation. Consult with your administrator to determine where your batch file directory is located.

About Batch Payment File Names

Each batch payment file that you upload and import into Billing Care must have a unique file name. Otherwise, the batch payment file fails.

Sometimes, you may need to re-import the same batch payment file into Billing Care, such as after you correct errors in its content. To maintain auditing data, rename the batch payment file before you import it into Billing Care again.

Configuring Auto Processing of Batch Payment Files

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

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

To configure Billing Care auto processing behavior:

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

Processing Payments in Foreign Currencies

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

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See "Changing Currency Conversion Rates" in *BRM Managing Customers* for more information about configuring currency conversion rates.

Uploading Batch Payment Files to the Billing Care Server

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

*BatchFile_home***/unprocessed**

where *BatchFile_home* is the **Batch Payment Files Location** that was entered during installation. Consult with your administrator to determine where your unprocessed folder is located.

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

To view uploaded files:

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

> **Note**
>
> If Auto Process is enabled, uploaded batch payment files are automatically processed by Billing Care.

Importing Batch Payment Files Manually Using Billing Care

To manually import and process batch payment files:

1. Log into Billing Care.
2. Click **Batch Payment**.
3. Click **Import** to upload a batch payment file.
4. Select the batch payment file.

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> **Note**
>
> If your batch file includes any non-standard data in the header area, it will be ignored. Standard header fields must use the exact names listed below:
>
> - Locale
> - Batch Date
> - Batch Total
> - Currency ID
> - Channel
> - Batch Size
> - Batch Name
> - Lockbox ID
> - Lockbox Date

5. Click **Open**.

   The payment file is imported and listed as **Unprocessed**.

6. Click **View File** to confirm the contents of your payment file.

   The payment file is rendered in a separate tab or window.

7. Click **Process** to process the batch payment.

   Billing Care processes the batch payment file.

Viewing Imported File Status and Errors

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

Billing Care displays each payment batch as a card with a status such as **Processed** or **Error**.

- **Processed** (green): Indicates the file was successfully processed. The card shows a success message (“Batch was processed successfully”) and you can click **View in History** for additional details about the batch.
- **Error** (red): Indicates that there was an issue processing the file. The card displays details about the error (for example, “Processing Error” or “Unknown Bank”) and the specific reason for the failure. For error files, you may be prompted to select a template or take corrective action. Options such as **View File**, **Retry**, or **Delete** may be available depending on the error.

About Batch Processing Errors

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

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Error	Description
Older Version Found	An older version of the same batch payment file has been previously loaded and not processed. When prompted, do one of the following: • Click **Override** to have Billing Care overwrite the older file version with the newly imported version. In this case, you will lose the previous file data and auditing will not be possible. • Click **Cancel** to leave the file unprocessed. To maintain auditing data, rename the batch payment file and then upload or import the file again.
Processing Error	A Billing Care system error or connection failure occurred. Clear the error and retry processing. Contact your administrator if the problem persists.
Threshold Exceeded	The number of suspended payments in a batch has exceeded a preconfigured threshold. Successful allocations in the payment batch are rolled back. Check the batch payment file for errors before reattempting processing.
Unknown Bank	The batch payment file is readable but cannot be processed due to an unknown/unidentifiable bank. This error occurs when a valid template for the batch payment file cannot be determined. A list of valid templates is shown. If the file complies with an existing template, select the template and click **Retry**.
Unrecognizable File Type	The file uploaded or imported is not a recognizable batch payment file.

Reversing Failed Batch Payments

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

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

Individual payments can be reversed when viewing an account. See "Reversing a Payment" for more information on reversing payments when viewing an account.

Viewing Batch Payment Processing History

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

- **Process Complete**: The date and time when batch processing was completed.
- **Batch Name**: The name given to the batch payment.
- **Source**: The originating source or system that submitted the batch (for example, bank, API test).
- **Total**: The total currency amount for the batch.
- **Total Records**: The number of records processed in the batch.
- **Suspended Records**: The number of records in the batch that were suspended (with links to details, if available).
- **Processing Duration**: The time taken to process the batch.

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- **Queue Duration**: The duration the batch spent in queue before processing.

You can sort the batch payment processing history using the **Sort** list. The following sort options are available:

- Currency total (first occurrence)
- Number of Records
- Process Complete Date
- Processing Duration
- Queue Duration
- Source

To view batch payments history:

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

Viewing Suspended Batch Payments

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

To view suspended payments in a processed payment batch:

1. Click **Batch Payment**.
2. Select **History**.
3. Click the number in the **Suspended Records** column next to the relevant batch.

   The Suspended Payments page with the suspended payments from the processed batch is displayed.

About Batch Payment Template Files

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

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

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

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See "Enabling Custom Payment Types in Batch Processing" in *Billing Care SDK Guide* for more information on batch payment templates.

Creating, Editing, and Processing Payment, Refund, and Reversal Batches

You can edit the contents of batch files, whether you have imported them or created them in the Billing Care UI. You can also provide refunds and reversals in batches in addition to payments.

You can work with batches in the following ways:

- Creating and Processing a Batch
- Creating a Record in a Batch
- Searching for Records to Add to a Batch
- Modifying a Record in a Batch
- Allocating Payments to Bills or Items
- Suspending a Payment in a Batch
- Removing Suspension from a Payment in a Batch
- Importing and Editing Batches Manually Using Billing Care
- Validating a Batch
- Exporting a Batch to a File
- Submitting a Batch

Creating and Processing a Batch

You can create a batch in Billing Care.

To create a batch:

1. Log into Billing Care.
2. Click **Batch Payment.**
3. Click **More Actions** and click **Create Batch**.

   The Create Batch dialog box appears.
4. Click **Continue** to continue without uploading a file to create a new batch.
5. Enter details for the batch such as **Number of Records, Projected Total Amount** in the Create Batch page. See "Create Batch Page" for more details about the Create Batch page.

   > **Note**
   >
   > Type, Payment Method, Currency, Effective Date and Number of Records are populated by default but you can change them if required. The Batch ID field is read-only. It is automatically populated when the batch is submitted.
6. Add records to the batch. See "Creating a Record in a Batch" for more information.

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7. You can search for records to add to the batch. See "Searching for Records to Add to a Batch" for more information.
8. You can modify a record in a batch. See "Modifying a Record in a Batch" for more information.
9. You can allocate payments to bills or items in a batch. See "Allocating Payments to Bills or Items" for more information.
10. You can manually suspend records in a batch. See "Suspending a Payment in a Batch" for more information.
11. You can remove suspension from manually suspended records in a batch. See "Removing Suspension from a Payment in a Batch" for more information.
12. Validate the batch, see "Validating a Batch" for more information.
13. You can export the batch, see "Exporting a Batch to a File" for more information.
14. Submit the batch. See "Submitting a Batch" for more information.

Creating a Record in a Batch

You can create a record in a batch in Billing Care.

To create a record in a batch:

1. Create a batch. See "Creating and Processing a Batch" for more information.
2. In the Records in Batch table, click **Add Record** and add records to the table by filling details like **Payment Amount, Account Number**. See "Create Batch Page" to learn about the fields in the table.

Searching for Records to Add to a Batch

You can search for a record in a batch through **Account** or **Bill** details while adding an existing record to a batch.

You can search for records or payments to add them to batch in the following ways:

- Search for Records Through Accounts
- Search for Records Through Bills
- Search for Payments in a Reversal Batch

Search for Records Through Accounts

To search for a record by providing **Accounts** details:

1. In the Create Batch page, select a row to activate the **Search** button at the top.
2. Click the **Search** button to open the Search dialog box.
3. In the Search dialog box, keep the default of **Accounts** in the list. Optionally, you can enter any of the details as search criteria.

   All fields are optional. If no criteria are entered, all accounts are fetched.
4. Click the **Search** button to find all the matching accounts.
5. You can clear existing search results and criteria by clicking the **Reset** button.
6. When the results are fetched, select one of the accounts and press **Enter**.

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7. Click **Add To Batch**.

> **Note**
>
> You can also double-click the desired record to add it to the batch.

Search for Records Through Bills

To search for a record by providing **Bills** details:

1. In the Create Batch page, select a row to activate the **Search** button at the top.
2. Click **Search** to open the Search dialog box.
3. In the Search dialog box, choose **Bills** from the list. Optionally, you can enter any of the details as search criteria.

   All fields are optional. If no criteria are entered, all bills are fetched.
4. Click **Search** to find all the matching bills.
5. You can clear existing search results and criteria by clicking the **Reset** button.
6. When the results are fetched, select one of the Bills and press **Enter**.
7. Click **Add To Batch**.

> **Note**
>
> You can also double-click the desired record to add it to batch.

Search for Payments in a Reversal Batch

In a reversal batch, you search only for payments which are not suspended or already reversed.

> **Note**
>
> The type of reversal batch determines the payment being searched. For example, in a **"Check Reversal Batch"** only check payments can be searched.

To search for **Payments** in a **Reversal** type batch:

1. In the Create Batch page, change the batch **Type** to **Reversal**.
2. Select a row on the table to activate the **Search** button at the top.
3. Click the **Search** button to open the Search dialog box.
4. In the Search dialog box, you can search for any **Payment**. Optionally, you can enter any of the details as search criteria.

   All fields are optional. If no criteria are entered, all payments are fetched.
5. Click **Search** button to find all the matching payments.
6. Click **Add to Batch** to add the desired record to batch.

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> **Note**
>
> You can also double-click the record to add it to batch.

Modifying a Record in a Batch

To modify a record in a batch:

1. Access a batch. For more information, see "Creating and Processing a Batch" and "Importing and Editing Batches Manually Using Billing Care".
2. In the table, click the **Edit**  button to modify a record in a batch.

> **Note**
>
> You can also edit a record by double-clicking the required row.

3. Click **Save.**

Allocating Payments to Bills or Items

You can allocate payments in Billing Care. If the payment is already allocated, you can change the allocation using this method.

To allocate payments to bills or items:

1. Access a batch. For more information, see "Creating and Processing a Batch" and "Importing and Editing Batches Manually Using Billing Care".
2. In the table, identify the row corresponding to the record you wish to allocate and click **Allocation**.

   The Allocate Payment dialog box appears with the details for the row, such as bill unit, bill ID, due date, and balance.
3. In the Allocate Payment dialog box, you can switch between **Simple View** for bill-level allocation and **Advanced View** for item-level allocation.
4. Enter the allocation amount which should be less than the unallocated amount and click **Allocate**.
5. Click **Save** or **Cancel** the changes you have made in any view.

   You can also **Reset** the changes in both the views.

Suspending a Payment in a Batch

You can manually suspend a payment in Billing Care.

To manually suspend a payment:

1. Access a batch file. For more information, see "Creating and Processing a Batch" and "Importing and Editing Batches Manually Using Billing Care"
2. (Optional) Click the **Validate** button to validate the records.

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3. Click **More Actions** (three dots).
4. You will get two options, **Suspend Payment**, and **Delete Record**. If the status is already Suspended or the records are not validated, the **Suspend Payment** button is disabled.
5. If you select **Suspend Payment**, select a Reason and add Comments in the Suspend Payment dialog box.
6. Click **Suspend**.

Removing Suspension from a Payment in a Batch

You can remove suspension of a manually suspended payment in Billing Care.

To remove manual suspension of a payment:

1. Access a batch. For more information, see "Creating and Processing a Batch" and "Importing and Editing Batches Manually Using Billing Care".
2. Click **More Actions** from the **Action Column** in the end of each row.
3. From the list, select **Remove Suspension**.

Importing and Editing Batches Manually Using Billing Care

You can edit imported batches in the same way as created batches using the following mechanism.

To manually import and edit batches:

1. Log into Billing Care.
2. Click **Batch Payment.**
3. Click **More Actions** and select **Create Batch**.
4. In the Create Batch dialog box, click **Upload File**.
5. Browse to and select the batch file and click **Continue**. Make sure that the batch name in your imported batch **.pmt** file is the same as the template name.

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> **Note**
>
> a. If your batch file includes any non-standard data in the header area, it will be ignored. Standard header data which must be named which must have the exact name listed below:
>
> - Locale
> - Batch Date
> - Batch Total
> - Currency ID
> - Channel
> - Batch Size
> - Batch Name
> - Lockbox ID
> - Lockbox Date
>
> b. Only files with the extensions **.pmt**, **.txt**, or **.text** are supported for upload. Attempting to upload a file with an unsupported format will result in an error message:*"Unrecognizable file format, the imported payment file type is not supported."*

If the system can find a template that matches your batch file, the **Matching template ready for processing** option will be selected by default, and the **Select template** field will contain the name of the matching template. If not, the **Create Template** option will be selected by default.

6. Do one of the following:

   a. To process the payment file with an existing template, click **Matching template ready for processing** and select a template from the **Select Template** list to use as the template you will use to process the file. If the system selected a template by default, you can select a different template if you want. Click **Continue**.

   b. To process the payment file with a template that you create from scratch, click **Create template**, click **Continue**, and create a template to process the file. See "Creating a Batch Template" for more information. When you are finished, click **Save**.

   c. To process the payment file with an existing template and edit the template before processing, click **Edit and use existing template**.

      i. Select a template from the **Select template** list to edit and use.

      ii. Click **Continue**.

      iii. In the Edit Batch Template page, set the options to process your batch file. See "Create or Edit Template Page" for more information.

      iv. When you are finished, click **Save**.

   d. To process the payment file using a new template that is based on an existing template, click **Duplicate and use an existing template**.

      i. Select a template from the **Select template** list to use as the basis for the template you will use to process the file.

      ii. Click **Continue**.

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iii. In the Create template page, set the options to process your batch file. See "Create or Edit Template Page" for more information.

iv. When you are finished, click **Save**.

The Create Batch page appears where you can edit your batch file.

7. Make changes in the batch file as appropriate, validate, and submit the file. See "Creating and Processing a Batch" for more information.

Validating a Batch

You can validate the records in a batch in Billing Care.

To validate a batch:

1. Access a batch. For more information, see "Creating and Processing a Batch" and "Importing and Editing Batches Manually Using Billing Care" for more information.

> **Note**
>
> The Validate button is enabled only after you provide the account number, bill number and payment amount of the respective records.

2. Click the **Validate** button to validate the records.

   The status of the validated records will show as validated and you can see a summary table with the validated records. Records that have not been validated successfully will be marked for suspension if you are using Payment Suspense Manager. See "Managing Suspended Payments" in *Configuring and Collecting Payments* for more information about Payment Suspense Manager.

> **Note**
>
> A payment can fail validation if it is less or more than the amount for a specific bill. If you have the correct permission in Billing Care (noManualAllocationMandatory), you can select to ignore this error and allocate the payment at the account level rather than the bill level by selecting the **Deferred Allocation** check box.

Exporting a Batch to a File

You can export a batch to a file in Billing Care.

To export a batch to a file:

1. Create a batch. See "Creating and Processing a Batch" for more information on how to create a batch.
2. When you have finished creating and editing the records in your new batch, or at any time during the creation process, click **More Actions** and select **Save this payment batch**.

   The Export File dialog box appears.
3. Choose one of the two formats:
   - **Grid view** to export in default grid format.
   - The uploaded file template format, for example, **Cash Refund Batch Template**.

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4. If the batch has a different locale than the locale for your browser, choose a locale to export between **Original File Locale** or **Current Locale**.
5. Click **Export**.

   The data from the table will be saved as **Export**_*BatchName*_*Date*_*Time*_*Locale*.**pmt** where *BatchName* is the name of the batch template, *Date* and *Time* are the date and time of the export, and *Locale* is the locale of the payments in the file.

Submitting a Batch

You can submit a batch after exporting in Billing Care.

To submit a batch:

1. Create a batch. See "Creating and Processing a Batch" for more information on how to create a batch.
2. Validate all the records in a batch. See "Validating a Batch" to learn how to validate records.

   > **Note**
   >
   > The **Submit** button will be enabled only after all the records are either validated, suspended or manually suspended.

3. Click **Submit**.

   A dialog box will be displayed indicating whether the batch submission was successful. If the batch submission is not successful, the number of records which couldn't be processed will also be displayed.
4. Click **OK**.

   You are returned to the Create Batch page, with all buttons disabled except **Close** and **Save this payment batch**. If any of the records were not successful, there will also be a link at the top to **Edit failed records**.
5. If you want to export the final version of this batch, click **Save this payment batch**.
6. If there were failed records and you want to correct them, click **Edit failed records**. This will create a new batch with only the failed records that you can update just like any batch. See "Create Batch Page".
7. Click **Close**.

Working with Batch Templates

The following sections contain information about batch templates:

- Creating a Batch Template
- Creating a Batch Template Based on an Existing Template
- Editing a Batch Template
- Viewing Existing Batch Templates
- Deleting a Batch Template

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Creating a Batch Template

If the batch file you upload doesn't match any existing templates, an error message will appear. The Create Batch dialog box will pop up where you can either choose an existing batch or proceed without uploading a file to create a new batch. You can create, edit, and duplicate existing templates here.

To create a new batch template:

1. Log into Billing Care and click **Batch Payment**.
2. Click **More Actions** and select **Batch Templates** from the list.

   The Batch Templates page will appear with a list of templates.
3. Click **Create Template** to create a new template.

   The Create Batch Template page will appear.
4. Enter details for the new template like **Name, Number of Fields** according to your needs. See "Create or Edit Template Page" for information about the fields in this page.

   > **Note**
   >
   > If you have an existing **.pit** file, you can enter the data from your file to the Create Template page.
5. Click **Create**.

   The Create Batch Template dialog box will appear indicating that the template was created successfully.
6. Click **OK.**

Creating a Batch Template Based on an Existing Template

You can create a batch template based on an existing template in Billing Care.

To create a batch template based on an existing template:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Templates**.
3. On the Batch Payments page, click **More Actions** (three dots) on the corresponding row for the template you want to edit.
4. Select **Duplicate** from the list.

   The Edit Batch Template page appears.

   The new template is created with the name *BaseTemplate*_**copy** and values that match the ones in the source template where *BaseTemplate* is the name of the source template.
5. Edit the template according to your needs. See "Create or Edit Template Page" for information about the fields in this page.

Editing a Batch Template

You can edit a batch template in Billing Care.

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To edit a batch template:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Templates**.
3. On the Batch Payments page, click **More Actions** (three dots) on the corresponding row for the template you want to edit.
4. Edit the template according to your needs. See "Create or Edit Template Page" for information about the fields in this page.

Viewing Existing Batch Templates

You can view an existing batch template in the Billing Care UI.

To view an existing standard template:

1. Log into Billing Care and click **Batch Payments**.
2. On the Batch Payments page, click **More Actions**.
3. Select **Batch Templates** from the list.

   A list of standard batch templates will be displayed.

To search for a specific template in the list of standard preinstalled batch templates:

1. Use the **Browse batch templates by name** search bar to search for a specific template name.
2. (Optional) Click **More Filters** to refine your search by selecting a **Type** and **Payment Method**.
3. Click **Update** to apply the selected search filters.

Deleting a Batch Template

You can delete a batch template in Billing Care.

To delete a batch template:

1. Log into Billing Care and click **More Actions**.
2. Click **Batch Templates**.
3. On the Batch Payments page, click **More Actions** (three dots) on the corresponding row for the template you want to edit.
4. Click **Delete** to delete the template according to your needs.

Create Batch Page

Use the Create Batch page to create and make batch payments.

Field	Description
Type	Select the type of payment for the batch (**Payment**, **Refund**, or **Reversal**).
Payment Method	States the method of payment of the source template, such as **Cash** or **Check**.
Number of Records	Enter the number of records or transactions to include in the batch.

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Field	Description
Batch ID	A unique identifier for the batch which is populated by Billing Care automatically.
Effective Date	Select the date of the batch from which it is effective.
Currency	Select the currency for the batch (for example **USD** for US Dollars or **EUR** for Euros).
Payment Channel	The delivery method by which customer payments are sent to a financial institution.
Projected Total Amount	The projected total amount for the batch.
Include Lockbox Batch	Click to include lockbox batch and include details like Lockbox ID and Lockbox Date.
Add Record	Click to add a new payment to the batch.
Search	Click to search for a record in a batch.
Validate	Click to validate the batch.
More Actions	Use this menu to access additional commands, like **Save this payment batch** or **Clear Data**.
Records in Batch	This table displays the details of the payment, refund, or reversal records, for example, **Account Number** and **Amount**. You can edit, allocate, suspend, and delete records in this table.

Create or Edit Template Page

The Create Template page and the Edit Template page have the same fields. Use these pages to create or edit a batch template.

Field	Description
Name	Enter batch template file name.
Type	States the type of batch: **Payment**, **Refund**, or **Reversal**. This field is disabled if you are editing the template after it is created.
Payment Method	States the method of payment, such as **Cash** or **Check**. This field is disabled if you are editing the template after it is created.
Delimiter	Select a column delimiter like comma or tab or enter a different delimiter.
Ignore delimiters within specific characters	Select this option to ignore column delimiters within strings, and then select the appropriate string delimiter character in the field below.
Treat consecutive delimiters as one	Select this option to ignore duplicate delimiter characters.
File includes a batch header **File includes a batch footer**	Select whether the file includes a batch header and footer and enter start and end line numbers for any headers or footers.
Sample File Contents	Enter some sample payment records from a **.pmt** file. The data is displayed in the **Field Mapping** table.
Records Start Line	Choose the line number in the file of the first record. Ensure that this does not conflict with the lines containing any header rows.
Number of Fields	Choose the number of fields in your template.

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Field	Description
Field Mapping	The data entered in **Sample File Contents** is displayed here. You can map each column by selecting the fields from the lists as per the data.
More Options (ellipsis)	**Edit**: Allows modification of the selected batch payment template's configuration. **Duplicate**: Creates a copy of the selected batch payment template. **Delete**: Permanently removes the selected batch payment template. **Generate Sample File**: Generates a sample **.pmt** file for a batch template that is saved and used as a sample template for preparing batches.

Search Dialog Box

Use the Search dialog box to search for accounts, bills, and payments through account, bill, and payment information.

The default of **Accounts** is selected. You can use the fields in the following table to search for accounts to add them to batch.

Field	Description
Account Information	Enter account information details like Account Number or Company Name in the search filters.
Results	Search results will show in a table with columns like Account Number, First and Last Name, and Company Name.
Add to Batch	Select the appropriate rows in the table and click to add them to the batch You can also double-click any record to add it to batch.

When you select **Bills** in the list, you can use the fields in the following table to search for bills to add them to batch.

Field	Description
Bill Information	Enter bill information details like Account details and Bill number in the search filters.
Results	Search results will show in a table consisting of columns like Account Number, Bill Number, Cycle Start Date, Days Overdue, Billed Amount, Balance Due.
Add to Batch	Select the appropriate rows in the table and click to add them to the batch. You can also double-click any record to add it to batch.

When you search for **Payment** in a Reversal type batch, you can use the fields in the following table to search for payments to add them to batch.

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Field	Description
Payment Information	Enter payment information details such as account number, check number, bank code, date in the search filters.
Results	Search results will be displayed in a table consisting of columns like Account Number, Payment ID, Effective Date, Amount, Check Number, Bank Code, Bank Account Number.
Add to Batch	Select the appropriate rows in the table and click to add them to the batch. You can also double-click any payment record to add it to batch.

Suspend Payment Dialog Box

Use the Suspend Payment dialog box to manually suspend payments.

Field	Description
Reason	Enter the reason that you want to suspend the payment. You can select any reason from the list, or you can enter a reason manually.
Comments	Enter comments about the suspension if needed.

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8

Payments

You can manage your customers' payments by using Oracle Communications Billing Care.

To work with payments, see the following topics:

- Initiating a Payment
- Making a Payment
- Viewing Payment Details
- Allocating Payments
- Allocating a Payment
- Reversing a Payment

For information about batch payments, see "Batch Payments, Refunds, and Reversals".

Initiating a Payment

For information about searching for an account and opening the account page, see "Finding an Account".

You can initiate a payment from any of the following locations after opening an account in Billing Care:

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

For information about applying a payment to a customer's account, see "Making a Payment".

Making a Payment

Billing Care supports the following payment methods:

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

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- SEPA

> **Note**
>
> - A payment amount does not need to match a bill amount. You determine where to apply a payment when allocating the payment.
> - You cannot make payments to wholesale child accounts.

To make a payment:

1. From the **Actions** menu, select **Payments** and then select **Make a Payment**.

   The Make a Payment dialog box appears. See "Make a Payment Dialog Box" for details.

   > **Tip**
   >
   > For alternative ways to open the **Make a Payment** dialog box, see "Initiating a Payment".

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

      If you are making a payment for an account, the payment method applies to the account. If you are making a payment for a bill unit, the payment method applies to the bill unit.
4. For **Select a reason**, select the reason that matches the situation.
5. (Optional) Enter notes.
6. Do one of the following:
   - Click **Continue to manually allocate** to make the payment and to allocate the payment.
   - Click **Save** to make the payment without allocating.

See "Allocating Payments" for information about allocating payments.

Make a Payment Dialog Box

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

Field	Description
Bill Unit	For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the term does not appear.

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Field	Description
Use a different payment method	Select if you want to change the payment method.
Payment method	If multiple payment methods are available, select a payment method. If you selected **Use a different payment method**, select a new payment method option. For a new payment method, new fields appear for you to enter the details.
Amount	Enter the payment amount.
Select a reason	Select the reason that most closely matches the situation.
Notes	(Optional) Enter notes.
Continue to manually allocate	Click to save and allocate the payment.
Save	Click to make the payment without allocating the payment. You can allocate the payment later.

