

**Functional Requirements Specification for**

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| ***Version*** | ***Date*** | ***Whom*** | ***Changes*** |
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Comverse Converged Billing Solution

**Confidential - Internal Use Only**

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# FRS Information

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## Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Rev. #** | **Date** | **Whom** | **Changes** |
| 0.1 | 12/14/09 | MP | First version copied from 3.2 version |
| 1.0 | 12/22/09 | MP | Version to base lined  Remove all use cases moved to specific DR |
| 1.1 | 01/05/10 | RG | Updated use cases (Referral management):  NCA0010 – New customer  NSA0010 – New customer for an existing customer  SUM0080 – Migrate from prepaid to postpaid  SUM0090 – Change primary offer and supplementary offers  RRM0010 - View list of requests in referral  RRM0020 – View details of request in referral  RRM0030 – Handle status of a request in referral  Updated use cases (Account and Subscriber dashboard):  BAM0010 – View and manage billing account  SUM0010 – View and manage subscriber  New requirements (Account and subscriber dashboard)  CHA-3.6.4.10.5.1  CHA-3.6.4.10.6  CHA-3.6.4.65.x  Removed requirements (Account and subscriber dashboard):  CHA-3.6.4.60.x  CHA-3.7.4.60.x |
| 2.0 | 02/05/2010 | RG | New use case:  SUM0155 – Modify subscriber supplementary offer  New requirements:  CHA-3.7.4.355  CHA-3.7.4.355.1 |
| 3.0 | 02/10/2010 | RG | Update use case:  [SUM0155 – Modify subscriber offer](#_Use_Case:_) |
|  |  |  |  |

## Acronyms and Definitions used in this document

### Acronyms

|  |  |
| --- | --- |
| **Acronym** | **Description** |
|  |  |
|  |  |

### Definitions

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Customer | A customer is a client of the service provider. In context of Comverse one billing, a customer is the root account of an account hierarchy. |
| Root billing account | A root billing account is a billing account with no parent billing account and is the only one having no parent within the same organization. |

### Mapping channel Self service-Comverse one terminology

Legacy terms used in Self service are renamed to be consistent with Comverse One vocabulary according to table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Comverse one** | **Channel Self service –**  **Former FRS terms** | **Channel Self service –**  **New FRS terms** | **Channel Self service –**  **Application labelling** |
| Billing Account | Billing Account | Billing Account | idem |
| Account Bundle | Account Bundle | Account Bundle | idem |
| Account Offer | Account Service | **Account Offer \* (new)** | Offer |
| Product Group for Dealer | Channel Catalog | **Product Group (new)** | idem |
| External id type | Line Role | External Id type | idem |
| External Id value | Line Value | External Id | idem |
| Plan | Feature | Plan | idem |
| Primary Offer | Plan | **Primary Offer (new)** | idem |
| N/A | Plan Element | Primary Offer | idem |
| N/A | Plan Series | **Offer Series (new)** | idem |
| Subscriber | Contract | **Subscriber (new)** | idem |
| Subscriber Bundle | Plan Bundle | **Subscriber Bundle (new)** | idem |
| Subscriber Supplementary Offer | Contract service | **Subscriber Supplementary Offer (new)** | Offer |
| Provisioning Items | Service Parameter | **Offer Parameter (new)** | Parameter |
| Service Category | Network Type | Service category | Idem |
| N/A | Service Option | **Offer Option (new)** | Offer Option |
| N/A | Bonus Group | Bonus Group | idem |
| N/A | Bonus Option | Bonus Option | idem |

## Issues

### Open Issues

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### Resolved Issues

[ISSUE # 1 (resolved): Is there any deposit notion associated to an offer in PC? 165](#_Toc234982485)

### Deferred Issues

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# Feature Description

This FRS defines all capabilities of Channel/CSR light solution scheduled in 2 phases, or 2 versions of Channel CSR/Light solution.

## Feature Overview

Channel/CSR light is a Web based solution covering two main goals:

* Allow dealers acquiring new customers/subscribers and managing existing ones.
* Provides to first level CSRs a Web interface providing capabilities similar to CSM (but not all) exposed more simply but less powerful.

This solution doesn’t intend to replace CSM.

Even if from a core product group, the idea is to develop only one solution, Channel and CSR light can be sold as two different products

List of use cases available for the service provider will depends on products he has purchased:

* Channel only: only use cases available in channel
* CSR light only: only use cases available in CSR light
* Both: all use cases will be available, Service provider could decide by localization to give to a dealer actors access to a CSR light use case

Of course most of use cases will be available for the both product by default. The goal of having some use cases available in only one product is to justify two different products.

Main domains covered by this solution are:



Channel/CSR light provides capabilities in the following main domains:

* Customer/subscriber acquisition: New customer acquisition and new subscribers for an existing customer
* Existing Customer/Subscriber management: account/subscriber search, , account and subscriber information management, account/subscriber offers reconfiguration and account/subscriber life cycle management (fraud lock, suspend, resume, disconnect)
* Referral management: Referral process management in any acquisition process (channel only)
* Electronic Bill Presentment and Payment: List/Display customer invoices, their details and payment. Allows to register a payment for an invoice
* Adjustments: Adjust balance, View/Add/Reverse/Delete adjustments on invoice balance, billed/unbilled RC,NRC and calls
* Problem management: Submission of trouble tickets for a customer, get PUK for GSM subscriber
* Shopping Management: Catalog browsing, basket management and checkout process in support of acquisition processes. Catalog browsing is required for any acquisition use case; but dealer user can also browses the catalog to inform customers/prospects about offers in general and more specifically on offers eligibility
* Deposit and stand alone charge: Create/View deposits, Provision stand alone charge for account/subscriber
* Real time balance management, accumulators and recharge: View, configuration and reconfiguration of real time balances, recharge of account and subscriber, view real time promotions for account and subscriber
* Request management: Follow up of requests submitted by the dealer
* Dealer registration: Registration of a dealer organization to channel self service application (Channel only)
* Dealer and Telco organization management: Telco hierarchy and Dealer hierarchy management
* User and access management: login and logout processes, new user creation, user administration.
* Order follow up: Search/View orders submitted through channel CSR light.
* B2C lead management: View account/subscriber up sell leads, order lead, add/modify note to a lead and cancel a lead: This domain is not described in this document but specified in ‘DR 4-008-523 Channel and CSR portal enhancements for up sell lead’

**Channel/CSR light solution is available both to be deployed with Comverse one Billing but can be sold ‘alone’ to be integrated with any back office system the service provider has already in place. However, in this case only the channel part will be available. There isn’t any requirement to support CSR light in stand alone mode.**

## Actors

Channel/CSR light addresses two categories of users/actors:

* Service provider users (also called Telco users)
* Dealer users

The list of actors available and use cases they will be able to access will depend on products purchased by the service provider.

### Telco Actors

Telco actors and their rights on Channel/CSR light solution use cases can be organized hierarchically as described in the following diagram.



#### Telco User

This user is a generic (or abstract) user defining any Telco employee. This actor is a way to represent users from the Telco family (belonging to a Telco organization).

#### Telco Administrator

A Telco administrator is in charge of

* Administration of the service provider organization and employees,
* Registration of dealers and creation of the first employee
* Administration of a specific dealer organization and employees when requested

This user doesn’t have access to customers

This actor has access to dealer management capabilities only if the service provider has purchased at least channel application

This actor is available in both products.

#### Telco Referral User

The Telco Referral User has the specific responsibility of managing prospects to be manually referred.

This actor has the privileges of:

* Listing prospects to be referred
* Viewing and validating referred prospects

This actor is available only if the service provider has purchased at least Channel product.

#### Telco Referral Admin

This actor has the privileges of:

* Telco Referral user
* Create and manage referral users in his hierarchy
* Create and manage levels in his hierarchy
* Special assignment capabilities for referral prospect management (unlock…)

This actor is available only if the service provider has purchased at least Channel product.

#### CSR user

CSR user (Customer Support Representative) is the main user of CSR light application. They are in charge of acquiring new customers and managing/supporting them.

This actor is available only if the service provider has purchased at least CSR light product.

#### CSR administrator

This actor has the privileges of:

* CSR user
* Create and manage CSR users in his hierarchy
* Create and manage levels in his hierarchy

This actor is available only if the service provider has purchased at least CSR light product.

#### Telco OCM Publisher

This user is an OCM user with publication rights.

This actor is available in both products

#### Telco OCM User

This user is able to edit and modify a catalog and is only able to use the Online Catalogue Manager application.

This actor is available in both products

### Dealer Actors

Dealer organizations represent a whole Dealer company, organized hierarchically with departments and employees.



#### Dealer User

This user is a generic (or abstract) user defining any Dealer employee. This actor is a way to represent users from the Dealer family (belonging to a Dealer organization).

A dealer user will be able to perform POS workflow of customer acquisition and customer care for a customer.

Dealer user roles are existing both for dealer part of the service provider organization and for independent user.

Having different roles will help specializing use case depending if the dealer is part of Telco organization or not.

This actor is available only if the service provider has purchased at least Channel product.

#### Dealer Employee

This user is a generic (or abstract) user defining any Dealer employee. This actor is a way to represent users from the Dealer family (belonging to a Dealer organization).

A dealer user will be able to perform POS workflow of customer acquisition and customer care for a customer.

This actor is available only if the service provider has purchased at least Channel product.

#### Dealer Administrator

The dealer administrator has administrative rights over the organisation or department he is attached to.

In addition to all features a dealer employee will have access to a dealer administrator will be able to manage the dealer organization itself.

This actor is available only if the service provider has purchased at least Channel product.

### Actor security

Channel/CSR light solution supports two users referential, the Comverse One security server and the self service local users referential.

Following table specified combination of supported referential per actor type and purchased product.(when integrated with Comverse One)

|  |  |  |  |
| --- | --- | --- | --- |
| **Actor/Product** | **Channel** | **CSR lite** | **Channel/CSR lite** |
| Telco admin | Self Service | Self Service | Self Service |
| Telco ocm (user and admin) | Self service | Self service | Self service |
| Telco referral (user and admin) | Security server | N/A | Security server |
| CSR (user and admin) | N/A | Security server | Security server |
| Affiliated dealer (employee and admin) | Security server | N/A | Security server |
| Indep. Dealer (employee and admin) | Security server | N/A | Security server |

## Main Entities Overview

### Dealer organization



A dealer organization is a hierarchical organization in CSS. There is no restriction in Channel application concerning the dealer hierarchy depth.

Nevertheless, in Comverse one billing backend side, a dealer is not hierarchical, but only the root is managed.

In PC, a dealer also exists and similarly to the backend end side, solely the root is defined.

A dealer organization has a profile. This profile can specify a channel to limit offers that can be sold by the dealer. This is limited to Channel application stand alone mode.

When integrated with Comverse one:

* Dealers are synchronized with dealer defined in PC
* Dealer hierarchy is managed only locally in Channel application
* Channel application support associating one or more product groups (i.e. dealer group) to the dealer organization allowing offer filtering according to PC definition. In addition, Channel application allows reducing the list of product groups available at any level of the dealer hierarchy

## FRS Capabilities Overview

### Domain Customer/Subscriber Acquisition

#### Capability 1 – Customer Acquisition



This capability is the main activity of the dealer and is also available for CSR. It allows dealers and CSR acquiring a new customer with one or more subscribers (i.e. subscribers) and sends the order to the billing.

At a very high level, Dealer/CSR user starts by capturing all information required to identify the customer but also to process credit checking. Then he can browse primary offers, subscriber bundles (i.e. primary offers, subscriber bundles) and account bundles to select what the customer wants to purchase and creates subscriber accordingly to selected primary offer/bundle.

After every new created subscriber, the dealer/CSR user views his basket. Dealer/CSR will be able to give external id being reserved that must be given to the user (e.g. MSISDN). He can either decide to checkout or browse again offering to add another subscriber.

Checkout finally submits the order to the billing.

#### Capability 2 – Subscriber Creation

This capability is the base of all acquisition process. It allows the user creating new subscribers either for a new customer or an existing one using the channel/CSR light solution.

##### New subscriber for existing customer



This use case allows a dealer user to acquire one or more subscribers for an existing customer. It is very similar to the new customer acquisition use case except for account information management (Update an existing account or create a new account at the same time).

Handling orders containing multiple subscribers will be managed in terms of transaction with Comverse One billing similarly than in Consumer application. In consumer, when a subscriber creation fails, other subscribers can succeed.

##### New subscriber



The use case ‘New subscriber’ describes all the steps (and reference included use cases) that are part of both “New subscriber for existing customer” and “New customer” use cases (described in Capability Customer acquisition).

In fact, use case ‘New subscriber’ is shared between these two higher level use cases.

To create a new subscriber, Dealer and CSR user has to set the subscriber attributes, the subscriber identity and service address.

He can subscribe to supplementary offers.

According to subscribed primary offer and offer options, he can have to set their parameters value (i.e. provisioning items).

He can also in some case configure balances mainly to set spending and credit limits.

To complete subscriber creation, he needs to configure subscriber identifiers (i.e. external id type and values)

### Domain Existing Customer/Subscriber Management

#### Capability 3 – Customer Identification



This capability allows a user retrieving a customer using different criteria either on the customer (i.e. root account) or through external id type of a given subscriber. When integrated with Comverse one billing 3.2, it allows initializing synchronization of the customer with channel/CSR light solution

#### Capability 4 – Customer Information Management



This capability allows presenting a dashboard/summary of the customer and modifying his contact

Billing accounts are displayed in the view customer information summary in flat mode as in Consumer application.

#### Capability 5 – Billing Account Management



Billing account management groups all use cases allowing user to manage a specific billing account.

Basically it allows user:

* Viewing the billing account and main account details like the associated contact, status, attributes and current account bundle and offers
  + When integrated with Comverse billing, a financial summary based on account attributes is displayed and also some customer care information like cases and session notes (Customer Interaction Tracking)
* Modifying basic account information like attributes, billing address and payment method.
* Reconfiguring the account offering by changing account offers
* Viewing balances, reconfiguring them and recharge
* Viewing real time promotions and associated accumulators
* Viewing and modifying account level notification
* Add deposit
* Add stand alone charge

Note: viewing and re configuring account level notification is not specified in this document but in a specific DR: DR-4-009-789

#### Capability 6 – Subscriber Management



Subscriber management groups all use cases allowing user to manage a specific subscriber

Basically it allows user:

* Viewing the subscriber and main subscriber details like the associated contact, status history, attributes and current primary offer and subscriber supplementary offers
* Modifying basic subscriber information like attributes and associated identity.
* Reconfiguring the subscriber offering like migrating from prepaid to postpaid and changing primary offer and/or subscriber supplementary offers but also viewing and reconfiguring F&F numbers if any and swapping an external id.
* Viewing balances, reconfiguring them and recharge
* Viewing real time promotions and associated accumulators
* Adding stand alone charge

#### Capability 25 – Subscriber life cycle management

Channel/CSR light shall allow user to suspend subscriber for a specific period either on the initiative of the service provider or requested by the customer.

Channel/CSR light shall also allow fraud locking, unlocking and disconnecting a subscriber.



#### Capability 26 – Account life cycle management

Channel/CSR light shall allow user to disconnect an account. Disconnecting an account shall disconnect all subscribers owned by the account. Even if it is assumed SAPI will do the disconnection of all the subscribers, Channel/CSR light shall display impact of the disconnection both for the account and for the subscribers.

In case of accounts hierarchy, an account can’t be disconnected until child accounts have been disconnected.

One of the complexities of disconnecting account is account bundle management for following reasons:

* Because subscriber bundle under the account being disconnected may be required bundles of another account bundles owned by accounts other then the one being disconnected
* Because account offers under the account being disconnected may be required account offers of account bundles owned by other accounts
* Because the account being disconnected may own an account bundle with mandatory account offers distributed to other accounts in the hierarchy, and because those mandatory account offers may be prerequisites for an account bundle or other account offers on those other accounts

It is assumed this logic will be managed by the SAPI but Channel/CSR light application shall be able to advise user of any pre requisite rules violation that prevent disconnecting the account



#### Capability 27 – Account/Subscriber view activity history



This capability will allow analyzing main transactions history globally for one account and/or for a specific subscriber. At account level, the history for any type of event will take into account transactions associated to all subscribers owned by the account.

Channel/CSR light displays also history of all transactions impacting balances giving a global view for a subscriber.

### Domain Shopping

This domain assists dealer and CSR user in the selling process. Shopping domain or e-Commerce includes typical capabilities related to the shopping such as selecting some products, doing some actions in the basket before the checkout.

It is assumed that devices and accessories are not sold through Channel application.

#### Capability 7 – Product Selection

This capability is devoted to the browsing and selection of products the customer wants to subscribe.



