

CRM Training Module



আইফ এখন বিশ্বালি রঙিন...

Start



Every representative will receive individual password and ID

CRM
COM

Enter ID and password

Callagent

.....

BEXIMCO

▼

Internal Community / Beximco Group / Call Center Team Leaders Unit

Click on go

GO

Search customer

This screenshot shows the top section of the application. At the top right are links for HELP, CONTACT US, ACCOUNT, and SWITCH UNIT. Below these is a search bar with a dropdown menu currently open, listing various search criteria: Subscription Alternative Code, ID Number, Phone, Postal Code, Company Name, Subscription, Subscription Item Serial Number, Account Number, Bill Number, and Full Name. To the left of the search bar is an "ACTION PANEL" with an information icon and the text "Search for an actions below". A pink dashed line connects the search bar area to a callout box on the right.

Type and press enter

Next page

This screenshot shows the customer profile page for "Antonis Papageorgiou (Test Notification 11)". The page is divided into several sections: "CONTACT INFORMATION" on the left with a photo placeholder and "Add Image" link; a central section with fields for Name, Type, Title, ID Number, and Social Security Number; and a right-hand section with expandable lists for Addresses, Phones, Emails, Accounts Receivable, and Non Completed Activities. At the bottom, there is a row of tabs: SUBSCRIPTION, FINANCIALS, JOBS, SERVICE REQUESTS, CUSTOMER MANAGEMENT, and REWARDS. A pink dashed line connects the "ADD MORE INFORMATION" link to a callout box on the right.

Select criteria(i.e ID, Name)

Click here to see information

subscription



- LOG PERSON INFORMATION
- CREATE NEW ACCOUNTS RECEIVABLE
- PAY A BILL
- SCHEDULE AN ACTIVITY
- RAISE A SERVICE REQUEST
- LOG COMPANY INFORMATION
- BECOME SUBSCRIBER
- USE VOUCHER
- CREATE A COMMUNICATION
- TAKE A LEAD

SUBSCRIPTION

FINANCIALS

JOBS

SERVICE REQUESTS

CUSTOMER MANAGEMENT

REWARDS

S00000155

Need to click on the subscription number to see history

S00000155

S00000155

Type: Prepaid Life Cycle State: Not Effective

MANAGE SUBSCRIPTION

VIEW SUBSCRIPTION HISTORY

Billing Terms

Billing Term Scheme	Version	Effective From	Effective To	Price Plan	Billing Frequency	Binding Period	Binding Start	Binding End	Concurrent Usage	Concurrent Usage Rate Percentage	Agreement Date
Prepaid Term Scheme	1	03/03/2016		Base Price Plan							03/03/2016

1-1 of 1

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	03/03/2016	04/03/2016	Not Effective	VIEW

Subscription history will help us to find each and every information of a subscriber

Click to manage subscription to see customer's detail information

Click to view history

Manage and View subscription history



OPTIONS ACTIONS

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

The subscriber's contact information.

Type

Person

Gender

Title

First Name

Antonis

Last Name

Papageorgiou (Test Notification 11)

ID Number

Passport Number

Social Sec. No.

Category

VIEW MORE INFORMATION

NEXT

ACTION PANEL

Subscription Service Related Actions

Subscription-Installed Item Related Actions

Subscription Related Actions

VIEW HISTORY

VIEW ALLOWED ACTIONS

This window will appear after clicking manage subscription

By clicking next all the pages can be viewed

This window will appear after clicking view subscription history

SUBSCRIPTION HISTORY	SERVICES HISTORY	INSTALLED ITEMS HISTORY	PROVISIONING DISTRIBUTION HISTORY	SUBSCRIPTION ACTIONS HISTORY
BILLING TERMS	ADHOC DISCOUNTS	BUY IN ADVANCE REQUESTS	GRACE PERIODS	RESTING PERIODS
LIFE CYCLE STATE HISTORY				
View the complete subscription life cycle state history.				
Life Cycle State	Started On	Ended On	Started by Subscription Action	Ended by Subscription Action
Not Effective	04/03/2016		438	
Effective	03/03/2016	04/03/2016	431	438
Draft	03/03/2016	03/03/2016		431

Other pages can be viewed by clicking these options

financial and job history



SUBSCRIPTIONFINANCIALSJOBSERVICE REQUESTSCUSTOMER MANAGEMENTREWARDS

FA000161FA000188FA000186

FA000161

MANAGE ACCOUNT

Bills

Number	Status	Life Cycle State	Total Billed Amount	Total Amount To Be Paid	Bill Information	Bill Items	Communications
No Records Found.							