Viewing Payment Details

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

To view payment details:

1. Click the **Bills** tab and select a bill that has a payment.
2. Click **Payment Applied**.

   One of the following happens:

   - If only one payment has been made, the Payment Details dialog box appears. See "Payment Details Dialog Box" for details.
   - If more than one payment has been made, the All Payments dialog box appears first. See "All Payments Dialog Box" for details. Click **Payment Details** to go to the Payment Details dialog box.
3. View payment allocations in the **Allocation** tab.
4. View the payment's audit trail in the **Audit Trail** tab.
5. (Optional) If all or part of the payment has been allocated, to see details about the allocated items, do any of the following:

   - Under **Original payment**, click the **Show all items affected** link.
   - In the **Allocation** tab, click the link in the **Items Affected** column.

   The Items Affected dialog box appears. You can view details about the adjusted items. See "Items Affected Dialog Box".
6. (Optional) Click **Export** to save the account adjustment details to a CSV file.
7. Click **Close**.

Payment Details Dialog Box

Use the Payment Details dialog box to identify payments.

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Field	Description
Effective	The payment's effective date.
Receipt Date	The payment receipt date.
Receipt No.	An automatically generated ID for a receipt.
Transaction ID	Similar to a payment ID, a transaction ID is automatically generated for each payment, payment reversal, and refund. Additionally, the transaction ID identifies transactions involving third parties, such as transactions with credit card processing companies.
Original Payment	The original payment amount and method.
Show all items affected	If any part of the payment has been allocated, click for details on the items.
Effective (reversal)	The payment reversal date (if a payment has been reversed).
Move to Suspended Payments	Click to move payment into suspense.
Reverse Payment	The payment reversal amount and method.
Audit Trail	The audit trail information for any payment reversal or suspense actions.
Payment Details	The amount (with payment method), time, reason, and notes (if notes are available) for the payment. Billing Care also lists any reversed payment amounts or amounts that have been moved into suspense.
Comment	Click to add a note to the payment.
Export	Click to export the payment details to a CSV file. The Export button is enabled for the **Allocation** tab and disabled for the **Audit Trail** tab.
Allocation	• **Account** - This is only displayed when the customer has multiple accounts. • **Bill Unit** - A bill unit is a group of one or more bills consisting of its own payment settings and invoices. This is only visible when the customer has multiple bill units. **Note:** Bill Unit will not appear if there is only one bill unit. • **Payment ID** - An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals. • **Bill ID** - Displays the ID number of the bill. • **Items Affected** - If any part of the payment has been allocated, click the links under Items Affected for details on the items. • **Amount** - Displays the payment amount. • **Date** - Displays the date of the payment.

All Payments Dialog Box

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

Field	Description
Effective Date	The effective date of the applied payment.
ID	An automatically generated ID for a payment transaction. Accounting can use this number to process payments, refunds, and payment reversals.

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Field	Description
Payment Amount	The payment amount.
Payment Actions	A description of reversed and suspended payment amounts.
Payment Details	The amount (with payment method), time, reason, and notes (if notes are available) for the payment. Billing Care also lists any reversed payment amounts or amounts that have been moved into suspense.
Export	Click to export the payment details to a CSV file. The Export button is enabled for the **Allocation** tab and disabled for the **Audit Trail** tab.

Items Affected Dialog Box

Field	Description
Item	Displays the name or details of the affected or adjusted billing item.
Amount	Displays the total amount associated with the item, including both taxed and non-taxed portions.
Settled Tax Amount	Displays the portion of the adjustment amount that is related to tax that has been settled.
Settled Taxed Amount	Shows the portion of the settled amount that includes tax.
Settled Non-Taxed Amount	Shows the portion of the settled amount that does not include tax.
Export	Click to export the payment details to a CSV file. The Export button is enabled for the **Allocation** tab and disabled for the **Audit Trail** tab.

Allocating Payments

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

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

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

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

Allocating a Payment

To allocate a payment:

1. From the **Actions** menu, select **Payments**, and then select **Allocate**.

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

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

   The Allocate Payment dialog box appears.

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

3. Click a bill.

   You can search for a bill by entering the Bill ID or balance amount.

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

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

4. (Optional) Select an allocation cell and enter a specific amount to allocate.
5. (Optional) Continue allocating funds to other bills.
6. (Optional) Click **Payment Details** for more information about a payment.
7. Click **Save** to complete allocating the payment, or **Save, select another payment** to allocate more payments.
8. (Optional) Click **Export** to save the allocated payment details to a CSV file. Customize the exported data by choosing specific columns from the optional columns available in the drop-down list.

Allocating a Payment to a Bill Unit or an Item

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

To allocate a payment to specific bill units or items:

1. From the **Actions** menu, select **Payments**, and then select **Allocate**.

   You can also allocate a payment while making the payment.

2. In the Allocate Payment dialog box, click the Advanced View icon.
3. (Optional) In **Search**, enter text to find bills, bill units, services, or items.
4. Click the bill, bill unit, or item that you want to allocate a payment to.

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

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

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

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6. (Optional) Continue allocating funds to other bills.
7. (Optional) Click **Payment Details** for more information about a payment.
8. Click **Save**.

Allocate Payment Dialog Box

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

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

Reversing a Payment

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

To permanently reverse a previously applied payment:

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

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

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

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9

Payment Browser

Oracle Communications Billing and Revenue Management (BRM) suspends payments that cannot be posted to customer accounts because of insufficient information, account closure, or other criteria.

Use Payment Browser in Billing Care to find and manage payments across different payment states. You can find suspended payments, payments that were previously suspended and fully or partially allocated to customer accounts, and active payments that were posted directly to customer accounts without being suspended.

Depending on the payment state, you can allocate suspended payments to customer accounts and undo payment allocations directly from Payment Browser without navigating to individual customer accounts. You can also remove unallocatable payment amounts from suspense, reverse payments, or move incorrectly posted payments into suspense.

To work with Payment Browser, see the following topics:

- Available Actions by Payment Category
- Finding a Payment
- Export the Search Results
- Make a Payment
- Allocating a Suspended Payment
- Allocating a Suspended Payment across Multiple Accounts
- Adding Notes to a Payment
- Moving an Active Payment to Suspense
- Assigning Suspended Payments to Billing Care Users
- Reversing a Payment in Payment Browser
- Removing an Unallocated Payment from Suspense
- Returning an Allocated Payment to Suspense
- Returning All Distributions

Available Actions by Payment Category

The actions available for a payment depend on its payment category.

Table 9-1 Available Actions by Payment Category

Payment Category	Available Actions
Suspended	Allocate the payment, assign the payment to a Billing Care user, reverse the payment, or remove an unallocated payment from suspense.

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Table 9-1 (Cont.) Available Actions by Payment Category

Payment Category	Available Actions
Suspended, Partially Recycled	Allocate the remaining payment amount, undo an existing allocation, assign the payment to a Billing Care user, reverse the payment, or remove an unallocated payment amount from suspense.
Suspended, Fully Recycled	Undo an allocation or reverse the payment. Undoing an allocation returns the payment to suspense.
Active	Move the payment to suspense or reverse the payment.

Finding a Payment

You can use Payment Browser to find payments by applying filter criteria. You can sort the displayed search results and reset the filter criteria to return to the default results.

To find a payment:

1. On the landing page, click **Payment Browser**.

   The Payment filter appears with a list of payments that meet the filter criteria. By default, Payment Browser displays payments in all payment lifecycle states: fully allocated suspended payments (**Suspended, Fully Recycled**), partially allocated suspended payments (**Suspended, Partially Recycled**), suspended payments that have not been allocated (**Suspended**), and active payments (**Active**). The Payment filter helps you narrow the payments shown and find a payment to manage. Billing Care sets a default 30-day search criteria.

   To adjust the filter criteria, do the following:

   a. Click **Edit Filter** next to the Payment area.

      The Filter dialog box appears.

   b. Select the payment filter criteria. You can filter payments by currency, amount, date range, channel, payment method, and payment category.

   c. Click **Update**.

      The filtered payments are shown.

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

2. Select a payment to view it.

   Billing Care displays the selected payment details.

   > **Tip**
   >
   > Click **Search Results** at the top right to return to the payment search results.

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Export the Search Results

You can export the payments displayed in Payment Browser search results. The exported file contains the payments that match the current filter criteria.

To export search results:

1. On the Payment Browser page, set the required filter criteria and display the search results.
2. Click **Export**.

   Billing Care downloads the search results as a CSV file.

Make a Payment

You can use Payment Browser to create a suspended payment and later apply it to the appropriate accounts.

To make a payment:

1. On the Payment Browser page, click **Make Payment**.

   The Make a Payment dialog box appears.
2. Select a payment method.
3. Enter the payment amount.
4. Select the payment currency.
5. Enter the receipt date.
6. Enter the receipt number.
7. Select a reason for the payment.
8. (Optional) Enter notes.
9. Click **Save**.

Allocating a Suspended Payment

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

You can allocate a suspended payment to multiple customer accounts. However, you must complete the allocation for the initial distribution account before adding another distribution account.

To allocate a suspended payment to an account:

1. From the Billing Care landing page, click **Payment Browser**.
2. Select a suspended payment from the list. If no suspended payment is available, click **Make Payment** to create one. See "Finding a Payment" for more information.
3. On the payment details page, in the **Account Distribution** section, click **Add Account**.

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4. In the **Search Accounts** window, enter search criteria such as Service ID, Account Number, First Name, Last Name, or Company Name, then click **Search**.

   The search results appear on the right side of the window.

5. Select the appropriate account from the search results and click **Continue**.
6. On the Bill Unit page, select the required bill unit and click **Continue**.
7. On the Allocate page, enter an amount to allocate.

   This amount must be less than or equal to the suspended payment amount. Multiple separate allocations to the same distribution account can be made if the payment still contains funds awaiting allocation.

8. Select a required reason from the list.
9. Select **Auto Allocate** or **Manually Allocate** buttons:
   - Click **Auto Allocate** for Billing Care to automatically select the account's bill items to which to allocate a suspended payment. If an allocation amount is greater than all the account's bills, or if allocation amounts are made to accounts with no balance due, the remaining balance is assigned a status of Awaiting Allocation and available when a future payment is due.
   - Click **Manually Allocate** to perform manual allocation at the bill or item level. Use the allocation grid to enter specific amounts for individual bill items, as shown in the Advanced View.
10. Click **Save**.

> **Note**
>
> If more than one payment has been applied to a bill, including any payments allocated from suspended payments, the total payment applied for the bill will include all payments applied.

Allocating a Suspended Payment across Multiple Accounts

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

To allocate a payment across multiple accounts:

1. Make a new payment in Billing Care. See "Make a Payment " for more information.
2. Under Account Distribution, click **Add Account**.
3. In the **Search Accounts** window, enter your search criteria and select the account to allocate the payment to.
4. Click **Continue**.
5. On the **Bill Unit** page, select the required bill unit and click **Continue**.
6. Enter the amount to allocate to this account in **Add Allocation**. The allocation amount must not exceed the available suspended payment amount.
7. Select a required reason for allocation.
8. Choose an allocation method:
   - Click **Auto Allocate** to automatically apply funds to the account's open bill items.

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- Click **Manually Allocate** to specify allocations at the bill or item level in the allocation grid (Advanced View).

9. Click **Save**.
10. To allocate any remaining payment amount, repeat steps 2–8 for each additional account.
11. (Optional) Assign a payment administrator from the **Assigned to** list.
12. (Optional) Enter notes and click **Post** for the payment.

    Any portion of the payment not allocated remains in payment suspense with the status **Awaiting Allocation**.

> **Note**
>
> Unallocated payments are placed into suspense. You can use the payments search filter to find unallocated payments ready for multiple account distribution. Select the suspense reason as **Unable to Process**, and the detailed reason as **Multiple Account Distribution** to filter for unallocated payments.

Adding Notes to a Payment

To add a note to a payment:

1. Open the suspended payment details. See "Finding a Payment" for more information.
2. In the Notes area, click the following icon:

   An **Enter notes here** box appears.
3. Enter your notes.
4. Click **Post**.

Moving an Active Payment to Suspense

You can move an active payment to suspense when the payment was posted to a customer account incorrectly and requires further resolution. An active payment is a payment that was posted directly to a customer account without previously being suspended.

To move an active payment to suspense:

1. Find and open an **Active** payment in Payment Browser.
2. Click **Actions**, and then select **Move to Suspense**.

   The Move to Suspense dialog box appears.
3. Review the amount to move.
4. Set the effective date.
5. Select a reason for moving the payment to suspense.
6. (Optional) Enter notes.

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7. Click **Move**.

Assigning Suspended Payments to Billing Care Users

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

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

To assign a suspended payment to an authorized user:

1. Find the suspended payment. See "Finding a Payment" for more information.
2. From the search results, select and open the suspended payment.
3. Click the Edit icon next to the **Assigned to** field.
4. From the **Assigned to** list, select a Billing Care user with permissions to manage suspended payments.
5. Click **Save**.

Reversing a Payment in Payment Browser

You can reverse an eligible payment from Payment Browser when the payment must be canceled. Reversing a payment enables Billing Care to treat the payment as if it never occurred.

Payment Browser supports payment reversal for active payments and suspended payments, including partially and fully recycled suspended payments.

> **Note**
>
> Reversing a payment is permanent and cannot be undone.

To reverse a payment:

1. Find and select the payment to reverse. See "Finding a Payment" for more information.
2. Click **Actions**, and then select **Reverse Payment**.

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

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Removing an Unallocated Payment from Suspense

If a suspended payment amount cannot be allocated to the proper account, you can remove the unallocated amount from suspense. This enables the funds to be tracked in the general ledger system.

> **Note**
>
> Removing an unallocated payment is permanent and cannot be undone.

To remove an unallocated payment:

1. Find and select the suspended payment to remove. See "Finding a Payment" for more information.
2. Click **Actions**, and then select **Reverse Unallocated Payment**.

   The Reverse Unallocated Payment dialog box appears.
3. Set the effective date for the unallocated payment removal.
4. Select a reason for removing the unallocated payment.
5. (Optional) Enter notes for removing the unallocated payment.
6. Click **Reverse**.

Returning an Allocated Payment to Suspense

You can undo an allocation for a payment that was previously suspended and then allocated to a customer account. Undoing the allocation returns the payment to suspense, where it can be managed as a suspended payment.

To return an allocated payment to suspense:

1. On the Payment Browser page, find and open the suspended payment that contains the allocated payment.
2. In the **Account Distribution** section, click for the account distribution, and then select **Return To Suspense**.

   The Move to Suspense dialog box appears.

   > **Note**
   >
   > To view information about the payment allocated to an account, select **Payment Details for This Account** from the menu.
3. Review the amount to move to suspense.
4. Set the effective date.
5. Select a reason for moving the payment to suspense.
6. (Optional) Enter notes.

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7. Click **Move**.

Returning All Distributions

You can return all distributions for a suspended payment to suspense at the same time. This returns the payment amounts distributed to customer accounts and makes them available for further suspense management.

To return all distributions to suspense:

1. On the Payment Browser page, find and open the suspended payment with distributions to return.
2. Click **Actions**, and then select **Return All Distributions**.

   The Move to Suspense dialog box appears.
3. Review the amount to move to suspense.
4. Set the effective date.
5. Select a reason for returning the distributions to suspense.
6. (Optional) Enter notes.
7. Click **Move**.

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10

Accounts Receivable

You can manage accounts receivable in Oracle Communications Billing Care. Accounts receivable (or A/R) tracks the money that customers owe to your company for services performed or merchandise sold.

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

- Working with Adjustments
- Working with Disputes
- Working with Settlements
- Working with Refunds
- Working with Write-Offs
- Transferring Negative Balances to Another Bill

Working with Adjustments

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

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

If you want to work with multiple customer bills or items, you may want to make adjustments on the account level.

> **Note**
>
> You cannot perform account adjustments to wholesale child accounts.

For more information on Adjustments, see:

- Making a Currency Adjustment
- Allocating Currency Adjustments
- Allocating an Adjustment to a Specific Bill Unit or Specific Items
- Adjusting a Bill
- Adjusting an Item
- Adjusting an Event
- Adjusting Multiple Events for an Account
- Adjusting a Noncurrency Resource
- Viewing Account Adjustment Details
- Viewing Item Adjustment Details

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- Viewing Event Adjustment Details

To review and manage A/R information in Billing Care, you need the appropriate permissions.

Making a Currency Adjustment

> **Note**
>
> You cannot adjust loan sub-balances in a currency balance.

To make a currency adjustment:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, from the **Actions** menu, select **Account Receivables** and then select **Adjust Currency Balance**.

   The Account Adjustment dialog box appears. See "Account Adjustment Dialog Box" for details.
3. Choose whether to enter an adjustment by **Amount** or **Percentage**.

   Enter the value in the corresponding field.

   To increase the amount due, enter a negative number.
4. For **Effective**, select a date.
5. (Optional) Select **Exclude taxes from the adjustment**.
6. From the list, select a reason.
7. (Optional) Enter a note.
8. Do one of the following:
   - Click **Continue to manually allocate** to make the adjustment and to allocate the adjustment.
   - Click **Save** to make the adjustment without allocating.

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

Account Adjustment Dialog Box

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

Table 10-1 Account Adjustment Dialog Box

Field	Description
Selected Bill Unit	For accounts with multiple bill units, select a bill unit. If an account has only one bill unit, the field is read only.
Amount	Enter an amount for the adjustment. This field is applicable only when Percentage is not specified.
Percentage	Enter a percentage for the adjustment. This field is applicable only when Amount is not specified.
Effective	Select a date.

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Table 10-1 (Cont.) Account Adjustment Dialog Box

Field	Description
Exclude taxes from the adjustment	(Optional) Select if appropriate.
Select a reason	Select the reason that most closely matches the situation.
Notes	(Optional) Enter notes.
Continue to manually allocate	Click to save and continue allocating the adjustment.
Save	Click to save the information you entered without allocating the adjustment. You can allocate the adjustment later.

Allocating Currency Adjustments

To allocate currency adjustments:

1. On the account page, from the **Actions** menu, select **Account Receivables** and then select **Allocate Currency Adjustments**.

   You can also allocate an adjustment while making the adjustment.

   If more than one unallocated adjustment exists, the All Unallocated Adjustments dialog box appears first. Otherwise, the Allocate Adjustment dialog box appears.
2. In the All Unallocated Adjustments dialog box, select the adjustment you want to work with.
3. Click **Allocate**.

   The Allocate Adjustment dialog box appears.

   > **Tip**
   >
   > To see more details about the bill or to allocate to a specific bill unit, item, or service, turn on the **Advanced View** switch. See "Allocating an Adjustment to a Specific Bill Unit or Specific Items".
4. Select a bill by double-clicking.

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

   > **Tip**
   >
   > Press Shift+select to contiguously select **Allocate** cells.
5. (Optional) Select an allocation cell and enter a specific amount to allocate.
6. (Optional) Continue allocating funds to other bills by entering the amount to allocate for each bill.
7. To increase the unallocated amount in a bill, enter a negative number preceded by a minus symbol (-).
8. (Optional) Click **Adjustment Details** for more information about an adjustment.
9. Click **Save** to complete the adjustment allocation, or click **Save, select another adjustment** to allocate more unallocated adjustments.

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10. (Optional) Click **Export** to save the allocated currency details to a CSV file. To customize the exported data, click **Columns** and select the required columns from the list.

Allocating an Adjustment to a Specific Bill Unit or Specific Items

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

To allocate an adjustment to specific bill units or items:

1. On the account page, from the **Actions** menu, select **Account Receivables** and select **Allocate Currency Adjustments**.

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

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

   The Allocate Adjustment dialog box appears. See "Allocate Adjustment Dialog Box" for details.

3. Turn on **Advanced View**.
4. (Optional) In the search bar, enter text to view the items of interest.
5. Double-click the item row that you want to allocate the adjustment to.

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

6. (Optional) Double-click an allocation cell and enter a specific amount to allocate.
7. (Optional) Click **Adjustment Details** for more information about an adjustment.
8. Click **Save** to complete the adjustment allocation, or click **Save, select another adjustment** to allocate more unallocated adjustments.

Allocate Adjustment Dialog Box

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

Table 10-2 Allocate Adjustment Dialog Box

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

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Table 10-2 (Cont.) Allocate Adjustment Dialog Box

View	Description
Export	Click to export allocated adjustment details to a CSV file. To customize the exported data, click **Columns** and select the columns from the list.

Adjusting a Bill

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

> **Note**
>
> The **Actions** menu (☰) is disabled for written-off bills. No adjustments can be made to written-off bills.

To adjust a bill from the Bills tab:

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

   In the Bills tab, select the bill you want to work with using the **Switch Bills** menu.
2. From the **Actions** menu (☰), select **Adjust Bill**.

   Bill Adjustment dialog box appears. See "Bill Adjustment Dialog Box" for details.
3. Choose whether to enter an adjustment by **Amount** or **Percentage**.

   Enter the value in the corresponding field.

   To increase the amount due, enter a negative number.
4. For **Effective**, select a date.
5. (Optional) Select **Exclude taxes from the adjustment**.
6. From the list, select a reason.
7. (Optional) Enter a note.
8. Do one of the following:
   - To have the allocation distributed automatically, click **Auto Allocate**.
   - To specify allocation amounts, click **Continue to manually allocate**, and enter the amounts to allocate in the Allocate Adjustment dialog box.

Bill Adjustment Dialog Box

Use the Bill Adjustment dialog box to adjust a bill.

Table 10-3 Bill Adjustment Dialog Box

Field	Description
Amount	Enter an amount for the adjustment. This field is applicable only when Percentage is not specified.

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Table 10-3 (Cont.) Bill Adjustment Dialog Box

Field	Description
Percentage	Enter a percentage for the adjustment. This field is applicable only when Amount is not specified.
Effective	Select a date.
Exclude taxes from the adjustment	(Optional) Select if appropriate.
Select a reason	Select the reason that most closely matches the situation.
Notes	(Optional) Enter notes.
Continue to manually allocate	Click to specifically allocate items.
Auto Allocate	Click to save adjustment and to allocate the adjustment evenly to all items.

Adjusting an Item

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

To adjust an item:

1. On the account page, click the **Bills** tab.
2. In the **Bills** tab, select the bill you want to work with using **Switch Bills**.
3. In the **My Charges** area, select an account or a service charge.

   If you have selected an account charge, the Account Charges pane appears at the right.

   If you have selected a service charge, the Charges by service pane appears at the right.
4. Click the **Actions** menu (⋮) adjacent to a Charge description.
5. Click **New Adjustment**.

   The Item Adjustment dialog box opens. See "Item Adjustment Dialog Box" for details.
6. For **Adjustment**, enter the amount or percent to adjust.
7. For **Effective**, select a date.
8. (Optional) Select **Exclude taxes from the adjustment**.
9. Select a reason.
10. (Optional) Enter notes.
11. Click **Save**.

Item Adjustment Dialog Box

Use the Item Adjustment dialog box to adjust an item.

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Table 10-4 Item Adjustment Dialog Box

Field	Description
Amount	Enter an amount for the adjustment. This field is applicable only when Percentage is not specified.
Percentage	Enter a percentage for the adjustment. This field is applicable only when Amount is not specified.
Effective	Select a date.
Exclude taxes from the adjustment	(Optional) Select if appropriate.
Select a reason	Select the reason that most closely matches the situation.
Notes	(Optional) Enter notes.
Save	Click to save and close.

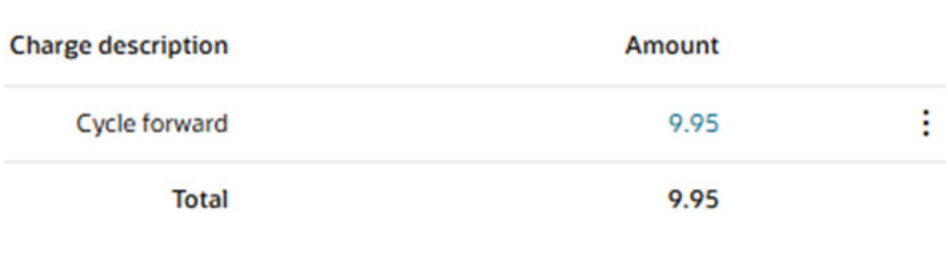
Adjusting an Event

To adjust an event:

1. Open a bill.
2. In the **My Charges** area, select a service charge.

   The Charges by service pane appears at the right.
3. In the charge, click the link to an amount.

   For example, in this figure, you would click **9.95**.



   The Events dialog box appears.
4. Select the event you want to adjust and then click **Adjust Selected**.

   The Event Adjustment dialog box appears. See "Event Adjustment Dialog Box" for details.
5. From the **What to Adjust** list, select one of the following:
   - **Amount and tax**
   - **Amount only**
   - **Tax only**
6. Choose whether to enter an adjustment by **Amount** or **Percentage**.

   Enter the value in the corresponding field.

   To reduce the balance, enter a positive number. To increase the balance, enter a negative number such as -10.
7. In the **Effective** field, select or enter a date.

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8. From the list, select a reason.
9. (Optional) Enter a note.
10. Click **Save**.

Event Adjustment Dialog Box

Use the Event Adjustment dialog box to adjust the amount to charge a customer for an event. You can adjust the amount and tax.

