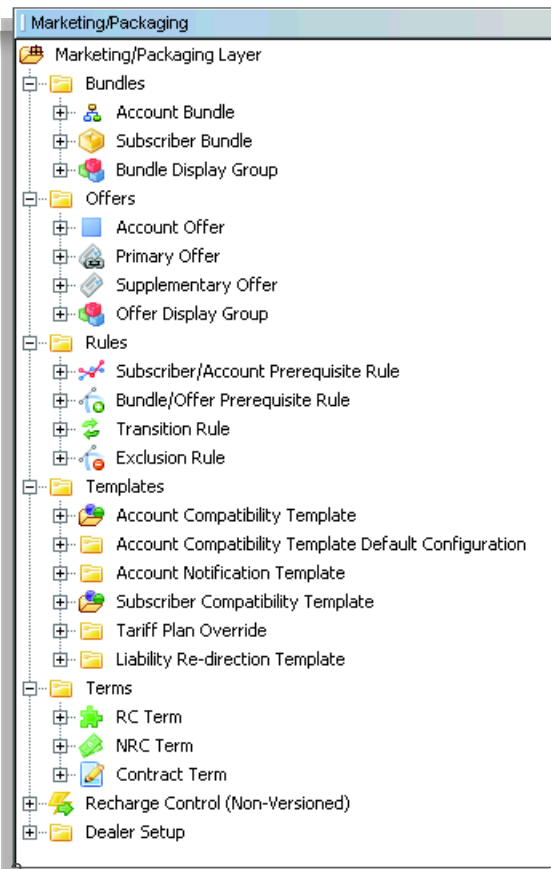




Section 6

Terms, Rules, and Templates

Marketing/Packaging Layer

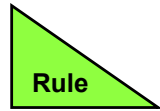


- Used to define customer-facing market offerings
- The other building blocks are configured here:
 - Rules
 - Templates
 - Terms
- Then resellers define their Offers and Bundles

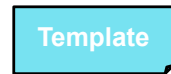
Marketing Layer “Building Blocks”



- Defines some pricing aspect of the agreement that is represented by the bundle or offer (3 types)



- A condition or constraint for delivering a bundle or offer (4 types)



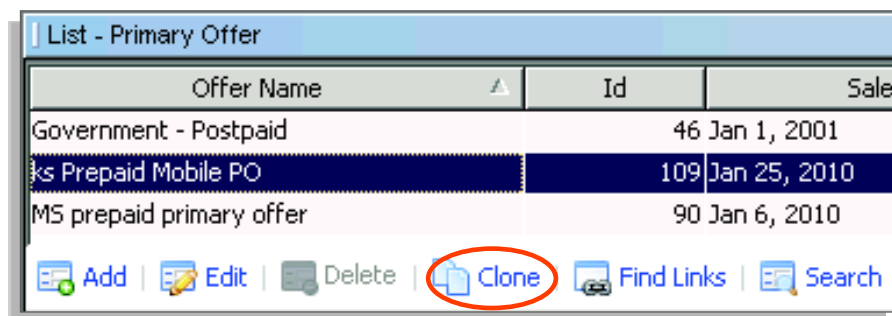
- Entities that are configured to aid in the instantiation of customer accounts or drive configuration of catalog entities (4 types)

Note: Plans, Balances and Accumulators are defined on other layers

3

Cloning Entities

- Create a new entity that differs only slightly from an existing entity
- From the List, select the entity to be duplicated and click Clone
- Enter a name for the duplicate entity and make other changes as necessary



4

Agenda

6.1 Terms

6.2 Rules

6.3 Templates

5



Module Objectives

- Describe the purpose of each of the three types of terms
- Define each of the main attributes (rating, scheduling, RC Award, etc.)
- Given a business scenario, identify and configure the terms

- A Term defines some pricing aspect of the agreement that is represented by the bundle or offer
- Types:
 - Recurring Charge
 - Non-recurring Charge
 - Contract Terms
- Conditions typically include:
 - Charge rates
 - Provisioning rules
 - Proration behavior
 - Contract duration
 - Tax information

7

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Terms

RC Term

RC/NRC Server

NRC Term

Contract Term

Terms and Bundles



8

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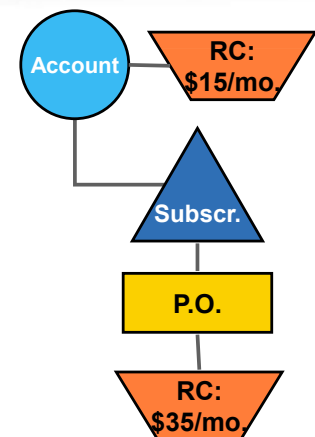
RC Term

9



Recurring Charge (RC) Term Types

- RC Terms are charges that are applied at specified intervals
- Delivered through bundles and offers
- RC Types
 - Regular
 - Commitment
 - Minimum Charge
 - Inventory Vanity
 - Equipment



RC Term Screen

RC Term

Version 3.0

Name*
ks Prepaid Mobile Access Fee

Description

Short Display

Language
English

Keywords
Type or choose from list of standard keywords

Keywords

General | Schedule | Rates | Advanced Settings

RC Type*
Regular

Service Provider*
Standard

Product Line

Provisioning Level*
Subscriber

Default Currency*
US Dollars

Active Date
Thu 01/28/2010

Inactive Date

Open Item*
Default Open Item id

Balance/Liability Impact Method*
Balance and Liability

☐ Notification Required

☐ Allow Offer Rate Override

☐ Allow CSR to override rates

☐ Announcement Required

Be sure to select the correct Provisioning Level; it cannot be changed after saving

11

RC Components

- RC Terms can have 2 components:
 - Charge component **Cấu hình Số tiền cần charge RC, VD: 5\$/1 tháng**
 - Award component (optional) **Sau khi charge RC thì set or add một Amount vào các Balance của Offer, VD: set 100SMS cho SMS Balance**
- Examples:
 - As part of a prepaid offer, an RC is instantiated to subtract \$5 from the subscriber's core balance each month, and add 100 SMSs to the subscriber's SMS balance
 - An operator makes additions on a regular schedule to a monetary balance for their employees, which involves a \$0 RC Term

12

RC Charge Component

New RC Rate

☒ Default Rate

Currency Code*
US Dollars

Rate*
\$5.00

Period Frequency*
Monthly

Rate Keys

Subscriber Class
Any

Class of Service
Any

Subscriber Type
Any

Rate Class
Any

Standard Units-Based Rating

Units Type
[Empty]

Units Rate*
0

Lower Limit*
0

Upper Limit
[Empty]

General | Schedule | **Rates** | Advanced Settings

Applicable Rate Keys

☐ Unit Based Rating

☐ Class of Service

☐ Subscriber Class

☐ Subscriber Type

☐ Rate Class

Rate	Currency	Period Frequency	Is Default Rate
\$5.00	US Dollars	Monthly	<input checked="" type="checkbox"/>

13

RC Awards

New Offer RC Term/Award Relationship

Award Definition | Grant

Units Type*
OCTET

Balance*
GPRS WAP-INTERNET

Award Currency
[Empty]

Period Frequency*
Monthly

Amount*
1000000

Rollover

☒ Grants can be rolled over
Number of Expiring Cycles*
1

☐ Previously rolled grants consumed before new grants

Maximum Grant Rollover
500000

Maximum Total Rollover
1000000

Defined when the RC is added to an offer

New Offer RC Term/Award Relationship

Award Definition | **Grant**

RC Multiplication
[Empty]

Action*
Add

Award Activation

Activation Type*
Immediate

Activation Offset
[Empty]

Award Expiration

Expiration Type*
Independent

Expiration Offset Type
Fixed RC cycle

Expiration Date
[Empty]

Expiration Offset
[Empty]

☐ Prorate on partial charge

14

RC Schedule

Select “Allow defined schedule” to set a billing schedule independent of the offer

The screenshot shows the 'Schedule' tab of a configuration window. The 'Allow defined schedule' checkbox is checked and circled in red. Below it, 'RC Frequency*' is set to 'Monthly' and 'Weekly Schedule Type' is set to 'Calendar-Based Cycle Start'. The 'Schedule' section has three radio buttons: 'User-Defined Cycle Start' (unselected), 'Calendar-Based Cycle Start' (selected), and 'Adjusted Calendar-Based Cycle Start' (unselected). On the right, there are input fields for 'Flexible Cycle Duration (days)', 'Number of Cycle Applications', 'Cycle Date's Offset', 'Apply Day' (set to 0), 'Allow charge multiple cycles in advance' (checkbox), and 'Advance Periods*' (set to 0).