More in detail, it allows user:

* Browsing of all primary offers, primary offers bundles and account bundles to let the user selecting what he wants to purchase or to inform customers/prospects about offers and their eligibility
* Add an account bundle
* Configure parameters of selected primary offers and subscriber supplementary offers
* Select supplementary/selective account offers in or out an account bundle
* Select supplementary/selective subscriber supplementary offers in or out a subscriber bundle

Catalog browsing support serviceability testing (‘is service available where I want to subscribe’)

Catalog can be filtered by ‘product groups’ if activated. A product group is a subset of the whole catalog handled by self service. These product groups can be associated to dealers to reduce their offering compared to the one of the operator.

Adding a primary offer or a subscriber bundle is not identified as a separate use case as already part of the new customer and new subscriber for existing customer use case and doesn’t need more user interaction as what is already described.

Pre-requisite attributes or criteria are only required at the account level and not at the subscriber one.

#### Capability 8 – Basket Management

This capability describes all the possible actions user can do in the basket.



#### Capability 9 – Checkout

This capability manages the checkout of an order, whatever the order contains.

Checkout is the final step of any shopping process. It allows user to review the order and add any deposit, prepayment he wants. Adding prepayments allows user to take into account NRC that have been paid immediately by cash or check by the customer during the shopping process.



### Domain Referral Management

#### Capability 10 – Requests in referral Management



These use cases allow establishing and managing the referral process between the dealer, CSR user and the referral.

Referral process allows establishing an approval process between dealer or CSR users and service provider dedicated referral team when acquiring a new customer, subscribing to a new subscriber or migrating a prepaid subscriber to postpaid.

Channel application can be integrated with a credit checking system and depending on return of the credit checking, the request is sent to referral management for service provider referral analysis. If not external credit checking system is available, Dealer user can manually send the request to referral management if he has some doubt on the customer/prospect.

The referral is in charge of reviewing requests in referral that has been sent to referral and takes a decision to accept or reject the customer.

The dealer or CSR can review the requests in referral and continue shopping or not depending if customer has been accepted or rejected (final referral status).

The referral admin user has the capability of unlocking a referred customer to assign it to another referral user.

### Domain Dealer Registration

#### Capability 11 – Dealer Registration



To use channel application, dealer must be registered. This capability provides two use cases either to create locally a dealer without any integration or to register the dealer synchronizing him from an external system.

### Domain Dealer and Telco Organization Management



#### Capability 12 – Dealer Search



This capability allows a Telco administrator to identify a dealer already registered to manage his hierarchy and his employees.

A telco administrator will also be able to search a dealer organization but a dealer user shall not be able to search another dealer organization.

#### Capability 13 – Hierarchy Management



This capability provides all use cases to manage the Telco and dealers’ hierarchy.

In fact, a telco administrator and a dealer administrator will be able to manage their own hierarchy.

Note that if CSR users are managed in security server in mode user discovery (see chapter 2.7 for more details), Telco hierarchy menu shall be disabled

In addition, a telco administrator will be able to manage a dealer hierarchy.

Use cases ‘View level profile’ and ‘Modify level profile’ are only related to dealer users and not telco users. Dealer and Telco admin have the capability of reducing product groups authorized for the dealer.

Logic is the following:

* If there is no product group associated to the level, it inherits product groups associated to its parent level and thus recursively until finding a level with associated product groups (and of course reaching the root level)
* If there is at least one product group associated to the level, only these product groups are valid for the level if they are also valid for the parent level (and thus recursively if no product group on the parent level)

When setting product groups for the level, user will be limited to product groups available for the parent level

**When integrated with Comverse One:**

A dealer or telco hierarchy is managed locally in self service.

Nevertheless, the root of a dealer organization is synchronized with Comverse One Security Server and PC

#### Capability 14 – Employee Identification

This capability provides all use cases required to:

* Find and identify an employee contextually to a dealer or Telco organization in Channel application.



This capability provides all use cases to identify a telco employee or a dealer employee respectively by a telco user and a dealer user.

A telco administrator will also be able to identify a dealer employee, but a dealer user will not be able to identify a telco employee.

#### Capability 15 – Employee Management



This capability allows a telco user or a dealer user to manage employees in their respective organization.

A telco administrator will also be able to manage a dealer employee, but a dealer user will not be able to manage a telco employee.

### Domain User and Access Management

#### Capability 16 – User Session Management



This capability provides all use cases required to:

* Manage login and password life cycle in general from creation to deactivation
* Get forgotten password (customer only).

Channel/CSR light provides on out of the box integration with Comverse one security server for Dealer and CSR user.

Users are stored in the security server but their life cycle is managed through Channel/CSR light application only.

#### Capability 17 – User Management



This capability provides all use cases required to:

* Manage login and password life cycle in general from creation to deactivation
* Get forgotten password (customer only).

Channel/CSR light provides on out of the box integration with Comverse one security server for Dealer and CSR user.

### Domain real time balance management, accumulators and recharge

#### Capability 18 – Manage balances



This capability allows user to manage the different balance types provided in Comverse One.

User can configure both spending and credit limits (if authorized) and shadow balances when acquiring a new subscriber and swapping an existing one.

User can view balances on a specific account or subscriber and reconfigure them if relevant.

In case of a credit limit, user can relax it via a prepayment

These use case can be integrated with any billing system supporting same capabilities as Comverse one Billing

Note: Relax credit limit with Prepayment use case is not specified in this FRS but in a separate DR: DR-4-009-791

#### Capability 19 – Recharge

To be reviewed before modification



This capability allows a dealer user to recharge either an account or a subscriber and access to the recharge history.

Channel/CSR light application allows a user recharging an account or a subscriber either using a voucher or through a non voucher recharge.

* + For non voucher recharge, user can select payment method to recharge. Supported payment methods can be any payment method not requiring parameters (cash, check,…) or credit/debit card.
  + Depending on application configuration, user can select an already existing payment profile.

#### Capability 20 – View Real time Promotions



This capability allows user viewing candidate awards and bonus the customer can get (and associated accumulators) for an account or a subscriber thanks to real time promotions.

### Domain Problem management

#### Capability 21 – Trouble ticketing

Refer to Case management and CIT FRS

#### Capability 32 – Get PUK



This capability allows user to retrieve PUK code of a specific subscriber in GSM Market

#### Capability 33 – Customer Interaction Tracking (CIT)

Refer to Case management and CIT FRS

### Domain Request and Order Management

#### Capability 22 – Request Management



Dealer and CSR user can view and search requests he has submitted either at overall level (typically for new customer requests) or for a specific customer

Only requests submitted by Channel/CSR light application are available to the user, except in the following case:

When channel/CSR light and consumer applications are merged, a dealer or CSR user having access to a customer will also have access to requests impacting the customer entities, except when these requests corresponds to acquisition.

In other words, a dealer/CSR user will have access to requests submitted by users of other organizations (other dealer or customer) only for account management requests but not for acquisition.

#### Capability 24 – Order follow-up



Channel/CSR light solution allows user to follow up order they have submitted through the application.

Depending on their role they can access to order they have submitted and to order submitted by other users.

They can review every order with same information as in review order use case (refer to checkout domain) plus the order reference and status.

User can review in Channel/CSR light application only orders that have been submitted through Channel/CSR light application. This is only true for Dealer users (not for Telco users).

### Domain Electronic Bill Presentment and Payment

#### Capability 23 – EBPP

The EBPP capability is targeting three main goals:

* Allowing user to access to invoices/invoices’ details and view the bill image either as ASCII and/or PDF
* Allowing user to access to unbilled transactions
* Allowing user to access to payments already done and add new payments/prepayments



User is able to access to the list of invoices for a specific account, view their image and access to the detail of every invoice. By accessing to the invoice detail, user is able to view list and detail of ‘transactions’ ‘billed’ for the specific invoice (or statement): adjustments, recharges, RC and NRC, MTR and payment distributions.

Viewing invoice is dependent of format generated by the billing system. In case of Comverse one billing, User can view the invoice either in simple text format or in PDF. If the PDF is not already requested, Channel/CSR light application will request its generation thanks to IGEN capability. Note that for PDF, user can select if he wants a summary bill or a detailed bill if both formats are defined.



On the same way, user can see transactions not already billed for a specific account like unbilled RC/NRC, Unbilled usage, Unbilled MTR and unbilled recharge.



This capability allows also a user to register a payment for a specific invoice.

When registering a payment for an invoice, user is able to process it in real time if real time payment capability is enable on billing side.

At the account level or at checkout process, user can register a ‘prepayment’. Supporting at checkout time such prepayment is to cover case where customer has already paid directly some NRC to the dealer or CSR.

### Domain Adjustment

#### Capability 28 – Usage and charge adjustment



This capability allows to manage adjustments on invoice balances (miscellaneous adjustment), usage, RC and NRC.

First of all it allows user to view adjustments from different perspectives:

* All unbilled adjustments at the account level
* Adjustment by invoice balance, usage, RC and NRC through the invoice or the account depending if usage, RC and NRC is billed or not
* All adjustments that appears on a specific invoice (that were created on previous invoices)

This capability allows also user to create new adjustments on invoice balance, unbilled/billed usage records and unbilled/billed RC/NRC.

Once created, user can delete or reverse an adjustment depending if the adjustment has already been billed or not

#### Capability 29 – Balance adjustment

This capability allows a user to adjust value of an account or subscriber real time balance.



### Domain Deposit and Stand alone charge

#### Capability 30 – Manage deposit



This capability allows creating a deposit for an account either in checkout phase or directly on the account

#### Capability 31 – Manage Stand alone charges



This capability allows user provisioning directly a NRC on a subscriber or an account regarding some event like for example adding a number to F&F list. User will have to select the event type and the term type. Note that term types are different depending on if the NRC is for account or subscriber

In case of term supporting installments, user will be able to configure them.

For some specific event, a charge can be automatically associated. Channel/CSR light application will display the charge to the user and will allow him to waive it (if user is authorized).

Note that the charge can be different for channel and CSR light.

Channel/CSR light application will support automatic charges for following event:

* Reconfiguring friends and family
* Modifying or setting specific subscriber attributes (special day and happy hour)

### ~~Domain Lead management~~

#### ~~Capability 34 – Manage B2C up sell lead~~

## Source (FCD, SysRS, PWR, Other) Capabilities Traceability Matrix

| **Source Capability (or Requirement Number or PWR number)** | **FRS Capability / Section** | **Comments** |
| --- | --- | --- |
| FCD Channel Self-Service Req01: User access and roles | Capability 16: User session management  Capability 17: User management |  |
| FCD Channel Self-Service Req02: User access and roles for dealer users | Capability 16: User session management  Capability 17: User management |  |
| FCD Channel Self-Service Req03: Session expiration | Capability 16: User session management |  |
| FCD Channel Self-Service Req04: Support Single Sign On integration with other portal | Deployment consideration chapter, requirement: ‘CHA-4.1.10 Channel application shall support working in trust mode with an authentication delegation to a portal or single sign on system.’ |  |
| FCD Channel Self-Service Req06: Secured web with HTTPS | Deployment consideration chapter: CHA-4.1.20 Channel Self-Service shall support being deployed in such a way of working in HTTPS mode. |  |
| FCD Channel Self-Service Req07: Shopping cart | [Capability 8](#_Capability_8_–): Basket management |  |
| FCD Channel Self-Service Req08: Online catalog | Capability 7: Product selection |  |
| FCD Channel Self-Service Req09: Support integration with other billing systems via MOM/EAI using JMS  FCD Channel Self-Service Req09: Support integration with other billing systems via MOM/EAI using MQ series | Deployment consideration chapter: CHA-4.1.40 Channel Self Service shall support following transports for integration purpose:  CHA-4.1.40.1 Channel Self-Service shall support JMS.  CHA-4.1.40.2 Channel Self-Service shall support MQ Series (version to be determined with PM) |  |
| FCD Channel Self-Service Req10: Record Customer Interactions | General requirements: CHA-3.1.30 Channel Self-Service shall support recording user activities in the application. | Is not a CSS requirements but a SAPI requirements, not covered in this FRS |
| FCD Channel Self-Service Req11: Agent browses product catalogue and find a product item | Capability 7: Product selection |  |
| FCD Channel Self-Service Req12: Agent searches a product item in the product catalogue | CHA-3.8.4.195 Channel application shall allow a dealer user filtering primary offers and subscriber bundles by name and description including a free string set by the dealer |  |
| FCD Channel Self-Service Req17 Migrate from prepaid to postpaid | Capability 6: Subscriber management |  |
| FCD Channel Self-Service Req18 Change primary offer and supplementary offer | Capability 6: Subscriber management |  |
| FCD Channel Self-Service Req21: Account Management | Capability 5: Billing account management |  |
| FCD Channel Self-Service Req22: View balances, accumulators and bonus | Capability 18: Real time balances management  Capability 20: View real time promotions |  |
| FCD Channel Self-Service Req23: Prepaid top up (Recharge) | Capability 19: Recharge |  |
| FCD Channel Self-Service Req24: Manage spending limits for supplementary offers | Capability 18: Real time balances management |  |
| FCD Channel Self-Service Req25: Trouble Ticketing | Capability 21: Trouble ticketing |  |
| FCD Channel Self-Service Req26: Agent can change recurring payment methods upon customer request | Capability 5: Billing account management |  |
| FCD Channel Self-Service Req27: Dispute bills or billed usage | Capability 23: EBPP |  |
| FCD Channel Self-Service Req28: View itemized bills | Capability 23: EBPP |  |
| FCD Channel Self-Service Req29: View unbilled usages | Capability 6: Subscriber management |  |
| FCD Channel Self-Service Req30: View invoices | Capability 23: EBPP |  |
| FCD Channel Self-Service Req31: Pay an invoice | Capability 23: EBPP |  |
| FCD Channel Self-Service Req32: Search/view invoice payments | Capability 23: EBPP |  |
| FCD Channel Self-Service Req34: Manage CSP department and users | Capability 13: Hierarchy management  Capability 14: Employee identification  Capability 15: Employee management |  |
| FCD Channel Self-Service Req36: CSP administrator can setup a new dealer organization | Capability 11: Dealer registration |  |
| FCD Channel Self-Service Req37: Manage dealer department and users | Capability 13: Hierarchy management  Capability 14: Employee identification  Capability 15: Employee management |  |
|  | Deployment consideration: CHA-4.1.30 Channel Self-Service shall support being deployed with consumer application on the same system. | Refer to Business Self Service FCD and applicable to Channel:  FCD Business Self-Service Req13: Self service APPS must be able to access the same billing |
|  | Capability 17: User management | Refer to Business Self Service FCD and applicable to Channel:  FCD Business Self-Service Req18: Temporary password generation  FCD Business Self-Service Req21: Administrator can unlock locked user  FCD Business Self-Service Req22-23: Administrator can reactivate/deactivate a login  FCD Business Self-Service Req24 User changes his secret question  FCD Business Self-Service Req25 User gets a new password when forget his password  FCD Business Self-Service Req26 User changes his own password  FCD Business Self-Service Req27 User reset password of another users  FCD Business Self-Service Req28 User gets their personal home page  FCD Business Self-Service Req31 Browse product catalog |
|  | Capability 16: User session management | Refer to Business Self Service FCD and applicable to Channel:  FCD Business Self-Service Req20: Employee Login is locked after N unsuccessful logins |
|  | Capability 22: Request follow-up | Refer to Business Self Service FCD and applicable to Channel:  FCD Business Self-Service Req51: Search and follow requests submitted from Consumer self service Web |
|  | Capability 1: Customer Acquisition | High level capability covering customer acquisition based on several shopping requirement expressed in FCD |
|  | Capability 2: Subscriber creation | High level capability covering several shopping requirement expressed in FCD |
|  | Capability 3: Customer identification | Required for Dealer user use cases on customers |
|  | Capability 4: Customer information management | Required for Dealer user use cases on customers |
|  | Capability 9: Checkout | Required for Dealer user use cases when acquiring subscribers or swapping offers on customers |
|  | Capability 10: Requests in referral management | Required for Dealer user use cases to manage customers or subscriber acquisition |
|  | Capability 12: Dealer search | Required for Telco user use cases to manage dealers access |

## Feature Assumptions

## Requirements Terminology

The following requirements terminology is used throughout this document:

* **Requirement:** Feature or function that, in Product Management’s view, is necessary to meet our customers’ need. Failure to meet a Requirement may cause applications restrictions, result in improper functioning of the product, hinder operations, or cause failure to meet customer commitments. A Requirement contains the word “shall”, and is flagged by the letter “**R”** in the Requirement number (e.g., **Rfn-#**), where **fn is feature name initials**.
* **Conditional Requirement** - Feature or function that, in Product Management’s view, is necessary to meet our customers’ needs, however, no customer commitments are explicitly made with any timeline. Conditional Requirements may be deferred to a later phase due to resource limitation. Product Management views these Conditional Requirements also very important and requests development to treat them accordingly. Conditions that may cause the Conditional Requirement to apply include, but are not limited to, delayed deployment of the application or dependency on other features or functions to be available. A Conditional Requirement contains the word “should”, and is flagged by the letters CR in the Conditional Requirement number used in the document (e.g., **CRfn-#**).
* **Objective** - Feature or function that, in Product Management’s view, is desirable and may be required by a service provider. An Objective represents a goal to be achieved, and in many cases represents the views of the PM. An Objective contains the words “desirable”, and is flagged by the letter “O” in the Objective number used in the document (e.g., **Ofn-#**).
  + **Fn**- feature name can be constructed as an abbreviation from the source full name or from PWR, DR number, etc.