Financial Transactions

Number	Reference Number	Type	Life Cycle State	Cancelled By	Issue Date	Posted Date	Due Date	Total Amount	Items	Paid/Credited Invoices	Paid Bills	Communications
No Records Found.												

Payments

Number	Reference Number	Type	Life Cycle State	Cancelled By	Issue Date	Posted Date	Due Date	Total Amount	Items	Paid/Credited Invoices	Paid Bills	Communications
--------	------------------	------	------------------	--------------	------------	-------------	----------	--------------	-------	------------------------	------------	----------------

Financial history can be viewed by clicking on financials

SUBSCRIPTIONFINANCIALSJOBSERVICE REQUESTSCUSTOMER MANAGEMENTREWARDS

NON COMPLETEDCOMPLETED

Number	Account Number	Type	Status	Life Cycle State	Start Date	Expected Completion Date	Actual Completed Date	Assigned to	Subscription	Job Information	Billing Information
No Records Found.											

Click on jobs to view details about completed and incomplete jobs regarding device

service requests



SUBSCRIPTIONFINANCIALSJOBSSERVICE REQUESTSCUSTOMER MANAGEMENTREWARDS

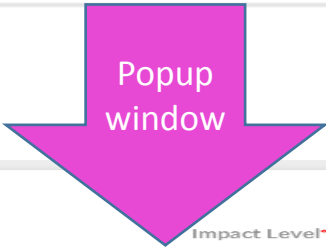
click on service requests to see customer requests

NON COMPLETED

COMPLETED

Number	Account Number	Type	Status	Life Cycle State	Priority Level	Impact Level	Urgency Level	Assigned To	Related Entity	Start Date	Expected Completion Date	Actual Completion Date	Service Request Information	
7	FA000161	Faulty STB	Responded	Responded	1	Impact 1	Urgency 1	superuser		05/03/2016	06/03/2016		View	▼
8	FA000161	Faulty STB	Pending	Pending	1	Impact 1	Urgency 1	superuser		05/03/2016	06/03/2016		View	▼

Click here to see details



Popup window

OPTIONS SAVE CANCEL

CUSTOMER INFORMATION

SERVICE REQUEST TERMS

AFFECTED PRODUCTS

RELATED SERVICE REQUESTS

RESPONSE

RESOLUTION

ACTIVITIES

COMMUNICATIONS

KEY DATES & ASSIGNMENTS

ATTACHMENTS

LOG INFORMATION

Type

Faulty STB

Status

Final Resolved

Life Cycle State

Final Resolved

Related Entities

Job

Type to Search

Subscription

Type to Search

Category

Information

Classification

Information

Impact Level

Impact 1

Urgency Level

Urgency 1

Priority Level

1

BACK

NEXT

Click next to go to next pages and at last click on save

customer management



SUBSCRIPTION

FINANCIALS

JOBS

SERVICE REQUESTS

CUSTOMER MANAGEMENT

REWARDS

ACTIVITIES

COMMUNICATIONS

NOTIFICATIONS

LEADS

Number	Life Cycle State	Contact Information	Direction	Media	Subject	Date Created	Referring To	Follow Up Communication	Communication Queue	
CM01278	Completed	tasneen lodhi	Outgoing	SMS	Account Balance	05/03/2016	Referring To	Follow Up Communication	Communication Queue	
CM01193	Completed	tasneen lodhi	Outgoing	Email	account not settled	05/03/2016	Referring To	Follow Up Communication	Communication Queue	

Click on customer management to view communication

Clicking this number will bring the next window

OPTIONS

SAVE

SAVE AS DRAFT

MAIN INFORMATION

REFERRING TO

COMMUNICATION QUEUE

ATTACHMENTS

LOG INFORMATION

Create a communication by specifying the related contact. The communication cannot be modified once it is created unless draft. Specify the media that the communication is going to be sent with (defined in the communication definition settings)

Contact

tasneen lodhi

VIEW MORE INFORMATION

Direction*

Outgoing

Category

Type to Search

Life Cycle State

Draft

Communication Template

Media*

SMS

From

CRM

To

008801678665041

FIND

Content *

Your Account Balance is 0.00

Anything that needed to be communicated with the customer can be typed here and can be sent to customer by clicking save