Table 10-5 Event Adjustment Dialog Box

Field	Description
Events	Click to return to the Events dialog box.
What to Adjust	Select one of the following: • **Amount and tax**: Adjusts the amount for the events and the tax levied on the amount. • **Amount only**: Adjusts the amount on the events. • **Tax only**: Limits the adjustment to the tax levied on the events.
How to Apply Adjustment Amount	Select one of the following: • **Apply amount equally per event**: The adjustment amount is applied to each event equally. For example, if the adjustment amount is $5, $5 is applied to the first event, $5 to the second event, $5 to the third event, and so on. • **Apply to events in order until amount is used up**: The total adjustment amount is applied to the first event and each subsequent event until the adjustment amount runs out. For example, assume Event A is for $6, Event B is for $8, and Event C is for $10. If the adjustment amount is $10, $6 is applied to Event A, $4 is applied to Event B, and $0 is applied to Event C. **Note:** This field appears only if you have selected multiple events to adjust.
Amount or **Percentage**	Enter an adjustment amount or a percentage.
Effective	Select or enter a date, when the adjustment takes effect. See "About Date and Time Formats" for more information on the format for entering the date and time. You can backdate the adjustment.
Number of selected events	Displays the number of events that can be adjusted. **Note:** This field appears only if you have selected multiple events to adjust.
Available to adjust	Displays the sum of all events that can be adjusted.
Adjustment (for *N* events)	Displays the sum of all event adjustments that will be applied.
Due after adjustment	Displays the net amount due after adjustments are applied. Due after adjustment = Available to adjust – Adjustment (for *N* events)
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.
Save or **Cancel**	Click **Save** to save your changes or click **Cancel** to close the dialog box without saving your changes.

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Adjusting Multiple Events for an Account

When you adjust multiple events for an account at the same time, you can specify how to apply the adjustment to each event. You can specify to apply:

- The same adjustment amount, such as $20, to each event that you have selected. For example, if you have selected four events, Billing Care would apply a $20 adjustment to each of the four events.
- The total adjustment amount to the events you have selected, in order, until it runs out. For example, assume you want to apply a $70 adjustment to these events: Event A ($50), Event B ($30), and Event C ($40). In this case, Billing Care would apply an adjustment of $50 to Event A, $20 to Event B, and $0 to Event C.

> **Note**
>
> If you specify to increase the balance by applying a negative adjustment, such as -$50, Billing Care applies the adjustment, in order, up to the credit limit amount.

To adjust multiple events in an account at the same time:

1. Open the account for which you want to adjust multiple events.
2. In the **Bills** tab, select the bill you want to work with using the **Switch Bills** menu.
3. In the **My Charges** area, select a service charge.

   The Charges by service pane appears on the right.
4. Click the link to an amount.

   The Events dialog box appears.
5. In the Events dialog box, select multiple events to adjust and then click **Adjust Selected**.

   The Event Adjustment dialog box appears. See "Event Adjustment Dialog Box" for details.
6. From the **What to Adjust** list, select one of the following:
   - **Amount and tax**
   - **Amount only**
   - **Tax only**
7. From the **How to Apply Adjustment Amount** list, select one of the following:
   - **Apply amount equally per event**
   - **Apply to events in order until amount is used up**
8. In the **Adjustment** field, enter the adjustment amount or percentage.

   To reduce the balance, enter a positive number. To increase the balance, enter a negative number such as -10.
9. In the **Effective** field, select or enter a date.
10. From the list, select a reason.
11. (Optional) Enter a note.
12. Click **Save**.

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Adjusting a Noncurrency Resource

You can adjust a noncurrency resource by creating an adjustment or adjusting an existing sub-balance.

- Creating a Noncurrency Adjustment
- Applying Filters for Sub-Balances in Balance Bucket
- Modifying an Existing Sub-Balance
- Modifying Credit Control Properties

> **Note**
>
> When you create a new adjustment, Billing Care checks whether it can be added to any existing sub-balance based on the validity period and grantor options. If not, Billing Care creates a new sub-balance.

Creating a Noncurrency Adjustment

To create a noncurrency adjustment:

1. On the account page, click the **Home** tab, and then select the Account History area or the area for a bill unit.

   By default, in the Balances area, the balances for all services appear.
2. In the **Balances** list, select the service that has the noncurrency balance you want to adjust.

   The names of the services and the related balances appear below the menu.
3. Click the noncurrency balance.

   The Noncurrency Balance Details dialog box appears with the name of the noncurrency balance. For example "Free Seconds". See "Noncurrency Balance Details Dialog Box" for details.
4. Click **New adjustment**.

   The Non-Currency Adjustment dialog box appears. See "Non-Currency Adjustment Dialog Box" for details.
5. For **Adjustment**, enter the amount to adjust.
6. (Optional) For **From**, enter a date from which the noncurrency adjustment will be valid.
7. (Optional) For **To**, enter a date or leave it as **never ends**. This denotes the date until which the noncurrency adjustment will be valid.
8. Select a reason.
9. (Optional) Enter notes.
10. Click **Save**.

Non-Currency Adjustment Dialog Box

Use the Non-Currency Adjustment dialog box to make a noncurrency adjustment.

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Table 10-6 Non-Currency Adjustment Dialog Box

Field	Description
Adjustment	Enter an amount.
Valid from	Enter a date.
Valid to	Enter a date.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.
Save	Click to save and close.

Applying Filters for Sub-Balances in Balance Bucket

To limit the number of sub-balances displayed:

1. On the account page, click the **Home** tab, and then select the Account History section or the section for a bill unit.

   By default, in the Balances section, the balances for all services appear.

2. In the **Balances** list, select the service that has the noncurrency balance you want to adjust.

   The name of the services and the related balances appear below the menu.

3. Click the noncurrency balance.

   The dialog box with noncurrency balance details appears. See "Noncurrency Balance Details Dialog Box" for details.

4. Click **Filter**.

   The Filter dialog box appears.

5. Enter any desired filter criteria:

   - For **Valid from**, enter or select a date.
   - For **Valid to**, enter or select a date, or leave it as **never ends**.
   - From the **Status** list, select **Open**, **Expired**, or **Future**.

   Tip

   - You must provide an input for at least one of these fields to apply the filter.
   - Click **Clear Filter** to clear all the applied filters.

6. Click **Update**.

Modifying an Existing Sub-Balance

To modify an existing sub-balance:

1. On the account page, click the **Home** tab, and then select the Account History area or the area for a bill unit.

   By default, in the Balances area, the balances for all services appear.

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2. In the **Balances** list, select the service that has the noncurrency balance you want to adjust.

   The names of the services and the related balances appear below the menu.

3. Click the noncurrency balance.

   The dialog box with noncurrency balance details appears. See "Noncurrency Balance Details Dialog Box" for details.

4. (Optional) To adjust the sub-balance:

   a. From the **Action** menu (⋮), select **Adjust bucket** for the appropriate sub-balance.

      The row expands to display the **Adjust bucket** drawer.

   b. In **Adjustment amount**, enter the amount of the adjustment.

   c. Select a reason.

   d. (Optional) Enter notes.

5. (Optional) To change the validity for a sub-balance:

   a. From the **Action** menu (⋮), select **Change validity** for the appropriate sub-balance.

      The row expands to display the current validity end period for the sub-balance.

   b. From the **Valid to** list, select one of the following:

      - **Calendar**: To select a date and time.
      - **Never ends**: To have the sub-balance never expire.

6. Click **Save**.

> **Note**
>
> If the input is invalid, the **Save** button is disabled, and an error message pops up. You can change the inputs accordingly to fix the error and proceed.

Modifying Credit Control Properties

To update the credit control properties for a noncurrency resource:

1. On the account page, click the **Home** tab, and then select the Account History area or the area for a bill unit.

   By default, in the Balances area, the balances for all services appear.

2. In the **Balances** list, select the service that has the noncurrency balance you want to adjust.

   The name of the services and the related balances appear below the menu.

3. Click the noncurrency balance.

4. In the **Credit Control** section, click **Edit**.

   The credit control fields become editable. See "Credit Control Section" for details.

5. Enter or select the values for the items you want to modify:

   - For **Limit allowed**, enter a value or leave it empty.
   - For **Dynamic Floor**, select if you want the credit floor to be determined dynamically.

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- For **Floor**, enter a lower credit limit amount for the balance.

  This can be set only if the **Dynamic Floor** field is not selected.
- For **Fixed Thresholds**, enter the fixed threshold value at which you need to send the notification to customers.

  This value must be greater than the floor.
- For **Thresholds**, select the desired percentage value.
- For **Credit limit check**, select whether to enforce or override the credit limit.

6. Click **Save**.

Viewing Account Adjustment Details

To view account adjustment details:

1. In the account page, click **Unallocated A/R** in the Home tab.

   If more than one unallocated adjustment exists, the All Unallocated Adjustments dialog box appears first. Otherwise, the Allocate Adjustment dialog box appears.
2. In the All Unallocated Adjustments dialog box, select the adjustment you want to view and click **Allocate**.

   The Allocate Adjustment dialog box appears.
3. Click **Adjustment Details**.

   The Account Adjustment Details dialog box appears. See "Account Adjustment Details Dialog Box" for more details.
4. (Optional) Click the comment icon ( ), add a comment, and then click **Post**.
5. (Optional) To see all items affected by an adjustment, do one of the following:
   - Click the **Show all items affected** link.
   - In the **Allocation** tab, click the link in the **Items Affected** column.

   The Items Affected dialog box appears where you can view details about the adjusted items.
6. (Optional) Click **Export** to save the account adjustment details to a CSV file.
7. Click **Close**.

Account Adjustment Details Dialog Box

Use the Account Adjustment Details dialog box to view or comment on an account adjustment in the **Summary** tab of this dialog box.

Table 10-7 Account Adjustment Details Dialog Box

Field	Description
Original Adjustment	Lists the total of allocated and unallocated amounts.
Unallocated	If listed, click the link to allocate the amount.

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Table 10-7 (Cont.) Account Adjustment Details Dialog Box

Field	Description
	(Optional) Enter notes.
Allocated	Lists information about allocated amounts. For more information, click **Show all items affected** or the individual items.

Viewing Item Adjustment Details

To view item adjustment details:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area, select a service for the selected bill.

   The Charges by service pane appears on the right.
4. Select **Show Charge Changes**. This option appears only if an item or event has been changed.

   A dialog box pops up.
5. Click **Item adjustment**. This link appears only if an item has been adjusted.

   The Item Adjustment Details page appears, which shows the adjustment date and amount.

Viewing Event Adjustment Details

To view event adjustment details:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area, select a service for the selected bill.

   The Charges by service pane appears at the right.
4. Select **Show Charge Changes**. This option appears only if an item or event has been changed.

   A dialog box pops up.
5. Click **Event adjustment**. This link appears only if an event has been adjusted.

   The Event Adjustment Details page appears, which shows the adjustment date and amount.

Viewing Bill Adjustment Details

To view bill adjustment details:

1. On the Account page, click the **Bills** tab.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. Click the **A/R actions** link, if available.

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A dialog box appears displaying all A/R actions the bill has undergone.

4. Select the row with the bill adjustment and then click **A/R Action Details**.

   A dialog box appears.

5. (Optional) You can add a comment by clicking the comment icon ( ) and then clicking **Post**.
6. Enter the required details.
7. (Optional) Click **Export** to save the bill adjustment details to a CSV file.

Working with Disputes

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

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

For disputes, see:

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

Disputing a Bill

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

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

To dispute a bill:

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

   Select the bill you want to work with using the **Switch Bills** menu.

2. From the **Actions** menu ( ) in the **Bills** tab, select **Dispute Bill**.

   The Dispute Bill dialog box appears. See "Dispute Bill Dialog Box" for details.

3. In the **Dispute** field, enter the amount you want to dispute.

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The due amount, the disputed amount, and the amount available for disputing are calculated and displayed on the page.

4. For **Effective**, select a date.
5. (Optional) Select **Exclude taxes from the dispute**.
6. Select a reason for disputing from the list.
7. (Optional) Enter a note.
8. Click **Save**.

Dispute Bill Dialog Box

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

Table 10-8 Dispute Bill Dialog Box

Field	Description
Dispute	Enter an amount.
Due	Amount that is due for the bill.
Effective	Select a date.
Exclude taxes from the dispute	(Optional) Select if appropriate.
Select a reason	Select a reason.
Enter notes here	(Optional) Enter notes.

Disputing an Item

To dispute an item:

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

   The Charges by service pane appears for the selected service.
4. Click the charge's **Action** menu (⋮) and select **Open Item Dispute**.

   The Dispute Item dialog box appears. See "Dispute Item Dialog Box" for details.
5. Enter the amount to be disputed in the **Dispute** field.
6. For **Effective**, select a date. By default, the current date is selected.
7. (Optional) Select **Exclude taxes from the dispute**.
8. Select a reason for the dispute.
9. (Optional) Enter any notes about the dispute.
10. Click **Save**.

Dispute Item Dialog Box

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

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Table 10-9 Dispute Item Dialog Box

Field	Description
Dispute	Enter an amount.
Due	Amount that is due for the bill.
Effective	Select a date.
Exclude taxes from the dispute	(Optional) Select if appropriate.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Viewing Item Dispute Details

To view item dispute details:

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

> **Tip**
>
> You can access details of settled or unsettled item disputes through **News Feed** in the Home tab. You can find these details in **Notes** that pop-up on top of the chart, **A/R Actions** in the Bills tab, or from within the graph.

2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

   The Charges by service pane appears at the right.
4. Click **Show Charge Changes**. This option appears only if there are any open settled or unsettled item disputes.

   The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Do one of the following:
   a. To view a settled item dispute, click the appropriate settled item dispute.

      The Settle Item Dispute dialog box appears and displays the item dispute that is settled. See "Settle Item Dispute Dialog Box" for details.

   b. To view an unsettled item dispute, click the appropriate unsettled item dispute.

      The Settle Item Dispute dialog box appears and displays the item dispute that is not settled. See "Settle Item Dispute Dialog Box" for details.

Disputing an Event

To dispute an event:

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

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The Charges by service pane appears for the selected service.

4. Select a charge by clicking on the amount.

   The Events dialog box appears.

5. Select the required event(s) and click **Dispute Selected**.

   The Dispute Event dialog box appears. See "Dispute Event Dialog Box " for details.

> **Note**
>
> You cannot open multiple disputes on the same event.

6. In the **What to Dispute** field, select one of the following:
   - **Amount and tax**
   - **Amount only**
   - **Tax only**
7. Enter the **Amount** or **Percentage**.
8. For **Effective**, select a date. By default, this is set to the current date.
9. Select a reason for the dispute.
10. Enter any notes about the dispute.
11. Click **Save**.

Dispute Event Dialog Box

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

Table 10-10 Dispute Event Dialog Box

Field	Description
What to Dispute	Select **Amount and tax**, **Amount only**, or **Tax only**.
Amount and tax	Select to adjust both the amount for the events and the tax levied on the amount.
Amount only	Select to adjust the amount on the events.
Tax only	Select to limit the adjustment to the tax levied on the events.
Amount or **Percentage**	Enter an amount or percentage.
Due	Amount that is due for the bill.
Effective	Select a date.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Viewing Event Dispute Details

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

To view event dispute details through the Bills tab:

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

   The Charges by service pane appears.
4. Select a charge amount.

   The Events dialog box appears. This displays the event disputes and any unsettled event disputes.

   You can also select the unsettled event disputes and settle them. For more information, see "Settling an Event Dispute".

Working with Settlements

You work with settlements when a dispute has to be resolved by the customer, after investigation. You can view settlements made to resolve your disputes using the Billing Care interface. These are generally divided into three levels:

- Item Dispute Level
- Bill Dispute Level
- Event Dispute Level

For settlements, see:

- Settling a Bill Dispute
- Settling an Item Dispute
- Settling an Event Dispute
- Viewing Settled Bill Dispute Details
- Viewing Settled Item Dispute Details
- Viewing Settled Event Dispute Details

Settling a Bill Dispute

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

To settle a dispute on a bill:

1. On the account page, click the **Bills** tab, then select the bill you want to work with using the **Switch Bills** menu.
2. From the **Actions** menu (☰) in the **Bills** tab, select **Settle Bill Dispute**. This option appears only if a bill has been disputed.

   The Settle Bill Dispute dialog box appears. See "Settle Bill Dispute Dialog Box" for details.
3. Select one of the following:
   - **Grant in full**
   - **Grant partial amount**
   - **Deny**
4. If you select **Grant partial amount**, enter the amount.
5. For **Effective**, select a date.

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6. (Optional) Select **Exclude taxes from the dispute**.
7. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
8. (Optional) Click the comment icon ( ) and enter a comment.
9. Click **Save**.

Settle Bill Dispute Dialog Box

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

Table 10-11 Settle Bill Dispute Dialog Box

Field	Description
Grant in full	Select to allow full amount of dispute.
Grant partial amount	Select to allow a partial amount. Enter the amount.
Deny	Do not allow dispute. Return disputed amount to bill.
Effective	Select a date.
Exclude taxes from the dispute	(Optional) Select if appropriate.
Other open disputes	The total amount of all other disputes. (Optional) Click to view other open disputes. Your company may have policies regarding how many disputes can be granted.
	(Optional) Click to enter a comment.
Due	Amount that is due for the bill.
This dispute	The current dispute amount.
Item	The name of the disputed item at the bill level.
Settled Tax Amount	Total tax amount paid as part of any AR action/payment.
Settled Taxed Amount	Total charge amount settled (taxed) paid as part of AR/payment.
Settled Non-Taxed Amount	Total charge amount (non-taxed) as part of AR/payment.

Settling an Item Dispute

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

To settle an item dispute:

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

> **Tip**
>
> You can also access the settled item dispute details through **Newsfeed** in the **Home** tab or **A/R Actions** in the **Bills** tab.

2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

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The Charges by service pane appears.

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

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

5. Click **Unsettled Item Dispute**.

   The Settle Item Dispute dialog box appears. See "Settle Item Dispute Dialog Box" for details.

6. Select one of the following:
   - **Grant in full**
   - **Grant partial amount**
   - **Deny**
7. If you select **Grant partial amount**, enter the amount.
8. For **Effective**, select a date.
9. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
10. (Optional) Click the comment icon ( ) and enter a comment.
11. Click **Save**.

Settle Item Dispute Dialog Box

Use the Settle Item dialog box to settle item disputes.

Table 10-12 Settle Item Dispute Dialog Box

Field	Description
Grant in full	Select to allow full amount of dispute.
Deny	Select to deny the dispute. The disputed amount is returned to the bill.
Effective	Select a date.
Due	Amount that is due for the bill.
This dispute	The current dispute amount.
Other open disputes	(Optional) Click to view other open disputes.
	(Optional) Click to enter a comment.
Item	The name of the disputed item.
Settled Tax Amount	Total tax amount paid as part of any AR action/payment.
Settled Taxed Amount	Total charge amount settled (taxed) paid as part of AR/payment.
Settled Non-Taxed Amount	Total charge amount (non-taxed) as part of AR/payment.

Settling an Event Dispute

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

To settle an event dispute:

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

   > **Tip**
   >
   > You can access details of settled or unsettled item disputes through **Newsfeed** in the **Home** tab. You can find these details in **Notes** that pop-up on top of the chart, **A/R Actions** in the **Bills** tab, or from within the graph.

2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

   The Charges by service pane appears.
4. Click **Show Charge Changes**. This option appears if there are any open settled or unsettled event disputes.

   The Cycle forward dialog box appears and displays any open settled or unsettled event disputes.
5. Click an **Unsettled Event Dispute**.

   The Settle Event Dispute dialog box appears. See "Settle Event Dispute Dialog Box" for details.
6. Select one of the following:
   - **Grant in full**
   - **Grant partial amount**
   - **Deny**
7. If you select **Grant partial amount**, enter the amount.
8. For **Effective**, select a date.
9. (Optional) To get a list of the open disputes for this account, select **Other open disputes**.
10. (Optional) Click the comment icon ( ) and enter a comment.
11. Click **Save**.

Settle Event Dispute Dialog Box

Use the Settle Event dialog box to settle event disputes.

Table 10-13 Settle Event Dispute Dialog Box

Field	Description
Grant in full	Select to allow full amount of dispute.
Grant partial amount	Select to allow a partial amount. Enter the amount.
Deny	Do not allow dispute. Return disputed amount to bill.
Effective	Select a date.
Due	Amount that is due for the bill.
Dispute	The current dispute amount.
Other open disputes	The total amount of all other disputes. (Optional) Click to view other open disputes.

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Table 10-13 (Cont.) Settle Event Dispute Dialog Box

Field	Description
Due after dispute	Amount that is due after the event is settled.
	(Optional) Click to enter a comment.
Item	The name of the disputed item at the event level.
Settled Tax Amount	Total tax amount paid as part of any AR action/payment.
Settled Taxed Amount	Total charge amount settled (taxed) paid as part of AR/payment.
Settled Non-Taxed Amount	Total charge amount (non-taxed) as part of AR/payment.

Viewing Settled Bill Dispute Details

To view settled bill dispute details:

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

> **Tip**
>
> You can access details of settled or unsettled item disputes through **News Feed** in the **Home** tab. You can find these details in **Notes** that pop-up on top of the chart, **A/R Actions** in the **Bills** tab, or from within the graph.

2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

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

   The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Click the appropriate settled bill dispute. The Settled Bill Dispute dialog box appears and displays the bill dispute that is settled. See "Settled Bill Dispute Detail Dialog Box" for details.

Settled Bill Dispute Detail Dialog Box

Use the Settled Bill dialog box to view settled bill disputes.

Table 10-14 Settled Bill Dispute Dialog Box

Field	Description
Opened	The date the dispute was raised.
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.
Settlement ID	The settlement ID.

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Table 10-14 (Cont.) Settled Bill Dispute Dialog Box

Field	Description
Settled amount	The settled amount.
	(Optional) Click to enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed bill's taxes. The table includes the following columns: • **Item**: The name of the disputed bill. • **Settled Tax Amount:** The tax amount settled by this adjustment. • **Settled Taxed Amount:** The amount of the adjustment that is taxable. • **Settled Non-Taxed Amount:** The amount of the adjustment that is not taxable.

Viewing Settled Item Dispute Details

To view settled item dispute details:

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

> **Tip**
>
> You can access details of settled or unsettled item disputes through **Newsfeed** in the **Home** tab. You can find these details in **Notes** that pop-up on top of the chart, **A/R Actions** in the **Bills** tab, or from within the graph.

2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

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

   The Cycle forward dialog box appears and displays any open settled or unsettled item disputes.
5. Click the appropriate settled item dispute.

   The Settled Item Dispute dialog box appears and displays the item dispute that is settled. See "Settled Item Dispute Dialog Box" for details.

Settled Item Dispute Dialog Box

Use the Settled Item dialog box to view settled item disputes.

Table 10-15 Settled Item Dispute Dialog Box

Field	Description
Opened	The date the dispute was raised.

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Table 10-15 (Cont.) Settled Item Dispute Dialog Box

Field	Description
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.
Settlement ID	The settlement ID.
Settled amount	The settled amount.
	(Optional) Click to enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed item's taxes. The table includes the following columns: • **Item**: The name of the disputed item. • **Settled Tax Amount:** The tax amount settled by this adjustment. • **Settled Taxed Amount:** The amount of the adjustment that is taxable. • **Settled Non-Taxed Amount:** The amount of the adjustment that is not taxable.

Viewing Settled Event Dispute Details

To view settled event dispute details:

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

> **Tip**
>
> You can access details of settled or unsettled item disputes through **Newsfeed** in the **Home** tab. You can find these details in **Notes** that pop-up on top of the chart, **A/R Actions** in the **Bills** tab, or from within the graph.

2. Select a bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area of the **Bills** tab, select a service for the selected bill.

   The Charges by service pane appears.
4. Select a charge amount. The Settled Event Dispute dialog box appears. See "Settled Event Dispute Dialog Box" for details.

Settled Event Dispute Dialog Box

Use the Settled Event dialog box to view settled event disputes.

Table 10-16 Settled Event Dispute Dialog Box

Field	Description
Opened	The date the dispute was raised.
Dispute ID	The dispute ID.
Settled	The date the dispute was settled.

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Table 10-16 (Cont.) Settled Event Dispute Dialog Box

Field	Description
Settlement ID	The settlement ID.
Settled amount	The settled amount.
	(Optional) Click to enter a comment.
Allocation	The table displays how the adjustment or payment has been allocated to the disputed event's taxes. The table includes the following columns: • **Item**: The name of the disputed event. • **Settled Tax Amount:** The tax amount settled by this adjustment. • **Settled Taxed Amount:** The amount of the adjustment that is taxable. • **Settled Non-Taxed Amount:** The amount of the adjustment that is not taxable.

Working with Refunds

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

> **Note**
>
> You cannot refund to wholesale child accounts.

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

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

> **Caution**
>
> Refunds cannot be reversed. You should give a refund only in strict compliance with your company's guidelines. If you refund a customer account by mistake, you can adjust the account balance for the refunded amount.

For refunds, see:

- Refunding an Account
- Refunding a Bill

Refunding an Account

To refund an account:

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1. On the account page, from the **Actions** menu, select **Accounts Receivables** and then select **Refunds**.

   The Credit Balances Available for Refund dialog box appears and lists all the items that are eligible for refunds.

2. Do one of the following:

   To refund all items:

   a. Select **Refund all**.

      All the items that are eligible for refund are selected.

   b. Click **Refund** or **Next**.

      The Refund Multiple Items dialog box appears.