# Requirements – Functional

General Requirements

CHA-3.1.10 Channel/CSR light application shall support multi language

CHA-3.1.20 Channel/CSR light application shall support multi currency

CHA-3.1.30 Channel/CSR light application shall support recording user activities in the application

CHA-3.1.30.1 Channel/CSR light application shall provide OOTB only events tracked by the Self service platform

CHA-3.1.30.2 Channel/CSR light application shall allow an integrator to customize Channel/CSR light application to track any event he wants to track.

CHA-3.1.100 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-249 about Serviceability feature support in Comverse One

CHA-3.1.110 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-484 about Additional Support of extended Data in Comverse One

CHA-3.1.120 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-254 about Full support of MSA architecture in Comverse One

CHA-3.1.125 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-255 about Case Management and Interaction tracking in Comverse One

CHA-3.1.130 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-0-131-970 about Basic Friends and Family Support (as in Comverse 3.1)

CHA-3.1.140 Channel/CSR light application shall be sellable as a ‘Channel CV’ product and as a ‘Channel SV’ product and as ‘CSR light CV’ product. (SV: Stand alone Version so not pre-integrated with Comverse One, CV: Converged Version so pre-integrated with Comverse one)

CHA-3.1.150 Channel/CSR light application shall support actors defined in actors chapter and according to product definition as also defined in actors chapters ([Actors](#_Actors))

CHA-3.1.160 Channel/CSR light application shall support managing users either in security server or in Self service local store depending on user role and thus according to actors security chapter ([Actor security](#_Actor_security))

~~CHA-3.1.160.1 For a specific deployment and for a specific role, Channel/CSR light shall support defining if users are managed exclusively in the security server or in the self service local store~~

~~CHA-3.1.160.2 Channel/CSR light shall support defining users referential depending on user role and deployed products according to table specified in the actors security chapter ([Actor security](#_Actor_security))~~

CHA-3.1.170 Channel/CSR light shall limit list of available use cases depending on product sold

CHA-3.1.170.1 Channel/CSR light shall allow by localization to give access for a specific role to use cases not available by default if the two products have been sold.

CHA-3.1.180 Channel/CSR light shall allow by localization customizing a use case in one product differently from the other product when both products (Channel CV and CSR light CV) are deployed

CHA-3.1.190 Channel/CSR light shall propose to CSR actors same offers to sell as in CSM with limitation already accepted for Channel/CSR light application like mandatory subscriber bundles in account bundle

CHA-3.1.300 Channel/CSR light shall never apply product group filtering for CSR users

CHA-3.1.350 Channel/CSR light shall allow configuring allocation mode for a external id type per product. In other words, Channel/CSR light shall allow configuring how setting of external id for a subscriber will be presented in the application (e.g. they can be auto assigned automatically and hidden to the user or user has to select the inventory type and value)

Capability 1 Customer Acquisition - NCA

### Capability Description

This capability allows a Dealer user to acquire a new customer with one or more subscribers

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: New Customer

|  |  |  |
| --- | --- | --- |
| New customer | | NCA0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user to enroll a new customer in the back office system. | | |
| Pre-conditions | User is logged in and optionally, he has verified that the customer did not already exist in the system. | | |
| Trigger | User has selected the option to create a new customer either prepaid or postpaid | | |
| Minimum guarantees | User can cancel the customer acquisition process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the customer information necessary to the backend.  The order sent by application is acknowledged  External id type value of every subscriber (e.g. MSISDN) that must be known by the customer have been assigned and displayed to user | | |
| Normal Flow: | 1. User sets new account information (refer to use case Capture administrative data) (A1) (A1bis). 2. Channel/CSR light application displays primary offers and bundles available for the user (refer to use case Browse primary offers/Bundles) 3. User browses the catalog and select a primary offer or subscriber bundle (A11) 4. Channel/CSR light application redirects the user to create a first subscriber 5. User creates a subscriber (Refer to use case new subscriber) 6. Channel/CSR light application redirect the user to view its basket 7. User reviews the basket and validates that the order corresponds to customer’s expectations (Refer to use case: View Basket) 8. User decides to checkout the basket following customer’s acceptance (Refer to use case: Checkout) (A2) 9. Channel/CSR light application sends the order to the back office system 10. Channel application displays the order number | | |
| Alternative Flows: | A1: User has selected create postpaid customer option and automatic credit checking is active   1. Channel/CSR light application calls an external system to process credit checking and wait for the answer 2. Channel/CSR light application redirects the user to the browsing of primary offers and bundles (A3)(A4)(A5)   A1bis: User has selected create postpaid customer option and manual credit checking is active   1. User decides to continue(A6) 2. Channel/CSR light application redirects the user to the browsing of primary offers and bundles   A2: User decides to create another subscriber for the new customer   1. Channel/CSR light application redirects the user to the catalog browsing 2. Next steps are similar as nominal case   A3: Channel/CSR light application can’t access to credit checking service for any technical reason   1. Channel/CSR light application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking 2. User selects to skip credit checking (A3bis)(A6)(A7) 3. Channel/CSR light application redirects the user to the catalog browsing 4. Next steps are similar to nominal case   A3bis: User decides to retry credit checking step   1. Channel/CSR light application redirects to (A1)   A4: Credit checking refuses the customer   1. Channel/CSR light application displays an error message informing user he can’t create this postpaid customer 2. Channel/CSR light application redirects the user to the catalog browsing in prepaid mode only. 3. Next steps are similar to the nominal case   A5: Credit checking requires approval from service provider   1. Channel/CSR light application displays an error message informing user creation of this customer requires service provider approval. 2. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 3. Channel/CSR light application sends the order to referral management 4. Channel/CSR light application redirects the user on the Referred customers page   A6: User has selected send to referral option   1. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user 2. Channel/CSR light application sends the order to referral management 3. Channel/CSR light informs the user that the request is in referral 4. Channel/CSR light application redirects the user on the Referred customers page   A9: Order processing fails   1. Channel/CSR light application displays an error message informing the user the order has failed for technical reason.   A10: There is no need to give external id to the end user   1. Use case returns   A11: User has selected a subscriber bundle in an account bundle and there isn’t already an account bundle in the basket   1. Use case returns 2. User configures the account bundle (refer to add account bundle use case) 3. Next steps are similar to the nominal case | | |

#### Use Case: Capture administrative data



|  |  |  |
| --- | --- | --- |
| Capture administrative data | | NCA0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user capturing customer information and administrative information, reviewing all information to get customer acceptance. | | |
| Pre-conditions | User has already specified the customer type he wants to create | | |
| Trigger | User has selected one new customer option | | |
| Minimum guarantees | User can’t process new customer acquisition without customer acceptance | | |
| Success guarantees: | Customer information and billing account information has been set for the new customer | | |
| Normal Flow: | 1. User sets the customer identity 2. User sets the phone & email 3. User sets the customer address (A4) 4. Channel/CSR light application requests additional administrative information 5. User set additional administrative information 6. Channel/CSR light application validates all information set (A1) 7. Channel/CSR light application redirects user to set billing account information 8. User set billing account information (refer to use case capture billing account information) 9. Channel/CSR light application displays all information set for review 10. Use case ends (A2) | | |
| Alternative Flows: | A1: Information set by the user are not correct or not complete   1. Channel/CSR light application request again to set information and highlights mistakes 2. User corrects set information   A2: Application is configured to request acceptance of terms and conditions:   1. Channel/CSR light application requests for acceptance of terms and conditions and return policy 2. User accepts and continue (A3)   A3: User has not validated terms and conditions and return policy   1. Channel/CSR light application displays an error message to inform user he must accept terms and condition and return policy to continue 2. User accepts and continues 3. Next step are similar to nominal case   A4: User selects the option to search an address, instead of entering it   1. User selects an address in the referential. Refer to use case ‘Search and select address in referential’ 2. Next step are similar to nominal case | | |

#### Use Case: Capture billing information

|  |  |  |
| --- | --- | --- |
| Capture billing information | | NCA0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user capturing recurring payment information and billing account information for a new account | | |
| Pre-conditions | User is either:   * Creating a new customer * Creating a new subscriber and new account for an existing customer | | |
| Trigger | User is at the capture billing information step for a new account | | |
| Minimum guarantees |  | | |
| Success guarantees: | Billing account information are set | | |
| Normal Flow: | 1. Channel/CSR light application displays supported recurring payment methods and relevant parameters 2. User selects one payment method and set relevant parameters 3. Channel/CSR light application displays billing attributes information to set (A2) 4. User set billing attributes information 5. Channel/CSR light application validates information set (A3) 6. Channel/CSR light application adds payment information and billing attributes information on the new account. | | |
| Alternative Flows: | A2: There is no billing attributes information to require from user   1. Channel/CSR light application doesn’t request anything to user   A3: User has not set correctly requested information   1. Channel/CSR light application requests the user to set again information and highlights mistakes 2. User set requested information | | |

#### Use Case: Search and select address in referential

|  |  |  |
| --- | --- | --- |
| Search and select address in referential | | NCA0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user searching and selecting an address in an address referential, instead of entering all address lines. | | |
| Pre-conditions | User is either:   * Creating a new customer * Creating a new subscriber and new account for an existing customer * Creating a new subscriber on an existing account | | |
| Trigger | User selects the option to search the address. | | |
| Minimum guarantees |  | | |
| Success guarantees: | An address has been found and selected by the user | | |
| Normal Flow: | 1. Channel/CSR light application displays all the supported address attributes (criteria) supported to search address 2. User sets value for all mandatory fields at least, and optionally non mandatory address attributes and submits 3. Channel/CSR light application processes the search (A1) 4. Channel/CSR light application display list of found addresses (A2)(A3) | | |
| Alternative Flows: | A1: There is no address matching criteria   1. Channel/CSR light application displays an error message to inform the user there is no address matching criteria   A2: There are too many addresses matching criteria (up to configured max value)   1. Channel/CSR light application displays an error message to inform the user there are too many addresses matching criteria and suggest him to search again   A3: Channel/CSR light application can’t process the search for any technical reason   1. Channel/CSR light application display an error message to inform user that for technical reason the service is temporarily unavailable | | |

Channel/CSR light application requirements

CHA-3.2.4.10 Channel/CSR light application shall allow a user to create a new customer with respect of use case ‘new customer’ describe above’

CHA-3.2.4.15 Channel/CSR light application shall propose different options to create a postpaid or a prepaid customer

CHA-3.2.4.20 Channel/CSR light application shall prevent User going back to previous steps after credit checking has been processed (V2)

CHA-3.2.4.30 Channel/CSR light application shall allow enabling or disabling automatic credit checking (i.e. integration with an external credit checking system) (V2)

CHA-3.2.4.40 Channel/CSR light application shall allow enabling or disabling manual credit checking (i.e. capability to manually submit the new customer to referral management) (V2)

CHA-3.2.4.45 Channel/CSR light application shall support configuring a different credit checking policy for Dealers and CSRs (V2)

CHA-3.2.4.60 Channel/CSR light application shall allow user capturing account information with respect of use case capture administrative data

CHA-3.2.4.60.1 Channel/CSR light application shall allow the configuration of account attributes respecting CHA-3.2.4.80.x requirements

CHA-3.2.4.60.2 Channel/CSR light application shall allow supporting a different policy for dealers and CSR to confirm terms and condition and return policy

CHA-3.2.4.70 Channel/CSR light application shall support to capture customer identity according to customer type (SOHO versus residential)

CHA-3.2.4.80 Channel/CSR light application shall support configuring additional account information to set

CHA-3.2.4.80.1 Channel/CSR light application shall support different configurations depending if the customer is postpaid or prepaid

CHA-3.2.4.80.2 Channel/CSR light application shall support different configurations depending on the customer type

CHA-3.2.4.80.3 Channel/CSR light application shall support to group additional information for display purpose (display group)

CHA-3.2.4.80.3.1 Channel/CSR light application shall allow the configuration of the order to display groups of account attributes.

CHA-3.2.4.80.3.2 Channel/CSR light application shall allow the configuration of the order to display an account attribute relatively to its display group.

CHA-3.2.4.80.3.3 Channel/CSR light application shall support to configure display groups per logged user role.

CHA-3.2.4.80.4 Channel/CSR light application shall support to configure additional account information that will be integrated with Comverse one Billing 3.1 on the account used for shopping.

CHA-3.2.4.80.4.1 Channel/CSR light application shall support configuring account attributes that must be hidden to user and set automatically by the application with a default value.

CHA-3.2.4.80.7 Channel/CSR light application shall support different default values for the same account attribute when defined in different groups (group sensitive configuration).

CHA-3.2.4.80.8 Channel/CSR light application shall allow to configure an account attribute as mandatory in group sensitive way (different configuration per group).

CHA-3.2.4.80.9 Channel/CSR light application shall support a different configuration of its account attributes than in consumer application, when application are deployed on the same CSS system (co-existence mode).

CHA-3.2.4.80.9.1 Channel/CSR light application shall support a different set of eligible account attributes than in Consumer for new customer acquisition.

CHA-3.2.4.100 Channel/CSR light application shall allow user capturing billing information with respect of use case capture billing information

CHA-3.2.4.100.1 Channel/CSR light application shall allow the configuration of account attributes respecting CHA-3.2.4.80.x requirements

CHA-3.2.4.100.2 Channel/CSR light application shall allow configuring list of supported recurrent payment method and their respective parameters

CHA-3.2.4.110 Channel/CSR light application shall support configuring list of account attributes

CHA-3.2.4.110.1 Channel/CSR light application shall support configuring account attributes that must be set by the user for a new billing account

CHA-3.2.4.110.2 Channel/CSR light application shall support configuring account attributes that must be hidden to user and set automatically by the application with a default value for a new billing account

CHA-3.2.4.130 If the user selects a subscriber bundle in the context of an account bundle, Channel/CSR light application shall redirect the user to add account bundle if not already in the basket.

CHA-3.2.4.150 Channel/CSR light application shall allow user searching an address in a referential with respect of use case ‘Search and select address in referential’.

CHA-3.2.4.150.10 Channel/CSR light application shall allow configuring max number of addresses that can be retrieved from the search

Capability 1 Subscriber Creation - NSA

### Capability Description

This capability allows creating new subscribers for an existing or new customer

### Capability Assumptions/Dependencies

~~CSS in general has been updated to support service address management as described in FRS serviceability~~.