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Advanced Settings Tab

The screenshot shows the 'Advanced Settings' tab. The 'Charging Info' section is selected and circled in red. It contains three dropdown menus: 'Apply during Suspend' (set to 'Continue charging'), 'Apply During Fraud Lockout' (set to 'Stop charging no prorate'), and 'Charge In Postactive States*' (set to 'Never'). To the right, there are checkboxes for 'Late Fee Exempt', 'Split booking (at journals)', 'Allow Adjustments' (checked), and 'Include in estimate'.

The screenshot shows the 'Advanced Settings' tab. The 'Tax' section is selected and circled in red. It contains three input fields: 'Tax Location*', 'Billing Address', and 'Tax Class*' (set to 'No Tax Class/Single Rate'). To the right, there are input fields for 'Number of Billed Lines*' (set to 1) and 'Number of Trunk Lines*' (set to 0).

The screenshot shows the 'Advanced Settings' tab. The 'Prorate' section is selected and circled in red. It contains three dropdown menus: 'Activation Proration Policy*' (set to 'Charge Full'), 'Prorate On End Policy*' (set to 'Charge Full'), and 'Disconnect Credit Policy*' (set to 'Do Not Credit').

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Commitment RC Term (and NRC Term)

- Both the Commitment RC and Commitment NRC terms are part of a plan in an offer

Plan
Pay **\$240** for 1 year and get 350 minutes per month, with rollover.
Option to pay in full or **\$20** per month

	January	February	December
Commitment NRC = 240	Commitment NRC = 220	Commitment NRC = 200		Commitment NRC = 0
RC = 20	RC= 20	RC= 20		RC= 20

Free minutes balance: Award 350 minutes every month from the RC

17

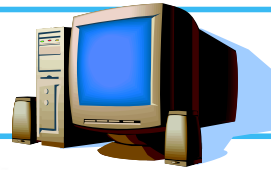
More RC Options

- RCs can be:
 - Prorated, charged in advance, or billed in arrears
 - Rated based on account or subscriber attributes
 - Rated based on the offer they apply to
 - Allowed to have the rate overridden (ICB) by the CSR
 - Can be charged to multiple balances, if the first balance cannot cover the full amount
 - Configured to handle insufficient balance amounts in various ways
 - Applied immediately, at batch time, or at first usage event
 - Configured to send a real-time notification
 - Redirected to a different liable party
 - Overridden at the bundle level
 - A negative amount, which will increment the balance (use a minus sign)

18

RC Examples

- Wireless Family Plan with 1000 shared minutes
- Additional line charge
- 100 text messages for \$5/month
- Landline phone service
- Caller ID
- High-speed internet access
- Modem rental
- Basic cable television
- HBO premium channel



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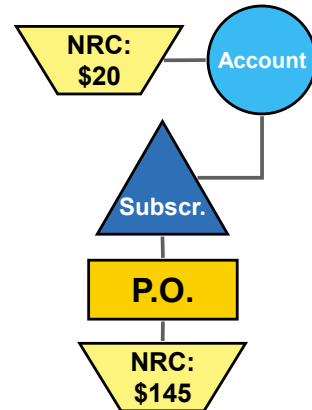
NRC Term



20

Non-recurring Charge (NRC) Term Types

- NRCs are one-time charges
- NRC Types
 - One-time
 - Chargeable Event
 - Activation
 - Early Termination*
 - Unmet Commitment*
 - Offer Reactivation
 - Refinance
 - Inventory Vanity
 - Equipment
 - Late Fee



* **Note:** Only one terminating charge can be contained within an offer (Unmet Commitment NRC or Early Termination NRC)

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One-time NRCs

- Select an Event Type when configuring a One-time NRC
 - Bill Resend
 - Inventory Sales
 - Dispatch
 - Friends and Family
 - Calling Circles
 - General Charge
 - Balance Transfer
- Normally One-time NRCs are applied manually from a customer management GUI
- If the NRC is put in an offer, it is charged when the offer is activated

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Chargeable Event NRCs

- Chargeable Event NRCs are event-based
- They are applied automatically when certain events occur on the customer's account or subscription
 - Add subscriber to account
 - Add a child account
 - Add, modify, or remove Friends and Family phonebook entry
 - Add, modify, or remove Favorite Area (for example, home zone)
 - Add Favorite Destination
 - Add or modify Happy Hour
 - Add or modify Special Day
 - Bill resend

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NRC Term Screen

NRC Term Version 3.0

Name*
ks Mobile Internet Access Activation Fee

Description

Short Display

Language
English [Add/Remove](#)

General | Rates | Advanced Settings

NRC Type*
Activation

Event Type
Default Event Type

Service Provider
Standard

Product Line

Provisioning Level*
Subscriber

☐ Send Notification

☐ Allow Offer Rate Override

☐ Allow CSR to override rates

☒ Display charge on CSR's screen

Keywords
Type or choose from list of standard keywords

Keywords

Default Currency*
US Dollars

Open Item*
Default Open Item id

Maximum Installments*
0

Balance/Liability Impact Method
Balance and Liability

NRCs – Similarities with RCs

- The same as RCs:
 - Both can be rated based on account or subscriber attributes
 - Both can be rated based on the offer they are attached to
 - Both can have the rate overridden (ICB) by the CSR
 - Both can be charged to any monetary balance
 - Both can be charged to multiple balances
 - Both can be redirected to a different liable party
 - Both can be overridden at the bundle level
 - Both can trigger a real-time notification
 - Both can handle insufficient balance amounts (in slightly different ways)

25

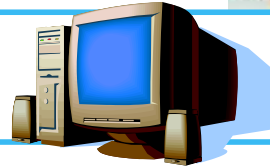
NRCs – Differences with RCs

- Different from RCs:
 - NRCs are only charged once
 - NRCs are applied in real-time when instantiated, unless future dated by the CSR (only an option for some types)
 - NRCs are never prorated (always attempted in full)
 - NRCs never have an award component
 - Some NRC types can be configured to allow payment in installments
 - Some NRCs can be waived by the CSR

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NRC Examples

- Handset purchase
- Balance transfer
- Number change
- Resend invoice
- Support call charge
- Late fee
- Repair charge
- PPV movie