   To refund selected items:

   a. Select **Refund selected bills**.

   b. Select the items to refund.

   c. Click **Refund** or **Next**.

      The Refund Bill or Refund Multiple Items dialog box appears depending on your selection.

3. Enter the required information.

4. Click **Save**.

Refunding a Bill

To create a bill-level refund:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to refund using the **Switch Bills** menu.
3. From the **Actions** menu (☰), select **Refund Bill**.

   The Refund Bill dialog box appears.

4. Enter the required information.
5. Click **Save**.

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

Working with Write-Offs

When your company determines that it will not receive payment from a customer, you may be asked to write off the amount the customer owes. You can perform a write-off for an account, a bill, or an item charge. The write-off can be performed as one event that includes both the net and tax amounts, or as two events, one for the net amount and one for the tax amount.

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> **⚠ Caution**
>
> A write-off can be reversed. However, you should perform a write-off only in strict compliance with your company's guidelines.

To write off a bad debt and reverse a write-off, see:

- Writing Off an Account
- Writing Off a Bill
- Writing Off a Bill Item
- Viewing Write-Off Details
- Reversing a Write-Off

Writing Off an Account

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

To write off an account:

1. On the account page, from the **Actions** menu, select **Account Receivables** and then select **Write-Off Account**.

   The Write Off Account dialog box appears. See "Write Off Account Dialog Box" for details.
2. For **Effective**, select a date.

   > **ⓘ Note**
   >
   > Selecting a future date is not supported. However, backdating is supported.
3. (Optional) Select **Inactivate account**.

   This option appears only if the account status is Active.
4. (Optional) Select **Separate the tax portion from the write-off**.
5. Select a reason.
6. (Optional) Enter appropriate notes.
7. Click **Save**.

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Write Off Account Dialog Box

> **⚠ Caution**
>
> You should perform a write-off only in strict compliance with your company's guidelines. To reverse a write-off of an account, the account status must be inactive before you write off the account.

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

Table 10-17 Write Off Account Dialog Box

Field	Description
Amount	The amount to write off, that is, the amount owed on the account.
Effective	Select a date.
Account Status	Displays the account status whether it is active or not.
Inactivate account	Select to make the account inactive.
Separate the tax portion from the write-off	(Optional) Select to keep the tax amount separate.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Writing Off a Bill

> **⚠ Caution**
>
> The write-off action is permanent and cannot be reversed.

To write off a bill:

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

   The existing bill details are displayed.
2. Select the bill you want to write off using the **Switch Bills** menu.
3. From the **Actions** menu (☰), select **Write Off Bill**.

   The Write Off Bill dialog box appears. See "Write Off Bill Dialog Box" for details.
4. For **Effective**, select a date.
5. (Optional) Select **Separate the tax portion from the write off**.
6. Select a reason.
7. (Optional) Enter any notes.
8. Click **Save**.

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Write Off Bill Dialog Box

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

Table 10-18 Write Off Bill Dialog Box

Field	Description
Effective	Select a date.
Separate the tax portion from the write off	(Optional) Select to keep the tax amount separate.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Writing Off a Bill Item

> ⚠ **Caution**
>
> The write-off action is permanent and cannot be reversed.

To write off a bill item:

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

   The existing bill details are displayed.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the section, select a service for the selected bill.

   The Charges by service pane appears.
4. Select a charge, click the **Action**s menu (⋮), and select **Write Off Item**.

   The Write Off Bill Item dialog box appears. See "Writing Off Bill Item Dialog Box" for details.
5. In the **Effective** field, enter a date.
6. (Optional) Select **Separate the tax portion from the write off**.
7. Select a reason.
8. (Optional) Enter notes.
9. Click **Save**.

Writing Off Bill Item Dialog Box

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

Table 10-19 Writing Off Bill Item Dialog Box

Field	Description
Effective	Select a date.

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Table 10-19 (Cont.) Writing Off Bill Item Dialog Box

Field	Description
Separate the tax portion from the write off	(Optional) Select to keep the tax amount separate.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Viewing Write-Off Details

You can view write-off details from **Newsfeed** in the **Home** tab, **A/R Actions** in the **Bills** tab, or from the **Service Charges** area in the **Bill Details** section. See the following topics for more information.

- Viewing Write-Off Details from the Newsfeed
- Viewing Write-Off Details from A/R Actions
- Viewing Write-Off Details from the Service Charges Area

Viewing Write-Off Details from the Newsfeed

To view write-off details from the news feed:

1. On the account page, click the **Home** tab.
2. Click **Newsfeed** in the Account History area.

   The Newsfeed page appears and displays details about A/R actions, payments, charges, and accounts. See "Newsfeed" for details.
3. To view a write-off, click **Write off**.

   Based on the selected write-off type, the appropriate write-off dialog box appears. The Details column specifies the write-off type.

   - If the selected write-off is for an account, the Write Off Account dialog box appears and displays details about the account.
   - If the selected write-off is for a bill, the Write Off Bill dialog box appears and displays details about the bill.
   - If the selected write-off is for an item, the Write Off Item dialog box appears and displays details about the item.
4. (Optional) Click the comment icon ( ) and enter a comment.
5. Click **Post**.

Viewing Write-Off Details from A/R Actions

To view the write-off details from the A/R actions:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. Click **A/R actions** in the **Bills** tab.

   A dialog box appears.

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4. Select the required type of write-off A/R action and click **A/R Action Details**.

   The appropriate type of Write Off dialog box appears.

5. (Optional) Click the comment icon ( ) and enter a comment.
6. Click **Post**.

Viewing Write-Off Details from the Service Charges Area

To view the write-off from the Services Charges Area:

1. On the account page, click the **Bills** tab.
2. Select the bill you want to work with using the **Switch Bills** menu.
3. In the Service Charges area, select a service for the selected bill.

   The Charges by service pane appears.

4. Click **Show Charge Changes**.

   The related dialog box appears with the actions that affected the item.

5. Do one of the following:
   a. To view an account write-off, click **Account Write-off**.

      The Write Off Account dialog box appears and displays the details about the account. See "Write Off Account Dialog Box" for details.

      > **Note**
      >
      > You cannot perform account write-off to wholesale child accounts.

   b. To view a bill write-off, click **Bill Write-off**.

      The Write Off Bill dialog box appears and displays the details about the bill. See "Write Off Bill Dialog Box" for details.

   c. To view an item write-off, click **Item Write-off**.

      The Write Off Item dialog box appears and displays the details about the item.

6. (Optional) Click the comment icon ( ) and enter a comment.
7. Click **Post**.

Reversing a Write-Off

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

To reverse the account write-off:

1. On the account page, from the **Actions** menu, select **Account Receivables**.
2. Select **Reverse Account Write Off**.

   The Reverse Write-Off Account dialog box appears with the selected account name. See "Reverse Write Off Account Dialog Box" for details.

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

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4. Select a reason.
5. (Optional) Enter appropriate notes.
6. Click **Reverse Write-Off**.

Reverse Write Off Account Dialog Box

Use the Reverse Write Off Account dialog box to reverse write-offs for an account.

Table 10-20 Reverse Write Off Account Dialog Box

Field	Description
Effective	The current date.
Reason	Select a reason that most closely matches the situation.
Enter notes here	(Optional) Enter notes.

Transferring Negative Balances to Another Bill

Your customers' bills could have a negative balance (credit) when they return a product, overpay a bill, or so on. Your customers can apply this negative balance to another bill that they owe money on. For example, if a customer's mobile phone bill has a balance of -$10, that balance could be transferred to a $50 Internet bill. In this case, the balance would become $0 for the mobile phone bill and $40 for the Internet bill.

To transfer a negative balance from one bill to another bill:

1. On the account page, click the **Bills** tab.
2. Select the bill that you want to work with using the **Switch Bills** menu.
3. From the **Actions** menu (☰), select **Transfer Negative Balance**.

> **Note**
>
> The **Transfer Negative Balance** option is enabled only when there is a negative balance.

The Transfer Negative Balance dialog box appears and shows the amount owed for each bill unit in the account. The table is blank if none of the bill units have a positive balance.

4. Type an amount to allocate to each bill unit in the **Allocate** column.

> **Tip**
>
> To remove all amounts from the **Allocate** column, click **Clear**.

5. Optionally, click **Export** to save the information to a CSV file.
6. Click **Save**.

   If necessary, Billing Care automatically recalculates the remaining amount to be allocated.

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11

Organization Hierarchies

You can manage your customers' organization hierarchies by using Oracle Communications Billing Care.

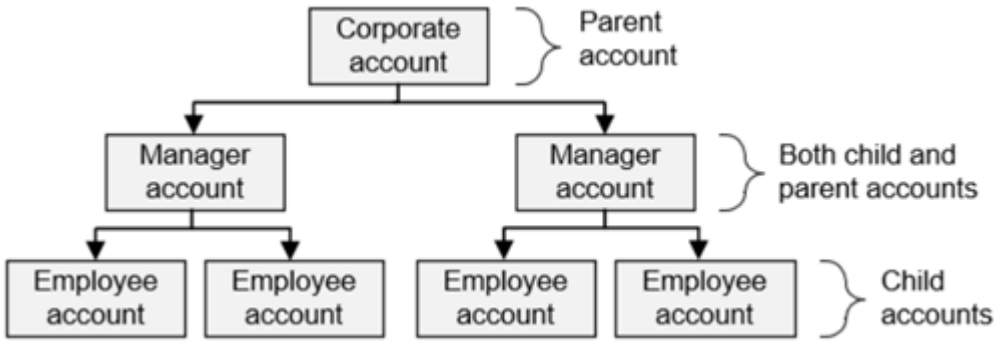
To work with organization hierarchies, see the following topics:

- About Organization Hierarchies
- Creating an Organization Hierarchy
- About Account Hierarchy Types
- Assigning Hierarchy Types to Accounts
- Adding Child Accounts to an Organization Hierarchy
- Adding a Parent Account to an Organization Hierarchy
- Modifying the Hierarchy Relationships of Child Accounts
- Modifying the Hierarchy Relationships of Parent Accounts
- Removing a Child Account from an Organization Hierarchy
- Viewing an Account's Organization Hierarchy

About Organization Hierarchies

You use organization hierarchies to connect accounts in an organization and display their relationship graphically. Billing Care shows the parent account at the top and child accounts beneath it.

Child accounts can also be parent accounts themselves, as shown below.



You can assign hierarchy types and classify multiple accounts by functional roles, which allows you to manage and group accounts within your organization's structure in Billing Care.

Creating an Organization Hierarchy

Creating an organization hierarchy involves these general steps:

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1. Create the account that will be the parent in the hierarchy. For example, create one account to represent a corporate account.
2. Create the accounts that will be the children in the hierarchy. For example, create accounts to represent employees and departments within a company.
3. Associate the child account with the appropriate parent. For example, associate an employee account with the corporate account.

   You don't explicitly identify an account as a parent or child. Instead, they become parent or child accounts when you associate them.

About Account Hierarchy Types

Accounts in an organization hierarchy can have one of these hierarchy types:

Hierarchy Type	Description
Not Set	The account does not have a hierarchy type.
Site	A nonservice-owning account used for physical or logical sites in an organization. Classify other account types under a common site when defining an organization's hierarchy in Billing Care.
Legal Entity	A nonservice-owning account type used for legal entities in an organization with accounts in Billing Care.
Billing Account	An account type used for configuring billing hierarchies representing a parent billing account with financial responsibility for child account bill units. See "Billing Hierarchies".
Service Account	An account type used for accounts with active, billable services.

Assigning Hierarchy Types to Accounts

Assign a hierarchy type to an account in one of these ways:

- During account creation, select a value from the **Organization Hierarchy Type** list.
- For existing accounts, assign a hierarchy type by editing the account's profile:
  1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
  2. From the **Actions** menu, select **Account** and then select **Account Profile**.

     The account profile appears.
  3. Select a value from the **Organization Hierarchy Type** list. See "About Account Hierarchy Types".
  4. Click **Save**.

After assigning an organization hierarchy type, add the account to an organization hierarchy. See "Adding Child Accounts to an Organization Hierarchy" and "Adding a Parent Account to an Organization Hierarchy".

Adding Child Accounts to an Organization Hierarchy

You add a child account to an organization hierarchy by associating it with its parent account.

To add a child account to an organization hierarchy:

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1. Open the account that is the parent in the organization hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The organization hierarchy page for the account appears. Billing Care highlights the active account and displays any connected accounts in the organization.
3. Click the

   menu icon at the top right and then click **Add Children**.

   The **Add to Hierarchy** page appears and a search window pops up. See "Search Dialog Box" for more information.
4. Click **Search** or enter your search criteria, such as the account's company name, and then click **Search**.

   Billing Care lists the accounts that meet your criteria.
5. Click the  icon next to each account that you want to add as a child.

   The account is moved to the **This 1 account will be added to hierarchy** column on the right.
6. Click **Add to Hierarchy**.

   The account is added as a child in the organization hierarchy.

Adding a Parent Account to an Organization Hierarchy

You add a parent account to an organization hierarchy by associating it with a child account.

To add a parent account to an organization hierarchy:

1. Open the account that is a child in the organization hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The organization hierarchy for the account appears. Billing Care highlights the active account and displays any connected accounts in the organization.
3. Click the

   menu icon at the top right and then click **Move to a new parent**.

   The **Hierarchy Move** page appears and a search window pops up. See "Search Dialog Box" for more information.
4. Click **Search** or enter your search criteria, and then click **Search**.

   Billing Care lists the accounts that meet your criteria in the **Select the new parent account** section.
5. Select the new parent account.
6. In the **Select the children's parent account** section, next to **Find account**, select the **Search** icon and enter your criteria.

   Select the account that you want to be the child and then click **Move Account**.

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The account is added as a parent in the organization hierarchy.

Modifying the Hierarchy Relationships of Child Accounts

You can modify a child account's relationship to other accounts in an organization hierarchy in these ways:

- Move it underneath a different parent account.

  For example, move child account 1 from parent account A to parent account B.
- Remove it from the organization hierarchy.
- Add one or more children underneath it.

Modifying the Hierarchy Relationships of Parent Accounts

You can modify a parent account's relationship to other accounts in an organization hierarchy in these ways:

- Add more children underneath it.
- Move it underneath a parent account and move all its children to a different parent account.

  For example, if parent account A has child accounts 1 and 2, you could add account A as a child of parent account B and then move child accounts 1 and 2 to parent account C.
- Move it and all its children underneath a parent account.

  For example, if parent account A has child accounts 1 and 2, you could move account A to account B. Child accounts 1 and 2 would stay underneath account A.
- Move all its children underneath a different parent account.

  For example, if parent account A has child accounts 1 and 2, you could move child accounts 1 and 2 to parent account B.
- Remove it from the organization hierarchy and move all its children underneath an upstream parent account.

  For example, assume a hierarchy has account A at the top, account B underneath account A, and accounts 1 and 2 underneath account B. This option would remove account B from the hierarchy and move accounts 1 and 2 to account A.

  > **Note**
  >
  > This option is available only if the parent account is a child underneath another parent account.

- Remove it and all its children from the organization hierarchy.

  > **Note**
  >
  > This option is available only if the parent account is a child underneath another parent account.

- Remove all its children from the organization hierarchy.

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Removing a Child Account from an Organization Hierarchy

To remove a child account from an organization hierarchy:

1. Open the child account that you want to remove.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**. Alternatively, click the **Organizational child** link from the account banner.

   The organization hierarchy for the account appears. Billing Care highlights the active account and displays connected accounts in the organization.
3. In the account you want to remove, click the

   menu icon at the top right and then select **Remove from hierarchy**.

   > **Note**
   >
   > If this account also has child accounts, its children are moved to the upstream parent account.

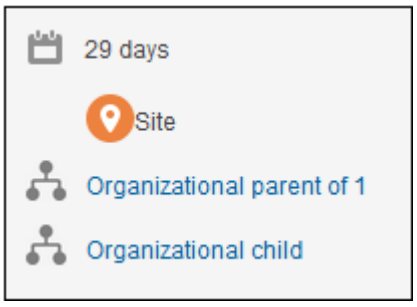
   Billing Care displays a removal confirmation message.
4. To approve the account's removal from the organization hierarchy, click **Remove**.

Viewing an Account's Organization Hierarchy

View an account's position in an organization hierarchy in one of these ways:

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

  The organization hierarchy for the account appears. Billing Care highlights the active account and displays connected accounts in the organization. Each account displays its type with an icon. No accounts are displayed if no organization hierarchy relationships exist.
- Look at the Billing Care account banner, which displays organization hierarchy information for the account. For example, this shows an account that has one child account underneath it and a parent account on top of it:

  If you click the **Organizational child** or **Organizational parent** link, Billing Care displays the entire organization hierarchy that is associated with the account.

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12

Event Browser

You can search for events, investigate related account activity, and adjust or dispute events by using Event Browser in Oracle Communications Billing Care.

For information about working with Event Browser, see the following topics:

- About Event Browser
- Searching for Events in Event Browser
- Clearing Event Search Criteria
- Viewing Event Details in Event Browser
- Adjusting Events in Event Browser
- Disputing Events in Event Browser

About Event Browser

Use Event Browser to investigate customer inquiries about billing, usage, payments, and other account activity. Event Browser displays event details and related account, service, bill, item, balance impact, charge, and accounts receivable (A/R) information.

Depending on your permissions, you can adjust or dispute one or more events from the search results.

Searching for Events in Event Browser

Use Event Browser to search by account, bill, service, or event information.

To search for events, complete the following steps:

1. On the Billing Care landing page, select **Event Browser**.

   The **Event Browser** page appears.
2. Under **Filter**, select **Edit Filter** next to **Account**, **Bill**, **Service**, or **Event**.

   The Filter dialog box appears.
3. Enter one or more criteria:
   - **For accounts**: Enter a first name, last name, company name, account number, or account status.
   - **For bills**: Enter a bill number or item number.
   - **For services**: Enter a service ID or select a service type.
   - **For events**: Select an event type, created time, or effective time.
4. Click **Update**.
5. Repeat steps 2 through 4 to add criteria from another filter area.

Billing Care displays the events that match the search criteria.

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Clearing Event Search Criteria

You can clear criteria from one filter area or from all filter areas.

To clear criteria from one filter area, complete the following steps:

1. Under **Filter**, select **Edit Filter** next to the filter area that you want to change.
2. Clear the fields that you no longer want to use.
3. Click **Update**.

To clear all filter criteria, click **Reset**.

Viewing Event Details in Event Browser

View event details to investigate customer account activity.

To view event details, complete the following steps:

1. Search for events. See "Searching for Events in Event Browser".
2. In the search results, select the checkbox for the event that you want to view.
3. To open the associated account, click the account number link on the right.
4. Click **View**.

   The event log page appears.
5. Review the event, account, service, bill, item, A/R action, balance impact, and charge information.

Adjusting Events in Event Browser

You can adjust one or more events after you investigate the event details.

To adjust events, complete the following steps:

1. Search for events. See "Searching for Events in Event Browser".
2. In the search results, select the events that you want to adjust.

   Tip

   To help you view the selected events, click **Show Selected** to group them at the top of the search results.
3. At the top of the page, click **Adjustment**.

   The **Event Adjustment** dialog box appears.
4. For **What to Adjust**, select **Amount and tax**, **Amount only**, or **Tax only**.
5. For **Amount or Percentage**, enter the adjustment amount or percentage.
6. For **Effective**, select or enter the date when the adjustment takes effect.
7. Select a reason and, optionally, enter notes.
8. Review the available amount, adjustment amount, and amount due after the adjustment.

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9. Click **Save**.

   Billing Care applies the adjustment to the selected events.

Table 12-1 describes the fields and buttons in the **Event Adjustment** dialog box.

Table 12-1 Event Adjustment Dialog Box

Field or Button	Description
What to Adjust	Select **Amount and tax**, **Amount only**, or **Tax only**.
How to Apply Adjustment Amount	For multiple events, select how Billing Care applies the adjustment amount to the events.
Amount or **Percentage**	Enter an adjustment amount or percentage.
Effective	Select or enter the date when the adjustment takes effect.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	Enter optional notes about the adjustment.
Save or **Cancel**	Click **Save** to apply the adjustment, or click **Cancel** to close the dialog box without saving.

Disputing Events in Event Browser

You can open a dispute for one or more events after you investigate the event details.

To dispute events, complete the following steps:

1. Search for events. See "Searching for Events in Event Browser".
2. In the search results, select the events that you want to dispute.

   > **Tip**
   >
   > To help you view the selected events, click **Show Selected** to group them at the top of the search results.

3. At the top of the page, click **Dispute**.

   The **Dispute Event** dialog box appears.

   > **Note**
   >
   > You cannot open multiple disputes for the same event.

4. For **What to Dispute**, select **Amount and tax**, **Amount only**, or **Tax only**.
5. For **Amount or Percentage**, enter the disputed amount or percentage.
6. For **Effective**, select the effective date.
7. Select a reason and, optionally, enter notes.
8. Click **Save**.

   Billing Care opens a dispute for the selected events.

Table 12-2 describes the fields and buttons in the **Dispute Event** dialog box.

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Table 12-2 Dispute Event Dialog Box

Field or Button	Description
What to Dispute	Select **Amount and tax**, **Amount only**, or **Tax only**.
Amount or **Percentage**	Enter a disputed amount or percentage.
Effective	Select the effective date.
Select a reason	Select the reason that most closely matches the situation.
Enter notes here	Enter optional notes about the dispute.
Save or **Cancel**	Click **Save** to open the dispute, or click **Cancel** to close the dialog box without saving.

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13

Billing Hierarchies

You can manage your customers' billing hierarchies by using Oracle Communications Billing Care.

To work with billing hierarchies, see the following topics:

- About Billing Hierarchies
- Creating a Billing Hierarchy
- Adding Nonpaying Children to a Parent's Bill Unit
- Removing Nonpaying Children from a Billing Hierarchy
- Adding a Paying Parent for a Child's Bill Unit
- Changing a Bill Unit's Parent Account
- Returning a Bill Unit to an Account's Own Payment Method
- Viewing Who Pays for a Bill
- Changing the Billing Day of Month Asynchronously for Large Hierarchy

About Billing Hierarchies

Billing hierarchies allow one account to be financially responsible for another account's bills, such as when a parent pays for a child's bill or a company pays for its employees' bills. You create a billing hierarchy by associating bill units in a parent–child relationship.

For more information, see "Managing Account and Bill Unit Hierarchies" in *BRM Managing Customers*.

Creating a Billing Hierarchy

Creating a billing hierarchy involves these general steps:

1. Create the account that will be the parent in the hierarchy and the bill unit that will be responsible for paying the group's bills. For example, create one account and bill unit for a corporate account.
2. Create an account and bill units for each child in the hierarchy. For example, create an account and a bill unit for each employee within a company.
3. Associate each child's bill unit with the parent's bill unit. For example, associate an employee's bill unit with the corporate bill unit.

   You don't explicitly identify a bill unit as a parent or child. Instead, they become parent or child bill units when you associate them.

Adding Nonpaying Children to a Parent's Bill Unit

You add a child's bill unit to a billing hierarchy by associating the bill unit with the hierarchy's parent.

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To add nonpaying children to a parent's bill unit:

1. Open the parent account that will be financially responsible for all child bill units in the billing hierarchy. See "Finding an Account" for more information.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Add children**.

   The Search dialog appears in the **Add to Billing Hierarchy** page. See "Search Dialog Box" for more information.
5. Enter your search criteria, such as the account's company name, and then click **Search**.

   Billing Care lists the accounts that meet your criteria.
6. Click the ⊕ icon next to each account that you want to add as nonpaying children.

   Each account that you select and its bill units are moved to the Add these selected bill units to the hierarchy pane on the right.
7. In the Add these selected bill units to the hierarchy pane, select the bill units that the parent account will pay for.

   Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.
8. Select **Roll Up Credit Limit** to add the child bill unit's credit limit to the parent's bill unit.

   > **Note**
   >
   > This option appears only when the parent account owns a payment responsible real-time credit exposure (PR_RTCE) balance monitoring group. See "About Balance Monitoring Groups" in *BRM Managing Customers* for more information.
9. Click **Add to Hierarchy** at the top right.

   The selected child bill units are added to the billing hierarchy. The parent account will be financially responsible for all child bill units in the billing hierarchy going forward.
10. Click **Close**.

Removing Nonpaying Children from a Billing Hierarchy

To remove nonpaying child accounts from a billing hierarchy:

1. Open the parent account in the billing hierarchy.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Remove children**.
5. Under the list of **Nonpaying children**, click the ⊗ icon next to a bill unit that you want to remove from the billing hierarchy.

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Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.

The Remove from hierarchy dialog box appears.

6. In the **Select the new payment method for this bill unit** list, select a payment method on file for the child account or create a new payment method.
7. Click **Remove**.

   You are returned to the **Hierarchy** page.
8. After you have deleted all children that you want to remove from the billing hierarchy, click **Done** at the top right.
9. Click **Close**.

Adding a Paying Parent for a Child's Bill Unit

To specify that a customer's bill is paid by another account, you associate the customer's bill unit with a paying parent.

To add a paying parent for a child's bill unit:

1. Open the child account.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Associate with Parent**.

   The Search dialog box appears in the **Select Parent** page. See "Search Dialog Box" for more information.
5. Enter your search criteria, such as the account's company name, and then click **Search**.

   Billing Care lists the accounts that meet your criteria.
6. Select the account that will be the parent and then select the bill unit that will be responsible for payment.
7. Select **Roll up credit limit to this parent** to add the child bill unit's credit limit to this parent's bill unit.