### Capability Use Cases

#### Use Case: New subscriber for an existing customer

|  |  |  |
| --- | --- | --- |
| New subscriber for an existing customer | | NSA0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user to create one or several additional subscribers to an existing customer | | |
| Pre-conditions | User has already identified a customer | | |
| Trigger | User has selected the option to create a new subscriber either prepaid or postpaid | | |
| Minimum guarantees | User can cancel the new subscriber acquisition process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all new subscriber information necessary to the backend.  The order sent by the Channel/CSR light application is acknowledged  External id type value of every subscriber (e.g. MSISDN) that must be known by the customer have been assigned and displayed to the dealer | | |
| Normal Flow: | 1. Channel/CSR light application displays the list of accounts in the account hierarchy to create the new subscriber 2. User selects one of the proposed account (A12) 3. User Reviews and updates administrative data (refer to use case Review administrative data) (A1) (A1bis). 4. Channel/CSR light application displays primary offers and bundles available for the user (refer to use case Browse primary offers/Bundles) 5. User browses the catalog and selects a primary offer or subscriber bundle (A11) 6. Channel/CSR light application redirects the user to create a first subscriber 7. User creates a subscriber (Refer to use case new subscriber) 8. Channel/CSR light application redirects the user to view its basket 9. User reviews the basket and validates that the order corresponds to customer’s expectations (Refer to use case: View Basket) 10. User decides to checkout the basket following customer’s acceptance (Refer to use case: Checkout) (A2) 11. Channel/CSR light application sends the order to the back office system 12. Channel/CSR light application displays new subscribers external id (e.g. MSISDN) (A9)(A10) (refer to display new subscriber use case) | | |
| Alternative Flows: | A1: User has selected create postpaid subscriber option and automatic credit checking is active   1. Channel/CSR light application calls an external system to process credit checking and wait for the answer 2. Channel/CSR light application redirects the user to the create first subscriber step similarly as the nominal case (A3)(A4)(A5)   A1bis: User has selected create postpaid subscriber option and manual credit checking is active   1. User decides to continue(A6) 2. Channel/CSR light application redirects the user to the new subscriber creation   A2: User decides to create another subscriber for the existing customer   1. Channel/CSR light application redirects the user to the catalog browsing 2. Next steps are similar as nominal case   A3: Channel/CSR light application can’t access to credit checking service for any technical reason   1. Channel/CSR light application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking 2. User selects to skip credit checking (A3bis)(A6)(A7) 3. Channel/CSR light application redirects the user to the catalog browsing 4. Next steps are similar to nominal case   A3bis: User decides to retry credit checking step   1. Channel/CSR light application redirects to (A1)   A4: Credit checking refuses the customer   1. Channel/CSR light application displays an error message informing user he can’t add additional postpaid subscriber 2. Channel/CSR light application redirects the user to the catalog browsing in prepaid mode only. 3. Next steps are similar to the nominal case   A5: Credit checking requires approval from service provider   1. Channel/CSR light application displays an error message informing user that adding a postpaid subscriber requires service provider approval. 2. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 3. Channel/CSR light application sends the order to referral management 4. Channel/CSR light application redirects the user on the Referred customers page   A6: User has selected send to referral option   1. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 2. Channel/CSR light application sends the order to referral management 3. Channel/CSR light informs the user that the request is in referral 4. Channel/CSR light application redirects the user on the Referred customers page   A9: Order processing fails   1. Channel/CSR light application displays an error message informing the user the order has failed for technical reason.   A10: There is no need to give external id to the end user   1. Use case returns   A11: User has selected a subscriber bundle in an account bundle and there isn’t any account bundle already subscribed (in the basket, already subscribed or in a pending order)   1. User configure the account bundle (refer to add account bundle use case) 2. Next steps are similar to the nominal case   A12: User selects the new account option   1. Channel/CSR light application set the context with a ‘new account’ 2. Channel/CSR light application redirects the user to ‘Capture administrative data’ step 3. Next steps are similar to nominal case | | |

#### Use Case: Review existing account



|  |  |  |
| --- | --- | --- |
| Review existing account | | NSA0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user reviewing existing account information to update them, reviewing all information to get customer acceptance and also processing credit checking | | |
| Pre-conditions | User is either creating a new subscriber or migrating from a prepaid to a postpaid offer | | |
| Trigger | User has selected one new subscriber option or migrate prepaid to postpaid | | |
| Minimum guarantees | User can’t process new subscriber acquisition without customer acceptance | | |
| Success guarantees: | Account information have been set/updated | | |
| Normal Flow: | 1. Channel/CSR light displays administrative information with value already set if any (including account contact and address) 2. User updates administrative information (refer to use case update administrative data) (A2) 3. Channel/CSR light application redirects user to update billing information 4. User updates billing information (refer to use case update billing information) (A5) (A6) 5. Channel/CSR light application displays all information set for review(A2) 6. User continue (A3) | | |
| Alternative Flows: | A1: Information set by the user are not correct or not complete   1. Channel/CSR light application request again to set information and highlights mistakes 2. User set new values   A2: User does not need to update administrative data   1. Next steps are similar to nominal case   A3: Application configuration request approval of terms and condition and return policy   1. User accepts and continue (A4)   A4: User has not validated terms and conditions and return policy   1. Channel/CSR light application displays an error message to inform user he must accept terms and condition and return policy to continue 2. User accepts and continues 3. Next step are similar to nominal case   A5: User does not need to update billing information   1. Next steps are similar to nominal case   A6: A mandatory attribute has not been set   1. Channel/CSR light application requests the user to update the (or more) mandatory attribute(s) 2. User updates administrative data and/or billing account information depending on the mandatory attribute to set. 3. Next steps are similar to nominal case | | |

#### Use Case: Update administrative data

|  |  |  |
| --- | --- | --- |
| Update administrative data | | NSA0025 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing current administrative data set and updating them | | |
| Pre-conditions | User is either:   * Adding a new subscriber on an existing account * Migrating a prepaid to postpaid subscriber | | |
| Trigger | User has selected the option to update administrative data for a an existing account | | |
| Minimum guarantees |  | | |
| Success guarantees: | Administrative data are set | | |
| Normal Flow: | 1. Channel/CSR light application displays current administrative data method and relevant parameters with values if already set 2. User updates administrative data (including account contact and address) and relevant parameters he is authorized to modify of the current existing account (A2) 3. Channel/CSR light application validates information set (A1) 4. Channel/CSR light application updates new administrative data on the existing account. | | |
| Alternative Flows: | A1: User has not set correctly requested information   1. Channel/CSR light application requests the user to set again information and highlights mistakes 2. User set requested information   A2: User has selected the option to search and select an address in a referential   1. User updates administrative data (including account contact and address selection thanks to the address referential. Refer to use case ‘Search and select address in referential’) and relevant parameters he is authorized to modify of the current existing account | | |

#### Use Case: Update billing information

|  |  |  |
| --- | --- | --- |
| Update billing information | | NSA0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user viewing current billing information set and updating them | | |
| Pre-conditions | User is either:   * Adding a new subscriber * Migrating a prepaid to postpaid subscriber | | |
| Trigger | User is at the update billing information step for a an existing account | | |
| Minimum guarantees |  | | |
| Success guarantees: | Billing account information are set | | |
| Normal Flow: | 1. Channel/CSR light application displays current payment method and relevant parameters with values if already set (A1) 2. User set a new payment method and set relevant parameters or update parameters of the current one 3. Channel/CSR light application displays billing information with value already set if any 4. User set/update billing information he is authorized to modify 5. Channel/CSR light application validates information set (A2) 6. Channel/CSR light application adds new payment information and new billing information on the existing account. | | |
| Alternative Flows: | A1: User is creating a new prepaid customer   1. Channel/CSR light application doesn’t force user to set recurring payment information 2. Next steps are similar to nominal case   A2: User has not set correctly requested information   1. Channel/CSR light application requests the user to set again information and highlights mistakes 2. User set requested information | | |

#### Use Case: New Subscriber

|  |  |  |
| --- | --- | --- |
| New subscriber | | NSA0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user creating a new subscriber | | |
| Pre-conditions | User is in a new customer or new subscriber for existing customer process | | |
| Trigger | User has selected a primary offer of subscriber bundle | | |
| Minimum guarantees |  | | |
| Success guarantees: | New subscriber has been added to the basket | | |
| Normal Flow: | 1. User set the new subscriber contact (refer to use case set subscriber contact) 2. User set the subscriber attributes (refer to use case set subscriber attributes) 3. User selects supplementary (and selective for a subscriber bundle) offers (refer to use case select subscriber supplementary offers) 4. User configures primary offer and offer parameters (refer to use case configure primary offer/offer parameters) 5. User configures new subscriber balances (refer to use case configure balances) 6. User configures new subscriber external id types (refer to Configure subscriber external id use case) 7. Channel/CSR light application adds the new subscriber to the basket | | |
| Alternative Flows: | None | | |

#### Use Case: Set subscriber contact



|  |  |  |
| --- | --- | --- |
| Set subscriber contact | | NSA0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user setting identity and service address for a new subscriber | | |
| Pre-conditions | User is creating a new subscriber for either a new customer or an existing customer | | |
| Trigger | User has completed previous step to create a new subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees: | New subscriber contact is set | | |
| Normal Flow: | 1. Channel/CSR light user displays personal identity attributes to set 2. User set identity attributes 3. User set service address (refer to use case set service address) 4. User submits 5. Channel/CSR light application validates data (A1) 6. Channel/CSR light application adds the contact to the new subscriber | | |
| Alternative Flows: | A1: Data have not been correctly set by user or are incomplete   1. Channel/CSR light application display the form and highlights mistakes to fix 2. User set new values 3. Next steps are similar to nominal case | | |

#### Use Case: Set service address

|  |  |  |
| --- | --- | --- |
| Set Service address | | NSA0070 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user setting service address of a new subscriber | | |
| Pre-conditions | User is setting the contact for a new subscriber | | |
| Trigger | User has completed previous step to create a new subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees: | New subscriber service address is set | | |
| Normal Flow: | 1. Channel/CSR light application displays a form to set service address attributes according to service address template (A2) (A3) 2. User sets optionally service address values (A1) 3. Channel/CSR light application validates service address values | | |
| Alternative Flows: | A1: There is an address referential available to set the service address   1. User selects an address in the referential. Refer to use case ‘Search and select address in referential’ 2. Next step are similar to nominal case   A2: The selected offer of the contextual subscriber required “fixed point” serviceability processing.   1. Channel/CSR light application displays the service address in read-only mode.   A3: The selected offer of the contextual subscriber required “non fixed point” serviceability processing.   1. Channel/CSR light application displays already set serviceability criteria set in read-only mode. 2. Next step are similar to nominal case | | |

#### Use Case: Set subscriber attributes

|  |  |  |
| --- | --- | --- |
| Set subscriber attributes | | NSA0080 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows a user setting subscriber attributes | | |
| Pre-conditions | User is setting the contact for a new subscriber | | |
| Trigger | User has completed previous step to create a new subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees: | Subscriber attributes are set | | |
| Normal Flow: | 1. Channel/CSR light application shall display subscriber attributes that have to be set by user 2. User set values 3. Channel/CSR light application validates value set(A1) 4. Channel/CSR light application completes hidden subscriber attributes with default value 5. Channel/CSR light application set subscriber attributes on the new subscriber | | |
| Alternative Flows: | A1: Data have not been correctly set by user or are incomplete   1. Channel/CSR light application display the form and highlights mistakes to fix 2. User set new values 3. Next steps are similar to nominal case | | |

#### Use Case: Configure subscriber external id

|  |  |  |
| --- | --- | --- |
| Configure subscriber external id | | NSA0090 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to configure external id type for the new subscriber | | |
| Pre-conditions | User is creating a new subscriber  User is reconfiguring external ids of a subscriber selection in the basket | | |
| Trigger | User has completed previous step to create a new subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees: | External id type are configured for the new subscriber | | |
| Normal Flow: | 1. User selects a external id type to configure 2. Channel/CSR light application displays candidate inventory type and input field for the selected external id type configured in ‘input mode’ (A5) 3. User selects inventory type and set inventory identifier if required (i.e. SIM card reference) and submits (A12) 4. Channel/CSR light application validates with inventory module if reference set by the dealer are correct (A1)(A2) (A3) (A6) 5. Channel application displays all the lines to configure with the current configuration 6. User confirms the current configuration (A4) (A10) 7. Channel/CSR light application completes external id type configuration with inventory type for external id type configured as ‘hidden’ | | |
| Alternative Flows: | A1: Reference set is not existing in inventory module or already assigned   1. Channel/CSR light application displays an error message of values not correctly set or already assigned 2. User set new value 3. Next step are similar to nominal case   A2: External id type is not configured to check inventory   1. Channel/CSR light application doesn’t check with inventory module   A3: Inventory module does not answer (technical error)   1. Channel/CSR light application displays an error message informing the user that the current external id type cannot be validated   A4: User decides to accepts to cancel the current selection but want to finalize his order   1. User selects the cancel option to finalize his order (possible when only one selection exists in the basket). 2. Channel application displays a confirmation screen. 3. Dealer user confirms the cancellation of the current selection (A9). 4. The current selection is removed from the basket and channel application redirects the user to the use case view and manage basket.   A5: Line to configure is in ‘select’ mode   1. Channel/CSR light application displays candidate inventory types that must be selected by the user 2. Channel application displays a free filter allowing to search items based on this filter (wildcard is allowed) 3. User selects the search option (A7) 4. Channel application searches for items respecting the selected inventory type and free filter, if any. 5. Channel application displays a list of items matching with search criteria 6. User selects an item 7. Next step are similar to nominal case (step 5)   A6: Validating an line causes other lines to be automatically configured (container concept in inventory)   1. Channel/CSR light validates with inventory module if reference sets by the dealer are correct and updates additional lines with identifiers and types returned from the inventory. 2. Next step are similar to nominal case   A7: User selects the option ‘search and assign’:   1. Channel application searches for an item respecting the selected inventory type and free filter, if any. 2. Channel application sets the item retrieved. (A8) 3. Next step are similar to nominal case (step 5)   A8: No items matching with search criteria have been found:   1. Channel application displays a message informing the user that no item has been found. 2. Next step are similar to nominal case (step 5)   A9: User does not confirm the cancellation of the current selection.   1. Channel application redirects the user to the first step of this use case.   A10: At least one mandatory line to configure is not set (**not** configured in ‘hidden’ mode) (A11)   1. Channel application displays a message informing the user of the lines that must be set to have a valid configuration.   A11: At least one mandatory line to configure is not set (**is** configured in ‘hidden’ mode)   1. Channel application displays a message informing the user of a technical error (A4)   A12: User has selected the option to generate a place holder   1. Channel/CSR light application generates a place holder for this external id type in the order | | |

Channel/CSR light application requirements

CHA-3.3.4.10 Channel/CSR light application shall allow a user creating new subscriber(s) for an existing customer with respect of use case ‘New subscriber for existing customer’

CHA-3.3.4.10.1 Channel/CSR light application shall propose different options to add postpaid or prepaid subscribers

CHA-3.3.4.10.2 Channel/CSR light application shall propose different options to add a subscriber with a new account or on an existing account

CHA-3.3.4.10.3 Channel/CSR light application shall propose an option to create a subscriber with a new account

CHA-3.3.4.10.3.1 when integrated with Comverse one billing, Channel/CSR light application shall propose to add a new account below the contextual account (root account is the default)

CHA-3.3.4.10.3.2 Channel/CSR light application shall add the account directly to the customer (flat) if there is no root account (i.e. a root account means there is one and only one account with no parent account)

CHA-3.3.4.10.3.3 when integrated with Comverse one billing and when a root account exists, additional accounts shall always be created as sub-accounts of the root one.

CHA-3.3.4.10.3.4 Channel/CSR light application shall allow to configure the maximum depth of an account hierarchy for acquisition purpose.

CHA-3.3.4.10.3.5 Channel/CSR light application shall prevent creating a new sub-account beyond the configured maximum depth of an account hierarchy.

CHA-3.3.4.10.3.10 Channel/CSR light application shall force the user to select an account for the new subscriber

CHA-3.3.4.10.4 when creating a new subscriber for an existing account, Channel/CSR light application shall display the reference of the account

CHA-3.3.4.30 Channel/CSR light application shall allow user reviewing existing account information with respect of use case review existing account

CHA-3.3.4.30.1 Channel/CSR light application shall force the user to select an account for the new subscriber

CHA-3.3.4.30.2 Channel/CSR light application shall display the account reference and account identity for every account

CHA-3.3.4.40 Channel application shall allow dealer user updating administrative data with respect of use case ‘Update administrative data’

CHA-3.3.4.50 Channel/CSR light application shall allow user reviewing and updating billing information with respect of use case Update billing information

CHA-3.3.4.60 Channel/CSR light application shall support configuring list of account attributes

CHA-3.3.4.60.1 Channel/CSR light application shall support configuring account attributes that can be displayed to the user for an existing billing account

CHA-3.3.4.60.2 Channel/CSR light application shall support configuring account attributes that can be modified by a user for an existing billing account

CHA-3.3.4.60.3 Channel/CSR light application shall support different attribute configuration depending on the logged user role

CHA-3.3.4.70 Channel/CSR light application shall send modified billing information in the order to update the billing system

CHA-3.3.4.80 Channel/CSR light application shall allow a user creating a new subscriber for a new or existing customer with respect of use case ‘new subscriber’

CHA-3.3.4.90 Channel/CSR light application shall not display to the user any step that doesn’t require user interaction (interaction can be view only) in the specific context of a subscriber

CHA-3.3.4.100 Channel/CSR light application shall allow a user setting subscriber contact of the new subscriber with respect of use case ‘Set subscriber contact’.

CHA-3.3.4.110 Channel/CSR light application shall allow a user setting the service address of the contact with respect of use case ‘Set service address’.

CHA-3.3.4.120 Channel/CSR light application shall support all requirements to manage a service address already specified in serviceability FRS

CHA-3.3.4.130 Channel/CSR light application shall allow a user setting subscriber attributes of a new subscriber with respect of use case ‘set subscriber attributes’ included in ‘new subscriber’ use case.

CHA-3.3.4.130.1 Channel/CSR light application shall support configuring subscriber attributes that can be set by user for a new subscriber

CHA-3.3.4.130.2 Channel/CSR light application shall support configuring subscriber attributes to hidden them to the user and automatically set them with a default value

CHA-3.2.4.130.3 Channel application shall allow the configuration of subscriber attributes respecting CHA-3.2.4.80.x requirements, applied to subscriber attributes except CHA-3.2.4.80.3.3, not necessary for a subscriber.