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Contract Term

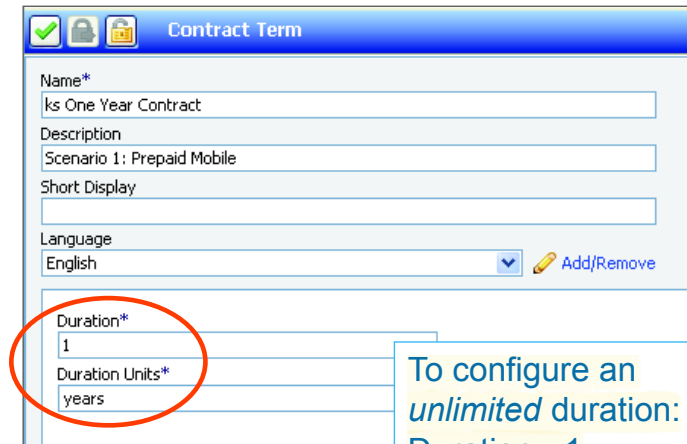


28

Contract Term

- Defines the duration of the commitment
- In order to have one of the following types of NRCs, the offer must also have a contract term, even if the duration is unlimited:
 - Termination NRC
 - Commitment NRC

Examples:
1-year contract,
18-month contract



Contract Term

Name*
ks One Year Contract

Description
Scenario 1: Prepaid Mobile

Short Display

Language
English

Duration*
1

Duration Units*
years

To configure an
unlimited duration:
Duration: -1
Duration Units: null

29

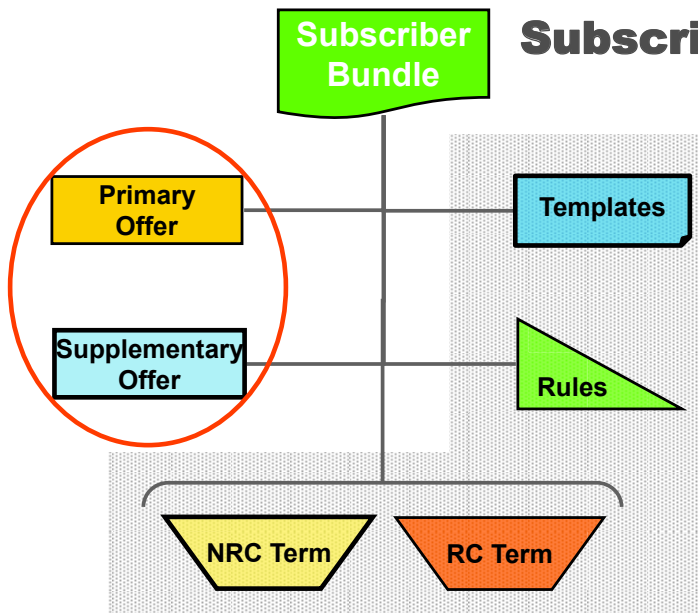
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Terms and Bundles



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Reminder – Subscriber bundle items



Subscriber bundles can contain:

“bundle items”:

- Primary Offer
 - Plans, Terms, Rules, Templates, Balances, Accumulators
- Supplementary Offers
 - Plans, Terms, Rules, Templates, Balances, Accumulators

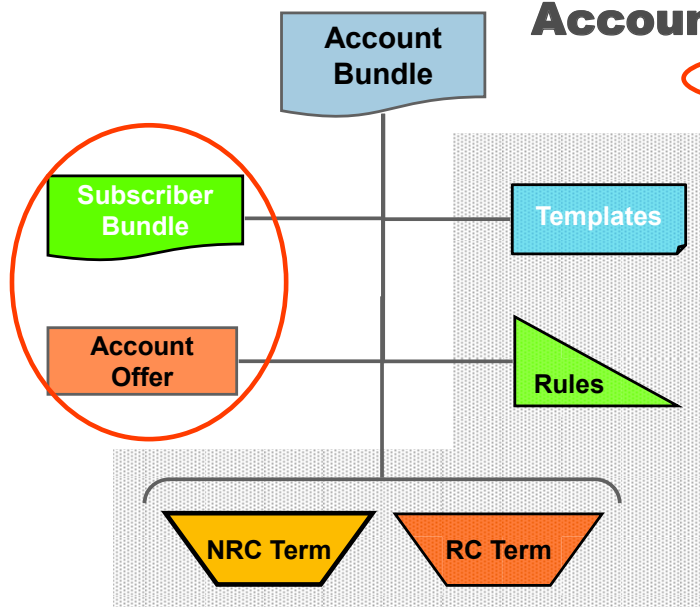
“bundle-level” items*:

- Terms
- Rules
- Templates

* Plans, Balances and Accumulators are always at the Subscriber level

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Reminder – Account bundle items



Account bundles can contain:

“bundle items”:

- Subscriber Bundles
 - Primary Offer
 - Supplementary Offers
 - “bundle-level” items (see previous slide)
- Account Offers
 - Plans, Terms, Rules, Templates, Balances, Accumulators

“bundle-level” items*:

- Terms
- Rules
- Templates

* Plans, Balances and Accumulators are always at the Subscriber level

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Reminder – Selection Type

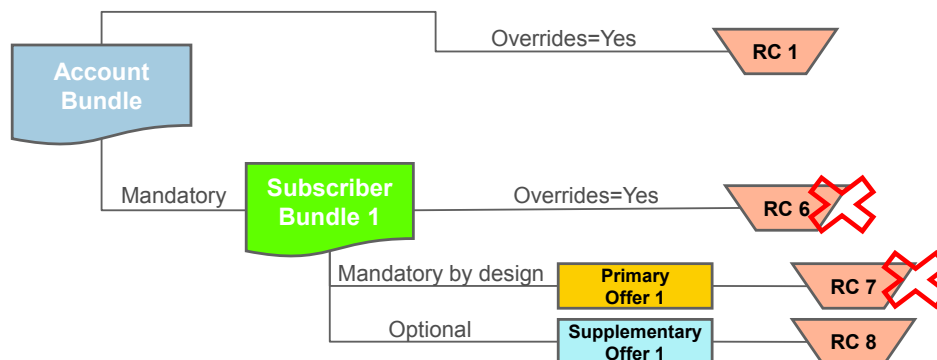
- When a supplementary offer is added to a subscriber bundle, or a subscriber bundle is added to an account bundle, configure whether the customer must take the offer or bundle
- Options:
 - **Mandatory*** – Subscriber must take the entity
 - **Selective*** – Subscriber must choose the number specified (example: choose 2 out of 5)
 - **Optional** – Subscriber can accept or decline the entity
 - **Optional and Selective** – Sometimes called “hybrid”

* Impacts related to overriding

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Terms within Bundles (1)

- Terms at the bundle level can be set as overriding, which means that any other term of the same type assigned to a bundle item is ignored
- Overriding of terms applies to mandatory and selective bundle items (not to optional items)
- Overriding only applies to the next level down



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Terms within Bundles (2)

Bundles do not always have to “Override Offer Terms” (except in the case of Contract Terms)

Options:

- **RC Terms** – 2 options:
 - Do not override RC Offer Terms
 - Override all RC Terms for Mandatory and Selective Offers in the Bundle
- **NRC Terms** – 2 options:
 - Do not override NRC Offer Terms
 - Override the equivalent NRC Terms for Mandatory and Selective Offers in the Bundle
- **Bundle-level Contract Terms** always override Offer Contract Terms

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Summary

- RC Term – Charges that are applied at specified intervals
- NRC Term – One-time charges
- Contract Term – Defines the duration of the commitment

36

Agenda

6.1 Terms

6.2 Rules

6.3 Templates

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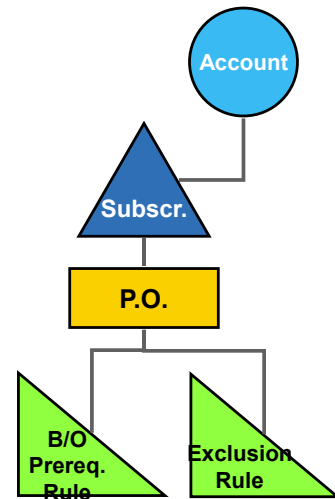
Module Objectives