   > **Note**
   >
   > This option appears only when the parent account owns a payment responsible real-time credit exposure (PR_RTCE) balance monitoring group. See "About Balance Monitoring Groups" in *BRM Managing Customers* for more information.

8. Click **Select Parent** at the top right.

   The parent account is now financially responsible for the child account's bill.
9. Click **Close**.

Changing a Bill Unit's Parent Account

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

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1. Open the child account.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The account's **Hierarchy** page appears.
3. Click the **Bill Units** tab.
4. Click **Change Parent** on the top right.

   The Search dialog box appears in the **Select Parent** page. See "Search Dialog Box" for more information.
5. Enter your search criteria, such as the account's company name, and then click **Search**.

   Billing Care lists the accounts that meet your criteria.
6. Select the new paying parent's bill unit and then click **Select Parent**.

   The child account is moved to the new paying parent's billing hierarchy.
7. Click **Close**.

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

You make an account responsible for its own bills again by removing its bill unit from a billing hierarchy.

To return a bill unit to an account's own payment method:

1. Open the child account.
2. From the **Actions** menu, select **Hierarchy** and then select **Hierarchy**.

   The **Hierarchy** page appears.
3. Click the **Bill Units** tab.

   The **Bill Units** tab displays the bill unit's location in the billing hierarchy and the paying parent is shown on the right.
4. Click **Change to Standalone**.

   Billing Care will alert you if a bill unit has any pending charges. Specify who will pay for the pending charges: the parent account or the child account.

   The Remove from hierarchy dialog box appears.
5. In the **Select the new payment method for this bill unit** list, select a payment method on file for the child account or create a new payment method.
6. Click **Remove**.

   The account is responsible for paying its own bill going forward.
7. Click **Close**.

Viewing Who Pays for a Bill

You can view who is responsible for paying a bill in one of these ways:

- Click the **Bills** tab for an account.

  If it is a child account, the **Bills** tab displays the child icon and the account number that is responsible for paying the bill.

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If it is a parent account, the **Bills** tab displays the parent icon and lists the bills that it is responsible for paying. The bill total is broken down into the amount generated by the parent and the amount generated by all children in the billing hierarchy.



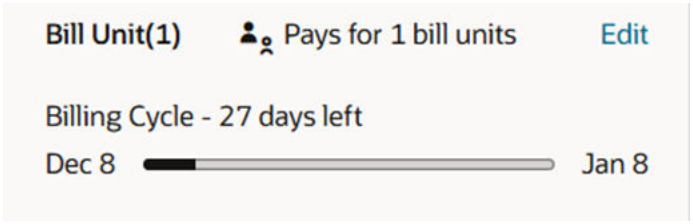
- From the **Actions** menu, select **Hierarchy**, select **Hierarchy**, and then click the **Bill Units** tab.

  Billing Care shows a graphical display of the account's position in the billing hierarchy. For parent accounts, it lists all child bills that they are responsible for paying. For child accounts, it lists the paying parent account.

  For example, this shows a parent account that is financially responsible for one child bill.



- Look at an account's Billing Cycle banner, which displays whether the account is responsible for paying any child bills. For example, this shows an account that is financially responsible for one child bill:



  If you click the **Edit** link, Billing Care displays the entire billing hierarchy that is associated with the account.

Changing the Billing Day of Month Asynchronously for Large Hierarchy

To change the billing day of month (DOM) asynchronously for a large hierarchy:

1. On the parent's account page, select **Actions**, then **Financial Setup**, and then **Bill Unit Setup**.

   The Financial Setup page appears.

2. In the bill unit for which you want to change the billing DOM, click the **Edit** icon.

   The Edit Bill Unit dialog box appears.

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3. From the **Business profile** list, select the standard **AsyncBDOMChange** profile or a custom profile with the **AsyncBDOMChange** key set to **yes**.
4. In the **Billing day of month** field, enter or select a new billing DOM.

   The status of the billing DOM change appears under the field. See "Financial Setup Edit Bill Unit Page".
5. To asynchronously change the billing DOM immediately, select the **Immediately update the billing day** option. If not selected, you must schedule the update for a later time. For more information, see "Changing a Customer's Billing Day of Month" in *BRM Managing Customers*.
6. Change any other details that you want to change, such as its name, payment method, accounting type, and billing frequency.
7. Click **Save** to save the changes.

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14

Wholesale Billing Hierarchies

You can manage your customers' wholesale billing hierarchies by using Oracle Communications Billing Care.

To work with wholesale billing hierarchies, see the following topics:

- About Wholesale Billing Hierarchies
- Creating Wholesale Billing Hierarchies
- Changing an Existing Bill Unit into a Wholesale Billing Parent
- Adding Normal Bill Units to a Wholesale Billing Parent
- Adding Child Bill Units to a Wholesale Billing Parent
- Changing the Billing Day of Month Asynchronously for Large Hierarchy
- Viewing an Account's Position in a Wholesale Billing Hierarchy

About Wholesale Billing Hierarchies

You use wholesale billing to handle very large billing hierarchies more efficiently. For example, you might use it for a large corporation that is financially responsible for the telco services of ten thousand employees. In this case, wholesale billing would allow you to perform billing and invoicing much faster than if you used a billing hierarchy.

For more information, see "Configuring Wholesale Billing" in *BRM Configuring and Running Billing*.

Creating Wholesale Billing Hierarchies

Creating a wholesale billing hierarchy involves these general steps:

1. Open the account that will contain the wholesale billing parent and change its default bill unit into the wholesale bill unit. For more details, see "Configuring Wholesale Business Profile" in *BRM Configuring and Running Billing*.
2. Create an account and bill unit for each child under the wholesale billing parent. In the bill unit, set the payment method to the parent's wholesale bill unit. For more details, see "Adding a Payment Method".
3. Create a billing hierarchy by associating each child's bill unit with the wholesale parent's bill unit. For more details, see "Creating a Wholesale Billing Account" in *BRM Configuring and Running Billing*.

> **Note**
>
> You do not explicitly identify a bill unit as a parent or child. Instead, they become parent or child bill units when you associate them in a billing hierarchy.

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Changing an Existing Bill Unit into a Wholesale Billing Parent

You change an existing bill unit into a wholesale billing parent by setting its business profile to **Wholesale Billing**.

To change a bill unit into a wholesale billing parent:

1. Open the account you want to change into a wholesale billing parent. See "Finding an Account" for more information.
2. On the account page, select **Actions**, then **Financial Setup**, and then **Bill Unit Setup**.
3. In the default bill unit, click the **Edit** icon:



4. From the **Business Profile** list, select **Wholesale Billing**.
5. Click **Save**.

Adding Normal Bill Units to a Wholesale Billing Parent

A wholesale billing parent contains only one wholesale parent bill unit. Charges from all child bill units in the wholesale billing hierarchy are rolled up to this bill unit. Any other bill units that you add to a wholesale billing parent must be normal bill units. These bill units contain charges from the parent account only. You cannot set a normal bill unit in the parent account as a wholesale parent to any other account. For example, a bill unit could contain charges for a service the parent purchases. This helps in tracking the parent's own charges separately.

To add one or more normal bill units to a wholesale billing parent:

1. On the wholesale billing parent's account page, select **Actions**, then **Financial Setup**, and then **Bill Unit Setup**.

   The **Financial Setup** dialog box appears.
2. In the **Bill Units** area, click **New**.

   The **New Bill Unit** dialog box appears.
3. Enter details about the bill unit, such as its name, payment method, accounting type, and billing frequency. See "New Bill Unit Pane" for details.
4. From the **Business profile** list, select **Not Set**.
5. Click **Apply** to save the changes.

   The new bill unit is added.

Adding Child Bill Units to a Wholesale Billing Parent

To add child bill units to a wholesale billing parent:

1. Create a child account or open an existing account.
2. On the account page for the child account, select **Actions**, then **Financial Setup**, and then **Bill Unit Setup**.

   The **Financial Setup** page appears.

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3. In the **Bill Units** area, click **New**.

   The **New Bill Unit** dialog box appears.

4. Enter details about the bill unit, such as its name, accounting type, and billing frequency. See "New Bill Unit Pane" for details.

5. From the **Payment method or Paying Account** list, select the wholesale parent's bill unit.

6. Click **Save**.

7. Add the child's bill unit to the wholesale billing parent's hierarchy. See "Adding Nonpaying Children to a Parent's Bill Unit".

Viewing an Account's Position in a Wholesale Billing Hierarchy

You can view an account's position in a wholesale billing hierarchy. For more details, see Viewing an Account's Organization Hierarchy.

The Billing Care account banner shows **Wholesale Parent** if the account is a wholesale billing parent, and **Wholesale Child** if it is a child in a wholesale billing hierarchy.

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15

Financial Setup

You can set up and modify an account's financial details, such as the payment method and tax settings, by using Oracle Communications Billing Care.

To work with an account's financial setup, perform the following tasks:

- Working with Payment Methods
- Adding a Payment Method
- Editing a Payment Method
- Deleting a Payment Method
- Adding Bill Units to an Account
- Editing a Bill Unit
- Moving Services Between Bill Units
- Changing a Bill Unit's Invoice Template
- Assigning a Bill Unit for Payment by Another Account
- Adding and Changing Basic Tax Information
- Adding Tax Exemptions

Working with Payment Methods

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

Adding a Payment Method

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

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, from the **Actions** menu, select **Financial Setup** and then **Payment Methods**.

   The Financial Setup page appears.
3. Click **New** in the Payment Methods pane.

   The New Payment Method pane appears. See "Financial Setup New Payment Method Pane".
4. Select a **Payment type**.
5. Enter the details for the payment type.

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

6. Enter the contact information:
   - For **Credit Card** or **Direct Debit** payment types, provide the address details or select **Use name and billing address from primary contact**.
   - For **Invoice**, provide the invoice payment method, select the delivery method, email, and address details.

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

   - For **SEPA**, provide the type of payment and address details.
7. (Optional) For **Bill unit assignment**, select one or more bill units to assign the new payment method to.
8. Click **Save**.

Related Tasks

Making a Payment

Financial Setup New Payment Method Pane

Use the New Payment Method pane of the Financial Setup page to add a new payment method to an account.

Table 15-1 Financial Setup New Payment Method Pane

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

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Table 15-1 (Cont.) Financial Setup New Payment Method Pane

Field	Description
Contact Details	Enter the contact information or select **Use name and billing address from primary contact**. For email delivery method, provide the email address.
Bill unit assignment	Select to assign this payment method to one or more bill units. If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.

Editing a Payment Method

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

To change a payment method:

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Payment Methods**.

   The Financial Setup page appears with the existing payment methods.
2. For the payment method that you want to work with, click the edit icon.

   The Edit Payment Method page appears. The contents of the section depend on the payment type. See "Financial Setup Edit Payment Method Page".
3. (Optional) You can change the following:
   - For credit cards, change the expiration date.
   - For direct debit, change the bank number, account number, and account type.
   - For invoices, change the invoice ID and the contact method.

     For invoice payments that use email for delivery, the email address is required.
   - For SEPA, change the IBAN, BIC, and the Unique Mandate Reference number as required.
4. (Optional) Change the contact information.
5. (Optional) Select **Bill unit assignment**, to assign the payment method to a bill unit.

   If you assign a payment method to a bill unit that has already been assigned a payment method, that previous method is automatically unassigned.
6. Click **Save**.

Financial Setup Edit Payment Method Page

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

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Table 15-2 Financial Setup Edit Payment Method Page

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

Deleting a Payment Method

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

To delete a payment method:

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Payment Methods**.

   The Financial Setup page appears.

2. On the payment method that you want to delete, click the delete icon ( ).
3. Click **Delete**.

Adding Bill Units to an Account

A bill unit defines when and how often to generate a bill and invoice as well as the customer's preferred method for paying for the bill. Every account contains one bill unit, but you can add bill units to an account. For example, you might add a bill unit if the customer wants to:

- Receive a separate invoice for each service
- Use a different payment method for each service
- Pay for other accounts' bills in a billing hierarchy
- Have a parent in a billing hierarchy be financially responsible for the bill

For more information, see "Billing Hierarchies" or "Adding a Payment Method".

To add a bill unit to an account:

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1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Bill Unit Setup**.

   The Financial Setup page appears.

2. Click **New** next to Bill Units.

   The New Bill Unit pane appears.

3. Enter the bill unit name.

4. Select the Payment method, Accounting type, Billing frequency, Billing day of month, and Re-rated invoice options from the lists for the new bill unit.

   If the payment method is not available, you can select **No Payment Method**.

5. Click **Save**.

> **Tip**
>
> You can move services between bill units. See "Moving Services Between Bill Units" for information on how to move services between bill units.

The new bill unit is created and displays the date when the bill unit was last modified.

New Bill Unit Pane

Use the New Bill Unit pane to add a new bill unit.

Table 15-3 New Bill Unit Pane

Field	Description
Name	Enter a new name.
Accounting type	Select either **Balance forward** or **Open Item**. You cannot change the accounting type of a child bill unit.
Currency	Select the currency. For SEPA payment, select the currency type as **EUR**.
Billing frequency	(Optional) Select an interval.
Billing day of month	(Optional) Enter a day of the month.
Business profile	Select an existing business profile or create a new business profile. See "Creating Business Profiles" in *BRM Opcode Guide* for more information about creating a business profile. Select **Not Set** if you do not want to assign a business profile.
Invoice template	Select an existing invoice template or customize a template. Templates can be customized in Oracle Analytics Publisher. The invoice template determines which template Billing Care selects when creating a new invoice.
Re-rated invoice option	Select an existing template or customize a template for re-rated invoices. Templates can be customized in Oracle Analytics Publisher. The template determines which template Billing Care selects when creating a re-rated invoice.

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Table 15-3 (Cont.) New Bill Unit Pane

Field	Description
Payment Method or Paying Account	Select an existing payment method, a paying account, or select one of the options to create a new method. For a new payment method, enter the account details and contact information. See "Adding a Payment Method". If the payment method is not available, you can select **No Payment Method**.

Editing a Bill Unit

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

To edit a bill unit:

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Bill Unit Setup**.

   The Financial Setup page appears with all existing bill units.
2. In the bill unit that you want to modify, click the **Edit** icon:

   The **Edit Bill Unit** page appears. See "Financial Setup Edit Bill Unit Page" for details.
3. (Optional) Enter a new name.
4. (Optional) Select or edit a new value for **Payment method or Paying Account**.

   If you selected a payment method that is new to the account, enter the required information. See "Financial Setup New Payment Method Pane" for more information.

   If the payment method is not available, you can select **No Payment Method**.
5. (Optional) Select new values for the other fields in the pane as needed.
6. Click **Save**.

Financial Setup Edit Bill Unit Page

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

Table 15-4 Financial Setup Edit Bill Unit Page

Field	Description
Name	Enter a new name.
Accounting type	Select either **Balance forward** or **Open Item**. You cannot change the accounting type of a child bill unit.

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Table 15-4 (Cont.) Financial Setup Edit Bill Unit Page

Field	Description
Currency	Select the currency. For SEPA payment, the only supported currency is **EUR** and it gets displayed automatically.
Billing frequency	Select a new interval.
Billing day of month	Enter a new day of the month.
Business profile	Select a business profile. You may either choose an existing profile or a custom profile available in the list. For example, Wholesale, AsyncBDOMChange are some of the options. For more information, see "Loading the Wholesale Business Profile" and "Loading the Business Profile Configuration File for Changing the Billing Day of Month Asynchronously" in *BRM Configuring and Running Billing*.
Billing day of month (DOM) change status	(Appears only if the **Business profile** is set to standard **AsyncBDOMChange** profile or to a custom business profile with the **AsyncBDOMChange** key set to **yes**) Displays the current status of billing DOM update for wholesale accounts. The status is one of the following: • **Billing day update is in progress**: Indicates that the updating process is ongoing. • **Billing day update is scheduled**: Indicates that a new job has been created but the updating process is yet to begin. • **Billing day update is pending**: Indicates that the update is pending for child bill units. • **Billing day update has failed**: Indicates that the updating process has run into an error. • **Billing day update is completed**: Indicates that the updating process is successfully completed and this is displayed till two midnights.
Immediately update the billing day	(Displays only when a change is made in the billing DOM) Select the checkbox to immediately trigger the updating process for billing DOM.
Invoice template	Select the invoice template to apply.
Re-rated invoice option	Select whether to create a **Replacement** or **Corrective** invoice for the customer when a bill unit requires rerating.
Payment method or Paying Account	Select an existing payment method or select one of the options from the list to create a new method. For a new payment method, enter the account details and contact information. See "Adding a Payment Method". If the payment method is not available, you can select **No Payment Method**.

Moving Services Between Bill Units

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

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Bill Unit Setup**.

   The **Financial Setup** page appears.

2. Click **Move services between Bill Units**.

   The **Move services between Bill Units** page displays the bill units.

3. Select the services from the originating bill unit.

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4. Drag and drop the selected services to the destination bill unit.

   All the services that are part of the balance group are moved at once.

5. Click **Save**.

Changing a Bill Unit's Invoice Template

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

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

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

Assigning a Bill Unit for Payment by Another Account

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

Adding and Changing Basic Tax Information

Whether an account is a business account or subject to city taxes can affect taxation.

To add or change basic tax information for an account:

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Tax Setup**.

   The Tax Setup pane of the Financial Setup page appears. See "Financial Setup Tax Setup Pane" for details.

2. Click **Edit** at the top right corner.
3. If the account is a business account, select **This is a business account**.
4. If the account address is inside the incorporated area of a city, select **Inside incorporated area of a city**.
5. (Optional) Enter any notes that are required for the account's taxation setup. When entering notes, select an appropriate reason from the **Select a Reason** list.
6. Click **Save** or continue with adding exemptions.

   See "Adding Tax Exemptions".

Adding Tax Exemptions

To add tax exemptions:

1. On the account page, from the **Actions** menu, select **Financial Setup** and then **Tax Setup**.

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The Tax Setup pane of the Financial Setup page appears. See "Financial Setup Tax Setup Pane" for details.

2. Click **Edit** at the top right corner.
3. Do one of the following:
   - If this is the first tax exemption, the message **No tax exemption certificate found** is displayed. Click **Add Tax Certificate**.
   - If this is not the first tax exemption, click **Add Tax Certificate** to add a new exemption.
4. For each exemption:
   a. For **Certificate number**, enter the number.
   b. For **Tax type**, select the type.
   c. For **Percent exempt**, enter the amount.
   d. For **From**, select the date the exemption starts.

      You can backdate an exemption.
   e. For **To**, select the end date, or leave as **never ends**.
5. To add a new exemption, click **Add Tax Certificate**.

> **Tip**
>
> You can edit an existing exemption. To delete an exemption, click the delete icon.

Financial Setup Tax Setup Pane

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

Table 15-5 Financial Setup Tax Setup Pane

Field	Description
This is a business account	Select for business accounts.
Inside incorporated area of a city	Select for customers whose billing address is inside the incorporated area of a city.
Add Tax Certificate	Click to add first tax exemption or a new exemption.
Tax type	Select the type of tax exemption.
Certificate number	Enter the certificate number that authorizes the exemption.
Percent exempt	Enter the percentage of the bill that is exempt from taxation.
From	Select the date the exemption starts. The start date can be backdated.
Validity	Select **Calendar** to choose an end date of exemption, or select **never ends**.
To	Appears if you select **Calendar** in the **Validity** field. Select the date the exemption ends.

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Table 15-5 (Cont.) Financial Setup Tax Setup Pane

Field	Description
	Click to delete a tax exemption.

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16

Sharing Groups

You use sharing groups in Oracle Communications Billing Care to create and maintain resource sharing groups.

To work with sharing groups, see the following topics:

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

Working with Resource Sharing Groups

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

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

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

About Charge Sharing

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

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

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

- Creating a New Charge Sharing Group
- Modifying a Charge Sharing Group
- Deleting a Charge Sharing Group
- Adding Members to a Charge Sharing Group

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- Viewing the Membership List in a Charge Sharing Group
- Searching for a Member in a Charge Sharing Group
- Removing One or More Members from a Charge Sharing Group
- Modifying a Member's Details
- Modifying Priorities for Members of a Charge Sharing Group
- New or Edit Charge Sharing Group Page

Creating a New Charge Sharing Group

To create a new charge sharing group:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. On the account page, from the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.
3. Click **New** in the Charge Sharing pane.

   The New Charge Sharing Group page appears.
4. In the **Name** field, enter a name for the charge sharing group.
5. Select **Defer update of parent balance** to postpone updating the balance of a parent account.
6. From the **Services** list, either select the required service or select **Account** for non-service charges.

   A list of charge shares appears in the **Charges to be Shared** table. This table displays the name, description, events, and validity period of the charge.
7. Select one or more charges to be shared from the table.
8. Click **Save**.

   A charge sharing group is created with no members.

Modifying a Charge Sharing Group

To modify a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click **Edit** () for the group that you want to modify.

   The Edit Charge Sharing Group page appears.
3. To change the name of the charge sharing group, enter a new name.
4. To postpone the process of updating the balance of a parent account, select **Defer update of parent balance**. If already selected, you can deselect it to cancel postponing the process.
5. To add or remove charges from the group, select or deselect the charges in the **Charges Shared** table.
6. Click **Save**.

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Deleting a Charge Sharing Group

To delete a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, click **Delete** ( ) for the group that you want to delete.

   A warning message appears.

3. Click **Delete**.

Adding Members to a Charge Sharing Group

To add members to a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, do one of the following:

   - If the group has existing members, click the link showing the number of members, and then **Add Members**.
   - If the group has no members, click **Add Members**.

   The **Add Members** dialog box appears, displaying the **Find Members** tab.

3. Enter the account search criteria and click **Search**.

   The search results appear on the right. The search returns a maximum of 50 results. Refine your search criteria if you do not find the account you are searching for.

4. Select one or more accounts to add as members.

5. Click **Next**.

   The **Select Service** tab appears.

6. From the list, either select the required service or select **Account** for non-service charges that you want to include for charge sharing.

   To include services for future purchases, select the appropriate services from the checklist displayed below the service selection field.

7. Click **Save**.

Viewing the Membership List in a Charge Sharing Group

To view the membership list in a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members.

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Searching for a Member in a Charge Sharing Group

To search for a member in a charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members.
3. Click **Search**.

   The Search Members dialog box appears.
4. Enter the member account search criteria and click **Search**.

   The search results appear. The search returns a maximum of 200 results.

> **Tip**
>
> To view all the members' accounts again, click **Search** and then, in the **Search Members** dialog box, click **Reset**.

Removing One or More Members from a Charge Sharing Group

To remove one or more members from the charge sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.
3. Select one or more members to remove.
4. Click **Delete**.

   A confirmation message appears.
5. Click **Remove**.

Modifying a Member's Details

You can modify a member account in a charge sharing group to include or exclude services based on the requirements. For example, you can add future purchases and non-service charges or remove services that are currently being charged by the group owner. The charges for each specific service you select are assumed by the group owner.

To modify the details of a member account:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.

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3. Click **Edit** ( ) next to the account details.

   The **Member Details** page appears that lists all the services for that account.

4. To add or remove a service for current or future purchases, select or deselect the appropriate services from the checklist.
5. Click **Save**.

Modifying Priorities for Members of a Charge Sharing Group

You can increase or decrease priorities for members of charge sharing groups.

To modify the priorities of charge sharing group members:

1. From the **Actions** menu, select **Sharing Groups**, and then **Charge Sharing**.

   The **Charge Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Membership** section, click **Edit** ( ) for the member for which you want to modify the priority.

   The **Modify Priorities** appears with a list of group names and existing priority settings.

3. Select the up arrow (move up) or the down arrow (move down) to increase or decrease the priority.
4. Click **Save**.

New or Edit Charge Sharing Group Page

Use the New or Edit Charge Sharing Group page to:

- Create and modify charge sharing groups
- Add or remove members from charge sharing groups
- Select specific services for charge sharing groups

Field	Description
Name	Name the charge sharing group. The name you enter must be unique. You cannot use this name for any other discount or charge sharing group owned by the account.
Services	Select a service. You can either select the specific service or select **Account** for non-service charges.
Charges to be Shared	This table lists the charges that the group owner will assume for the group members. Each row displays the charge name, description, event type included in the charge, and validity period of the charge.

About Discount Sharing

Discount sharing is based on discounts purchased by the owner as part of a product rate plan. Shared discounts impact the member's balance groups by either increasing noncurrency resources or reducing the currency impact of an event.

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

Shared discounts can also participate in offer association. When a shared discount has an offer association ID, Billing Care can make that ID available to eligible member accounts or services during purchase and rate customization flows. See "About Offer Association IDs" for more information.

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

- Creating a Discount Sharing Group
- Modifying a Discount Sharing Group
- Deleting a Discount Sharing Group
- Adding Members to the Discount Sharing Group
- Viewing the Membership List in a Discount Sharing Group
- Searching for a Member in a Discount Sharing Group
- Removing One or More Members from the Discount Sharing Group
- Modifying a Member's Details
- Modifying Priorities for Members of a Discount Sharing Group
- New or Edit Discount Sharing Group Page

Creating a Discount Sharing Group

To create a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. Click **New** in the Discount Sharing pane.

   The New Discount Sharing Group page appears.
3. In the **Name** field, enter a name for the discount sharing group.
4. Select **Defer update of parent balance** to postpone updating the balance of a parent account.
5. From the **Services** list, either select the required service or select **Account** for non-service charges.
6. Select one or more discounts to share.
7. Click **Save**.