CHA-3.3.4.140 Channel/CSR light application shall allow a user configuring external id type according to selected primary offer/supplementary offers and co requisite rules with respect of use case ‘Configure subscriber external id’

CHA-3.3.4.140.1 Channel/CSR light application shall support configuring for every external id type, a method to configure it

CHA-3.3.4.140.2 Channel/CSR light application shall support hidden method in the same way as Consumer application

CHA-3.3.4.140.3 Channel/CSR light application shall support Select method.

CHA-3.3.4.140.3.1 Channel/CSR light application shall allow to search by filter criteria and reserve an inventory item only if External id type is configured to check inventory.

CHA-3.3.4.140.3.2 Channel/CSR light application shall allow to search inventory item by free text input (and optionally wildcard), specific container, Inventory location, Inventory Serial number, vanity code, inventory sales channel, serial number, primary number, secondary number, tertiary number, service number and security type and value (e.g. PUK).

CHA-3.3.4.140.3.3 when check inventory is enabled, Channel/CSR light application shall allow to select an inventory item in a list.

CHA-3.3.4.140.3.3.1 Channel/CSR light application shall ensure that when selecting an item, this item shall not be available for another user.

CHA-3.3.4.140.3.3.2 Channel/CSR light application shall allow to configure at design-time the maximum number of items to retrieve and propose to the user.

CHA-3.3.4.140.3.4 when check inventory is enabled, Channel/CSR light application shall allow to get and assign straightly an inventory item (no selection).

CHA-3.3.4.140.3.4.1 Channel/CSR light application shall ensure that when assigning an item, this item shall not be available for another user.

CHA-3.3.4.140.3.5 Channel/CSR light application shall allow user specifying if a place holder must be generated instead of already assigning the inventory item.

CHA-3.3.4.140.4 Channel/CSR light application shall support Input method (User set the external id type inventory type reference)

CHA-3.3.4.140.5 In case of Input method, Channel/CSR light application shall support configuring if check with inventory module must be processed (i.e. real time call to inventory module).

CHA-3.3.4.140.6 Channel/CSR light application shall display previous values configured when user is redirected from a basket option to reconfigure the associated selection.

CHA-3.3.4.140.7 Channel/CSR light application shall support ‘Input or Select’ method, allowing to select or enter an inventory type reference as a user choice.

CHA-3.3.4.140.8 Channel/CSR light application shall support retrieving single or multiple inventory types and references when check to inventory is activated (multiple when container concept in inventory module is found).

CHA-3.3.4.140.9 Channel/CSR light application shall support updating dependent inventory types and references (contextually to a new subscriber selection) when check to inventory is activated.

CHA-3.3.4.140.10 Channel/CSR light application shall present labeling of a external id type using product kind if any in the configuration , otherwise shall present labeling using external id type name instead (UI requirement)

CHA-3.3.4.140.11 Channel/CSR light application shall validate if configuration of lines is complete and valid (if check with inventory module has been activated) before continuing the flow

CHA-3.3.4.140.11.1 Channel/CSR light application shall force the user to configure (or set) all mandatory lines (i.e. required co-requisite rules, not in ‘hidden’ mode) before continuing the flow.

CHA-3.3.4.190 If user has selected a subscriber bundle in the context of an account bundle, Channel/CSR light application shall redirect the user to add account bundle use case if not already in the basket, already subscribed or in a pending order.

CHA-3.3.4.200 Channel/CSR light application shall allow user configuring F&F numbers with respect of use case Configure new F&F list (V2)

CHA-3.3.4.200.1 Channel/CSR light application shall respect same requirements as the ones for Consumer application already described in FRS Friends and Family consumer 3.1

Capability 1 Identify customer - IDC

### Capability Description

This capability allows a user identifying a customer depending on customer and subscriber criteria.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Identify customer

|  |  |  |
| --- | --- | --- |
| Identify customer | | IDC0010 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows dealer to retrieve a specific customer | | |
| Pre-conditions | User is logged in Channel/CSR light application | | |
| Trigger | User has selected any option requiring first to identify a customer | | |
| Minimum guarantees | In case of integrated with billing:   * Channel/CSR light application will limit number of customers retrieved through the search * Channel/CSR light application will limit size of synchronized customer | | |
| Success guarantees: | Customer has been retrieved  Customer has been synchronized if integrated with Comverse Billing one 3.1 | | |
| Normal Flow: | 1. Channel/CSR light application proposes the different search options available (refer to search customers and search subscribers use cases) 2. User selects a customer 3. Channel/CSR light application set the application context with the selected customer and redirect the user to a summary of the customer (A1) | | |
| Alternative Flows: | A1: Channel/CSR light application is integrated with Comverse one billing   1. Channel/CSR light application call the billing to synchronize the selected customer 2. Channel/CSR light application waits until the selected customer is synchronized (A2) 3. Channel/CSR light application set the application context with the selected customer and redirect the user to a summary of the customer   A2: Customer can’t be synchronized and time out is reached   1. Channel/CSR light application displays an error message to inform the user that for technical reason, the customer can’t be accessed. | | |

#### Use Case: Search customers

|  |  |  |
| --- | --- | --- |
| Search customers | | IDC0020 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows a dealer to search customers based on customer criteria (i.e. root account criteria) | | |
| Pre-conditions | Dealer is logged in Channel/CSR light application | | |
| Trigger | Dealer wants to identify a customer | | |
| Minimum guarantees | In case of integrated with billing, Channel/CSR light application will limit number of customers retrieved through the search | | |
| Success guarantees: | Customer list is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays customer attributes (criteria) supported to search customers 2. User set attributes and submit 3. Channel/CSR light application processes the search (A1) 4. Channel/CSR light application display list of found customers (A2)(A3) | | |
| Alternative Flows: | A1: Channel/CSR light application is integrated with Comverse one billing   1. Channel/CSR light application call a search service to process the search in the billing 2. Next step is similar as nominal case (A4)   A2: There is no customer matching criteria   1. Channel/CSR light application displays an error message to inform the user there is no customer matching criteria   A3: There are too many customers matching criteria   1. Channel/CSR light application displays an error message to inform the user there are too many customers matching criteria and suggest him to refine his search   A4: Channel/CSR light application can’t process the search for any technical reason   1. Channel/CSR light application display an error message to inform user that for technical reason the service is temporarily unavailable | | |

#### Use Case: Search subscribers

|  |  |  |
| --- | --- | --- |
| Search subscribers | | IDC0030 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows a dealer to search customers based on subscriber criteria (i.e. root account criteria) | | |
| Pre-conditions | User is logged in Channel/CSR light application | | |
| Trigger | User wants to identify a customer | | |
| Minimum guarantees | In case of integrated with billing, Channel/CSR light application will limit number of subscribers retrieved through the search | | |
| Success guarantees: | Customer list is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays subscriber attributes (criteria) supported to search subscribers 2. User set attributes and submits 3. Channel/CSR light application processes the search (A1) 4. Channel/CSR light application display list of found subscribers with associated customers (A2)(A3) | | |
| Alternative Flows: | A1: Channel/CSR light application is integrated with Comverse one billing   1. Channel/CSR light application call a search service to process the search in the billing 2. Next step is similar as nominal case (A4)   A2: There is no subscribers matching criteria   1. Channel/CSR light application displays an error message to inform the user there is no customer matching criteria   A3: There are too many subscribers matching criteria   1. Channel/CSR light application displays an error message to inform the user there are too many subscribers matching criteria and suggest him to refine his search   A4: Channel/CSR light application can’t process the search for any technical reason   1. Channel/CSR light application display an error message to inform user that for technical reason the service is temporarily unavailable | | |

Channel/CSR light application requirements

CHA-3.4.4.10 Channel/CSR light application shall allow a user to identify an existing customer with respect of use cases ‘identify customer’, including ‘search customers’ and ‘search subscribers’ use cases described above.

CHA-3.4.4.20 Channel/CSR light application shall allow to search customers by identity (company name or first name/last name)

CHA-3.4.4.30 Channel/CSR light application shall allow to search customers by reference (i.e. default account external id when integrated)

CHA-3.4.4.40 Channel/CSR light application shall allow to search subscribers by the couple external id type-line value (i.e. external id type-external id value - integrated or not)

CHA-3.4.4.40.1 Channel/CSR light application shall allow to configure which external id type can be used as search criteria

CHA-3.4.4.45 Channel/CSR light application criteria shall not be case sensitive

CHA-3.4.4.50 Channel/CSR light application shall allow configuring if search must be done locally (i.e. in the CID) or in billing

CHA-3.4.4.60 Channel/CSR light application shall allow configuring Maximum number of subscribers in an account hierarchy that can be searched and synchronized

CHA-3.4.4.61 when search is done in the billing, Channel/CSR light application shall allow configuring the customer types eligible to the search.

CHA-3.4.4.70 Channel/CSR light application shall allow configuring max number of customers and max number of subscribers that can be retrieved from the search

CHA-3.4.4.75 Channel application shall support wildcards for any criteria.

CHA-3.4.4.80 Channel/CSR light application shall allow configuring which criteria accepts wildcards

CHA-3.4.4.90 Channel/CSR light application shall display list of customers found

CHA-3.4.4.90.1 Channel/CSR light application shall display for every customer the customer identity (last name/first name or company name) and the customer reference, customer type (if search is local) and customer address.

CHA-3.4.4.100 Channel/CSR light application shall display list of found subscribers

CHA-3.4.4.100.1 Channel/CSR light application shall display for every subscriber the customer identity, the customer reference, the customer address and the subscriber reference (primary external id type value if any).

Capability 1 Customer Information Management - CIM

### Capability Description

This capability allows updating some of the information of the customer such as the customer billing address when customer has moved for example.

### Capability Assumptions/Dependencies

This capability is dependent on the presence of the customer entity in the self service system. It means that if the customer does not exist in the self service system then it has to be synchronized with the backend before accessing to the use cases of this capability.

### Capability Use Cases

#### Use Case: View customer information

|  |  |  |
| --- | --- | --- |
| View customer information | | CIM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows viewing a customer with summary of his information, including customer contact, customer subscribers and customer billing accounts. | | |
| Pre-conditions | User is logged in.  The customer has been identified  Customer and root account are functionally different entities | | |
| Trigger | User has selected a customer | | |
| Minimum guarantees |  | | |
| Success guarantees: | Customer information has been displayed.  Channel/CSR light application is in the context of the customer. | | |
| Normal Flow: | 1. Channel/CSR light application displays the contextual customer name, customer reference and customer type 2. Channel/CSR light application displays main characteristics of the customer (i.e List of billing accounts with their account reference, list of subscribers with their primary identifier) 3. Channel/CSR light application displays customer contact 4. Channel/CSR light application displays customer pending requests | | |
| Alternative Flows: |  | | |

#### Use Case: Modify customer contact

|  |  |  |
| --- | --- | --- |
| Modify customer contact | | CIM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows modifying a customer contact. | | |
| Pre-conditions | User is logged in.  The customer has been found in self service.  User is viewing the customer information (refer to view customer information use case) | | |
| Trigger | User selects the option to modify the customer contact | | |
| Minimum guarantees | Customer legal contact has not been modified. | | |
| Success guarantees: | Modification of customer legal contact has been submitted. | | |
| Normal Flow: | 1. The application displays customer legal data in editable mode populated with existing values. 2. User updates data information upon user inputs. 3. The user submits or (A1). 4. The application submits the request to billing (A2) 5. The application confirms the user that the modification has been submitted | | |
| Alternative Flows: | A1: User decides to cancel this action   1. Application redirects the user to ‘View customer information’ use case.   A2: There is already a pending modification contact request for the customer   1. Application displays an error message informing the user he can’t submit this modification until previous request has been processed. | | |

Channel/CSR light application requirements

CHA-3.5.4.10 Channel/CSR light application shall allow a user to view a summary of customer information as a dashboard with respect of use case ‘view customer information’ describe above

CHA-3.5.4.10.4 Channel/CSR light application shall list billing accounts in the dashboard with billing account reference, if any, and subscribers list linked to each billing account

CHA-3.5.4.10.5 Channel/CSR light application shall list subscribers in the dashboard with Subscriber primary identifier and Billing account reference if linked to

CHA-3.5.4.10.6 Channel application shall display customer’s requests

CHA-3.5.4.10.6.1 Channel application shall display only requests with a pending status and impacting the customer (in the requests part of use case RQM0030 View requests impacting a customer)

CHA-3.5.4.10.6.2 Channel application shall display same request attributes as in view request general use case

CHA-3.5.4.10.6.3 Channel application shall allow user viewing details of every request similarly as in view details request use case.

CHA-3.5.4.10.7 Channel/CSR light application shall allow the user to access to detail of every request

CHA-3.5.4.10.8 Channel/CSR light application shall display pending requests impacting the customer when submitted by a user of the same organization than the logged user or by the customer user himself (using Consumer Self Service application)

CHA-3.5.4.10.20 Channel/CSR light application shall propose an option to go to a billing account dashboard for each billing account from the view customer information use case.

CHA-3.5.4.10.30 Channel/CSR light application shall propose an option to go to the subscriber information dashboard for each subscriber from the view customer information.

CHA-3.5.4.10.40 Channel/CSR light application shall propose options to modify customer contact information with respect of use case ‘Modify customer contact’ describe above.

Capability 1 Billing Account Management - BAM

### Capability Description

This capability allows viewing a dashboard/summary of a billing account and updating some of its information.

### Capability Assumptions/Dependencies

This capability is dependent on the presence of the customer entity in the self service system. It means that if the customer does not exist in the self service system then it has to be synchronized with the backend before accessing to the use cases of this capability.

### Capability Use Cases

#### Use Case: View and manage billing account

|  |  |  |
| --- | --- | --- |
| View and manage billing account | | BAM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to view billing account information (account offers and bundle, payment method, billing address and billing extended attributes), as a dashboard or synthetic view. | | |
| Pre-conditions | User is logged in.  Customer has been identified | | |
| Trigger | User selects a billing account | | |
| Minimum guarantees |  | | |
| Success guarantees: | Billing account dashboard is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays the contextual customer name, customer reference and customer type 2. Channel/CSR light application displays main characteristics of the account (i.e Billing account reference, account active date, account status and account holder) 3. Channel/CSR light application displays subscribed offers (i.e. account’s bundle and account offers instances) 4. Channel/CSR light application displays billing contact 5. Channel/CSR light application displays payment method and parameters if any 6. Channel/CSR light application displays all visible account attributes | | |
| Alternative Flows: |  | | |

#### Use Case: Modify billing contact

|  |  |  |
| --- | --- | --- |
| Modify billing contact | | BAM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to modify a billing contact | | |
| Pre-conditions | User is logged in.  Channel/CSR light application is in the context of a billing account | | |
| Trigger | User has selected the option to modify the billing contact | | |
| Minimum guarantees | Billing contact has not been modified. | | |
| Success guarantees: | Billing contact modification request has been posted | | |
| Normal Flow: | 1. The application displays billing contact in editable mode populated with existing values. 2. User updates data information upon consumer inputs. 3. The user submits (A1). 4. The application posts the modification request (A2) 5. The application confirms to the user the request has been posted | | |
| Alternative Flows: | A1: User decides to cancel this action   1. Application redirects the user to ‘View billing account information’ use case.   A2: There is a pending billing contact modification for the account   1. Application displays an error message informing the user he can’t submit this modification until previous request has been processed | | |

#### Use Case: Modify payment method information

|  |  |  |
| --- | --- | --- |
| Modify payment method information | | BAM0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to modify a billing account payment method. | | |
| Pre-conditions | User is logged in.  Channel/CSR light application is in the context of a billing account | | |
| Trigger | User has selected the option to modify the billing account payment information | | |
| Minimum guarantees | Payment method has not been modified. | | |
| Success guarantees: | Payment method has been modified. | | |
| Normal Flow: | 1. The application displays payment method in editable mode populated with existing values if any and the list of other available payment methods. 2. User updates data information upon user inputs. 3. The user submits or (A1). 4. The application posts the modification request (A2) 5. The application confirms to the user the request has been posted | | |
| Alternative Flows: | A1: User decides to cancel this action   1. Application redirects the user to ‘View and manage billing account’ use case.   A2: There is a pending payment method modification for the account   1. Application displays an error message informing the user he can’t submit this modification until previous request has been processed | | |

#### Use Case: Modify billing account attributes

|  |  |  |
| --- | --- | --- |
| Modify billing account attributes | | BAM0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to modify a billing account attributes. | | |
| Pre-conditions | User is logged in.  Channel/CSR light application is in the context of a billing account | | |
| Trigger | Customer needs to update his billing account attributes. | | |
| Minimum guarantees | Billing account attributes have been modified. | | |
| Success guarantees: | Billing account attributes have not been modified. | | |
| Normal Flow: | 1. The application displays billing account attributes in editable mode populated with existing values. 2. User updates data information upon consumer inputs. 3. The user submits or (A1). 4. The application posts the modification request (A2) 5. The application confirms to the user the request has been posted | | |
| Alternative Flows: | A1: User decides to cancel this action   1. Application redirects the user to ‘View billing account information’ use case.   A2: There is a pending billing contact modification for the account   1. Application displays an error message informing the user he can’t submit this modification until previous request has been processed | | |