- Describe the purpose of each of the four types of rules
- Given a business scenario, identify and configure the rules

Rules

Rule

- A condition or constraint for delivering a bundle or offer
- Rule types include:
 - Prerequisite (2 types)
 - Transition
 - Exclusion
- Only one rule of each type can be associated to a bundle or offer
- Rules are reusable: create once and attach to multiple offers and bundles



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Rules

Subscriber/Account Prerequisite Rule

Bundle/Offer Prerequisite Rule

Exclusion Rule

Transition Rule

No Rules / Rules and Bundles



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Subscriber/Account Prerequisite Rule

41

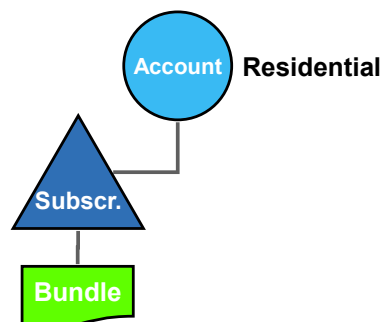
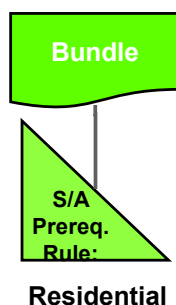


Subscriber/Account Prerequisite Rule (1)

- Constrains the delivery of a bundle or offer based on characteristics of an account or subscriber
- Enables the targeting of specific customer segments (business, residential, VIP, etc.)
- Can be based on any user-enterable account or subscriber attribute

This bundle can be associated
with accounts where...

...the account category = Residential



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Subscriber/Account Prerequisite Rule (2)

- The rule consists of:
 - An object type (account or subscriber)
 - An attribute of the object (e.g., account category)
 - An operator (e.g., equals)
 - A value (e.g., “Residential”)
- The expression can contain multiple parts, with a logical operator of AND (all of the listed items are required)

Expression

```
/Rule/Account/Attribute[N='accountCategory' and V=2] and /Rule/Subscriber/Attribute[N='agentId' and V='One']
```

- Only one subscriber/account prerequisite rule can be defined per bundle or offer

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Subscriber/Account Prerequisite Rule Screen

The screenshot shows the 'Subscriber/Account Prerequisite Rule' screen and a 'New Eligibility Rule' dialog box.

Subscriber/Account Prerequisite Rule Screen:

- Name*:** /ks Residential Account Category
- Description:**
- Short Display:**
- Language:** English
- Is Default:** ☐
- Add/Remove:** [Add/Remove](#)
- Expression:** /Rule/Account/Attribute[N='accountCategory' and V=3]

New Eligibility Rule Dialog:

- Object Type:** Account
- Object Attribute:** accountCategory
- Operator:** =
- Value:** Residential
- Add to Expression:** [Add to Expression](#)
- Eligibility Rule Expression:** /Rule/Account/Attribute[N='accountCategory' and V=3]

Account Category = Residential

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Subscriber/Account Prerequisite Rule Examples

- European Bundle can only be associated to accounts with Market Code = Europe
- Premium Mobile Offer can only be associated to accounts with Account Segment = Premium and VIP Code > 2

45

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Bundle/Offer Prerequisite Rule

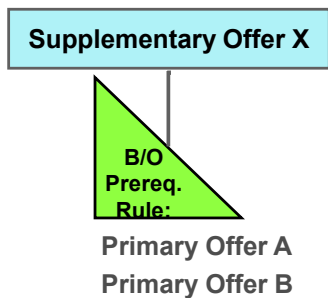
46



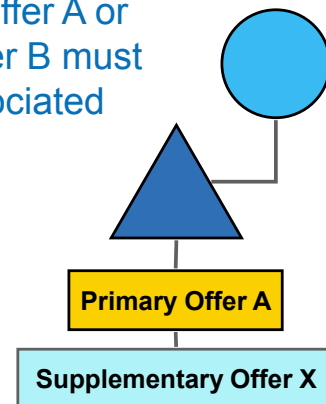
Bundle/Offer Prerequisite Rule (1)

- The associated bundle or offer requires certain other bundles or offers to be delivered to the subscriber or account
- The rule consists of a list of associated bundles or offers

To associate this supplementary offer to a subscriber...



...Primary Offer A or Primary Offer B must also be associated



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Bundle/Offer Prerequisite Rule (2)

- The logical operator is OR (only one of the listed items is required, not all of them)
- Either account-level entities or subscriber-level entities can be contained in the same bundle/offer prerequisite rule
- Only one bundle/offer prerequisite rule can be defined per bundle or offer

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Bundle/Offer Prerequisite Rule Screens

The screenshot shows a web application titled "Bundle/Offer Prerequisite Rule". It contains several input fields: "Name*" with the value "ks Prepaid Mobile PO", "Description", "Short Display", "Language" set to "English", and "Level*" set to "Subscriber". There is an "Add/Remove" button next to the language field. To the right of the form, a blue box contains the text: "To assign the SO also requires the PO". Below the form, a diagram illustrates the relationship between bundles and offers. A central box labeled "ks Prepaid Mobile PO" with "Level Code: Subscriber" has arrows pointing to two boxes: "Bundles" and "Offers". The "Offers" box also contains the text "ks Prepaid Mobile PO".

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Bundle/Offer Prerequisite Rule Examples

- The Data supplementary offer requires the Mobile primary offer
- The Premium Channel supplementary offer requires the Basic Cable primary offer

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Exclusion Rule

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Exclusion Rule (1)

- A list of the offers and bundles that are NOT compatible with the offer or bundle to which the rule is attached
- This is the opposite of the bundle/offer prerequisite rule

When this primary offer is associated with an account or subscriber...

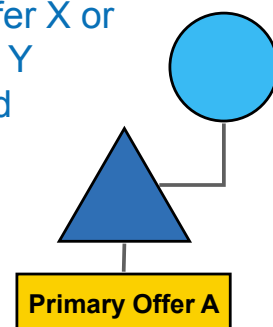
Primary Offer A

Excl.
Rule:

Suppl. Offer X
Suppl. Offer Y

...Supplementary Offer X or
Supplementary Offer Y
cannot also be added

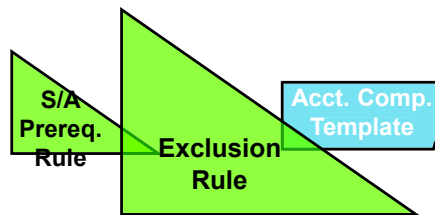
~~Suppl. Offer Y~~



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Exclusion Rule (2)

- Exclusion rules work in both directions
 - When one of the offers or bundles are already provisioned, then the others referenced in the rule cannot be
 - In our example, if the subscriber already has Supplementary Offer Y, they cannot also have Primary Offer A
- Only one exclusion rule can be defined per bundle or offer
- Exclusion rules take precedence over any other rule or offer compatibility template
 - The exclusion rule is evaluated first; for items not specifically excluded by the rule, other rule/compatibility checking will occur



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Exclusion Rule Screen

⚠ This entity may not be modified because it also exists in versions other than the current version.