This module is used to create customer's primary account

Log Person Information



CONTACT INFORMATION

⚙️ OPTIONS 💾 SAVE

MAIN INFORMATION

ADDRESSES

PHONES

EMAILS

DEMOGRAPHICS

RELATIONS

ATTACHMENTS

LOG INFORMATION

Gender

Title

First Name*

Middle Name

Last Name*

Photo

Add Image

NEXT ➡

Fill out customer's information

Add image

go through other pages by clicking next

⚙️ OPTIONS 💾 SAVE

MAIN INFORMATION

ADDRESSES

PHONES

EMAILS

DEMOGRAPHICS

RELATIONS

ATTACHMENTS

LOG INFORMATION

Owned By Group

Beximco Group

Privacy Level

Category

Type to Search

Log Details

Created By User	Created By Unit	Date Created
callagent	Call Center Team Leaders Unit	28/03/2016 13:42:32
Updated By User	Updated By Unit	Date Updated

Shared Notes

VIEW

Life Cycle State

Marketing

Go to log information and select owner and category

Click save

Become a subscriber




Change Image | Remove

Mashrafe Mortaza

Type	Title
Person	Md.
ID Number	Social Security Number
12345	

ADD MORE INFORMATION

LOG PERSON INFORMATION

CREATE NEW ACCOUNTS RECEIVABLE

PAY A BILL

SCHEDULE AN ACTIVITY

RAISE A SERVICE REQUEST

LOG COMPANY INFORMATION

BECOME SUBSCRIBER

USE VOUCHER

CREATE A COMMUNICATION

TAKE A LEAD

SUBSCRIPTION

FINANCIALS

JOBS

SERVICE REQUESTS

CUSTOMER MANAGEMENT

REWARDS

Click on become subscriber

New window

This module is used to select package and price plan

Subscription

OPTIONS CANCEL

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

SUBSCRIPTION ADDRESS

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

Specify the contact information who the subscription is for. Simply select an existing contact or create a new one.

Type	
Person	
Gender	
Male	
First Name	
Mashrafe	
ID Number	
12345	
Social Sec. No.	

MODIFY INFORMATION

START OVER AGAIN

Title	
Md.	
Last Name	
Mortaza	
Passport Number	
1234567890	
Category	

NEXT

To modify information click here



Become a subscriber (continued)

Go to subscription terms

CONTACT INFORMATION
ACCOUNT INFORMATION
BILLING ADDRESS
SUBSCRIPTION ADDRESS
SUBSCRIPTION TERMS
SERVICES & INSTALLED ITEMS

Type

Billing Term Scheme

Price Plan

Agreement Date

[VIEW PRICE PLAN RATES](#)

[BACK](#) [NEXT](#)

Select type and price plan of the package

Go to services and installed item

CONTACT INFORMATION
ACCOUNT INFORMATION
BILLING ADDRESS
SUBSCRIPTION ADDRESS
SUBSCRIPTION TERMS
SERVICES & INSTALLED ITEMS

Distributor
☒ EXSET MAIN ☐ EXSET TWIN1 ☐ EXSET TWIN2

Mandatory Services

Service	Distributor	Components
<input checked="" type="checkbox"/> S002 (Main Package)	ExSet Main	

Optional Services

Installed Items

[ADD](#) [REMOVE](#)

Physical Good	Serial No.	Distributor	Enabled	Components
<input checked="" type="checkbox"/> ACTV-6000	40111113113999	ExSet Main	<input checked="" type="checkbox"/>	

Subscription Services to Be Added

Service	Distributor	Components
S002 (Main Package)	ExSet Main	

Subscription Installed Items to Be Added

Physical Good	Serial No.	Distributor	Components
ACTV-6000	40111113113999	ExSet Main	

Subscription Action Details

Performed By User:

Performed Date:

[SUBMIT AS DRAFT](#) [SUBMIT](#)

Select distributor, service and physical good

Click on submit to save the changes



Create new accounts receivable

New accounts receivable needs to be created to manage the money the company will receive from its customer

⚡ LOG PERSON INFORMATION

⚡ CREATE NEW ACCOUNTS RECEIVABLE

⚡ PAY A BILL

⚡ SCHEDULE AN ACTIVITY

⚡ RAISE A SERVICE REQUEST

ID Number

12345

ADD MORE INFORMATION

⚡ LOG COMPANY INFORMATION

⚡ BECOME SUBSCRIBER

⚡ USE VOUCHER

⚡ CREATE A COMMUNICATION

⚡ TAKE A LEAD

Click on create new accounts receivable

New window

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

PAYMENT PREFERENCES

PRESENTMENT PREFERENCES

CREDIT TERMS

ACCESS TOKENS

ATTACHMENTS

LOG INFORMATION



Type

Person

Title

Md.