#### Use Case: Add account offers

|  |  |  |
| --- | --- | --- |
| Add account offers | | BAM0090 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows adding account offers to an existing billing account, with or without an account bundle subscribed. | | |
| Pre-conditions | Either:   * The user is logged in. * Customer has been identified and Channel/CSR light application is in the context of a specific billing account. | | |
| Trigger | The user has selected the option to add account offers | | |
| Minimum guarantees | The user can cancel account offers adding process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the new account offers information necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays account offers available for subscription for the user (refer to use case Browse and Select Account offers) (A1) (A3) 2. User creates a selection of new account offers (refer to use case Browse and Select Account offers). (A2) (A3) 3. Channel/CSR light application asks the user to confirm the new account offers selection. 4. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: There is already a pending request preventing the account offers reconfiguration   1. Channel/CSR light application displays an error message to the user to inform his reconfiguration can’t be done until current pending requests on this billing account have been processed.   A2: new account offer configuration is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays to the user all rules that doesn’t match 2. User confirms 3. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list with the last user selection (NF3)   A3: User selects reset option   1. Channel/CSR light application reinitializes the offers list as if it was the first time the user enters in the use case. 2. Next steps are similar to nominal case | | |

#### Use Case: Remove account offer

|  |  |  |
| --- | --- | --- |
| Remove account offer | | BAM00100 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows the user to remove an account offer from an account, with or without an account bundle subscribed. | | |
| Pre-conditions | Channel/CSR light application is in the context of a specific billing account and has at least one removable account offer.  And Either:   * The user is logged. * Customer has been identified. | | |
| Trigger | The user has selected the option to remove an account offer | | |
| Minimum guarantees | The user can cancel the removal process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the account offer information to remove necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays subscribed removable account offers to the user (refer to use case View and manage billing account) (A1) 2. User selects a removable account offer in the list. (A2) (A3) 3. Channel/CSR light application asks the user to confirm the account offer removal. 4. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: Account has no removable offers.   1. Channel/CSR light application disallows removal of account offer or has no subscribed account offers.   A2: There is already a pending request preventing the account offer removal   1. Channel/CSR light application displays an error message to the user to inform his action can’t be done until current pending requests on this billing account have been processed.   A3: Account offer removal is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays to the user all rules that doesn’t match 2. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list of subscribed account offers (NF1) | | |

#### Use Case: Reconfigure account offers

|  |  |  |
| --- | --- | --- |
| Reconfigure account offers | | BAM0110 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows reconfiguring account offers | | |
| Pre-conditions | * Customer has been identified and Channel/CSR light application is in the context of a specific billing account. | | |
| Trigger | The user has selected the option to reconfigure | | |
| Minimum guarantees |  | | |
| Success guarantees: | Channel/CSR light application has sent a new order with:   * Account offers to remove * Account offers to ‘swap’ from selective to optional * Account offers to ‘swap’ from optional to selective * Account offers to add | | |
| Normal Flow: | 1. Channel/CSR light application displays offers already subscribed with for selective offers:   - Information specifying if it can be kept as optional  - Current recurring cost (estimated according to current catalog version) (A1)   1. Channel/CSR light application displays offers candidate with for every offer   - Information specifying if they can be selected as selective  - Current recurring cost (estimated according to current catalog version for offers already subscribed)  - Non recurring cost   1. User selects offers he wants to remove 2. User selects selective offer he wants to keep but as optional 3. User selects optional offers already subscribed he wants to keep but as selective 4. User selects candidate new offers he wants to add 5. Channel/CSR light application recalculates fees according to user selections 6. User submits 7. Channel/CSR light application displays to users the list of removed offers and the list of added offers and requests confirmation (A2) 8. User confirms (A3) 9. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: There is already a pending request preventing the account offers reconfiguration   1. Channel/CSR light application displays an error message to the user to inform his reconfiguration can’t be done until current pending requests on this billing account have been processed.   A2: New configuration is not correct   1. Channel/CSR light application informs user of the error 2. Next steps are similar to step 1 of nominal case   A3: User cancels   1. Channel/CSR light application redirects user to first steps of the use case. | | |

Channel/CSR light application requirements

CHA-3.6.4.10 Channel/CSR light application shall allow a user to view a summary of each billing account a customer has, with respect of use case ‘view and manage billing account’ describe above.

CHA-3.6.4.10.1 Channel/CSR light application shall allow the user to navigate in the account hierarchy (if organized hierarchically).

CHA-3.6.4.10.2 Channel/CSR light application shall highlight the contextual account.

CHA-3.6.4.10.3 Channel/CSR light application shall display the account holder company name (if any) of the contextual billing account.

CHA-3.6.4.10.4 Channel/CSR light application shall display the account holder “title, first name and last name” of the contextual billing account (if any).

CHA-3.6.4.10.5 Channel/CSR light application shall display the subscribers (with their primary identifier) associated to all billing accounts.

CHA-3.6.4.10.5.1 Channel/CSR light application shall display for each subscriber belonging to the contextual billing account, its status and main offer (primary offer or subscriber bundle).

CHA-3.6.4.10.6 Channel/CSR light application shall display ‘collection indicator’, ‘outstanding balance’, ‘monetary liability limit’, ‘current monetary liability’, ‘rating status’, ‘next bill date’, ‘last bill cutoff date’ for the contextual account.

CHA-3.6.4.30 Channel/CSR light application shall allow configuring at design time a list of visible account attributes and their display order

CHA-3.6.4.30.1 Channel/CSR light application shall support different configurations depending on the customer type

CHA-3.6.4.30.2 Channel/CSR light application shall support to group visible account attributes for display purpose (display group)

CHA-3.6.4.30.2.1 Channel/CSR light application shall allow the configuration of the order of account attributes display groups.

CHA-3.6.4.30.2.2 Channel/CSR light application shall allow the configuration of the order to display an account attribute relatively to its display group.

CHA-3.6.4.30.2.3 Channel/CSR light application shall support to configure display groups per logged user role.

CHA-3.6.4.30.3 Channel/CSR light application shall support to configure additional viewable account attributes that will be integrated with Comverse one Billing 3.1.

CHA-3.6.4.30.4 Channel/CSR light application shall support a different configuration of its viewable account attributes than in consumer application, when application are deployed on the same CSS system (co-existence mode).

CHA-3.6.4.40 Channel/CSR light application shall display Billing account payment method in the dashboard and its parameters

CHA-3.6.4.50 Channel/CSR light application shall display Subscribed account bundle and offers instances

CHA-3.6.4.50.1 Channel/CSR light application shall display account bundle name if any

CHA-3.6.4.50.2 Channel/CSR light application shall display account’s mandatory offers

CHA-3.6.4.50.3 Channel/CSR light application shall display account’s selective offers

CHA-3.6.4.50.4 Channel/CSR light application shall display account’s optional offers

CHA-3.6.4.50.5 Channel/CSR light application shall display account’s bundle and offers active date

CHA-3.6.4.65 Channel/CSR light application shall display session notes and cases (Refer to DR-4-004-255)

CHA-3.6.4.65.1 Channel/CSR light application shall allow configuring at design time to enable/disable notes.

CHA-3.6.4.65.2 Channel/CSR light application shall allow configuring at design time to enable/disable cases.

CHA-3.6.4.65.3 Channel/CSR light application shall display a notes area above the cases area

CHA-3.6.4.65.4 Channel/CSR light application shall allow the user to refresh notes area.

CHA-3.6.4.65.5 Channel/CSR light application shall allow the user to refresh cases area.

CHA-3.6.4.65.6 Channel/CSR light application shall allow configuring at design time the maximum number of notes to be displayed on the dashboard (4 by default).

CHA-3.6.4.65.7 Channel/CSR light application shall allow configuring at design time the maximum number of cases to be displayed on the dashboard (4 by default).

CHA-3.6.4.70 Channel/CSR light application shall allow a user to modify a billing contact with respect of use case ‘modify billing contact’ describe above.

~~CHA-3.6.4.70.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing account status.~~

CHA-3.6.4.80 Channel/CSR light application shall allow a user to modify a payment method information with respect of use case ‘modify payment method information’ describe above.

CHA-3.6.4.80.1 Channel/CSR light application shall allow selecting only one payment method and its mandatory parameters must be filled to be complete.

~~CHA-3.6.4.80.2 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing account status.~~

CHA-3.6.4.90 Channel/CSR light application shall allow a user to modify billing account attributes with respect of use case ‘modify billing account attributes’ describe above.

CHA-3.6.4.90.1 Channel/CSR light application shall allow configuring at design time list of account modifiable attributes.

~~CHA-3.6.4.90.2 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing account status.~~

CHA-3.6.4.90.3 Channel/CSR light application shall allow the configuration of account attributes respecting CHA-3.2.4.80.x requirements, applied to the modification of account attributes

CHA-3.6.4.90.4 Channel/CSR light application shall allow the configuration of modifiable account attributes depending on user role

CHA-3.6.4.90.5 Channel/CSR light application shall support a default configuration of modifiable account attributes

CHA-3.6.4.120 Channel/CSR light application shall allow user viewing subscribed account offer details with respect of use case ‘View subscribed offer details’ described in subscriber management capability.

CHA-3.6.4.120.10 Channel/CSR light application shall display main offer characteristics:

CHA-3.6.4.121.12 Channel/CSR light application shall display offer’s instance payment mode

CHA-3.6.4.121.13 Channel/CSR light application shall display offer’s name and description

CHA-3.6.4.121.14 Channel/CSR light application shall display visible offer’s attributes

CHA-3.6.4.121.15 Channel/CSR light application shall display offer’s plans’ name and description

CHA-3.6.4.130 Channel/CSR light application shall allow a user adding account offers of the account with respect of use case ‘Add account offers’.

CHA-3.6.4.130.1 Channel/CSR light application shall display only account offers with a valid start and end date if set.

~~CHA-3.6.4.130.2 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing account status.~~

CHA-3.6.4.140 Channel/CSR light application shall allow a user removing an account offer of an account with respect of use case ‘Remove account offers’.

~~CHA-3.6.4.140.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing accou~~~~nt status.~~

CHA-3.6.4.150 Channel/CSR light application shall allow a user reconfiguring list of account offers with respect of use case ‘Reconfigure account offers’.

~~CHA-3.6.4.150.1 Channel/CSR light application shall propose the option only if there is an account bundle subscribed on the account and selective offers in the account bundle definition~~

CHA-3.6.4.150.2 Channel/CSR light application shall allow user to keep a selective offer but as optional only if the offer is hybrid and if the offer is still available.

CHA-3.6.4.150.3 Channel/CSR light application shall propose as candidate offers only offers valid (refer to select account offers for ‘valid’ requirements)

CHA-3.6.4.150.4 Channel/CSR light application shall display and control offers rules similarly as in select account offers

~~CHA-3.6.4.150.5 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual billing account status.~~

Capability 1 Subscriber Management - SUM

### Capability Description

This capability groups all use cases allowing a dealer managing a specific subscriber

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View and manage subscriber

|  |  |  |
| --- | --- | --- |
| View and manage subscriber | | SUM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing a dashboard of the subscriber summarizing main subscriber information | | |
| Pre-conditions | The customer has been identified | | |
| Trigger | User has selected an option to display a specific subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees: | User sees the subscriber summary | | |
| Normal Flow: | 1. Channel/CSR light application displays the contextual customer name, customer reference and customer type 2. Channel/CSR light application displays main characteristics of the subscriber (i.e Subscriber primary identifier (reference), subscriber active date, subscriber status and subscriber service category) 3. Channel/CSR light application displays subscribed offers (i.e. subscriber’s bundle and offers instances) 4. Channel/CSR light application displays subscriber contact and address 5. Channel/CSR light application displays all visible subscriber attributes 6. Channel/CSR light application displays all visible external ids | | |
| Alternative Flows: |  | | |

#### Use Case: View subscribed primary offer details

|  |  |  |
| --- | --- | --- |
| View subscribed primary offer details | | SUM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing the details of the subscribed primary offer (i.e. primary offer instance) | | |
| Pre-conditions | User is viewing a specific subscriber  The primary offer has been subscribed outside a subscriber bundle | | |
| Trigger | The user selects the option to view the primary offer details | | |
| Minimum guarantees |  | | |
| Success guarantees: | Primary offer instance details are displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays main primary offer’s characteristics 2. Channel/CSR light application displays primary offer’s mandatory offers 3. Channel/CSR light application displays primary offer’s optional offers specifying which ones are already subscribed 4. Channel/CSR light application displays primary offer’s parameters values | | |
| Alternative Flows: |  | | |

#### Use Case: View subscribed subscriber bundle details

|  |  |  |
| --- | --- | --- |
| View subscribed subscriber bundle details | | SUM0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing the details of the subscribed primary offer and subscriber bundle (i.e. primary offer instance and subscriber bundle instance) | | |
| Pre-conditions | User is viewing a specific subscriber  The primary offer has been subscribed in the context of a subscriber bundle | | |
| Trigger | The user selects the option to view the primary offer or subscriber bundle details | | |
| Minimum guarantees |  | | |
| Success guarantees: | Primary offer and subscriber bundle instance details are displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays main subscriber bundle’s characteristics 2. Channel/CSR light application display main primary offer’s characteristics 3. Channel/CSR light application displays subscriber bundle’s mandatory offers 4. Channel/CSR light application displays subscriber bundle’s selective offers specifying which one are already subscribed 5. Channel/CSR light application displays subscriber bundle’s optional offers specifying which one are already subscribed 6. Channel/CSR light application displays primary offer’s parameters values | | |

#### Use Case: View subscribed supplementary offer details

|  |  |  |
| --- | --- | --- |
| View subscribed supplementary offer details | | SUM0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user viewing details of a specific supplementary offers | | |
| Pre-conditions | Either:   * User is viewing a specific subscriber * User is viewing a specific billing account | | |
| Trigger | User has selected the option to view details of a specific supplementary offer | | |
| Minimum guarantees |  | | |
| Success guarantees: | Service details are displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays main supplementary offer’s characteristics 2. Channel/CSR light application displays supplementary offer’s options and parameters values | | |
| Alternative Flows: |  | | |

#### Use Case: View subscriber status history

|  |  |  |
| --- | --- | --- |
| View subscriber status history | | SUM0050 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user to view the status history of a given subscriber | | |
| Pre-conditions | User is viewing a subscriber | | |
| Trigger | User has selected the option to view subscriber history | | |
| Minimum guarantees |  | | |
| Success guarantees: | Status history is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays the list of statuses with their change date in a descending order (A1) | | |
| Alternative Flows: | A1: there is no status history   1. Channel/CSR light application displays an error message informing the user there is no history | | |

#### Use Case: Modify subscriber contact

|  |  |  |
| --- | --- | --- |
| Modify subscriber contact | | SUM0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user modifying the subscriber identity (service address can’t be modified) | | |
| Pre-conditions | The user is viewing a subscriber  There is no pending contact modification request for this subscriber | | |
| Trigger | User has selected the option to modify the subscriber contact | | |
| Minimum guarantees | User can cancel the modification (before submitting)  Only identity is modified in billing | | |
| Success guarantees: | Contact is modified and modification is sent to billing | | |
| Normal Flow: | 1. Channel/CSR light application displays the contact identity with current value (A1) 2. User set new values 3. Channel/CSR light application requests the user to confirm 4. User confirms 5. Channel/CSR light application posts the request 6. Channel/CSR light application displays a message specifying that the request has been successfully submitted | | |
| Alternative Flows: | A1: there is already a pending contact modification for this subscriber   1. Channel/CSR light application displays an error message to inform the user he can’t modify the contact until current pending modification request has been processed. | | |

#### Use Case: Modify subscriber attributes

|  |  |  |
| --- | --- | --- |
| Modify subscriber attributes | | SUM0070 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user modifying subscriber attributes of a specific subscriber | | |
| Pre-conditions | User is viewing a specific subscriber  There is no pending attribute modification request for this subscriber | | |
| Trigger | User has selected the option to modify subscriber attributes | | |
| Minimum guarantees | User can cancel the modification (before submitting) | | |
| Success guarantees: | Subscriber’s attributes are modified and modification is sent to billing | | |
| Normal Flow: | 1. Channel/CSR light application displays the list of modifiable subscriber attributes with current values (A1) 2. User set new values 3. Channel/CSR light application validates values set (A2) 4. Channel/CSR light application requests the user to confirm(A3) 5. User confirms 6. Channel/CSR light application posts the modification requests to the billing 7. Channel/CSR light application displays a confirmation message informing the user the request has been successfully sent | | |
| Alternative Flows: | A1: There is pending modification request for this subscriber   1. Channel/CSR light application displays an error message to inform the user he can’t modify the attributes until current pending modification request has been processed.   A2: attributes values are not set correctly   1. Channel/CSR light application displays an error message and highlights values not set correctly 2. User set new values 3. Next steps are similar to nominal case   A3: User is modifying/setting happy hour or special day   1. Channel/CSR light manages potential associated charge(s) (refer to Charge administrative event use case) | | |