Name*
Exclude Basic Voice Mail

Description

Short Display
Is Default ☐

Language
English ✎ Add/Remove

The offer that this rule is attached to is not compatible with the offer listed in the rule

Exclude Basic Voice Mail

Bundles

Offers

Basic Voice Mail

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Exclusion Rule Examples

- The HBO HD supplementary offer cannot exist on the same subscriber as the (regular) HBO supplementary offer
- Older cable offers cannot be associated with a new set of cable offers

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Transition Rule



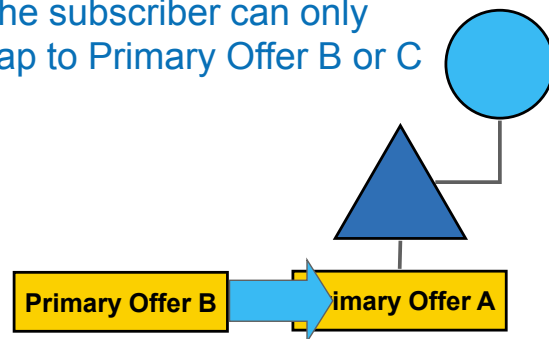
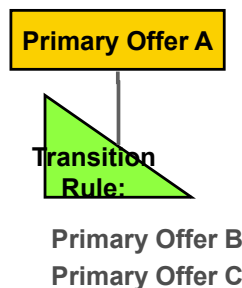
56

Transition Rule (1)

- Specifies the primary offers or subscriber bundles a subscriber can switch to (“swap”) from their current primary offer or subscriber bundle
- The rule consists of a list of primary offers or subscriber bundles

When this primary offer is associated with a subscriber...

...the subscriber can only swap to Primary Offer B or C



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Transition Rule (2)

- Only one transition rule can be defined per bundle or offer
- The logical operator between items is OR (only one can be swapped to)
- If a primary offer has no transition rule attached (and is not included in a bundle that has its own transition rule), then there is no way to swap offers: the subscriber must be disconnected and a new subscriber created
- When a swap is performed, if the new offer does not contain a balance that the old offer contained, the funds in the original balance are forfeited



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Transition Rule (3)

- When a swap is performed, if there is a commitment period for the new offer or bundle, it begins on the day the new service is activated



- Early termination fees (for the original offer or bundle) and activation fees (for the new offer or bundle) can be waived during the swap action

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Transition Rule Screen

The screenshot shows a software interface titled "Transition Rule" with "Version 3.0" in the top right corner. The interface includes the following fields and controls:

- Name***: A text field containing "ks Prepaid Mobile PO to Voice Plus Web SB".
- Description**: An empty text field.
- Short Display**: An empty text field.
- Language**: A dropdown menu set to "English", with an "Add/Remove" link next to it.
- Is Default**: A checkbox that is currently unchecked.

Below the form fields is a toolbar with five icons. The main area of the screen displays a diagram:

- A central yellow box labeled "ks Prepaid Mobile PO to Voice Plus Web SB" with a green arrow icon.
- Two arrows point from this central box to two separate boxes on the right:

 - The top box is labeled "Primary Offers".
 - The bottom box is labeled "Subscriber Bundles" and contains a yellow box icon followed by "(0) ks Prepaid Mobile Voice Plus Web SB".

A blue callout box on the right side of the screen contains the text: **Subscribers who have this primary offer are allowed to swap to this subscriber bundle**.

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Transition Rule Example (1)

- Assume that you have a variety of offers with different levels of service and different commitment terms:

1 year commitment:



2 year commitment:



- You want to allow subscribers to swap to different levels of service, but not to a shorter commitment period...

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Transition Rule Example (2)

Create a Transition rule for each of the offers. The rule will contain the other offers that have the same or longer commitment period.



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No Rules / Rules and Bundles

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No Rules Defined

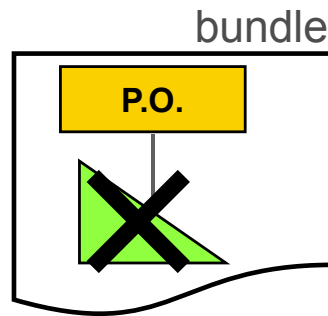
- Bundles and offers not having associated prerequisite, transition, or exclusion rules are marked as “Generally Available”
 - They can be provisioned to any account or subscriber permitted by the guidelines defined in their compatibility templates

List - Primary Offer			
Offer Name	Id	Generally Available	Global
BON CHIPPIE PREPAID BASIC	51000058	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BON CHIPPIE PREPAID FRIENDS & FAMILY	51000060	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BON CHIPPIE PREPAID PLUS	51000059	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BON CHIPPIE STUDENT	51000061	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BON LITS EMPLOYEE	51000074	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Rules within Bundles

- When bundling is used, any rules defined on bundle items are ignored (even if a rule is not set at the bundle level)



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Summary

- Subscriber/Account prerequisite rule – Constrains the delivery of a bundle or offer based on characteristics of an account or subscriber
- Bundle/Offer prerequisite rule – The associated bundle or offer requires certain other bundles or offers to be delivered to the subscriber or account
- Exclusion rule – A list of the offers and bundles that are not compatible with the offer or bundle to which the rule is attached
- Transition rule – Specifies the primary offers or subscriber bundles a subscriber can switch to (“swap”) from their current primary offer or subscriber bundle

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Agenda

6.1 Terms

6.2 Rules

6.3 Templates

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Module Objectives

- Describe the purpose of each of the four types of templates
- List the three functions of the Subscriber Compatibility Template
- Given a business scenario, identify and configure the templates

- Templates provide the framework for configuration of several types of complex entities:
 - Compatibility Templates (2 types)
 - Tariff Plan Override Template
 - Liability Re-direction Template

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Templates

Subscriber Compatibility Template
Account Compatibility Template
Tariff Plan Override Template
Liability Redirection Template



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Compatibility Templates

- Define the priority order between various functional areas (the order in which balances are charged, for example)
- Two types:
 - Subscriber Compatibility Template (this type has additional functionality)
 - Account Compatibility Template

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Subscriber Compatibility
Template



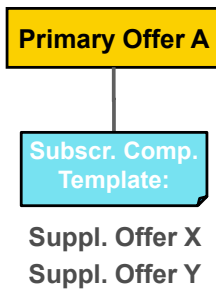
72

Subscriber Compatibility Template (1)

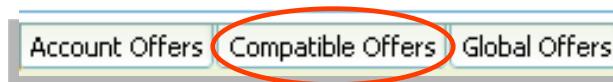
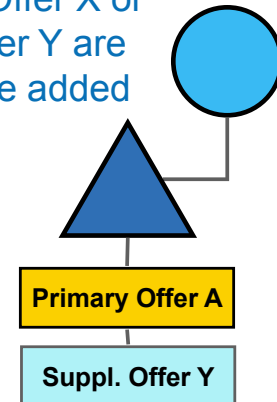
Provides three functionalities:

1. Lists the supplementary offers that are recommended to be sold with the associated primary offer*

When this primary offer is associated with a subscriber...



...Supplementary Offer X or Supplementary Offer Y are recommended to be added



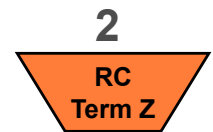
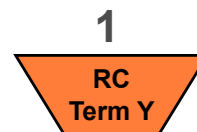
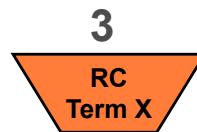
screen capture from Customer Center

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Subscriber Compatibility Template (2)

2. Defines the priority order of application for these *subscriber-level* data elements:

- Tariff priority
- RC priority
- Balance priority
- Discount priority
- Display order



Offer	Offer Type	Balance Priority Order	Tariff Plan Priority Order	Discount Priority
CUR-BON Chippie Culture_Haiti	Subscriber	4	4	
CUR-BON Chippie Culture_India	Subscriber	5	5	
CUR-BON Chippie Culture_Jamaica	Subscriber	6	6	
CUR-BON Chippie Culture_China	Subscriber	1	1	
CUR-BON Chippie Culture_Colombia	Subscriber	2	2	
CUR-BON Chippie Culture_Dominican_Rep	Subscriber	3	3	
CUR-BON Chippie Culture_Venezuela	Subscriber	7	7	
CUR_UTS_IDD_National_International	Subscriber	8	8	
CUR_CHIPPIE_PREPAID_FRIENDS_&_FAMILY	Subscriber Primary	0	0	

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Subscriber Compatibility Template (3)

3. Is required to create a Subscriber bundle

- A subscriber bundle is composed of a subset of offers included in the subscriber compatibility template of its primary offer.
- Thus, it is not possible to build a subscriber bundle if the primary offer does not have a subscriber compatibility template attached to it.