   A discount sharing group is created with no members.

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Modifying a Discount Sharing Group

> **Note**
>
> You cannot use Billing Care to modify automated discount sharing groups.

To modify a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, click **Edit** ( ) for the group that you want to modify.

   The Edit Discount Sharing Group page appears.

3. To change the name of the discount sharing group, enter a new name in the **Name** field.
4. To postpone the process of updating the balance of a parent account, select **Defer update of parent balance**. If already selected, you can deselect it to cancel postponing the process.
5. To add or remove discounts from the group, select or deselect the discounts in the **Discounts to Apply** table.
6. Click **Save**.

Deleting a Discount Sharing Group

> **Note**
>
> You cannot delete automated discount sharing groups.

To delete a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, click **Delete** ( ) for the group that you want to delete.

   A warning message appears.

3. Click **Delete**.

Adding Members to the Discount Sharing Group

> **Note**
>
> You cannot use Billing Care to add members to automated discount sharing groups.

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To add members to a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, do one of the following:
   - If the group has existing members, click the link showing the number of members, and then **Add Members**.
   - If the group has no members, click **Add Members**.

   The **Add Members** dialog box appears, displaying the **Find Members** tab.
3. Enter the account search criteria and click **Search**.

   The search results appear on the right. The search returns a maximum of 50 results. Refine your search criteria if you do not find the account you are searching for.
4. Select one or more accounts to add as members.
5. Click **Next**.

   The **Select Service** tab appears.
6. From the list, either select the required service or select **Account** for non-service charges that you want to include for charge sharing.

   To include services for future purchases, select the appropriate services from the checklist displayed below the service selection field.

   If a selected service or future purchase includes a shared discount with an **Offer Association ID**, that ID can be available to the member in purchase and rate customization flows for the selected service.
7. Click **Save**.

Viewing the Membership List in a Discount Sharing Group

To view the membership list in a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members.

Searching for a Member in a Discount Sharing Group

To search for a member in a discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members.
3. Click **Search**.

   The Search Members dialog box appears.
4. Enter the member account search criteria and click **Search**.

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The search results appear. The search returns a maximum of 200 results.

> **Tip**
>
> To view all the members' accounts again, click **Search** and then, in the **Search Members** dialog box, click **Reset**.

Removing One or More Members from the Discount Sharing Group

> **Note**
>
> You cannot remove members from automated discount sharing groups.

To remove one or more members from the discount sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.
3. Select one or more members to remove.
4. Click **Delete**.

   A confirmation message appears.
5. Click **Remove**.

Modifying a Member's Details

You can modify a member account in a discount sharing group to include or exclude services based on the requirements. For example, you can add future purchases and non-service discounts or remove services that are currently applicable for discount by the group owner.

If a selected service or future purchase includes a shared discount with an offer association ID, that ID can be available to the member in purchase and rate customization flows for the selected service.

To modify the details of a member account:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.
3. Click **Edit** () next to the account details.

   The **Member Details** page appears that lists all the services for that account.
4. To add or remove a service for current or future purchases, select or deselect the appropriate services from the checklist.
5. Click **Save**.

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Modifying Priorities for Members of a Discount Sharing Group

You can increase or decrease priorities for members of discount sharing groups.

To modify the priorities of discount sharing group members:

1. From the **Actions** menu, select **Sharing Groups**, and then **Discount Sharing**.

   The **Discount Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Membership** section, click **Edit** ( ) for the member for which you want to modify the priority.

   The Modify Priorities page appears with a list of group names and existing priority settings.

3. Select the up arrow (move up) or the down arrow (move down) to increase or decrease the priority.

4. Click **Save**.

New or Edit Discount Sharing Group Page

Use the New or Edit Discount Sharing page to:

- Create and modify discount sharing groups
- Add or remove members from discount sharing groups
- Select specific services for discount sharing groups

Field	Description
Name	Name the discount sharing group. The name you enter must be unique. You cannot use this name for any other discount or charge sharing group owned by the account.
Services	Select a service. You can either select the specific service or select **Account** for non-service charges.
Discounts to Apply	This table lists the discounts that the group owner will share with the group members. Each row displays the discount name, description, quantity, event type included in the discount, and validity period of the discount.

About Profile Sharing

A profile sharing group enables an account or an account's service to share a profile with other accounts or services. A profile stores ERAs or other types of information about an account.

The group owner can be an account or a service. If an account is the owner, profiles from all the services owned by the account are available for sharing. If a specific service is the owner, only profiles of that service are available for sharing. For example, a friends and family list can be set up for a GSM service owned by one account and then shared so that a GSM service belonging to other accounts can use the same list.

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> **Note**
>
> Only service-level profiles can be shared. Account-level profiles cannot be shared, even if the profile sharing group is owned by an account.

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

- Creating a Profile Sharing Group
- Modifying a Profile Sharing Group
- Deleting a Profile Sharing Group
- Adding Members to the Profile Sharing Group
- Removing One or More Members from the Profile Sharing Group
- New or Edit Profile Sharing Group Page

Creating a Profile Sharing Group

To create a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The **Profile Sharing** page appears, with **Ownership** and **Membership** sections.
2. Click **New** next to the Profile Sharing pane.

   The New Profile Sharing Group page appears.
3. In the **Name** field, enter a name for the profile sharing group.
4. From the **Services** list, either select the required service or select **Account** for non-service charges.

   A list of profiles that are available for sharing, appears in the **Profile Shared** table. This table displays the type, label and the account/service of the accounts.
5. Select one or more accounts for profile sharing.
6. Click **Save**.

   A profile sharing group is created with no members.

Modifying a Profile Sharing Group

To modify a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The **Profile Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click **Edit** ( ) for the group that you want to modify.

   The Edit Profile Sharing Group page appears.
3. To change the name of the profile sharing group, in the **Name** field, enter a new name for the group.

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4. To add or remove profiles shared from the group, in the **Profiles Shared** table, select or deselect the profiles in the group.
5. Click **Save**.

Deleting a Profile Sharing Group

To delete a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The **Profile Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, click **Delete** ( ) for the group that you want to delete.

   A warning message appears.

3. Click **Delete**.

Adding Members to the Profile Sharing Group

To add members to a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The **Profile Sharing** page appears, with **Ownership** and **Membership** sections.

2. In the **Ownership** section, do one of the following:
   - If the group has existing members, click the link showing the number of members, and then **Add Members**.
   - If the group has no members, click **Add Members**.

   The **Add Members** dialog box appears, displaying the **Find Members** tab.

3. Enter the account search criteria and click **Search**.

   The search results appear on the right. The search returns a maximum of 50 results. Refine your search criteria if you do not find the account you are searching for.

4. Select one or more accounts to add as members.
5. Click **Next**.

   The **Select Service** tab appears.

6. From the list, either select the services you want to include for profile sharing.

   > **Note**
   >
   > You can either select the specific service or select **Account** for non-service charges.

   To include services for future purchases, select the appropriate services from the checklist displayed below the service selection field.

7. Click **Save**.

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Removing One or More Members from the Profile Sharing Group

To remove one or more members from a profile sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Profile Sharing**.

   The **Profile Sharing** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.
3. Select one or more members to remove.
4. Click **Delete**.

   A confirmation message appears.
5. Click **Remove**.

New or Edit Profile Sharing Group Page

Use the New or Edit Profile Sharing Group page to:

- Create and modify profile sharing groups
- Add or remove members from profile sharing groups

Field	Description
Name	Name the profile sharing group. The name you enter must be unique. You cannot use this name for any other profile sharing group owned by the account.
Group owner	Select a service. You can either select the specific service or **Account** for non-services.

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17

Subscriber Preferences and Promotions

Use Profiles to view and update subscriber preferences and promotions for an account and for the services associated with the account. The Profiles page includes the **Subscriber Preferences** and **Promotions** tabs. The left pane lists **Account** and **Services** so that you can select the level at which to view or update profile information.

To work with profiles, see the following topics:

- Viewing Profiles
- Viewing and Adding Subscriber Preferences
- Viewing Promotions for an Account and its Associated Services
- Creating a Promotion
- Editing a Promotion
- Deleting a Promotion

Viewing Profiles

To access the Profiles page:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. From the **Actions** menu, select **Profiles**, and then select **Subscriber Preferences** or **Promotions**.

   The Profiles page appears with the selected tab open. The left pane lists account and the services associated with the account.

> **Tip**
>
> If more than 20 services are associated with the account, you can filter the list of services. To do so, click the **Filter** icon ( ). See "Filter Services Dialog Box" for details.

Filter Services Dialog Box

Use the Filter Services dialog box to narrow the list of services displayed in the Subscriber Preferences dialog box.

Field	Description
Bill Unit	Select the name of the bill unit to display.
Service ID	Enter a service ID to display.
by Service Type	Select a service type from the list of services in the account.

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Field	Description
Clear Filter	Click **Clear Filter** to remove all criteria you entered into the dialog box.
Update	Click **Update** to view all services that meet your filter criteria.

Viewing and Adding Subscriber Preferences

Subscriber preferences show how and when a customer wants to receive your company's messages. By default, Billing Care asks for your customer's preferred language, channel, notification interval and some more details, but your company may have added custom fields for collecting additional information.

If preferences have not been set, Billing Care displays the message **Subscriber preferences haven't been set yet**.

To view, add, or modify an account's subscriber preferences:

1. Access the subscriber preferences for the account you would like to see. See "Viewing Profiles".
2. From the left pane, select the level of preferences you want to see:
   - To view account preferences, click **Account**.
   - To view the preferences for a service, click the service's name.

   The preferences for the account or service appear.
3. To add or change any preferences, click **Edit**.
4. Enter values in the available fields, such as **Language** and **Channel**, as applicable.
5. Click **Save**.

Viewing Promotions for an Account and its Associated Services

Promotions can grant discounts, special rates, or free resources to customers. Billing Care displays promotion profile cards for the account and for services associated with the account. The promotion cards include active, future-dated, and expired promotion records when those records exist.

To view promotions for an account:

1. Access the promotions for the account you would like to see. See "Viewing Profiles".
2. From the left pane, select the level of promotion you want to see:
   - To view account promotions, click **Account**.
   - To view the promotions for a service, click the service's name.

   The promotion cards for the account or service appear.
3. To view promotion details, click **View** on the promotion card.

   Promotion details page appears. It shows the values configured for the promotion profile, including the name, value, and validity dates when available.
4. To return to the promotion cards, click the back arrow icon ( ).

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Creating a Promotion

Create an account-level promotion when the promotion applies to the account instead of a specific service. Create a service-level promotion when the promotion applies to a specific service owned by the account.

To create an account-level or service-level promotion:

1. Access the promotions for the account you would like to see. See "Viewing Profiles".
2. In the left pane, select where to create the promotion:
   a. To create an account-level promotion, click **Account**.
   b. To create a service-level promotion, click the service name under **Services**.
3. Click **New**.
4. From the **Name** list, select the promotion profile type or enter a new name.
5. If the **Rating Label** field appears, enter the rating label for the promotion profile.
6. Click **Add**.
7. In the new row, provide values for the fields in Table 17-1.

Table 17-1 Account-Level Promotion Fields

Field	Description
Name	Enter the promotion field name required by the selected promotion profile type.
Value	Enter the promotion value. The expected valid values depend on the selected promotion profile type.
Valid From	Enter a date or click the calendar icon ( ) to select the date when the promotion value becomes valid.
Valid To	Enter a date or click the calendar icon ( ) to select the date when the promotion value is no longer valid.

8. Click the check mark icon ( ) to add the row.
9. To add another row, click **Add** and repeat the previous steps.
10. Click **Save**.

Editing a Promotion

To edit an account or service-level promotion:

1. Access the promotions for the account you would like to see. See "Viewing Profiles".
2. On the promotion card, click the edit icon ( ).

   The promotion opens in edit mode.
3. To change the promotion profile, select another type from the **Name** list or enter a name of your choice.

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4. If the **Rating Label** field appears, modify the rating label as required.
5. (Optional) To add a row, click **Add**, provide values for the fields in Table 17-1, and click the check mark icon.
6. (Optional) To modify an existing row, click the edit icon ( ) for that row.
7. Modify the values as required.
8. Click the check mark icon ( ) to apply the row update.
9. Click **Save**.

Deleting a Promotion

To delete an account or service-level promotion:

1. Access the promotions for the account you would like to see. See "Viewing Profiles".
2. From the left pane, click **Account** or click the service name under **Services**.
3. On the promotion card, click the delete icon ( ).
4. In the Delete Promotion dialog box, click **Delete**.

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18

Collections

You can manage your customers' bill units that are in collections by using Oracle Communications Billing Care.

To work with collections, see the following topics:

- About Collections
- Finding an Account in Collections
- Viewing a Bill Unit in Collections
- Removing a Bill Unit from Collections
- Adding a Collections Action to a Bill Unit
- Changing the Status or Due Date of a Collections Action
- Viewing Actions History for a Bill Unit in Collections
- Replacing a Bill Unit's Collections Scenario
- Making a Payment for a Bill Unit in Collections
- Assigning a Collections Agent
- Working with Exempted Bill Units
- Working with Promise-to-Pay Agreements
- About Collections Sharing

About Collections

Collections, or debt management, is a proactive process used by businesses to collect overdue payments from their customers. Collections includes identifying accounts that have overdue balances, determining whether those accounts meet predefined criteria, and then taking collections actions.

When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, see "About Collections Sharing".

Finding an Account in Collections

To find an account in collections:

1. On the landing page, click **Collections**.

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> **Note**
>
> The **Collections** button appears on the landing page only if you have installed Collections Manager. For information, see "Understanding Collections Manager" in *BRM Collections Manager*.

The **Collections** page appears with the details about all accounts and bill units in collections.

2. In the filter section on the left, you now must click "Edit Filter" link in one of the groupings. See "Filtering Collections Results".

   If there are many results, you can refine the search by adding more filters or sorting the search results. See "Sorting Collections Results".

3. From the search results list, select an account.

   The account's collections details appear. See "Viewing a Bill Unit in Collections" for more information.

> **Tip**
>
> To return to the landing page, you now have to click Search Results at the top right.

Filtering Collections Results

Narrow your collections results by clicking **Edit Filter** provided by **Bill Unit**, **Collections**, and **Account**.

> **Tip**
>
> Click the **Reset** button to return to the default filter page.

To filter your search based on billing details, use these fields under **Bill Unit**:

Fields	Description
Name	Filter the results using the name of the bill unit.
Status	Filter the results using the status of the bill unit.
Billing Day	Filter the results using the billing day of the month (DOM).

To filter your search based on collections details, use these fields under **Collections**:

Fields	Description
Assigned	Filter the results using the CSR assigned. Click **Assigned to me** to see bill units assigned to you.
Amount Due	Filter the results using the amount due to be collected.
Days Overdue	Filter the results using the days overdue.

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Fields	Description
Scenario	Filter the results using the scenario information.
Profile	Filter the results using the collections profile information.

To filter your search based on account details, use these fields under **Account**:

Fields	Description
Account Number	Filter the results using the account number for the bill unit.
Name	Filter the results using the customer name.
Company	Filter the results using the company name.
Schema	Filter the results using the schema number. By default, the primary schema is selected.

Sorting Collections Results

By default, the search results are sorted in ascending order of days overdue. You can change how the results are sorted to one of the following:

- Descending order of days overdue
- Ascending order of collections amount due
- Descending order of collections amount due

Click **Show More** to see the next set of records.

Viewing a Bill Unit in Collections

You can view the following information about a bill unit that is in collections:

- Collections details, such as when the bill unit entered collections, the past due amount, and the date of the last collections payment.
- The collections agent assigned to the bill unit.
- An ordered list of collections actions that are scheduled for the bill unit, along with their current status.

  You can click a collections action to view more details.
- The collections agent notes associated with each collections operation.

To view details about a bill unit that is in collections:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is in collections.

   The account bar at the top of the page displays **Collections** tile with collections details.

> **Tip**
>
> Click the **Search Results** button to return to the **Collections** page.

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Collections Details Page

Use the Collections Details page to view information about a specific bill unit that is in collections for an account. Bill units are listed separately on the Collections search page. When you select a bill unit, the Collections Details page displays information for that selected bill unit only.

The top of the page shows the following information:

- **Account Name**: Displays the name of the account.
- **Account Number**: Displays the account number.
- **Past Due**: Displays the past-due amount for the selected bill unit.
- **Entry Date**: Displays the date the bill unit entered collections.
- **Overdue**: Displays the number of days the bill unit is overdue.
- **Minimum Payment**: Displays the minimum payment amount for the bill unit.

The Collections Details page also includes these sections:

- Collections Scenario Table
- Notes Section

Collections Scenario Table

The Collections Scenario table displays the order of collections actions that can be performed against the bill unit, along with their schedule and current status. You can also add or edit a collections action:

- To add a collections action, click the **Add Action** button. See "Adding a Collections Action to a Bill Unit" for more information.
- To edit an existing collections action, click the

  icon in the **Edit** column of the Collections Scenario table. See "Changing the Status or Due Date of a Collections Action" for more information.

The Collection Scenario table includes the following columns:

Column	Description
Action	Displays the name of a collections action.
Scheduled	Displays the date when the collection action is due.
Completed	Displays the collections action's current status or the date when the action was completed.
Edit	Click this to edit the action details like status, change schedule to date and other follow on actions.

Notes Section

The Notes section displays consolidated notes for each bill unit. It includes all comments that have been added for various collections operations on that bill unit.

You can also enter notes for the bill unit, if required.

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Removing a Bill Unit from Collections

To remove a bill unit from collections:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that you want to remove from collections.

   The account bar at the top of the page displays the **Collections** tile.
3. Click the Actions button at the top right and then select **Exit Collections**.

   The Exit Collections dialog box appears.
4. (Optional) Enter a note.
5. Click **Exit**.

Adding a Collections Action to a Bill Unit

To add a collections action to a bill unit in collections:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. From the **Collections** tile, click the **View in Collections** link.

   The **Collections Details** page appears. See "Collections Details Page" for details.
3. Click the **Add Action** above the Collections Scenario table.

   The Add Action dialog box appears. See "Add Action Dialog Box" for details.
4. From the **Select an Action** list, choose the collection action you want to add.

   You can choose from the following options:
   - Close Services of Billinfo
   - Collect Payment
   - CustomAction
   - Inactivate Services of Billinfo
   - Refer to outside agency
   - Writeoff Billinfo
5. If you selected **Collect Payment**, do the following:
   - In the **Amount** field, enter the payment amount to collect.
   - In the **Payment Method** list, select a payment method.
6. In the **Scheduled** field, select or enter a due date for the collections action.
7. From the **Follow on actions** list, select one of the following:
   - **No schedule change** to keep the due date of all remaining collections actions.
   - **Days to slip schedule** to move out the due date of all remaining collections actions by the specified number of days.
   - **Cancel all** to cancel all remaining collections actions.
8. From the reasons list, select a reason.

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9. (Optional) Enter a note.
10. Click **Save**.

Add Action Dialog Box

Use the Add Action dialog box to add a collections action to a bill unit.

Field	Description
Action	Select the collections action to add.
Amount	If the selected action is **Collect Payment**, enter the payment amount to collect.
Payment Method	If the selected action is **Collect Payment**, select a payment method.
Scheduled	Select or enter the date for the collections action.
Follow on actions	Select how to handle the scheduling of the remaining collections actions.
Reason	Select a reason for the action.
Notes	(Optional) Enter the notes for future reference.

Changing the Status or Due Date of a Collections Action

You can change the scheduled date or the status of a bill unit's collections action.

To edit an existing collections action for a bill unit:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is in collections.

   The account bar at the top of the page displays the **Collections** tile.
3. Click the  icon in the respective row in the Scenarios table.

   The Edit Action dialog box appears. See "Edit Action Dialog Box" for details.

   > **Note**
   >
   > You cannot edit a promise-to-pay collections action.

4. From the **Status** list, select a new status.
5. If you selected a **Pending** status, do the following:
   a. Select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions.
   b. In the **Change the schedule to** field, enter a date or select a date from the calendar.
   c. From the **Follow on actions** list, select an action.
6. If you selected a **Canceled** status, select one of the following options:
   - **Only this task** (and select **Do not reschedule outstanding actions** if you do not want to reschedule any outstanding collections actions).

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- **All following tasks** to cancel all remaining collections actions.

7. From the reasons list, select a reason.
8. (Optional) Enter a note.
9. Click **Save**.

Edit Action Dialog Box

Use the Edit Action dialog box to change the scheduled date or status for a collections action.

Field	Description
Action	Displays the name of the collections action.
Status	Select a new status, if applicable.
Change schedule to	Select or enter a new date. For a **Pending** status, also select one of the following: • **Do not reschedule outstanding actions**: Does not reschedule any outstanding collections actions. • **Change the schedule to**: Specifies a new due date for the collection actions.
Follow on actions	Select how to schedule any follow-on collections actions: • **No schedule change**: Does not reschedule any remaining collections actions. • **Days to slip schedule**: Specifies to move out all remaining collections actions by the specified number of days. • **Cancel all**: Cancels all remaining collections actions.
Reason	Select a reason for the change.
Notes	(Optional) Enter notes for future reference.

Viewing Actions History for a Bill Unit in Collections

The actions history for a bill unit in collections displays all the actions assigned to the bill unit.

To view the action history for a bill unit in collections:

1. Find the bill unit, see "Finding an Account in Collections" for more information.
2. Select the bill unit.
3. In the **Actions** table, click an action.

The Actions History dialog box appears with the details of the past actions.

Replacing a Bill Unit's Collections Scenario

To replace a bill unit's collection scenario:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is in collections.

   The account bar at the top of the page displays the **Collections** tile.
3. Click **View in Collections** in the **Collections** tile.

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The **Scenario Details** page appears.

4. Click the Actions button at the top right and then select **Replace Scenario**.

   The Replace Scenario dialog box appears. See "Replace Scenario Dialog Box" for details.

5. Under **Replace with**, do one of the following:
   - To specify a new collections scenario to assign to the bill unit, click **New Scenario** and then select the new collections scenario from the list that appears.
   - To automatically assign a collections scenario based on the amount owed, the number of days the bill unit has been in collections, and any custom criteria, click **Auto assigned by collections criteria**.

6. From the **Scheduled** list, select when the bill unit starts using the new collections scenario:
   - To start the new collections scenario on the bill unit's next payment due date, select between **Select a date** and **Bill due date**.
   - To start the new scenario on a specific date, choose **Select a date** to enter a date from the calendar.

   > **Note**
   >
   > The date specified must occur on or after the next bill due date.

7. If you want the new scenario's entry days to be considered for scheduling the collections actions, select **Based on new scenario entry days**.
8. (Optional) Enter a note.
9. Click **Save**.

Replace Scenario Dialog Box

Use the Replace Scenario dialog box to replace a bill unit's collections scenario.

Field	Description
Scenario	Displays the bill unit's current collections scenario.
Replace with	Select a new scenario or automatically assign a collections scenario based on the amount owed.
Scheduled	Select when the bill unit starts using the new collections scenario: • **Bill due date**: The new collections scenario starts on the bill unit's next payment due date. • **On**: The new collections scenario starts on the date you enter or select in the calendar.
Based on new scenario entry days	Select this option to consider the new scenario's entry days for scheduling its collections actions.
Notes	(Optional) Enter a note if required.

Making a Payment for a Bill Unit in Collections

To make a payment for a bill unit under collections:

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1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is making the payment.

   The account bar at the top of the page displays the **Collections** tile.
3. Click the **Actions** button and then select **Make Payment**.

   The Make a Payment dialog box appears. See "Make a Payment Dialog Box" for details.
4. Enter the payment amount.
5. (Optional) To use a payment method other than the one displayed, select **Use a different payment method** and then select a method from the **Payment Method** list.
   a. Enter the account information for the new payment method.
   b. Select **Use name and billing address from primary contact**, or enter the name and address for the card holder.
   c. (Optional) Select **Save to Payment Methods on file** for credit card and debit payment methods.

      If you are making a payment for an account, the payment method applies to the account. If you are making a payment for a bill unit, the payment method applies to the bill unit.
6. For **Select a reason**, select the reason that matches the situation.
7. (Optional) Enter notes.
8. Do one of the following:
   - Click **Continue to manually allocate** to make the payment and to allocate the payment.
   - Click **Save** to make the payment without allocating.

Assigning a Collections Agent

By default, bill units in collections are not assigned to any collections agent. When you assign a bill unit to a collections agent, the agent becomes responsible for completing all of the manual tasks for that bill unit.

> **Note**
>
> You must have permission to assign collections agents to collections accounts.

To assign a collections agent:

1. Find and open the account. See "Finding an Account in Collections" for more information.
2. From the list of search results, select an account with the required bill unit.

   The collection details for the selected account and bill unit appears.
3. Click the Edit icon



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next to the **Assigned to** list.

The **Assigned to** list becomes editable.

4. From the **Assigned to** list, select an agent.
5. Click **Save**.

Working with Exempted Bill Units

You exempt a bill unit from collections to prevent it from ever entering collections. Exemption also removes the bill unit from any existing collections scenarios and cancels any pending collections actions against it.

To work with exempted bill units, see the following topics:

- Exempting a Bill Unit from Collections
- Viewing Bill Units Exempted from Collections
- Removing a Bill Unit from Exemption

Exempting a Bill Unit from Collections

To exempt a bill unit from collections:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select **Action** button at top right, then select **Exempt Bill Unit** from the list.