Last Name

Mortaza

Passport Number

1234567890

Category

Gender

Male

First Name

Mashrafe

ID Number

12345

Social Security Number

MODIFY CONTACT INFORMATION

Go to account information

Create new accounts receivable(continued)



CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

PAYMENT PREFERENCES

PRESENTMENT PREFERENCES

CREDIT TERMS

ACCESS TOKENS

ATTACHMENTS

LOG INFORMATION

i Specify the account characteristics, such as name, classification, type etc. Accounts receivable type cannot be modified once the account is saved.

Name

Type

Description

Customer Account

Classification

Primary Account

Standard Customer

No

VIP Customer

Standard Customer

Employee

Black Listed

VIEW

Select customer class

Go to payment preferences

New window

⚙ OPTIONS **PRINTOUTS** **💾** SAVE

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

PAYMENT PREFERENCES

i

☐ CREDIT CARD

☐ ATM

☒ VOUCHER PAYMENT

☐ FLEXI TV

☐ MOBILE MONEY

☐ CHEQUE

☐ BANK TRANSFER

☐ AUTO DEBIT

Notes

Select payment mode

Create new accounts receivable(continued)



⚙️ OPTIONS PRINTOUTS 💾 SAVE

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

PAYMENT PREFERENCES

PRESENTMENT PREFERENCES

ⓘ

⊕ ADD ⊗ REMOVE

	Presentment Method	Active
<input type="checkbox"/>	<div>SMS</div> <div>Email</div> <div>SMS</div>	<input type="checkbox"/>
	<div>NEW</div>	

Go to presentment preferences to select mode by which customer prefers to get notification

Select from list

Go to attachments

⚙️ OPTIONS PRINTOUTS 💾 SAVE

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESS

PAYMENT PREFERENCES

PRESENTMENT PREFERENCES

CREDIT TERMS

ACCESS TOKENS

ATTACHMENTS

⊕ ADD ⊗ REMOVE

Attachment
UPLOAD FILE
URL

Upload file if necessary

Click save

If customer needs any service done then this module is used to schedule the activity

Schedule an activity



Name
Mashrafe Mortaza

Type Title
Person Md.

ID Number Social Security Number
12345

ADD MORE INFORMATION

- LOG PERSON INFORMATION
- CREATE NEW ACCOUNTS RECEIVABLE
- PAY A BILL
- SCHEDULE AN ACTIVITY
- RAISE A SERVICE REQUEST

- LOG COMPANY INFORMATION
- BECOME SUBSCRIBER
- USE VOUCHER
- CREATE A COMMUNICATION
- TAKE A LEAD

Click on schedule an activity

OPTIONS SAVE

CONTACT INFORMATION

ACTIVITY CHARACTERISTICS

SERVICES TO BE PROVIDED

KEY DATES & ASSIGNMENT

ATTACHMENTS

LOG INFORMATION



Type
☒ PERSON ☐ COMPANY

Title

Md

Last Name

Mortaza

Passport Number

1234567890

ADD MORE INFORMATION

Gender

Male

First Name

Mashrafe

ID Number

12345

Social Security Number

Popup window



Schedule an activity(continued)

⚙️ OPTIONS 💾 SAVE

CONTACT INFORMATION

ACTIVITY CHARACTERISTICS

SERVICES TO BE PROVIDED

KEY DATES & ASSIGNMENT

ATTACHMENTS

LOG INFORMATION

i

Type*

Repair Activity

Repair Activity
Installation

Category

🔍 Type to Search

Status

In Progress

Life Cycle State

In Progress

Subscription

🔍 Type to Search

Job

🔍 Type to Search

Service Request

🔍 Type to Search

Lead

🔍 Type to Search

Description

Go to activity characteristics

Select activity type

⚙️ OPTIONS 💾 SAVE

CONTACT INFORMATION

ACTIVITY CHARACTERISTICS

SERVICES TO BE PROVIDED

i

⊕ ADD ⊖ REMOVE

	Product	Time Spend	Resource Request	Resource Requested
No Records Listed				

Go to services to be provided

Click add for service to be provided

Schedule an activity(continued)