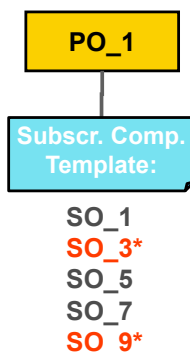
Also note:

- Only one subscriber compatibility template can be assigned to each primary offer
- Include the primary offer itself in the template

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Bundles and Subscriber Compatibility Templates

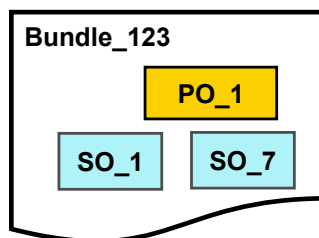
Primary Offer_1 is configured with a compatibility template:



These SOs are *not* in PO_1's compatibility template:

SO_2
SO_4*
SO_6
SO_8*

When Bundle_123 is configured and PO_1 is added to it, any SO that is in the compatibility template for PO_1 can be added to it.



SO_3, SO_5, and SO_9 are **not** added to the bundle even though they are in the template; this is a limiting device

* indicates "Can be sold outside of the Compatibility Template"

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Subscriber Compatibility Template Example

Subscriber compatibility template for the “Mobile and SMS” Primary Offer:

- “Unlimited Weekend SMS” supplementary offer (SO)
- Data supplementary offer (SO)

When URE guides to an offer, it will use the “Unlimited Weekend SMS” SO first if it matches, and get the tariffs from that offer

Mobile & SMS P.O.

Subscr. Comp.
Template:

Unlimited Weekend
SMS S.O.

Data S.O.

Mobile & SMS P.O.

Offer	Offer Type	Tariff Plan Priority Order
Unlimited Weekend SMS	Supplementary Offer	1
Data	Supplementary Offer	2
Mobile and SMS	Primary Offer	3

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Subscriber Compatibility Template Screen

The screenshot shows the 'Subscriber Compatibility Template' screen. The main form has fields for Name, Description, Short Display, and Language. Below these are icons for adding and removing offers. A list of offers is shown, including 'ks Prepaid Mobile PO' and 'ks Wireless Web'. A 'New Compatibility Template' dialog is open, showing fields for Balance Priority, RC Priority, Display Priority, Tariff Priority, and Discount Priority.

Subscriber Compatibility Template

Name*
ks Prepaid Mobile

Description

Short Display

Language
English

Add/Remove

Offers

- (1) ks Prepaid Mobile PO
- (2) ks Wireless Web

New Compatibility Template

Balance Priority: 1

RC Priority: 1

Display Priority: 1

Tariff Priority: 1

Discount Priority: 1

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Account Compatibility Template

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Account Compatibility Template

- Defines the priority order of application for these *account-level* data elements:

- Account balances
- Account RC terms
- Display order



3



2



1



Edit Compatibility Template

Balance Priority
1

RC Priority
1

Display Priority
1

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Account Compatibility Template Matching (1)

- An account compatibility template is automatically associated with an account when the account is created
- Comverse ONE attempts to match specific criteria to define which account compatibility template should be assigned to each account
- In the template, the following four account attributes are prioritized:

	<u>Example:</u>	<u>Ranking:</u>
Account Category	Business	1 st
Market Code	(null)	3 rd
Regulatory ID	(null)	4 th
VIP Code	VIP 2	2 nd

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Account Compatibility Template Matching (2)

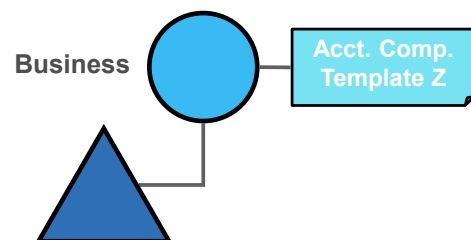
- A match is sought with the criterion that has the highest priority

Comverse ONE looks at the highest priority attribute (Account Category)...

...and attempts to match that value (Business) to the new account. If it's a match, that template is associated with the account.

Acct. Comp. Template Z:

1st: Account Category = Business
2nd: VIP Code = VIP 2
3rd: Market Code (null)
4th: Regulatory ID (null)



- If a match cannot be found on the highest priority attribute, it moves on to the second criterion, and so forth
- One compatibility template is marked as the default, and is used when a match is not found

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Account Compatibility Template Screens

The image displays two overlapping software screens. The top screen, titled "Account Compatibility Template", features a blue header bar with a checkmark icon and a lock icon. Below the header, there are several input fields: "Name*" (containing "Residential Accounts Only"), "Description", "Short Display", and "Language" (a dropdown menu set to "English" with an "Add/Remove" button). To the right, there are "Keywords" sections with a prompt "Type or choose from list of standard keywords" and a "Keywords" list. A yellow box labeled "Residential Accounts Only" is highlighted, with an arrow pointing to a box labeled "Offers and Bundles". The bottom screen, titled "Account Compatibility Template Default Configuration", has a blue header bar with a checkmark icon and a lock icon. It contains a section titled "Order or Importance for account matching and selection:" with five dropdown menus: "1st" (Account Category), "2nd" (Regulatory ID), "3rd" (VIP Code), "4th" (Market Code), and "Default Template*" (Default).

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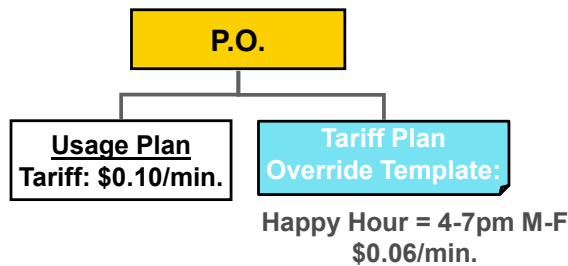
Tariff Plan Override Template



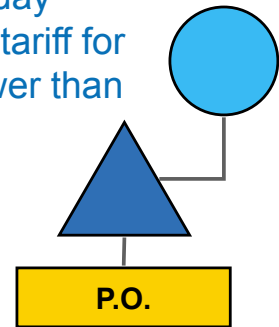
Tariff Plan Override Template (1)

- Defines specific conditions under which a provisioned tariff plan is overridden

When this primary offer is associated with a subscriber...



...from 4-7pm Monday through Friday, the tariff for certain usage is lower than normal



- Tariff plan override templates can be added to primary offers, supplementary offers, and subscriber bundles

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Tariff Plan Override Template (2)

- Conditions involve these account/subscriber attributes:
 - Home Zone
 - Longevity
 - Birthday
 - Anniversary
 - Happy Hour
 - Favorite Area
 - Balance
 - Dialed Number Prefix

Note: Once a tariff plan is derived using an override template, the tariff plan continues for the activity duration (the condition is never rechecked). For example, a happy hour call can continue to be free indefinitely, if otherwise allowed.