#### Use Case: Migrate from prepaid to postpaid



|  |  |  |
| --- | --- | --- |
| Migrate from prepaid to post-paid | | SUM0080 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user migrating one prepaid subscriber to one postpaid subscriber | | |
| Pre-conditions | User has already identified a customer  User is in a context of a specific subscriber  There is no swap, modify, remove or add supplementary offer pending request | | |
| Trigger | User has selected the option to migrate a prepaid subscriber to postpaid | | |
| Minimum guarantees | User can cancel subscriber migration process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the new subscriber information necessary to the backend. | | |
| Normal Flow: | 1. User Reviews and update existing account (refer to use case Review existing account). (A1)(A1bis)(A9)(A10) 2. Channel/CSR light application displays primary offers and bundles available for the user (refer to use case Browse primary offers/Bundles) 3. User browses the catalog and select a primary offer or subscriber bundle (A8) 4. Channel/CSR light application redirects the user to swap subscriber 5. User reconfigures the subscriber (Refer to swap subscriber use case) 6. Channel/CSR light application redirects the user to view its basket 7. User reviews the basket and validates that the order corresponds to customer’s expectations (Refer to use case: View Basket) 8. User decides to checkout the basket following customer’s acceptance (Refer to use case: Checkout) 9. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: Automatic Credit checking is active   1. Channel/CSR light application calls an external system to process credit checking and wait for the answer 2. Channel/CSR light application redirects the user to the selection of primary offer and bundles as in nominal case (A3)(A4)(A5)   A1bis: Manual credit checking is active   1. User decides to continue(A6) 2. Channel/CSR light application redirects the user to the selection of primary offer and bundles as in nominal case   A3: Channel/CSR light application can’t access to credit checking service for any technical reason   1. Channel/CSR light application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking 2. User selects to skip credit checking (A3bis)(A6)(A7) 3. Channel/CSR light application redirects the user to the catalog browsing 4. Next steps are similar to nominal case   A3bis: User decides to retry credit checking step   1. Channel/CSR light application redirects to (A1)   A4: Credit checking refuses the customer   1. Channel/CSR light application displays an error message informing user he can’t migrate to postpaid subscriber 2. User cancels the migration 3. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A5: Credit checking requires approval from service provider   1. Channel/CSR light application displays an error message informing the user that the migration of the subscriber to postpaid requires service provider approval. 2. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 3. Channel/CSR light application sends the order to referral management 4. Channel/CSR light informs the user that the request is on referral 5. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A6: User has selected send to referral option   1. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user 2. Channel/CSR light application sends the order to referral management 3. Channel/CSR light informs the user that the request is on referral 4. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A8: User has selected a new account bundle (not already subscribed on the account, in the basket or in a pending order)   1. User configures the account bundle (refer to add account bundle use case) 2. Next steps are similar to the nominal case   A9: There is already a pending request preventing the migration   1. Channel/CSR light application displays an error message to the user to inform him migration can’t be done until current pending requests on this subscriber have been processed.   A10: ‘Review existing account’ step (and use case) is disabled   1. Channel/CSR light application redirects the user to the next step. | | |

#### Use Case: Change primary offer and supplementary offers



|  |  |  |
| --- | --- | --- |
| Change primary offer and supplementary offers | | SUM0090 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows swapping primary offer/subscriber bundles and supplementary offers but limited to same payment mode (prepaid to prepaid, postpaid to postpaid) | | |
| Pre-conditions | User has already identified a customer  User is in a context of a specific subscriber | | |
| Trigger | User has selected the option to change primary offer and supplementary offers | | |
| Minimum guarantees | User can cancel subscriber reconfiguration process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the new subscribers information necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays primary offers and bundles available for the user (refer to use case Browse primary offers/Bundles) (A9) (A10) 2. User browses the catalog and select a primary offer or subscriber bundle (A8) 3. Channel/CSR light application redirects the user to swap subscriber 4. User reconfigures the subscriber (Refer to swap subscriber use case) 5. Channel/CSR light application redirects the user to view its basket 6. User reviews the basket and validates that the order corresponds to customer’s expectations (Refer to use case: View Basket) 7. User decides to checkout the basket following customer’s acceptance (Refer to use case: Checkout) 8. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: Automatic Credit checking is active   1. Channel/CSR light application calls an external system to process credit checking and wait for the answer 2. Channel/CSR light application redirects the user to the selection of primary offer and bundles as in nominal case (A3)(A4)(A5)   A1bis: Manual credit checking is active   1. User decides to continue(A6) 2. Channel/CSR light application redirects the user to the selection of primary offer and bundles as in nominal case   A3: Channel/CSR light application can’t access to credit checking service for any technical reason   1. Channel/CSR light application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking 2. User selects to skip credit checking (A3bis)(A6)(A7) 3. Channel/CSR light application redirects the user to the catalog browsing 4. Next steps are similar to nominal case   A3bis: User decides to retry credit checking step   1. Channel/CSR light application redirects to (A1)   A4: Credit checking refuses the customer   1. Channel/CSR light application displays an error message informing user he can’t change his primary offer 2. User cancels the change primary offer and supplementary offers 3. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A5: Credit checking requires approval from service provider   1. Channel/CSR light application displays an error message informing the dealer that the change primary offer and supplementary offers of the subscriber to postpaid requires service provider approval. 2. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 3. Channel/CSR light application sends the order to referral management 4. Channel/CSR light informs the user that the request is on referral 5. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A6: User has selected send to referral option   1. Channel/CSR light application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms 2. Channel/CSR light application sends the order to referral management 3. Channel/CSR light application redirects the user on the contextual subscriber dashboard (Refer to View and manage subscriber use case)   A8: User has selected a new account bundle (not already subscribed on the account, in the basket or in a pending order)   1. User configures the account bundle (refer to add account bundle use case) 2. Next steps are similar to the nominal case   A9: There is already a pending request preventing the change primary offer and supplementary offers (migration request)   1. Channel/CSR light application displays an error message to the user to inform him migration can’t be done until current pending requests on this subscriber have been processed.   A10: ‘Review existing account’ step (and use case) is enabled   1. User reviews and updates existing account (refer to use case Review existing account). (A1)(A1bis)(A9) | | |

#### Use Case: Swap primary offer/subscriber bundle



|  |  |  |
| --- | --- | --- |
| Swap primary offer/subscriber bundle | | SUM0100 |
| Primary actors | Dealer user  CSR | | |
| Summary Goal | This use case allows user reconfiguring the subscriber to complete the swap | | |
| Pre-conditions | User is either migrating a subscriber or changing primary offer and supplementary offers | | |
| Trigger | User has selected the primary offer | | |
| Minimum guarantees |  | | |
| Success guarantees: | New subscriber configuration has been set in the order | | |
| Normal Flow: | 1. Channel/CSR light application shall display impact on current balance of the swap specifically if he can lose some money (A1) 2. User reviews and updates subscriber attributes (refer to use update subscriber attributes) 3. User selects subscribers supplementary offers he wants (refer to select subscriber supplementary offers use case) 4. User Configures primary offer and offer parameters (refer to configure primary offer parameters use case) 5. User configures new F&F list (refer to use case configure new F&F list) 6. User configures balances (refer to configure balances use case) 7. Channel/CSR light application set the migrated subscriber in the basket | | |
| Alternative Flows: | A1: User cancels the swap   1. Channel/CSR light application redirects user to the customer main page. | | |

#### Use Case: Update subscriber external id

|  |  |  |
| --- | --- | --- |
| Update Subscriber external id | | SUM0110 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to re configure line roles for an existing subscriber | | |
| Pre-conditions | User is either swapping a subscriber or changing subscriber supplementary offers  New subscriber configuration is known | | |
| Trigger | User has completed previous step to swap the subscriber or to change its supplementary offers | | |
| Minimum guarantees |  | | |
| Success guarantees: | New Line role configuration is set for the existing subscriber | | |
| Normal Flow: | 1. Channel/CSR light application displays line roles already set in billing with their value in read only mode 2. User selects a line role to configure 3. Channel/CSR light application displays candidate inventory type and input field for the selected line role configured in ‘input mode’ (A5) 4. User selects inventory type and set inventory identifier if required (i.e. SIM card reference) and submits (A12) 5. Channel/CSR light application validates with inventory module if reference set by the dealer are correct (A1)(A2) (A3) (A6) 6. Channel application displays all the lines to configure with the current configuration 7. User confirms the current configuration 8. Channel/CSR light application completes line role configuration with inventory type for line role configured as ‘hidden’ | | |
| Alternative Flows: | A1: Reference set is not existing in inventory module or already assigned   1. Channel/CSR light application displays an error message of values not correctly set or already assigned 2. User set new value 3. Next step are similar to nominal case   A2: Line role is not configured to check inventory   1. Channel/CSR light application doesn’t check with inventory module   A3: Inventory module is not available   1. Channel/CSR light application displays an error message informing the user that the current selection cannot be finalized and allows the user to try again. (A4)   A4: User accepts to cancel the current selection but want to finalize his order   1. User selects the option to finalize his order (possible when only one selection exists in the basket). 2. The current selection is removed from the basket and Channel/CSR light application redirects the user to the use case view and manage basket.   A5: Line to configure is in ‘select’ mode   1. Channel/CSR light application displays candidate inventory types that must be selected by the user 2. Channel application displays filter options allowing to search items based on these options 3. User selects the search option (A7) 4. Channel application searches for items respecting the selected inventory type and filter options, if any. 5. Channel application displays a list of items matching with search criteria 6. User selects an item 7. Next step are similar to nominal case (step 5)   A6: Validating an line causes other lines to be automatically configured (container concept in inventory)   1. Channel/CSR light validates with inventory module if reference sets by the dealer are correct and updates additional lines with identifiers and types returned from the inventory. 2. Next step are similar to nominal case   A7: User selects the option ‘search and assign’:   1. Channel application searches for an item respecting the selected inventory type and free filter, if any. 2. Channel application sets the item retrieved. (A8) 3. Next step are similar to nominal case (step 5)   A8: No items matching with search criteria have been found:   1. Channel application displays a message informing the user that no item has been found. 2. Next step are similar to nominal case (step 5)   A9: User does not confirm the cancellation of the current selection.   1. Channel application redirects the user to the first step of this use case.   A10: At least one mandatory line to configure is not set (**not** configured in ‘hidden’ mode) (A11)   1. Channel application displays a message informing the user of the lines that must be set to have a valid configuration.   A11: At least one mandatory line to configure is not set (**is** configured in ‘hidden’ mode)   1. Channel application displays a message informing the user of a technical error (A4)   A12: User has selected the option to generate a place holder   1. Channel/CSR light application generates a place holder for this line role in the order | | |

#### Use Case: View and manage F&F



Same as consumer 3.1

#### Use Case: Reconfigure F&F list

Same as consumer 3.1

#### ~~Use Case: View F&F, FOA or FDA records history~~

|  |  |  |
| --- | --- | --- |
| ~~View F&F, FOA or FDA records history~~ | | ~~SUM0140~~ |
| ~~Primary actors~~ | ~~Dealer user~~ | | |
| ~~Summary Goal~~ | ~~This use case allows user to view last X records history of F&F, FOA or FDA history records~~ | | |
| ~~Pre-conditions~~ | ~~User is viewing subscriber already instantiated F&F, FOA and FDA lists~~ | | |
| ~~Trigger~~ | ~~User has selected the option to view records history of a specific list~~ | | |
| ~~Minimum guarantees~~ |  | | |
| ~~Success guarantees:~~ | ~~Channel/CSR light application displays record history~~ | | |
| ~~Normal Flow:~~ | 1. ~~Channel/CSR light application gets records history for a specific list~~ 2. ~~Channel/CSR light application displays records history (A1)Separate F&F list for voice calls to friends, voice calls to families, SMS list for colleagues, etc~~ | | |
| ~~Alternative Flows:~~ | ~~A1: Channel/CSR light application can’t access to records history for any reason~~   1. ~~Channel/CSR light application informs user the service is temporally unavailable and to try later~~ | | |

#### Use Case: Add subscriber supplementary offers



|  |  |  |
| --- | --- | --- |
| Add subscriber supplementary offers | | SUM0150 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows adding subscriber supplementary offers to an existing subscriber, with or without a subscriber bundle subscribed. | | |
| Pre-conditions | Either:   * The user is logged in and is in the context of a specific subscriber. * Customer has been identified and Channel/CSR light application is in the context of a specific subscriber. | | |
| Trigger | The user has selected the option to add subscriber supplementary offers | | |
| Minimum guarantees | The user can cancel subscriber supplementary offers adding process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the new subscriber supplementary offers information necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays subscriber supplementary offers available for subscription for the user (refer to use case Browse and Select subscriber supplementary offers) (A1) (A3) (A4) 2. User creates a selection of new subscriber supplementary offers. (A2) (A3) (A4) 3. User configures offer parameters (refer to configure primary offer parameters use case) (A4) 4. User configures balances (refer to configure balances use case) (A4) 5. User configures supplementary offer additional external ids for the subscriber (refer to Configure subscriber external id use case) (A4) 6. Channel/CSR light application displays the list of supplementary offers to add and asks the user to confirm adding the displayed supplementary offers. 7. User confirms (A4) 8. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: There is already a pending request preventing the subscription of new subscriber supplementary offers   1. Channel/CSR light application displays an error message to the user to inform his supplementary offers selection can’t be added until current pending requests on this subscriber have been processed   A2: new subscriber supplementary offer configuration is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays to the user all rules that doesn’t match. 2. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list with the last user selection (NF1)   A3: User selects reset option   1. Channel/CSR light application reinitializes the supplementary offers list as if it was the first time the user enters in the use case. 2. Next steps are similar to nominal case   A4: User cancels his action of adding supplementary offers   1. Channel/CSR light application redirects user to view and manage subscriber use case. | | |

#### Use Case: Modify subscriber offer

|  |  |  |
| --- | --- | --- |
| Modify subscriber offer | | SUM00155 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to modify primary offer (in a bundle or not) or supplementary offer parameters of a subscriber. | | |
| Pre-conditions | Channel/CSR light application is in the context of a specific subscriber and has at least one modifiable subscriber offer.  And either:   * The user is logged. * Customer has been identified. | | |
| Trigger | The user has selected the option to modify a subscriber offer | | |
| Minimum guarantees | The user can cancel the modification process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with the subscriber offer parameters to modify that are necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays subscribed modifiable subscriber offers to the user (refer to use case ‘View and manage subscriber’) (A1) 2. User selects a subscriber offer to modify. (A2) (A4) 3. User set new values (A4) 4. Channel/CSR light application validates values set (A3) (A4) 5. Channel/CSR light application asks the user to confirm the subscriber offer modification (A4). 6. User confirms and submits or (A1) (A4). 7. Channel/CSR light application sends the order to the back office system. | | |
| Alternative Flows: | A1: Subscriber has no modifiable offer.   1. Channel/CSR light application disallows modification of subscriber offer.   A2: There is already a pending request preventing the subscriber offer modification   1. Channel/CSR light application displays an error message to the user to inform his action can’t be done until current pending requests on this subscriber have been processed.   A3: Offer parameters values are not set correctly   1. Channel/CSR light application displays an error message and highlights values not set correctly 2. User set new values 3. Next steps are similar to nominal case   A4: User cancels his action to modify an offer   1. Channel/CSR light application redirects user to view and manage subscriber use case. | | |