Search By

Criteria	Value
Product Code	Begins With
Product Type	Equals
Product Family	Equals
Product Brand	Equals

CLEAR SEARCH

1 record found

Product Code	Product Brand	Alternative Code	Description
F001 (Installation Fee)		F001	Installation Fee

SELECT

Type % and search

Select the product

Click select

Click on save

Go to key dates and assignment

Fill up the necessary criteria's

OPTIONS SAVE

CONTACT INFORMATION

ACTIVITY CHARACTERISTICS

SERVICES TO BE PROVIDED

KEY DATES & ASSIGNMENT

ATTACHMENTS

LOG INFORMATION

Key Dates

Start Date* 08/03/2016 13:46:19

Estimated Completion Time* 2,00 Minutes

Expected Completion Date 08/03/2016 13:48:19

Assigned To

Unit IT Support Unit

User Type to Search

Time To Completion 49,00 Seconds

Time Overdue

Actual Completion Date

If customer's device
need any work done
.then service request
is raised

Raise a Service request



Name
Mashrafe Mortaza

Type Title
Person Md.

ID Number Social Security Number
/86

Addresses

Phones

Emails

Accounts Receivable

Non Completed Activities

[ADD MORE INFORMATION](#)

[LOG PERSON INFORMATION](#)

[CREATE NEW ACCOUNTS RECEIVABLE](#)

[PAY A BILL](#)

[SCHEDULE AN ACTIVITY](#)

[RAISE A SERVICE REQUEST](#)

[LOG COMPANY INFORMATION](#)

[BECOME SUBSCRIBER](#)

[USE VOUCHER](#)

[CREATE A COMMUNICATION](#)

[TAKE A LEAD](#)

Click on raise a service
request

[OPTIONS](#) [SAVE](#) [CANCEL](#)

New
window

CUSTOMER INFORMATION

[SERVICE REQUEST TERMS](#)

[AFFECTED PRODUCTS](#)

[RELATED SERVICE REQUESTS](#)

[KEY DATES & ASSIGNMENTS](#)

[ATTACHMENTS](#)

[LOG INFORMATION](#)



Accounts Receivable

FA000198

FA000198

Account Owner

Mashrafe Mortaza

Caller Contact

Account Owner - Mashrafe Mortaza

Caller Email

mashrafemortaza@yahoo.com

[FIND](#)

Description

[VIEW](#)

Select account receivable

Raise a Service request (continued)

Go to service request terms

⚙️ OPTIONS 💾 SAVE 🚫 CANCEL

- CUSTOMER INFORMATION
- SERVICE REQUEST TERMS**
- AFFECTED PRODUCTS
- RELATED SERVICE REQUESTS
- KEY DATES & ASSIGNMENTS
- ATTACHMENTS
- LOG INFORMATION

Type*
Faulty STB

Category*
Information

Impact Level*
Impact 1

Status
Pending

Classification
Information

Urgency Level*
Urgency 1

Life Cycle State
Pending

Priority Level
1

Related Entities

Job
Type to Search

Subscription
Type to Search

Select device

Select status

Select impact and urgency level

Go to key dates & assignments

⚙️ OPTIONS 💾 SAVE 🚫 CANCEL

- CUSTOMER INFORMATION
- SERVICE REQUEST TERMS
- AFFECTED PRODUCTS
- RELATED SERVICE REQUESTS
- KEY DATES & ASSIGNMENTS**
- ATTACHMENTS
- LOG INFORMATION

Key Dates

Start Date*
08/03/2016 15:02:40

Time To Completion
50,95

Minutes

Estimated Completion Time*
1,00

Hours

Expected Completion Date
08/03/2016 16:02:40

Actual Completion Date

Assigned To

Unit
IT Support Unit

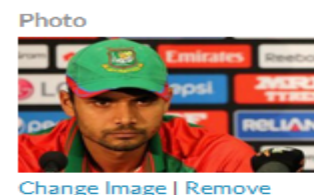
User

Select time

Click save

When subscriber can't recharge through voucher this module is used to make payment on behalf of them using those voucher numbers.

Use voucher



Name
Mashrafe Mortaza

Type Title
Person Md.