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Tariff Plan Override Components

- The override template consists of two parts:
 - **Tariff plan override condition** – Use to define the rules that govern when the override takes place
 - **Tariff plan override template** – Specify the initial tariff plan and the tariff plan that overrides it; associate the override condition

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Tariff Plan Override Condition

- Create an expression that defines the override rules

The image shows two screenshots of a software interface. The top screenshot is the 'Tariff Plan Override Condition' dialog box. It has a blue header bar with a title and three icons. Below the header, there are several fields: 'Name*' (containing 'ks Birthday Condition'), 'Description', 'Short Display', 'Language' (a dropdown menu set to 'English'), 'Priority*' (a text box containing '1'), and 'Is Default' (a checkbox). There are also buttons for 'Add Expression Group' and 'Add Expression'. A text box at the bottom contains the expression '((Birthday = 'true'))'. The bottom screenshot is the 'Add Expression' dialog box. It has a blue header bar with a title and a close button. Below the header, there is a 'Field= 'Value '' dropdown menu, a 'Segmentation Attribute' dropdown menu (set to 'Birthday'), an equals sign, a dropdown menu (set to 'true'), and a text box containing 'true' and 'false'. There are numbered callouts 1 through 6 pointing to various elements in both screenshots. Callout 1 points to the 'Add Expression Group' button. Callout 2 points to the 'Creating Expression Template' text. Callout 3 points to the 'Add Expression' button. Callout 4 points to the 'Segmentation Attribute' dropdown. Callout 5 points to the 'Priority*' text box. Callout 6 points to the 'Is Default' checkbox.

click on (<Empty>)

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Tariff Plan Override Template

- Specify:
 - Initial tariff plan
 - Overriding tariff plan
 - Override condition

The screenshot displays the 'Tariff Plan Override Template' application window (Version 3.0). The main form includes fields for 'Name*' (containing 'ks Free Calls on Birthday'), 'Description', 'Short Display', 'Language' (set to 'English'), and an 'Is Default' checkbox. A 'Keywords' section on the right has a dropdown for 'Type or choose list of standard keywords' and a text area for 'Keywords'. Below these is a table with columns: 'Init Tariff', 'Final Tariff', 'Expression Template', and 'Priority'. The table contains one row: 'ks TP Voice Peak \$0.61/min and TP Voice Offpeak \$0.51/min', 'TP Voice 24x7 \$0.00/min', 'ks Birthday Condition', and '1'. An 'Add/Remove' button is next to the table. An 'Edit Override Rule' dialog box is open in the foreground, showing fields for 'Initial Tariff Plan*' (selected as 'ks TP Voice Peak \$0.61/min and TP Voice ...'), 'Final Tariff Plan*' (selected as 'TP Voice 24x7 \$0.00/min'), 'Expression Template Id*' (selected as 'ks Birthday Condition'), and 'Priority*' (set to '1').

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Tariff Plan Override Template Examples

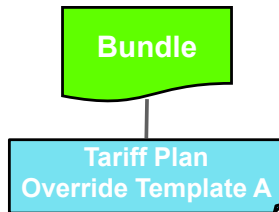
- SMSs sent on the subscriber's anniversary with the provider are only \$0.02 each
- Subscribers who have \$50 or over in their core balance enjoy 5% discount on data downloads
- Calls from the subscriber's home zone are half price

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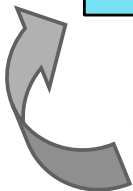
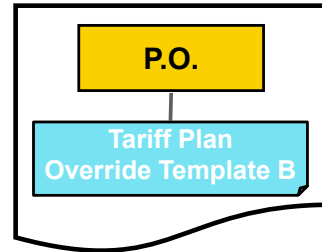
Tariff Plan Override Templates and Bundles

- Bundle-level Tariff Plan Override Templates are evaluated first, then any Offer-level Templates

If this bundle contains a tariff plan override template...



And the bundle also contains a mandatory offer with its own tariff plan override template...



...then the template at the *bundle-level* is applied first

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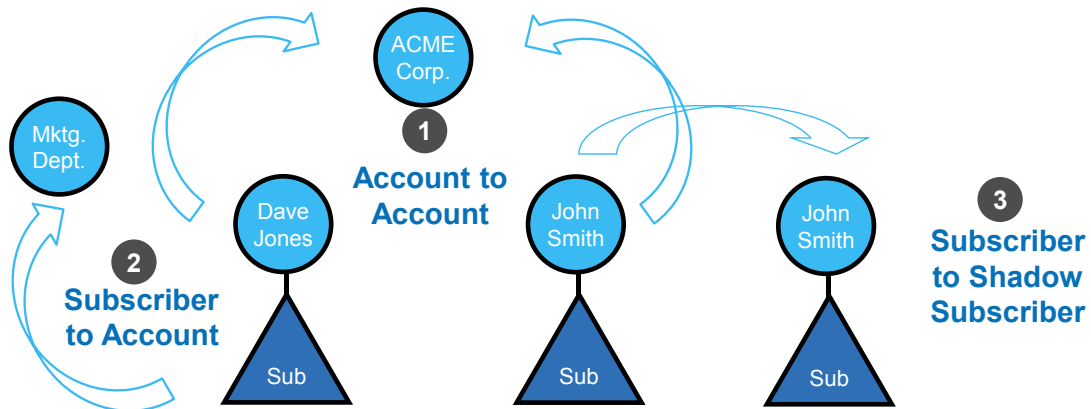
Liability Redirection Template



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Review of Liability Redirection (LR)

- There are 3 types of liability redirection



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Liability Redirection Example

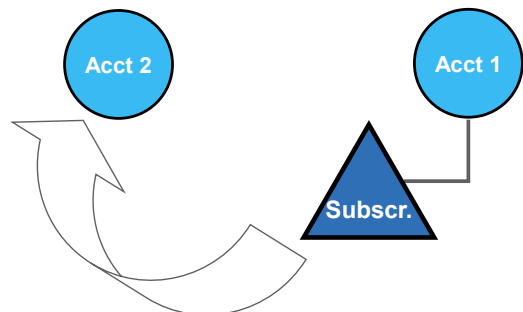
When this LR template is instantiated in Customer Center...

Liability Redirection Template X:

On weekends:

- Calls from Brazil to Peru
- Calls from Peru to Brazil

...when usage of this type occurs, the charge for it is transferred as specified in the redirection instantiation



In this example, during the weekends, liability for calls from Brazil to Peru and from Peru to Brazil for this subscriber of Account 1 are directed to Account 2.

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Liability Redirection (LR) Template

LR templates facilitate the work of CSRs to define which charges are redirected and when

Comverse Converged Billing Suite

Liability Transfer (Locate Source)

Select a Transfer Mode

☒ Transfer Liability from a Subscriber ☐ Transfer Liability from an Account

☐ Rated by Target/Limited Liability

Warning: Charges redirected to this account will be rejected unless the account owns a balance eligible to authorize them.