   The Exempt Bill Units dialog box appears. See "Exempt Bill Unit Dialog Box" for details.
3. Select a reason for the exemption from the list.
4. (Optional) Enter a note.
5. Click **Save**.

Exempt Bill Unit Dialog Box

Use the Exempt Bill Unit dialog box to prevent a bill unit from ever entering collections.

Field	Description
Reason	Select a reason for the exemption.
Exemption Notes	(Optional) Enter notes for future reference.

Viewing Bill Units Exempted from Collections

To view bill units exempted from collections:

1. On the landing page, click **Collections**.

   The **Collections** page appears with details about all accounts and bill units in collections.
2. Click **Exempted Bill Units** at the top right.

   The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections. See "Exempted Bill Units Dialog Box" for details.

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Removing a Bill Unit from Exemption

To remove a bill unit from exemption:

1. On the landing page, click **Collections**.

   The **Collections Search** page appears containing details of all the bill units in collections.
2. Click **Exempted Bill Units** at the top right.

   The Exempted Bill Units dialog box appears with a list of bill units that have been exempted from collections. See "Exempted Bill Units Dialog Box" for details.
3. (Optional) Enter any comments in the notes section.
4. Select an exempted bill unit and then click **Remove Exemption**.

Exempted Bill Units Dialog Box

Use the Exempted Bill Units dialog box to view the bill units exempted from collections. Select a bill unit to view its details or to remove it from exemption.

Field	Description
Remove exemption	Click to remove the bill unit from collections exemption.
Notes	Displays the bill unit details.
Comment	Click and enter a comment.

Working with Promise-to-Pay Agreements

When a bill unit is in collections, you can offer customers the option of a promise-to-pay agreement. This agreement defers all collections actions for a bill unit, allowing the customer to pay the due amount at a date beyond the original payment due date. Customers can choose to pay off the agreement amount using one or more installments.

The installments in a promise-to-pay agreement can be one of the following:

- **System-configured**: Collections Manager calculates the installment schedule and installment amount for you.
- **Manually configured**: Allows you to create installments with varying amounts owed and varying intervals between due dates.

> **Note**
>
> After a promise-to-pay agreement has been created, it cannot be modified.

To work with promise-to-pay agreements, see the following topics:

- Configuring System-Managed Promise-to-Pay Agreements
- Manually Configuring a Promise-to-Pay Agreement
- Canceling a Promise-to-Pay Agreement
- Promise to Pay Installment Details Dialog Box

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Configuring System-Managed Promise-to-Pay Agreements

To create a promise-to-pay agreement with system-configured details:

1. Find and open the customer's account in collections. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is in collections.

   The account bar at the top of the page displays the **Collections** tile.
3. Click **View in Collections**.
4. Click **Actions** on the top right and then select **Promise to Pay**.
5. The Promise to Pay Installment Details dialog box appears. See "Promise to Pay Installment Details Dialog Box" for details.
6. In the **Amount promised** field, enter the total amount that the customer agrees to pay.

   By default, Billing Care displays the full overdue amount. It also lists the minimum amount that the customer must pay to exit collections.
7. From the **Payment method** list, select a payment method.
8. In the **First installment due** field, enter or select the due date for the first installment payment.
9. Disable the **Manual installment configuration** option.

   > **Note**
   >
   > This option is displayed only if your system contains promise-to-pay specifications.

10. From the **Payment options** field, specify how to calculate the number of installment payments and the amount owed for each installment:
    - To specify the number of installment payments, select **Make a specific number of payments** and then enter the number of payments.

      To calculate the amount of each installment payment, the amount promised is divided by the number of installment payments.
    - To specify the amount owed for each installment, select **Pay a specific amount each time** and then enter the installment amount.

      To calculate the number of installment payments, the amount promised is divided by the installment amount.
11. From the **Time options** field, specify how to calculate the installment payment schedule:
    - To specify the interval between payments, select **Specify number of days between payments** and then enter the number of days between each payment.

      To calculate the end date of the promise-to-pay agreement, the number of installment payments is multiplied by the interval amount.
    - To specify the date when the full amount will be paid off, select **Complete payments by a specific date** and then select a date.

      To calculate the installment schedule, the total number of days between the first installment date and end date is divided by the number of installment payments.

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12. Select a reason for entering a promise-to-pay agreement and optionally enter a note.
13. Click **Save**.

Manually Configuring a Promise-to-Pay Agreement

> **Note**
>
> You can create manually configured promise-to-pay agreements only if your system contains promise-to-pay specifications. See "Creating Promise-to-Pay Specifications" in *BRM Collections Manager*.

To create a promise-to-pay agreement with a manually configured installment schedule and payment amounts:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.
2. Select the bill unit that is in collections.

   The account bar at the top of the page displays the **In Collections** tile.
3. From the **In Collections** tile, click the **View in Collections** link.

   The **Collections Details** page appears. See "Collections Details Page" for details.
4. Select the bill unit's icon and then select **Promise to Pay**.

   The Promise to Pay Installment Details dialog box appears. See "Promise to Pay Installment Details Dialog Box" for details.
5. In the **Amount promised** field, enter the total amount that the customer agrees to pay. By default, it is set to the total amount past due.

   Underneath this field, Billing Care displays the minimum amount that the customer must pay to exit collections.
6. From the **Payment method** list, select a payment method.
7. In the **First installment due** field, enter or select the due date for the first installment payment.
8. Enable the **Manual installment configuration** option.

   The Promise to pay specification section appears. See "Enabled Manual Installment Configuration Option" for details.
9. From the **Select specification** list, select the promise-to-pay specification to apply.

   On the bottom right, Billing Care displays the terms associated with the specification.
10. Select one of the following:
    - **Amount** to specify an absolute amount to pay for each installment.
    - **Percentage** to specify a percentage of the total promised amount to pay for each installment.
11. In the **Amount** or **Percentage** field, enter what the customer agrees to pay for the first installment.

    The **Interval** field is set to **0**, because the date of the first installment has already been set.

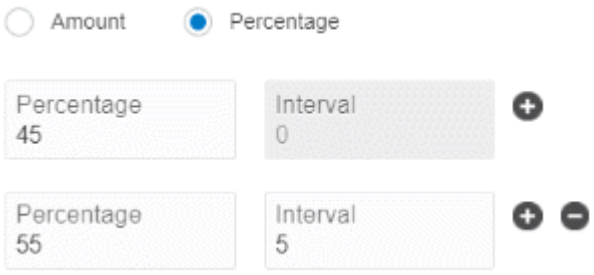
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12. If the customer wants to pay in multiple installments, click the ⊕ for each additional installment.

    Billing Care displays an **Amount**/**Percentage** and **Interval** field for each installment.

13. In each subsequent installment row, enter the amount or percentage the customer agrees to pay as well as the interval, in days, from the previous installment when the payment is due.

    For example, this creates two installments. On the first installment date, the customer owes 45% of the total amount promised. Five days later, the customer owes 55% of the total amount promised.



14. Ensure that the sum of all amount fields equals the amount promised, or that the sum of all percentage fields equals 100% of the amount promised.

    Billing Care displays an error message if the total installment amount does not equal the promised amount.

15. Select a reason for entering a promise-to-pay agreement and optionally enter a note.

16. Click **Save**.

Canceling a Promise-to-Pay Agreement

To cancel a customer's promise-to-pay agreement:

1. Find and open the customer's account. See "Finding an Account in Collections" for more information.

2. From the **In Collections** tile, click the **View in Collections** link.

   The **Collections Details** page appears. See "Collections Details Page" for details.

3. On top right, click **Actions** button, and select **Cancel Promise to Pay** from the list.

> **Note**
>
> You can cancel a promise-to-pay agreement only if there is an active promise-to-pay agreement for the selected bill unit.

4. Click **Cancel Promise to Pay**.

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Promise to Pay Installment Details Dialog Box

Use the Promise to Pay Installment Details dialog box to enter a bill unit into a promise-to-pay agreement.

Table 18-1 General Information

Field	Description
Past due	Displays the total amount due that is in collections.
Amount promised	Enter the total amount that the customer agrees to pay. The amount must be greater than the minimum payment amount. By default, this field displays the total due in collections and the minimum payment amount for exiting collections.
Payment method	Select a payment method, such as credit card.
First installment due	Enter or select the due date for the first installment. By default, it displays the existing due date.
Manual installment configuration	Do one of the following: • Enable this option to manually configure the promise-to-pay details. See "Enabled Manual Installment Configuration Option". • Disable this option to create a system-configured promise-to-pay agreement. See "Disabled Manual Installment Configuration Option". **Note:** This option is displayed only if your system contains promise-to-pay specifications.

Enabled Manual Installment Configuration Option

When you enable the **Manual Installment Configuration** option, the fields in the following table appear. Use these fields to create installments with varying amounts due and varying intervals between due dates.

Field	Description
Select specification	Select the promise-to-pay specification to apply.
Amount	Select **Amount** to set this installment to an absolute value, such as $50.
Percentage	Select **Percentage** to set this installment to a percentage of the total amount due, such as 25%.
Interval	For each installment, select or enter the interval, in days, from the previous installment.
Specification details	Displays the limits in the specified promise-to-pay specification.

Disabled Manual Installment Configuration Option

When you disable the **Manual Installment Configuration** option, the fields in the following table appear.

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Field	Description
Payment options	Select one of these payment options: • **Make a specific number of payments**: Enter the total number of installments that will be made. • **Pay a specific amount each time**: Enter the amount to be paid for each installment.
Time options	Select the time milestone for installments: • **Specific number of days between payments**: To add the number of days between each installment, select or enter the number of days between payments. • **Complete payments by a specific date**: To add the date by which all payments will be made, select or enter a date.
Promise To Pay	Select a reason why the bill unit entered a promise-to-pay agreement and optionally add notes.

About Collections Sharing

When you create an account and its bill units, you can specify whether collections actions must be taken against another account and bill unit. To do this, you create a collections sharing group, which consists of a group owner and one or more members.

A bill unit can belong to only one collections sharing group, and the group owner cannot be a member of the same collections sharing group. You can change a collections sharing group's owner and add or remove members' bill units at any time.

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

- Creating a Collections Sharing Group
- Viewing the Membership List in a Collections Sharing Group
- Modifying a Collections Sharing Group
- Deleting a Collections Sharing Group
- Adding Members to the Collections Sharing Group
- Removing a Member from the Collections Sharing Group
- New or Edit Collections Group Page

Creating a Collections Sharing Group

To create a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.
2. Click **New** next to the Collections Groups pane.

   The New Collections Group page appears.
3. In the **Name** field, enter a name for the collections sharing group.
4. Select a **Group Owner** from the list.

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5. Click **Save**.

   A collections group is created with no members.

Viewing the Membership List in a Collections Sharing Group

To view the membership list in a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.

   The Ownership section displays all the collections groups owned by the account.

   The Membership section displays the collections groups in which the account has been associated as a member.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members.

Modifying a Collections Sharing Group

To modify a collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click **Edit** for the group that you want to modify.

   The Edit Collections Group page appears.
3. To change the name of the collection sharing group, enter a new name in the **Name** field.
4. To change the owner of the group, select a different **Group Owner** from the list.
5. Click **Save**.

Deleting a Collections Sharing Group

To delete a collections group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click **Delete** for the group that you want to delete.

   A warning message appears.
3. Click **Delete.**

Adding Members to the Collections Sharing Group

To add members to the collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, do one of the following:

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- If the group has existing members, click the link showing the number of members, and then **Add Members**.
- If the group has no members, click **Add Members**.

The **Search Accounts** page appears.

3. Enter the account search criteria and click **Search**.

   The search results appear on the right. Search returns a maximum of 50 results. Refine your search criteria if you do not find the account you are searching for.
4. Select an account to add as a member.
5. Click **Open**.

   The **Bill Unit** page appears.
6. Select the required bill units and click **Add Member**.

   The member is added to the collections sharing group.

Removing a Member from the Collections Sharing Group

To remove a member from the collections sharing group:

1. From the **Actions** menu, select **Sharing Groups**, and then **Collections Sharing**.

   The **Collections Groups** page appears, with **Ownership** and **Membership** sections.
2. In the **Ownership** section, click the link showing the number of members.

   The **Members** page appears with a list of members in that group.
3. Click **Delete** for the member you want to remove from the group.

   A warning message appears.
4. Click **Delete**.

New or Edit Collections Group Page

Use the New or Edit Collections Sharing Group page to:

- Create and modify collections sharing groups
- Add or remove members from collections sharing groups

Field	Description
Name	Name the collections sharing group. The name you enter must be unique. You cannot use this name for any other sharing group owned by the account.
Group Owner	Select a group owner of the collections sharing group.

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19

Deposits

You can set up and collect customer deposits in Oracle Communications Billing Care for devices, services, packages, or accounts. To use this feature, you create deposit specification profiles and deposit specifications and use them to create deposits for individual customers.

To work with deposits, see the following topics:

- Working with Deposit Configurations
- Working with Deposits

Working with Deposit Configurations

Deposit configurations determine the rules used to create individual deposits for customers. A configuration includes:

- **Deposit specification profile**: Contains the business rules for associated deposit specifications and deposits. It defines the deposit validity period and release type, and rules governing whether deposits can be refunded, transferred, exempted, overridden, or accrue interest.
- **Deposit specification**: Defines the behavior of associated deposits. It specifies the permitted type (account, device, package, or service), charge offer, validity period, and the billing preference for deposits, and includes an associated deposit specification profile.

Deposits require charge offers that have a specific deposit event mapped to the charge. Include such a charge offer in the package, bundle, or device that customers purchase.

Deposit specification profiles and deposit specifications can have these status types:

- **Draft** (deposit specifications only)
- **Active**
- **Expired**

> **Note**
>
> Expired status means that the validity period has expired.

To work with deposit configurations, see the following topics:

- Creating a Deposit Specification Profile
- Creating a Deposit Specification
- Finding Deposit Specification Profiles or Deposit Specifications
- Editing a Deposit Specification Profile or Deposit Specification

Creating a Deposit Specification Profile

To create a deposit specification profile:

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1. On the Billing Care landing page, click **Deposit Configuration**.

   A page listing existing deposit specifications appears.
2. On the left side of the page, select **Deposit Specification Profiles**.

   The page now lists existing deposit specification profile names.
3. Click **Create**.

   The **Create Deposit Specification Profile** page appears.
4. Select one of the following options:
   - **Copy Existing**: Select to use data from an existing profile as a starting point for the new profile. If you select this option, click **Search** and select a profile.
   - **Create New**: Select to start with no data defined.
5. Enter a unique name and a description.
6. Enter the following:

Field	Description
End Date	Specify the end date of the profile's validity period. **Note:** • If you don't specify an end date, the deposit specification profile never expires. • If the end date is less than or equal to the current date, the deposit specification profile is considered to be expired.
Deposit Validity Value	Enter a number and select **Days**, **Weeks**, **Months**, or **Years** from the **Unit** list to specify how long a deposit associated with this specification profile is valid. **Note:** After the validity period ends, the deposit can be released as a prepayment or refund.
Deposit Release Type	Select one of the following as the default release type for this profile: • **Prepayment**: Customers use the deposit to pay other billed charges. • **Refund**: Customers get a refund of the deposit.
Refund Approval is needed	(Optional) If you selected **Refund** for **Deposit Release Type**, select to require approval for refunding deposits using this profile specification.
Refund handling fee is needed	(Optional) If you selected **Refund** for **Deposit Release Type**, select to require a handling fee when refunding deposits using this profile specification.
Refund Handling Fee Value	If you selected **Refund handling fee is needed**, enter a value for the fee and select **Percentage** or **Amount (in Account currency)** for the type of value.
GLID for the Refund Handling Fee	(Optional) If you selected **Refund handling fee is needed**, select a deposit refund G/L ID.

7. (Optional) Select one or more of the following options in the **Configure Business Attributes** section:

Option	Description
Deposit will be transferable	Select if deposits can be transferred to another account or service.
Deposit can be overridden	Select if CSRs can override the deposit amount.

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Option	Description
Deposit will be exemptible	Select if CSRs can waive the deposit for a customer.
Deposit attracts interest	Select if you want deposits to accrue interest. **Note:** If selected, the system calculates interest using the type and rate you specify.
Interest Type	If you selected **Deposit attracts interest**, select the interest type: • **Simple** • **Compound** • **Absolute**
Rate of Interest	If you selected **Deposit attracts interest**, enter the rate. For simple or compound interest, enter a percentage. For absolute interest, enter an amount.
Interest Frequency Value	If you selected **Deposit attracts interest**, specify the time interval for calculating interest. Enter a number and select **Days**, **Weeks**, **Months**, or **Years** from the **Unit** list.
Start Interest Calculation On	If you selected **Deposit attracts interest**, select the basis for calculating interest for the deposit, **Partial payment** or **Full payment**.
GLID for interest	(Optional) If you selected **Deposit attracts interest**, select a deposit interest G/L ID.

8. Click **Finish**.

Creating a Deposit Specification

To create a deposit specification:

1. On the Billing Care landing page, click **Deposit Configuration**.

   A page listing existing deposit specifications appears.
2. On the top left side of the page, select **Specifications**.
3. Click **Create**.

   The **Create Deposit Specification** wizard appears, on the **Select Profile** page.
4. Select one of the following options to specify a profile for the deposit specification:
   - **Use existing Deposit Specification Profile**: Select an existing profile from the list. Billing Care displays details of the selected profile on the right side of the page.
   - **Create new Deposit Specification Profile**: If you select this, profile creation fields appear. See "Creating a Deposit Specification Profile" for more information.

   > **Note**
   >
   > Billing Care displays profile details on the **Configure Details** page.
5. Click **Configure Details** or **Continue**.

   The **Configure Details** page appears.
6. Enter a unique name and a description.
7. Enter the following:

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Field	Description
Permitted	Select the permitted category value for the deposit: • **Account** • **Service**. If you select this, select a service from the **Category** list. • **Package**. If you select this, select a package from the **Category** list. • **Device**. If you select this, enter a category.
Charge Offer Name	Select a charge offer that determines the deposit charge. **Note:** The list displays charge offers with purchase deposit events.
End Date	Specify the end date of the specification's validity period. **Note:** • If you don't specify an end date, the deposit specification never expires. • If the end date is less than or equal to the current date, the deposit specification profile is considered to be expired.
Billing Preference	Select one of the following: • **Bill Immediately**: Select to bill the deposit amount immediately. • **Bill with next billing cycle**: Select to include the deposit amount in the next bill.
Increase credit limit based on deposit	Select to enable increasing the credit limit by the deposit amount. For example, a subscriber purchases any available international roaming plan and pays the deposit amount for that. While on international roaming, the subscriber's usage is more, and it requires more credit limit. Selecting this option enables the service provider to bump up the credit limit by the deposit amount. **Note:** Don't select this if the credit limit won't need to be increased. For example, the credit limit on the deposit for a device such as a phone need not be increased.

8. If you want to make more changes to the specification later, click **Save as Draft**. You do need to enter something for each required field before doing this.

> **Note**
>
> Use this option to save, revisit, and change any deposit specification details later.

9. Click **Finish** to complete the specification.

Finding Deposit Specification Profiles or Deposit Specifications

You can search existing deposit specification profiles or deposit specifications by wildcard (*), or by their name, or by the permitted category, or by their status.

To find deposit specifications or deposit specification profiles:

1. On the **Deposit Configurations** page, select either **Specifications** or **Specification Profiles** from the **View** list.

   The page lists existing specifications or specification profiles.

2. Click **Search**.

   The Search dialog box appears.

3. Enter search criteria.

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For deposit specifications, you can search for any combination of:

- Deposit specification name
- Deposit specification profile name
- Permitted category: **Account**, **Service**, **Package**, or **Device**
- Status: **Draft**, **Active**, or **Expired**

If you search for a deposit specification profile name, you'll get results for deposit specifications associated with that profile.

For deposit specification profiles, you can search for any combination of:

- Deposit specification profile name
- Status: **Active** or **Expired**

> **Note**
>
> Use an asterisk (*****) as a wildcard to match one or more characters at the start or end of names.

4. Click **Search**.

   Billing Care displays the search results.

Editing a Deposit Specification Profile or Deposit Specification

You can change the end date of a deposit specification in Draft state or a deposit specification profile.

To edit a deposit specification profile or deposit specification:

1. In the Deposit Configuration page, locate the specification or specification profile you want to edit in the **Specifications** or **Specification Profiles** list.
2. In the **Action** column for the specific row, click the

   (Action menu) and select **Edit**.

   The **Edit Deposit Specification** or **Edit Deposit Specification Profile** page appears.
3. Add or change the end date.
4. Click **Finish**.

Working with Deposits

You can create and manage customer deposits for accounts, packages, devices, or services in Billing Care.

To work with deposits, see the following topics:

- Creating Deposits
- Viewing Deposits

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- Reversing Deposits
- Transferring Deposits
- Updating Deposits
- Making Deposit Payments
- Converting Deposits to Prepayments
- Requesting Deposit Refunds
- Approving Deposit Refund Requests

Creating Deposits

To create a deposit:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. From the **Actions** menu, select **Deposits**, then select **Create**.

   > **Note**
   >
   > You can also use the **Create** button on the **Deposits** page for the account.

   The **Create Deposit** wizard appears.
3. On the **Details** page, select **Account**, **Package**, **Device**, or **Service**.
4. Depending on the deposit type, do the following:
   - For **Package**, select a package.
   - For **Device**, select a device category.
   - For **Service**, select a service type and login.
5. Select a deposit specification from the **Deposit Specification Name** list.

   Billing Care displays the deposit amount next to the deposit specification.
6. Select the start date from which the deposit is applicable.
7. For device deposits, select a bill unit from the **Bill Unit** list, and optionally select a service.
8. Select **Override** if you want to override the deposit amount. This is available if you selected a deposit specification that includes the override option.

   If you select **Override**, select one of the following:
   - **Override deposit**: Enter an amount.

     Specify discount: Enter a value as an amount or percentage.
9. For overrides, you can optionally change the **Deposit Validity Value** and **Deposit Release Type**.
10. Click **Continue**.

    The **Payment** page appears.
11. Do one of the following:
    - Select **Yes** for **Charge payment method on file immediately**. Then click **Continue**.

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- Select **No** for **Charge payment method on file immediately**, then select one of the following as the way to pay:
  - **Convert prepayment to deposit**: If you select this, click **Show Payments** to select the prepayment.
  - **Collect payment**: If you select this, enter an amount and a payment method.
- Select **Skip, Add this charge to regular billing cycle** to bill the deposit amount in the customer's next regular bill instead of collecting it immediately.

  Click **Continue**

The **Deposit Details** page appears.

12. Review the details, then click **Finish**.

Related Topics

Create Deposit Wizard Details Page Reference

Create Deposit Wizard Details Page Reference

Use the **Details** page of the **Create Deposit Wizard** to set up the details for a deposit.

Field	Description
Create Deposit for	Select **Account**, **Package**, **Device**, or **Service**.
Package	For package deposits, select a package.
Device Category	For device deposits, select a device category.
Service Type And Login	For service deposits, select a service and login.
Deposit Specification Name	Select a deposit specification. The list displays the deposit specifications valid for the deposit type you selected.
Start Date	Enter a date.
Deposit applies to	For device deposits, select a bill unit from the **Bill Unit** list.
Select Service	For device deposits, optionally select this, then select a service from the list.
Override	For deposit specifications that have an override option, select if you want to override the deposit amount.
Override deposit	For overrides, select this to specify an override amount.
Override Amount	Enter the amount of the override.
Specify discount	For overrides, select this to discount the deposit by a specified amount or percentage.
Discount Value	Enter a value and select **Amount** or **Percentage**.
Deposit Validity Value	For overrides, enter the number of days, weeks, months, or years for which the deposit is valid.
Deposit Release Type	For overrides, select how the deposit is released after its validity period ends: • **Prepayment**: Customers use the deposit to pay other billed charges. • **Refund**: You refund the deposit to the customer.

Viewing Deposits

To view a customer's deposits:

1. On the account page, from the **Actions** menu, select **Deposits**, then select **View All**.

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The **Deposits** page lists the account's deposits on the left side.

2. Click a deposit to see its details.

You can click **Create** on this page to start creating a new deposit. See "Creating Deposits".

Viewing Payment Details of a Deposit

You can view a list of deposits and the transaction details for payments you have made against a deposit. To do this:

1. From the **Actions** menu, select **Deposit**, then select **View All**.

> **Note**
>
> You can also click **Deposit** link from the account banner on the account page.

A **Deposits** page lists all the deposits on the left side.

2. To view the details of a deposit, click that deposit from the list on the left side.

   The deposit and its associated transaction details appear.

3. From the list of transactions with the description as **Deposit Payment**, click the Actions menu (

) of the respective row of the transaction for which you want to view payment details.

4. Click **View**.

   A **Transaction details** dialog box appears, displaying the payment details of the transaction.

Reversing Deposits

You can reverse a deposit, for example, if it was created by mistake. To do this:

1. On the customer's **Deposits** page, select a deposit, then select **Reverse** from the **Actions** menu.

   The Reverse drawer appears.

2. Enter a reason for the reversal in the **Notes** box.
3. Click **Reverse**.

Transferring Deposits

You can transfer a deposit to another account. For example, a customer might want to transfer a deposit to a friend or family member. Any interest accrued on the deposit is also transferred.

To transfer a deposit:

1. On the **Deposits** page of the account that currently owns the deposit, select the deposit.
2. From the **Actions** menu, select **Transfer**.