ID Number Social Security Number
786

Addresses

Phones

Emails

Accounts Receivable

Non Completed Activities

[ADD MORE INFORMATION](#)

[LOG PERSON INFORMATION](#)

[CREATE NEW ACCOUNTS RECEIVABLE](#)

[PAY A BILL](#)

[SCHEDULE AN ACTIVITY](#)

[LOG COMPANY INFORMATION](#)

[BECOME SUBSCRIBER](#)

[USE VOUCHER](#)

[CREATE A COMMUNICATION](#)

Click on use voucher

[OPTIONS](#) [SUBMIT](#)

Popup window

Type voucher secret number

Select account receivable

Click on submit



Voucher Secret Number

6038039075073823

Accounts Receivable

FA000198

Payment Category



Type to Search

Notes

Start service module is used whenever anyone wants to start the service.

Start service



SUBSCRIPTION

FINANCIALS

JOBS

SERVICE REQUESTS

CUSTOMER MANAGEMENT

REWARDS

S00000185

S00000185

Type: Prepaid Life Cycle State: Not Effective

MANAGE SUBSCRIPTION

VIEW SUBSCRIPTION HISTORY

Billing Terms

Billing Term Scheme	Version	Effective From	Effective To	Price Plan	Billing Frequency	Binding Period	Binding Start	Binding End	Concurrent Usage	Concurrent Usage Rate Percentage	Agreement Date
Prepaid Term Scheme	1	08/03/2016		Base Price Plan							08/03/2016

Click on manage subscriptions

CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

The subscriber's contact information.

Type
Person

Gender
Male

First Name
Mashrafe

ID Number
786

Social Sec. No.

Title
Md.

Last Name
Mortaza

Passport Number
1234567890

Category

VIEW MORE INFORMATION

ACTION PANEL

Subscription Service Related Actions

Subscription Installed Item Related Actions

Subscription Related Actions

VIEW HISTORY

VIEW ALL ACTIONS



New window

Go to services and installed items

Start service(continued)



ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	08/03/2016		Not Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	44111112613999	Rented to Customer	VIEW	N/A

Subscription Service Related Actions

- ADD SERVICES
- START SERVICES
- SWAP SERVICES
- REMOVE SERVICES
- STOP SERVICES
- ADD EXPENSE

Subscription Installed Item Related Actions

Subscription Related Actions

- VIEW HISTORY
- VIEW ALL ACTIONS

Select distributor

Click on start services

Apply On
☐ ALL SERVICES ☒ SPECIFIC SERVICES

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
<input checked="" type="checkbox"/> S002 (Main Package)	VIEW	N/A	08/03/2016		Not Effective

Optional Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
No Records Listed					

PREVIEW & ACTION PANEL

Subscription Services to Be Started

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
S002 (Main Package)	VIEW	N/A	08/03/2016		Not Effective

Subscription Action Details

Performed By User

Performed Date

Start Services
☒ NOW ☐ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

SUBMIT

Select package

Select Date

Click submit



Stop service

Go to services and installed items

CONTACT INFORMATION
ACCOUNT INFORMATION
BILLING ADDRESSES
SUBSCRIPTION ADDRESSES
SUBSCRIPTION TERMS
SERVICES & INSTALLED ITEMS
COMMUNICATIONS
LOG INFORMATION

Distributors						
<input type="radio"/> ANY <input checked="" type="radio"/> EXSET MAIN						
Mandatory Services						
Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	08/03/2016		Effective	VIEW
Optional Services						
Expense Services						
Subscription Installed Items						
Physical Good	Serial Number	Ownership Status	Distributors	Components		
ACTV-6000	44111112613999	Rented to Customer	VIEW	N/A		

Subscription Service Related Actions	
ADD SERVICES	REMOVE SERVICES
STOP SERVICES	SWAP SERVICES
ADD SERVICE USAGE	ADD EXPENSE
Subscription Installed Item Related Actions	
Subscription Related Actions	
VIEW HISTORY	VIEW ALL ACTIONS

Select distributor

Click on stop service

This module is used when any subscriber wants to stop the service

Apply On
☐ ALL SERVICES ☒ SPECIFIC SERVICES

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
<input checked="" type="checkbox"/> S002 (Main Package)	VIEW	N/A	08/03/2016		Effective

Optional Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
No Records Listed					

Subscription Services to Be Stopped

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State
S002 (Main Package)	VIEW	N/A	08/03/2016		Effective

Subscription Action Details

Performed By User	Performed Date
<input type="text" value="Type to Search"/>	<input type="text" value=""/>

Stop Services

☒ NOW ☐ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

Select package

Select submit

SUBMIT

Go to service and installed items

If any subscriber wants to get additional device this module is used to take a request.