Choose a Source Subscriber

Identifier:

Identifier Type:

First Name:

Last Name:

Current Account Only: ☐

Current Hierarchical Only: ☐

Account	Subscriber	Subscriber Type	Name	Address
1116	6680002282	TURC_VOICE_PO_31	a276	Cambridge, MA United
1119	6680002283	TURC_VOICE_PO_31	a277	Cambridge, MA United
1124	6660001316	TURC_VOICE_PO_14	a187	Cambridge, MA United
1126	6660001317	TURC_VOICE_PO_14	a188	Cambridge, MA United

Liability Transfer screen in *Customer Center*

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LR Template Components

- Consists of two parts:
 - One or more **liability redirection rules** – Define the set of charges to be redirected*
 - A **redirection template** – Associates a calendar and priority for each rule, and associates the rule(s) with a suggested primary offer**

* LR template rules can be overridden at the time the template is selected in Customer Center

** The primary offer suggested in the LR template can be replaced by the CSR when setting up the associated shadow subscriber

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Liability Redirection Rule (1)

- Define the set of charges to be redirected
- All charges of a designated type can be redirected:
 - RC Terms
 - NRC Terms
 - Activity Usage Types (AUTs)

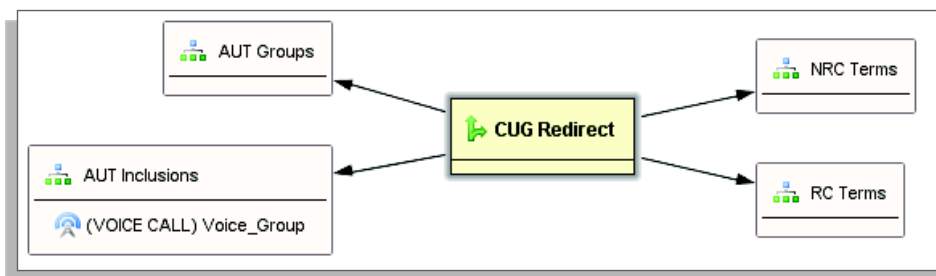
or...

The screenshot shows a software window titled "Redirection Rules". It contains several input fields: "Name*" with the value "All Usage Charges", "Description", "Short Display", and "Language" set to "English". There is an "Is Default" checkbox which is unchecked. Below these fields are three checkboxes: "All Auts Included" (checked), "All RC Terms Included" (unchecked), and "All NRC Terms Included" (unchecked). An "Add/Remove" button with a pencil icon is located to the right of the checkboxes.

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Liability Redirection Rule (2)

- Or you can limit the redirection to *particular* charges (for example, only a particular usage type)

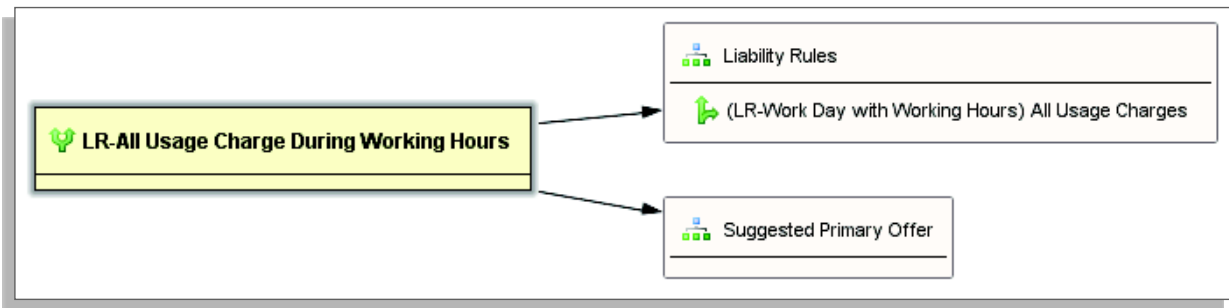


- A rule can only contain charges from *one* charge type. To redirect other charges, create additional rules

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Liability Redirection Template

- Provides several functions:
 - Defines a collection of one or more redirection rules
 - Associates a Calendar and Priority for each rule
 - Allows you to suggest a primary offer to which this template applies

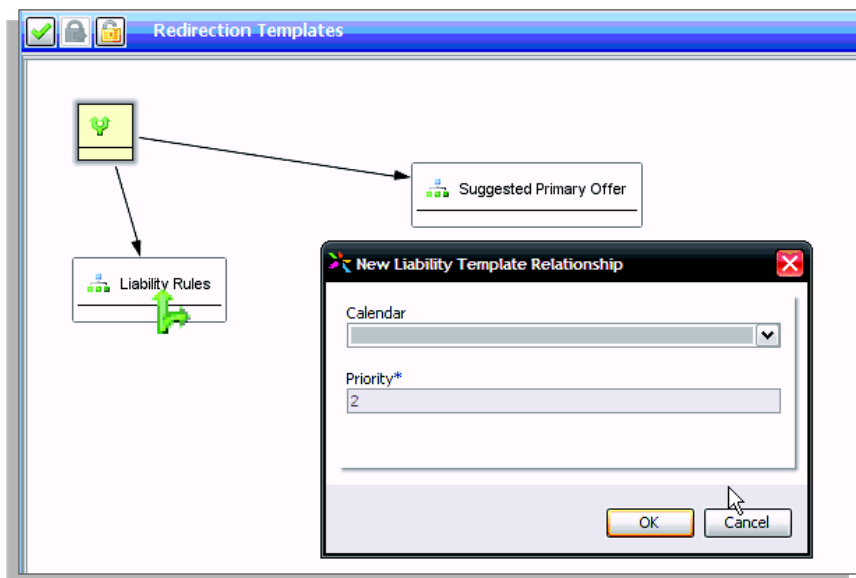


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LR Calendar

- When a rule is associated with a template, a Calendar* and Priority are designated

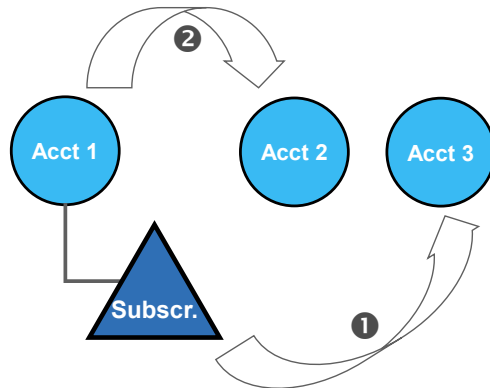
* When calendars are configured in Product Catalog, they are defined as pertaining to either tariffs or liability redirection



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LR Priority

- At event time, it's possible for more than one LR instantiation to apply. So the LR template defines the priority in which the rules are applied



- For example: Account 1 redirects charges to Account 2, but a subscriber on Account 1 redirects **its** charges to Account 3

- The priority for the rule is set to indicate which is the most important dimension in this LR template: Source Subscriber

The screenshot shows a window titled "Priorities of Liability Redirection Dimensions". It contains several dropdown menus for different dimensions. The "Source Subscriber" dropdown is highlighted with a red circle and is set to the value "1". The other dimensions are set to the following values: Account (3), Target Subscriber (4), B-Number (7), Calendar (2), Charge Type (5), and Charge Term Id (6).

Dimension	Value
Account	3
Source Subscriber	1
Target Subscriber	4
B-Number	7
Calendar	2
Charge Type	5
Charge Term Id	6

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LR Template Examples

- Redirect all charges for all times
 - Create 3 rules (one for each charge type)
 - Create a calendar for all day types (every day of the week, midnight-to-midnight)
 - Associate with an LR template
 - Instantiate the LRT to the account or subscriber
- Professional vs. personal use (redirect usage during business hours, Monday-Friday). Requires:
 - One rule: All AUTs Included
 - A calendar for the working hours

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LR Instantiation

- When setting up liability redirection in Customer Center, the CSR must be in the account that is accepting liability
- The CSR selects a LR Template to associate with the account or subscriber
- The source and target do not have to be in a hierarchy
- As mentioned earlier, the CSR can override the rules and calendars in the template

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Summary

- Account compatibility template – Lists the recommended account bundles and account offers that can be sold to the associated account , and defines the priority order of application for specific data elements
- Subscriber compatibility template – Defines recommended supplementary offers that can be sold with the associated primary offer, and defines the priority order of application for specific data elements
- Tariff plan override template – Defines specific conditions under which a provisioned tariff plan is overridden
- Liability redirection template – Facilitates the work of CSRs to define the charge redirections for customers

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