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The Deposit Transfer drawer appears with a search accounts section.

3. Search for and select the destination account and click **Open**.
4. Select the Bill Unit name and then click **Continue**.
5. Enter the transfer amount.

   If there is a service associated with the deposit, click **Select Service** and select a service from the list.
6. Click **Transfer**.

Updating Deposits

You can update a customer's deposit details.

To update deposit details:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Update**.

   The Update drawer appears. See "Update Drawer" for more information.
3. You can modify the validity value, the duration, the release type, and the amount. If the amount is updated, then a new deposit object is created.
4. Enter a reason for the changes in the **Notes** box.
5. Click **Update**.

Update Drawer

Use the Update dialog box to modify a customer's deposit details.

Field	Description
Specification Name (read only)	Displays the deposit specification name.
Deposit Date (read only)	Displays the date of the deposit.
Deposit Validity Value	Enter a number and select **Days**, **Weeks**, **Months**, or **Years** from the **Select** list to specify how long the deposit is valid.
Select (unit)	Select the unit from the options: Days, Months, Weeks, Years.
Release Type	Select how the deposit is released after its validity period ends: • **Prepayment**: Customers use the deposit to pay other billed charges. • **Refund**: Customers get a refund of the deposit.
Amount	Enter the deposit amount.
Notes	(Optional) Enter a reason for the changes.

Making Deposit Payments

Customers can make a deposit payment in multiple ways. They can pay immediately, pay with the next bill, convert a prepayment to a deposit payment, or pay with a payment received in advance.

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For example, a customer purchases a service that has a $500 deposit charge. At the time of purchase, the customer makes a $100 payment and wants to pay the remaining amount after a month. The customer can do any of the following:

- Pay the remaining $400 payment with the next bill.
- Pay the entire $400 at once by cash/card.
- Use any available balance amount or prepayment amount to pay.

To make a payment for a deposit:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Make Payment**.

   The Make Payment drawer appears.
3. For **Charge payment method on file immediately**:
   - Select **Yes** to use the account's current payment method to pay the amount immediately.
   - Select **No** to pay the amount with a balance or prepayment amount.
4. If you select **No**, select an option for **How would you like to pay?**:
   - **Convert prepayment to deposit**: Enter a payment item number or click **Show Payments** to select a payment.
   - **Collect Payment**:
     a. Enter the Payment Method from options like new credit card, new direct debit, cash, check, wire transfer, inter bank payment order, postal order and add further details based on your choice of option. If there are any existing payment methods already saved (such as saved VISA cards), those will also be available for selection.
     b. Enter the Amount Collected.
     c. Enter the Receipt Date.
     d. Enter the Receipt number.

   > **Note**
   >
   > You can combine both options to pay the deposit.
5. Click **Submit**.

Converting Deposits to Prepayments

You can release and refund a deposit payment of your customer in multiple ways. Your customer can choose to get a complete refund or convert all or part of the deposit amount to an advance payment for another service.

For example, a customer has a $1000 balance in a deposit. The customer can opt to use $200 as a prepayment for another deposit or a bill.

To convert a deposit to prepayment:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Convert to prepayment**.

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The Convert to prepayment drawer appears.

3. Enter the amount of the prepayment.
4. Enter any notes about the prepayment.
5. Click **Convert**.

Requesting Deposit Refunds

A customer can request a deposit refund. For example, a customer might do this if the service associated with the deposit is terminated.

To request a refund for a deposit:

1. On the customer's **Deposits** page, select a deposit.
2. From the **Actions** menu, select **Request Refund**.

   The Request Refund drawer appears.
3. Enter the refund amount.

> **Note**
>
> For a full refund, any interest accrued on the deposit is also transferred.

4. Enter any notes about the refund.
5. Click **Request**.

If the deposit specification used for this refund was configured to require approval, see "Approving Deposit Refund Requests".

Approving Deposit Refund Requests

Deposit specification profiles can be configured to require refund approval. An individual deposit requires refund approval if it's associated with such a deposit specification profile. See "Creating a Deposit Specification Profile" for information.

To approve deposit refund requests:

1. On the Billing Care landing page, click **Deposit Refund Requests**.

   The **Deposit Refund Requests** page appears, listing refund requests by account number. The page shows refund requests that are approved, partially approved, pending, or rejected. The list includes only deposits that require refund approval.

   You can't change refunds already approved or partially approved.

> **Note**
>
> You can click an account number to open that account in a new tab.

2. Select the angle bracket icon



for the row you want to update, or double-click inside the row.

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Billing Care expands the row with fields for the refund amount and notes.

3. Verify or change the amount and enter any notes.
4. Click **Approve** or **Reject**.

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20

Installments

You can enable your customers to pay bills in installments in Oracle Communications Billing Care.

To work with installments, see the following topics:

- Working with Installment Specifications
- Working with Installment Schedules

Working with Installment Specifications

Installment specifications provide the rules for installment payment schedules that you create. A specification includes the minimum value for installments, the maximum interval between non-equal installments, and the specification's validity period.

You can also add eligibility criteria to a specification. For example, you can have the specification be eligible only for a particular customer segment, category, or field.

To work with the installment specifications, see the following topics:

- Creating Installment Specifications
- Finding Installment Specifications
- Editing an Installment Specification

Creating Installment Specifications

To create an installment specification:

1. On the Billing Care landing page, click **Installment Configuration**.

   The **Installment Specifications** page appears.
2. Click **Create**.

   The **Create Installment Specification** dialog box appears.
3. Enter the following:
   - A unique name.
   - The minimum value for installment payments. Select **Percentage** or **Amount (in Account currency)** to specify the type of value you entered. Percentages must be less than 100.
   - The maximum number of days between non-equal installments.
   - The maximum number of non-equal installments.
   - Start and end dates for when the installment specification is valid. If you don't enter a start date, the specification is valid from the creation date. If you don't enter an end date, the specification never expires.
   - The G/L ID.

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4. (Optional) In the Eligibility Criteria section, do the following:
   - Select the criteria class or subclass. For example, select **Service**.
   - Select a field from the criteria class, for example, **Effective_T** (the effective timestamp).
   - Select an operator. The list shows operators that apply to the field you selected, for example, **=**.
   - Enter a value for the eligibility criteria. The type of value is dependent on the selected field. For example, if you selected **Effective_T**, you enter a date.
5. Click the **+** icon, next to the row, to create another eligibility criteria. Click the **–** icon, to delete an eligibility criteria.

> **Note**
>
> If you create multiple eligibility criteria, the installment specification is applicable only when all the criteria are met.

6. Click **Finish**.

Finding Installment Specifications

To search for existing installment specifications:

1. On the **Installment Specifications** page, click **Search**.

   The Search dialog box appears.
2. Filter the search by either name, status, or both. For name, enter all or part of a name. You can also use the asterisk (*) as a wildcard for one or more characters. For status, select **Active** or **Expired**.
3. Click **Search**.

   The **Installment Specifications** page displays the specifications that match the filters you set.

> **Note**
>
> You can sort the results using the up or down arrows next to each column.

Editing an Installment Specification

To edit an installment specification:

1. On the **Installment Specifications** page, find the specification you want to edit. See "Finding Installment Specifications".
2. In the required installment specification row, click the **Action** button

   and select **Edit**.

   The **Edit Installment Specification** page appears.

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3. Make the edits you want. For more information on the fields and descriptions, see "Creating Installment Specifications".
4. Click **Finish**.

Working with Installment Schedules

Create an installment schedule for a customer's bills or bill items to enable the customer to pay the amount due in periodic installments.

You can select multiple bill units for an account and divide the total bill amount into equal or unequal installment payments. For unequal installments, you can set up the amount for each payment.

You can cancel existing installments if the customer decides to pay the remaining amount all at once. You can also view the available installment payment schedules for an account.

> **Note**
>
> - Installment schedules with a status of open can only be canceled. If you cancel a schedule, the status for individual installments that are charged, broken, or paid will be unchanged.
> - When you cancel an installment schedule, the pending installment amount will be charged as a lump sum amount to the customer’s current bill in progress. Customers are still required to pay any remaining installments with a charged status, by the agreed-upon date.

To work with the installment payment schedule, see the following topics:

- Creating an Installment Schedule
- Viewing Installment Schedules
- Canceling an Installment Schedule

Creating an Installment Schedule

> **Note**
>
> You can create an installment payment schedule while viewing the installment payment schedule.

You create an installment payment schedule for any billed or unbilled item.

To create an installment payment schedule:

1. Navigate to the account page. For information about searching for an account and viewing the account page, see "Finding an Account".
2. From the **Actions** menu, select **Installment Schedule**, then select **Create**.

   The Create Installment Schedule dialog box appears.

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> **Note**
>
> You can also start creating a schedule from the **View Installment Schedules** page.

3. On the **Select Specification** page, review the selected installment specification or select one from the list.

   Specifications with eligibility criteria that apply to the current account are listed. Information about the selected specification appears.

4. Click **Continue**.

   The **Select Bills** page appears.

5. On the **Select Bills** page, review the selected bill unit.

   If the account has only one bill unit, the bill unit is displayed as read-only. If the account has multiple bill units, the account's default bill unit is selected by default and you can change the selection if required. The list of bills for the selected bill unit is displayed.

6. Select any combination of bills or bill items.

7. Click **Continue**.

   The **Details** page appears.

8. Enter the number of installments, the start date, and whether you want to bill immediately or with the existing billing cycle.

   The total bill amount is divided equally by the number of installment payments and appears in the **Installment Proposal** section.

9. To manually change any dates or amounts, select **Manual Entry of Installment Details**. You can then edit the dates and amounts.

   If you create unequal amounts:

   - The maximum interval between installment dates is 20 days.
   - The amounts you enter must add up to the total amount.

10. Click **Continue**.

11. Review, then click **Finish**.

Viewing Installment Schedules

To view the installment payment schedules:

1. From the **Actions** menu, select **Installment Schedule**, then select **View All**.

   The **Installment Schedule** page appears and lists all the installment schedules for the account.

2. Select a schedule. The page displays the date, amount, and status of each payment.

3. To see the details of the installment schedule, click **View Details**.

   The Installment Schedule Details dialog box appears listing the bills and amounts.

4. Click **OK**.

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Canceling an Installment Schedule

To cancel an installment schedule:

1. From the **Actions** menu, select **Installment Schedule**, then select **View All**.

   The **Installment Schedule** page appears and lists the installment schedules for the account.

2. Select an installment schedule and click **Cancel Installment**.

   A dialog box appears asking you to confirm.

3. Click **Confirm**.

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21

Notifications

You can configure notification specifications for your customers by using Oracle Communications Billing Care.

To work with notification specifications, see the following topics:

- About Notification Specifications
- Creating a Notification Specification for Delivery Within A Day
- Creating a Notification Specification for In-Advance Delivery
- Creating a Notification Specification for Post-Event Delivery
- Modifying a Notification Specification
- Finding Notification Specifications
- Create Notification Specification Wizard Reference

About Notification Specifications

Notification specifications provide the rules for sending messages to your customers through an external notification application. They define which customers can receive each type of message as well as how and when to deliver the message.

Each notification specification defines the following:

- The business event associated with the specification, such as **CustCreate**, **ProductTermination**, or **BillDue**.

  The business event indicates whether the message is generated when an account is created, when a product is canceled, when a bill is almost due, or so on.
- The delivery window:
  - Within a day after an event occurs
  - Minutes, hours, days, weeks, or months *before* an event occurs, such as one week before a bill becomes due
  - Minutes, hours, days, weeks, or months *after* an event occurs, such as five days after a bill is past due
- The specification's validity period, such as now through December.
- The criteria an account must meet to receive a message, such as a customer type, zip code, or payment method.
- The message's delivery method, such as text, email, or IVR.
- The message's delivery time of day, such as immediately, at 14:00, or any time outside of the silent period.
- The opt-in defaults, such as whether customers are automatically opted in to receive notification messages.

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For example, you can specify to send account creation messages to Canadian customers via email at 15:00 local time. Likewise, you can specify to send bill-due reminder messages to New York customers via text at noon, three days before the bill is due.

After you create a notification specification:

- You cannot delete it. However, you can change the end date to make it expired.
- You cannot change its name and associated business event.

Creating a Notification Specification for Delivery Within A Day

To create a notification specification for delivering messages to customers within a day after an event occurs:

1. On the landing page, click **Notifications Specification**.

   The **Notifications Specification** page appears.

2. Click **Create**.

   The **Trigger Criteria** screen appears. See "Trigger Criteria Screen" for details.

3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.

4. Enter general information about the notification specification:

   - Enter a unique name

     Note: You cannot modify the name after the notification specification has been created.

   - Enter a brief description
   - Select the business event that the specification applies to
   - Select a validity end date

     Note: If you do not select an end date, the notification specification never expires.

5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.

6. Click **Delivery Details**.

   The **Delivery Details** screen appears. See "Delivery Details Screen" for details.

7. In **Select Delivery Methods**, select how to deliver messages to your customers.

   You can select one or more delivery options.

8. In the **Trigger Time** list, select one of the following:

   - **Predefined time**: Delivers messages at a specified time of day after an event occurs. You must also enter the time of day to deliver messages, such as 09:00.
   - **Real time**: Delivers messages immediately after an event occurs.

9. In **Notification Defaults**, specify one of the following:

   - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
   - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.

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- Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.

10. Click **Review**.

    The **Review** screen appears. See "Review Screen" for details.

11. Review the details of your notification specification.
12. Click **Finish**.

Creating a Notification Specification for In-Advance Delivery

You can create notification specifications for delivering in-advance messages to your customers for the following business events:

- **BalanceExpiry**: A customer's balance is about to expire
- **BillDue**: A customer's bill is almost due
- **CollectionsActionDue**: A collections action is about to be performed against a customer
- **InstallmentDue**: A customer's installment payment is almost due
- **ProductExpiry**: A customer's subscription is about to expire
- **ServiceLifeStateChangeExpiry**: A customer's service life cycle is about to change
- **SuscriptionRenewalDue**: A customer's subscription is almost due for renewal

To create a notification specification for delivering messages before an event occurs:

1. On the landing page, click **Notifications Specifications**.

   The **Notification Specifications** page appears.

2. Click **Create**.

   The **Trigger Criteria** screen appears. See "Trigger Criteria Screen" for details.

3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.
4. Enter general information about the notification specification:
   - Enter a unique name

     Note: You cannot modify the name after the notification specification has been created.

   - Enter a brief description
   - Select the business event that the specification applies to
   - Select a validity end date

     Note: If you do not select an end date, the notification specification never expires.

5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.
6. Click **Delivery Details**.

   The **Delivery Details** screen appears. See "Delivery Details Screen" for details.

7. In **Select Delivery Methods**, select how to deliver messages to your customers.

   You can select one or more delivery options.

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8. In the **Trigger Time** list, select **Fixed time in advance**.
9. Do one of the following:
   - To deliver messages at a specified time: In **Time**, select the delivery time of day in 24-hour format and then click **OK**.
   - To deliver messages outside of the silent period: Enable the **Don't send notification during silent time** option. This prevents messages from being delivered to customers at inconvenient times, such as at night.

     If a business event occurs during the silent time configured in your system, the message is delivered after the silent time ends.
10. In **Fixed time value** and **Unit**, enter the number of minutes, hours, days, weeks, or months before an event occurs to deliver messages. For example, enter 3 Days.
11. In **Notification Defaults**, specify one of the following:
    - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
    - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.
    - Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
12. In **Aggregate Notifications**, specify whether to consolidate multiple notifications for a customer into one message.
13. Click **Review**.

    The **Review** screen appears. See "Review Screen" for details.
14. Review the details of your notification specification. If you see any mistakes, click **Delivery Details** at the top left to make changes.
15. Click **Finish**.

Creating a Notification Specification for Post-Event Delivery

You can create notification specifications for delivering post-event messages to your customers for the following business events:

- **PostBalanceExpiry**: A customer's balance has expired
- **PostBillDue**: A customer's bill is past due
- **PostCollectionsActionDue**: A collections action is past due
- **PostInstallmentDue**: A customer's installment payment is past due
- **PostProductExpiry**: A customer's subscription expired
- **PostServiceLifeStateChangeExpiry**: A customer's service life cycle has changed
- **PostSuscriptionRenewalDue**: A customer's subscription is past due for renewal

To create a notification specification for delivering messages after an event has occurred:

1. On the landing page, click **Notifications Specifications**.

   The **Notification Specifications** page appears.
2. Click **Create**.

   The **Trigger Criteria** screen appears. See "Trigger Criteria Screen" for details.

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3. (Optional) To duplicate an existing notification specification, select **Copy Existing Notification Specification** and then select the specification to duplicate.
4. Enter general information about the notification specification:
   - Enter a unique name.

     Note: You cannot modify the name after the notification specification has been created.
   - Enter a brief description.
   - Select the business event that the specification applies to.
   - Select a validity end date. If you don't select an end date, the notification specification never expires.
5. In the **Notification Trigger Criteria** section, specify the attributes that an account must have to receive a message. For example, you could specify that only Gold-level customers qualify or that only customers in France who pay through invoice qualify.
6. Click **Delivery Details**.

   The **Delivery Details** screen appears. See "Delivery Details Screen" for details.
7. In **Select Delivery Methods**, select how to deliver messages to your customers.

   You can select one or more delivery options.
8. In the **Trigger Time** list, select **Fixed time after due date**.
9. Do one of the following:
   - To deliver messages at a specified time: In **Time**, select the delivery time of day in 24-hour format and then click **OK**.
   - To deliver messages outside of the silent period: Enable the **Don't send notification during silent time** option. This prevents messages from being delivered to customers at inconvenient times, such as at night.

     If a business event occurs during the silent time configured in your system, the message is delivered after the silent time ends.
10. In **Fixed time value** and **Unit**, enter the number of minutes, hours, days, weeks, or months after an event to deliver messages. For example, 45 minutes or 1 week.
11. In **Notification Defaults**, specify one of the following:
    - Customers are automatically subscribed to receive messages for this notification type by default. However, customers can unsubscribe at any time.
    - Customers *do not* receive messages for this notification type by default. However, customers can subscribe to receive messages at any time.
    - Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
12. In **Aggregate Notifications**, specify whether to consolidate multiple notifications for a customer into one message.
13. Click **Review**.

    The **Review** screen appears. See "Review Screen" for details.
14. Review the details of your notification specification.

    To make changes, click **Delivery Details** at the top left.
15. Click **Finish**.

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Modifying a Notification Specification

You can modify a notification specification's validity date, trigger criteria, delivery method, and delivery time, but you cannot change its name or associated business event.

To modify a notification specification:

1. On the landing page, click **Notification Specification**.

   The **Notification Specification** page appears.

2. In the Notification Specifications page, locate the notification specification that you want to modify and click the **Action** button at the end of the row:

   See "Finding Notification Specifications" for more information.

3. Select **Edit**.
   The **Edit Notification Specification** wizard appears.

4. In the **Trigger Criteria** screen, modify the description, validity end date, or trigger criteria.

   See "Trigger Criteria Screen" for details.

5. Click **Continue** or **Delivery Details**.

6. In the **Delivery Details** screen, modify the delivery method, delivery time, notification defaults, or aggregation settings.

   See "Delivery Details Screen" for details.

7. Click **Continue** or **Review**.

8. In the **Review** screen, review the details of your notification specification.

   > **Tip**
   >
   > If you see any mistakes, click **Delivery Details** at the top left to make changes.

   See "Review Screen" for details.

9. Click **Finish** to save your changes.

Finding Notification Specifications

To find an existing notification specification:

1. On the **Notification Specifications** page, click **Search** at the top right.

   The **Search** dialog box appears.

2. Enter the search criteria. You can search by the name of the notification specification or business event, the delivery method, and the notification specification status.

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

3. Click **Search**.

   The **Notification Specifications** page displays the search results. You can enter more criteria to refine the search if there are many results. You can also sort the results using the up or down arrows next to the column names.

4. Select a notification specification name to open it.

   Billing Care displays the selected notification specification.

Create Notification Specification Wizard Reference

Use the Create Notification Specification wizard to create a notification specification, which defines the customers that can receive a specified message as well as how and when to deliver the message.

The Create Notification Specification wizard includes the following screens:

- Trigger Criteria Screen
- Delivery Details Screen
- Review Screen

Trigger Criteria Screen

Use the **Trigger Criteria** screen to specify general information about the notification specification, such as its name and the business event it applies to.

Field	Description
Copy existing notification specification	Select to reuse the details from an existing notification specification. If you select this option, the following field also appears. In **Notification Specification to Copy**, select the notification you want to copy from the list.
Notification Specification Name	Enter a unique name.
Description	Enter a brief description.
Business Event Name	Select the business event that this notification specification applies to.
End Date	Select an end date for the notification specification's validity period. If left blank, the notification specification never expires. The notification specification is considered expired if the end date is less than or equal to the current date.

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Field	Description
Trigger Criteria	• **Criteria**: Select the criteria to use, such as Service or Profile. • **Field**: Select the field to include, such as **Effective_T**. • **Operator**: Select an operator, such as equals (**=**). **Note**: All operators for the selected field appear in the Operator list. Select an appropriate operator. • **Value**: Enter the value for the eligibility criteria. **Note:** This field is dependent on the selected field. For example, if you select service and effective timestamp as the criteria and field, the value type will be **Criteria Date**. It prompts you to select a date from the calendar.

Delivery Details Screen

Use the **Delivery Details** screen to specify when and how to deliver messages to your customers.

Field	Description
Select Delivery Methods	Select one or more methods for delivering messages to your customers: • **IVR**: Delivers messages through interactive voice response (IVR). • **SMS**: Delivers messages through text. • **EMAIL**: Delivers messages through email.
Trigger Time	Select one of the following options: • **Fixed time in advance**: Delivers messages a specified amount of time *before* an event occurs. For example, one week before a subscription expires. • **Fixed time after due date**: Delivers messages a specified amount of time *after* an event occurs that hasn't been resolved. For example, one week after a bill is past due. • **Predefined time**: Delivers messages at the time of day you specify. • **Real time**: Delivers messages immediately after an event occurs. **Note:** The available options depend on the business event and how your system is configured.
Time	Select the time of day to deliver messages, such as at 14:00. **Note:** This option is grayed out when the **Don't send notifications during silent time** option is selected.
Fixed Time Value and **Unit**	Enter the number of hours, days, weeks, months, or years *before* or *after* an event occurs in which to deliver the message. **Note:** This option is available for only the **Fixed Time in advance** and **Fixed time after due date** trigger times.
	Select the **+** icon to add a new **Fixed Time Value** and **Unit** row, and the **–** icon to remove a row.

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Field	Description
Notification Defaults	Select whether customers receive messages for this notification type: • **Sent by default, but customers can unsubscribe**: By default, customers are automatically subscribed to receive messages for this notification type. However, customers can unsubscribe at any time. • **Not sent by default, but customers can subscribe**: By default, customers *do not* receive messages for this notification type. However, customers can subscribe to receive messages at any time. • **Always sent to customers**: Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
Aggregate Notifications	Select whether to consolidate multiple notifications for a customer into one message: • Select **Aggregate Notifications** to consolidate multiple notifications into one message sent to the customer. • Deselect **Aggregate Notifications** to send separate messages to the customer for each notification. **Note:** This option is available for only the **Fixed Time in advance** and **Fixed time after due date** trigger times.
Don't send notifications during silent time	Select this option to prevent messages from being delivered during the systemwide silent period configured in your system. **Note:** This option is available for only the **Fixed Time in advance** and **Fixed time after due date** trigger times.

Review Screen

Use the **Review** screen to view the configuration of the notification specification you created.

Field	Description
Delivery Details	Click to return to the previous screen and make changes to the notification specification.
Notification Specification Name	Displays the name of the notification specification.
Description	Displays the description of the notification specification.
Business Event Name	Displays the business event that this notification specification applies to.
End Date	Displays when the validity period ends for this notification specification. If no date is listed, the specification never expires.
Delivery Methods	Displays the methods for delivering messages to your customers, such as SMS or Email.

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Field	Description
Trigger Time	Displays when messages will be delivered to your customers: • **ADVANCE**: Delivered a specified amount of time before an object expires. • **PREDEFINED**: Delivered at a specified time of day after an event occurs. • **REALTIME**: Delivered immediately after an event occurs. • **AFTER DUE DATE**: Delivered a specified amount of time after an object expires.
Time	Displays the time of day that messages will be delivered.
Notification Defaults	Displays the default subscription options for receiving messages: • **Sent by default, but customers can unsubscribe**: By default, customers are automatically subscribed to receive messages for this notification type. • **Not sent by default, but customers can subscribe**: By default, customers *do not* receive messages for this notification type. • **Always sent to customers**: Customers are automatically subscribed to receive messages for this notification type. They cannot unsubscribe.
Don't send notifications during silent time	Displays whether messages can be delivered during the silent period: • **Yes**: Messages *cannot* be delivered during the silent period. • **No**: Messages can be delivered during the silent period. **Note**: This field is displayed only for the **ADVANCE** and **AFTER DUE DATE** trigger times.
Aggregate Notifications	Displays whether to consolidate multiple notifications for a customer into one message: • **Yes**: Notifications are consolidated into one message sent to the customer. • **No**: Separate messages are sent for each notification. **Note**: This field is displayed only for the **ADVANCE** and **AFTER DUE DATE** trigger times.
Finish	Click to create the notification specification and save your changes. **Note**: After your notification specification is created, you cannot change its name or associated business event.
Cancel	Click to exit the notification specification without saving your changes.

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