Add installed items



CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	08/03/2016		Not Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	44111112613999	Rented to Customer	VIEW	N/A
ACTV-6000	63487347860	Rented to Customer	VIEW	N/A

ACTION PANEL

Subscription Service Related Actions

Subscription Installed Item Related Actions

[ADD INSTALLED ITEMS](#) [REMOVE INSTALLED ITEMS](#)

[SWAP INSTALLED ITEMS](#)

Subscription Related Actions

[VIEW HISTORY](#) [VIEW ALL ACTIONS](#)

Select distributor

Click on add installed items

Click on add

Add device

Select product

Select user and date

Click on submit

Distributor
☒ EXSET MAIN ☐ EXSET TWIN1 ☐ EXSET TWIN2

[ADD](#) [REMOVE](#)

	Physical Good	Serial No.	Distributor	Enabled	Components
<input checked="" type="checkbox"/>	ACTV-6000	<input type="text" value="63487347867"/>	ExSet Main	<input checked="" type="checkbox"/>	

PREVIEW & ACTION PANEL

Subscription Installed Items to Be Added

Physical Good	Serial No.	Distributor	Components
ACTV-6000	63487347867	ExSet Main	

Subscription Action Details

Performed By User Performed Date

[SUBMIT](#)

Go to services and installed items

If any subscriber wants to remove any installed item, this module is used to take request.

Remove installed items



CONTACT INFORMATION

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Num	Ship Status	Distributors	Components
ACTV-6000	4411111	Rented to Customer	VIEW	N/A

ACTION PANEL

Subscription Service Related Actions

Subscription Installed Item Related Actions

REMOVE INSTALLED ITEMS

Subscription Related Actions

[VIEW HISTORY](#) [VIEW ALL ACTIONS](#)

Select distributor

Click on remove installed items

Select remove installed items

Select device

Select user and date

Click submit

Classification
☒ REMOVE INSTALLED ITEM ☐ UNDO ADD INSTALLED ITEM

Apply On
☐ ALL INSTALLED ITEMS ☒ SPECIFIC INSTALLED ITEMS

Physical Good	Serial No.	Ownership Status	Distributors	Components
<input checked="" type="checkbox"/> ACTV-6000	44111112613999	Rented to Customer	VIEW	

PREVIEW & ACTION PANEL

Subscription Installed Items to Be Removed

Physical Good	Serial No.	Ownership Status	Distributors	Components
ACTV-6000	44111112613999		VIEW	

Subscription Action Details

Performed By User

Performed Date

SUBMIT



Swap installed items

Go to services & installed items

When subscriber wants to swap the device, this module is used to take request.

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	07/03/2016	08/03/2016	Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	200000004	Rented to Customer	VIEW	N/A

[BACK](#) [NEXT](#)

Subscription Service Related Actions

Subscription Installed Item Related Actions

[ADD INSTALLED ITEMS](#) [REMOVE INSTALLED ITEMS](#)

[SWAP INSTALLED ITEMS](#)

Subscription Related Actions

[VIEW HISTORY](#) [VIEW ALL ACTIONS](#)

Select distributor

Click on swap installed items

Select the item to swapped with

Select user and time

Click submit

Installed Items

Physical Good	Existing Installed Item Serial No.	New Installed Item Serial No.	New Installed Item Components	Distributors
<input checked="" type="checkbox"/> ACTV-6000	63487347869	<input type="text" value="63487347869"/>		VIEW

Installed Items Components

PREVIEW & ACTION PANEL

Subscription Installed Items to Be Swapped

Physical Good	Existing Installed Item Serial No.	New Installed Item Serial No.	Components	Distributors
ACTV-6000	63487347869	63487347860		VIEW

Subscription Action Details

Performed By User Performed Date

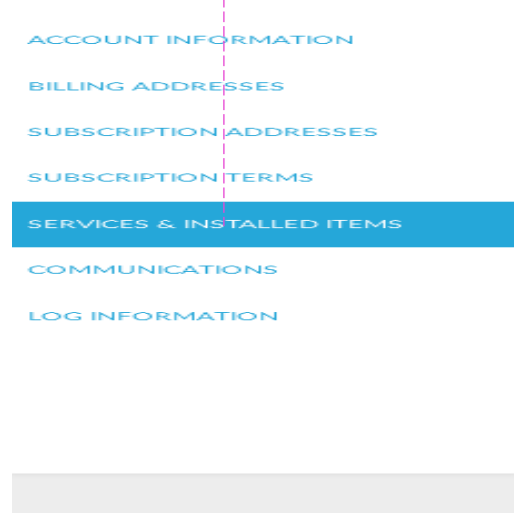
[SUBMIT](#)



Deactivate subscription

Go to services and installed items

this command is used when subscriber wants to deactivate service.



Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	07/03/2016	08/03/2016	Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	63487347860	Rented to Customer	VIEW	N/A



Select distributor

Select deactivate subscription

Select user and date

Click submit

PREVIEW & ACTION PANEL

Existing Subscription Services

Existing Subscription Installed Items

Unsettled Bills

Subscription Action Details

Performed By User Performed Date

Deactivate Subscription
☒ NOW ☐ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

[SUBMIT](#)

Go to services and installed items

If subscriber wants to rest subscription for a while this command is used then.

Rest subscription



ACCOUNT INFORMATION
BILLING ADDRESSES
SUBSCRIPTION ADDRESSES
SUBSCRIPTION TERMS
SERVICES & INSTALLED ITEMS
COMMUNICATIONS
LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	07/03/2016	08/03/2016	Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	63487347860	Rented to Customer	VIEW	N/A

Subscription Service Related Actions

Subscription Installed Item Related Actions

Subscription Related Actions

- ✦ DEACTIVATE SUBSCRIPTION
- ✦ SHORT TERM SUBSCRIPTION DEACTIVATION
- ✦ TERMINATE SUBSCRIPTION
- ✦ REST SUBSCRIPTION
- ✦ CHANGE SUBSCRIBER ACCOUNT
- ✦ BILL SUBSCRIBER
- ✦ AMEND BILLING TERMS
- ✦ CHANGE SUBSCRIPTION ADDRESS
- ✦ EXTEND GRACE PERIOD
- ✦ SUBMIT BUY IN ADVANCE REQUEST
- ✦ CHANGE SUBSCRIPTION DISTRIBUTION

[VIEW HISTORY](#)

[VIEW ALL ACTIONS](#)

Select distributor

Select rest subscription

Select user and date

Subscription Action Details

Performed By User

Performed Date

08/03/2016 18:53:46

Rest Subscription

☒ NOW ☐ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

End Resting

☒ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

Date

09/03/2016

Select time to start and stop rest

Click submit

SUBMIT

Go to services and installed items

When subscriber wants to activate subscription this module is used to take request.

Activate Subscription



Select distributor

Click on activate subscription

Select user and date

Click submit

ACCOUNT INFORMATION

BILLING ADDRESSES

SUBSCRIPTION ADDRESSES

SUBSCRIPTION TERMS

SERVICES & INSTALLED ITEMS

COMMUNICATIONS

LOG INFORMATION

Distributors
☐ ANY ☒ EXSET MAIN

Mandatory Services

Service	Distributors	Components	First Activated On	Rated up to	Life Cycle State	Life Cycle State History
S002 (Main Package)	VIEW	N/A	07/03/2016	08/03/2016	Not Effective	VIEW

Optional Services

Expense Services

Subscription Installed Items

Physical Good	Serial Number	Ownership Status	Distributors	Components
ACTV-6000	63487347860	Rented to Customer	VIEW	N/A

Subscription Service Related Actions

Subscription Installed Item Related Actions

Subscription Related Actions

ACTIVATE SUBSCRIPTION

TERMINATE SUBSCRIPTION

REST SUBSCRIPTION

SHORT TERM SUBSCRIPTION ACTIVATION

CHANGE SUBSCRIBER ACCOUNT

BILL SUBSCRIBER

AMEND BILLING TERMS

CHANGE SUBSCRIPTION ADDRESS

EXTEND GRACE PERIOD

SUBMIT BUY IN ADVANCE REQUEST

CHANGE SUBSCRIPTION DISTRIBUTION

VIEW HISTORY

VIEW ALL ACTIONS

Activate Subscription

OPTIONS

PREVIEW & ACTION PANEL

Existing Subscription Services

Existing Subscription Installed Items

Unsettled Bills

Subscription Action Details

Performed By User

superuser

Performed Date

08/03/2016 18:48:15

Activate Subscription

☒ NOW ☐ ON A SPECIFIC DATE ☐ AFTER A NUMBER OF DAYS

SUBMIT