#### Use Case: Remove subscriber supplementary offer

|  |  |  |
| --- | --- | --- |
| Remove subscriber supplementary offer | | SUM00160 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to remove a supplementary offer from a subscriber, with or without a subscriber bundle subscribed. | | |
| Pre-conditions | Channel/CSR light application is in the context of a specific subscriber and has at least one removable subscriber supplementary offer.  And either:   * The user is logged. * Customer has been identified. | | |
| Trigger | The user has selected the option to remove a subscriber supplementary offer | | |
| Minimum guarantees | The user can cancel the removal process at any moment before the last confirmation step. | | |
| Success guarantees: | Channel/CSR light application has sent a new order with all the subscriber supplementary offer information to remove that is necessary to the backend. | | |
| Normal Flow: | 1. Channel/CSR light application displays subscribed removable subscriber supplementary offers to the user (refer to use case ‘View and manage subscriber’) (A1) 2. User selects a subscriber supplementary offer to remove in the list. (A2) (A3) 3. Channel/CSR light application asks the user to confirm the subscriber supplementary offer removal. 4. Channel/CSR light application sends the order to the back office system. | | |
| Alternative Flows: | A1: Subscriber has no removable supplementary offers.   1. Channel/CSR light application disallows removal of subscriber supplementary offer or has no subscribed subscriber supplementary offers.   A2: There is already a pending request preventing the subscriber supplementary offer removal   1. Channel/CSR light application displays an error message to the user to inform his action can’t be done until current pending requests on this subscriber have been processed.   A3: Subscriber supplementary offer removal is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays to the user all rules that doesn’t match 2. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list of subscribed subscriber supplementary offers (NF1)   A4: User cancels his action to remove a supplementary offer   1. Channel/CSR light application redirects user to view and manage subscriber use case. | | |

#### Use Case: Reconfigure subscriber offers



|  |  |  |
| --- | --- | --- |
| Reconfigure subscriber offers | | SUM0170 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows reconfiguring list of subscriber supplementary offers | | |
| Pre-conditions | * Customer has been identified and Channel/CSR light application is in the context of a specific subscriber. | | |
| Trigger | The user has selected the option to reconfigure subscriber supplementary offers | | |
| Minimum guarantees |  | | |
| Success guarantees: | Channel/CSR light application has sent a new order with:   * Subscriber supplementary offers to remove * Subscriber supplementary offers to ‘swap’ from selective to optional * Subscriber supplementary offers to ‘swap’ from optional to selective * Subscriber supplementary offers to add | | |
| Normal Flow: | 1. Channel/CSR light application displays offers already subscribed with for every selective offer:   - Information specifying if it can be kept as optional  - Current recurring cost (estimated according to current catalog version) (A1)   1. Channel/CSR light application displays offers candidate   - Information specifying if it is already subscribed as selective  - Current recurring cost (estimated according to current catalog version for offers already subscribed)  - Non recurring cost for offers not already subscribed   1. User selects offers he wants to remove 2. User selects selective offer he wants to keep but as optional 3. User selects optional offers already subscribed he wants to keep but as selective 4. User selects candidate new offers he wants to add 5. Channel/CSR light application recalculates fees according to user selections 6. User submits 7. Channel/CSR light application redirects the user to use case Configure primary offer/offer parameters if relevant 8. Channel/CSR light application redirects the user to configure balances use case if relevant 9. Channel/CSR light application redirects the user to Update subscriber external id if relevant 10. Channel/CSR light application displays to the user the new list of offers and asks him for confirmation (A2) 11. User confirms (A3)(A4) 12. Channel/CSR light application sends the order to the back office system | | |
| Alternative Flows: | A1: There is already a pending request preventing the subscriber offers reconfiguration   1. Channel/CSR light application displays an error message to the user to inform his reconfiguration can’t be done until current pending requests on this subscriber have been processed.   A2: New configuration is not correct   1. Channel/CSR light application informs user of the error 2. Next steps are similar to step 1 of nominal case   A3: User cancels   1. Channel/CSR light application redirects user to first steps of the use case.   A4: User decides to reconfigures also account offers   1. Channel/CSR portal redirects user to reconfigure account offers use case 2. Channel/CSR light application displays the new list of supplementary and account offers 3. Next step is similar to step 13 of nominal case | | |

#### Use Case: Swap an external id

|  |  |  |
| --- | --- | --- |
| Swap an external id | | SUM0180 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to reconfigure a given line (or external id), swap to another identifier for an existing subscriber | | |
| Pre-conditions | * Customer has been identified and Channel/CSR light application is in the context of a specific subscriber. * Some co-requisite rules have been defined for the subscribed offers of the existing subscriber * The given external id type is configured as displayable | | |
| Trigger | User has selected the option to swap a specific external id. | | |
| Minimum guarantees | Channel/CSR light application will advise user if swap is not possible and will release any selected items. | | |
| Success guarantees: | Selected external id and associated external id (container case) have been reconfigured with a new value for the existing subscriber | | |
| Normal Flow: | 1. Channel/CSR light application displays the external id types to configure for all the subscribed offers (thanks to their co-requisite rules). 2. User selects an external id type to swap (A11) 3. Channel/CSR light application displays candidate inventory type and input field for the selected external id type independently of the configured allocation mode. (A10) 4. User optionally sets some filters before searching in the inventory the new inventory item (A1) (A7) 5. Channel/CSR light application searches for inventory item corresponding to the search criteria set and reserves them (note that a max number of inventories to select is configured at the application level) 6. Channel/CSR light application displays available inventory items and optionally dependent external id values (case container), if any. (A8) 7. User selects an inventory item in the list 8. Channel/CSR light application validates the selected item (A1)(A2)(A3)(A5) 9. Channel/CSR light application ask the user to enter the reason for this reconfiguration (swap) 10. Channel/CSR light application summarizes the reconfiguration with the old external id, the new one, optionally dependent external id values (case container), if any, and the reason for this change. 11. User confirms the new configuration (A4) 12. Channel/CSR light application sends this new configuration to the back office system 13. Channel/CSR light un-reserves all inventory items that have not been selected in the list. | | |
| Alternative Flows: | A1: Reference set is not existing in inventory module or already assigned   1. Channel application displays an error message of values not correctly set or already assigned 2. Dealer user set new value 3. Next step are similar to nominal case   A2: Line role is not configured to check inventory   1. Channel application doesn’t check with inventory module   A3: Inventory module does not answer (technical error) is not available   1. Channel application displays an error message informing the user that the current line role cannot be validated and allows the user to try again. (A4).   A4: User decides to accept to cancel the current swap   1. User selects the cancel option 2. Channel application displays a confirmation screen. 3. Dealer user confirms the cancellation of the current selection (A9). 4. Channel/SR light application redirects the user to the use case view and manage subscriber.   A5: Validating a line causes other lines to be automatically configured (container concept in inventory)   1. Channel application validates with inventory module if reference sets by the dealer are correct and return additional lines with identifiers and types returned from the inventory. 2. Next step are similar to nominal case   A7: User selects the option ‘search and assign’:   1. Channel application searches for an item respecting the selected inventory type and free filter, if any. 2. Channel application sets the item retrieved. (A8) 3. Next step are similar to nominal case (step 8)   A8: No items matching with search criteria have been found:   1. Channel application displays a message informing the user that no item has been found. 2. Next step are similar to nominal case (step 4)   A9: User does not confirm the cancellation of the current swap.   1. Channel application redirects the user to the first step of this use case.   A10: There is no inventory line associated to the co-requisite or no validation is required for the external id type.   1. User enters the new value of the external id. 2. Channel/CSR light application ask the user to enter the reason for this reconfiguration (swap) 3. Channel application redirects the user to the step of this use case. 4. Channel/CSR light application summarizes the reconfiguration with the old external id, the new one, and the reason for this change 5. User confirms the new configuration (A4) 6. Channel/CSR light application sends this new configuration to the back office system   A11: External id type has no current value (not yet set – e.g. optional co-requisite rule).   1. Next step are similar to nominal case, except that there is no old external id value to display. | | |

Channel/CSR light application requirements

CHA-3.7.4.10 Channel/CSR light application shall allow a user viewing a specific subscriber with respect of use case ‘view and manage subscriber’.

CHA-3.7.4.10.1 Channel/CSR light application shall allow the user to navigate in the account hierarchy (if organized hierarchically).

CHA-3.7.4.10.2 Channel/CSR light application shall highlight the contextual subscriber.

CHA-3.7.4.10.5 Channel/CSR light application shall display the subscribers (with their primary identifier) associated to all billing accounts.

CHA-3.7.4.20 Channel/CSR light application shall display main subscriber’s characteristics

CHA-3.7.4.20.1 Channel/CSR light application shall display subscriber’s reference (could be a primary identifier)

CHA-3.7.4.20.2 Channel/CSR light application shall display subscriber’s name if set

CHA-3.7.4.20.3 Channel/CSR light application shall display subscriber’s current status

CHA-3.7.4.20.4 Channel/CSR light application shall display subscriber’s service category

CHA-3.7.4.20.5 Channel/CSR light application shall display additional visible subscriber’s external id by external id type (line role) and then by line type (only if several line types)

CHA-3.7.4.20.6 Channel/CSR light application shall support configuring at design time which external id types are visible

CHA-3.7.4.20.7 Channel/CSR light application shall display subscriber first active date

CHA-3.7.4.30 Channel/CSR light application shall allow configuring at design time a list of visible subscriber attributes and their order

CHA-3.7.4.30.1 Channel/CSR light application shall support different configurations depending on the customer type

CHA-3.7.4.30.3 Channel/CSR light application shall support to group visible subscriber attributes for display purpose (display group)

CHA-3.7.4.30.3.1 Channel/CSR light application shall allow the configuration of the order of subscriber attributes display groups.

CHA-3.7.4.30.3.2 Channel/CSR light application shall allow the configuration of the order to display an subscriber attribute relatively to its display group.

CHA-3.7.4.30.3.3 Channel/CSR light application shall support to configure display groups per logged user role.

CHA-3.7.4.30.4 Channel/CSR light application shall support to configure additional viewable subscriber attributes that will be integrated with Comverse one Billing 3.1.

CHA-3.7.4.30.5 Channel/CSR light application shall support a different configuration of its viewable subscriber attributes than in consumer application, when application are deployed on the same CSS system (co-existence mode).

CHA-3.7.4.40 Channel/CSR light application shall display subscriber’s bundle, primary offer and supplementary offers instances

CHA-3.7.4.40.1 Channel/CSR light application shall display subscriber’s payment mode (i.e. primary offer instance payment mode)

CHA-3.7.4.40.2 Channel/CSR light application shall display engagement duration

CHA-3.7.4.40.3 Channel/CSR light application shall display primary offer name

CHA-3.7.4.40.4 Channel/CSR light application shall display subscriber bundle name if the primary offer has been subscribed in the context of a subscriber bundle

CHA-3.7.4.40.5 Channel/CSR light application shall display account bundle name if the subscriber bundle has been subscribed in the context of an account bundle

CHA-3.7.4.40.6 Channel/CSR light application shall display subscriber’s mandatory offers

CHA-3.7.4.40.7 Channel/CSR light application shall display subscriber’s selective offers

CHA-3.7.4.40.8 Channel/CSR light application shall display subscriber’s optional offers

CHA-3.7.4.40.9 Channel/CSR light application shall display subscriber’s primary offer, subscriber bundle and offers active date

CHA-3.7.4.50 Channel/CSR light application shall display subscriber’s contact

CHA-3.7.4.50.1 Channel/CSR light application shall display subscriber’s identity

CHA-3.7.4.50.2 Channel/CSR light application shall display subscriber’s service address

CHA-3.7.4.70 Channel/CSR light application shall allow user viewing subscribed primary offer details with respect of use case ‘View subscribed primary offer details’.

CHA-3.7.4.80 Channel/CSR light application shall display main primary offer’s characteristics

CHA-3.7.4.80.1 Channel/CSR light application shall display primary offer’s name and description

CHA-3.7.4.80.2 Channel/CSR light application shall display primary offer’s service category

CHA-3.7.4.80.3 Channel/CSR light application shall display primary offer’s payment mode

CHA-3.7.4.80.4 Channel/CSR light application shall display primary offer’s engagement duration

CHA-3.7.4.80.5 Channel/CSR light application shall display primary offer’s visible attributes

CHA-3.7.4.80.6 Channel/CSR light application shall display primary offer’s plans’ name and description

CHA-3.7.4.90 Channel/CSR light application shall display included and optional primary offer’s supplementary offers

CHA-3.7.4.90.1 Channel/CSR light application shall display name and description of every supplementary offers

CHA-3.7.4.90.2 Channel/CSR light application shall display which one are subscribed

CHA-3.7.4.100 Channel/CSR light application shall allow user viewing subscribed primary offer and subscriber bundle details with respect of use case ‘View subscribed subscriber bundle details’.

CHA-3.7.4.110 Channel/CSR light application shall display main subscriber bundle’s characteristics

CHA-3.7.4.110.1 Channel/CSR light application shall display subscriber bundle name and description

CHA-3.7.4.110.2 Channel/CSR light application shall display primary offer main characteristics similarly as in view primary offer details

CHA-3.7.4.110.3 Channel/CSR light application shall display subscriber bundle engagement duration instead of primary offer engagement duration if one overrides the primary offer one at the bundle level

CHA-3.7.4.120 Channel/CSR light application shall display included, selective and optional subscriber bundle’s offers

CHA-3.7.4.120.1 Channel/CSR light application shall display name and description of every offers

CHA-3.7.4.120.2 Channel/CSR light application shall display which one are subscribed

CHA-3.7.4.130 Channel/CSR light application shall allow user viewing subscribed supplementary offer details with respect of use case ‘View subscribed supplementary offer details’.

CHA-3.7.4.140 Channel/CSR light application shall display main supplementary offer characteristics

CHA-3.7.4.140.1 Channel/CSR light application shall display supplementary offer’s service category

CHA-3.7.4.140.2 Channel/CSR light application shall display supplementary offer’s instance payment mode

CHA-3.7.4.140.3 Channel/CSR light application shall display supplementary offer’s name and description

CHA-3.7.4.140.4 Channel/CSR light application shall display visible supplementary offer’s attributes

CHA-3.7.4.140.5 Channel/CSR light application shall display supplementary offer’s plans’ name and description

CHA-3.7.4.150 Channel/CSR light application shall allow user viewing subscriber status history with respect of use case ‘View subscriber status history’.

CHA-3.7.4.150.1 Channel/CSR light application shall display the whole subscriber status history known and managed by Comverse One billing’.

CHA-3.7.4.160 Channel/CSR light application shall allow user modifying subscriber identity with respect of use case ‘Modify subscriber contact’.

CHA-3.7.4.160.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.170 Channel/CSR light application shall request user to confirm contact modification

CHA-3.7.4.170.1 Channel/CSR light application shall display the new identity set in read only mode

CHA-3.7.4.170.2 when integrated with Comverse One billing, Channel/CSR light application shall only expose to modification the following attributes, ‘first name’, ‘last name’, ‘day phone’ and ‘evening phone’.

CHA-3.7.4.180 Channel/CSR light application shall allow user modifying subscriber attributes with respect of use case ‘Modify subscriber attributes’.

CHA-3.7.4.180.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.185 Channel/CSR light application shall support configuring at design time which attributes are modifiable by the user.

CHA-3.7.4.185.1 Channel/CSR light application shall support different configuration depending on user role

CHA-3.7.4.185.2 Channel/CSR light application shall support a default configuration

CHA-3.7.4.190 Channel/CSR light application shall request user to confirm attributes modification

CHA-3.7.4.190.1 Channel/CSR light application shall display the new attributes values in read only mode during confirmation.

CHA-3.7.4.190.2 Channel/CSR light application shall allow the configuration of subscriber attributes respecting CHA-3.2.4.80.x requirements, applied to subscriber attributes except CHA-3.2.4.80.3.3, not necessary for a subscriber.

CHA-3.7.4.200Channel/CSR light application shall allow a user migrating a prepaid subscriber to postpaid subscriber with respect of use case ‘Migrate from prepaid to postpaid’.

CHA-3.7.4.200.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.200.2 Channel/CSR light application shall allow by page flow configuration at design-time to enable/disable the ‘review existing account’ use case step (enable by default) in the use case ‘Migrate from prepaid to postpaid’.

CHA-3.7.4.210 Channel/CSR light application shall propose migrate option only if the subscriber has a prepaid primary offer

CHA-3.7.4.220 Channel/CSR light application shall propose migrate option only if the subscriber primary offer has not been subscribed in the context of a mandatory or selective subscriber bundle

CHA-3.7.4.230 Channel/CSR light application shall prevent migrating if there is a pending request for the subscriber implying a reconfiguration of the subscriber (‘swap’, add, modify, remove supplementary offers)

CHA-3.7.4.230.1 Channel/CSR light application shall display an error message to inform user of the reason preventing the migration

CHA-3.7.4.240 Channel/CSR light application shall limit the list of candidate primary offers and subscriber bundles for the migration.

CHA-3.7.4.240.1 Channel/CSR light application shall propose only primary offers or subscriber bundles declared in a transition rule associated to the source primary offer.

CHA-3.7.4.240.2 Channel/CSR light application shall allow enabling or disabling this rule for the migrate subscriber use case

CHA-3.7.4.240.3 Channel/CSR light application shall propose only postpaid primary offers and subscriber bundles with a postpaid primary offer

CHA-3.7.4.240.4 Channel/CSR light application shall propose only primary offers and subscriber bundles with the same service category as the source primary offer

CHA-3.7.4.240.5 Channel/CSR light application shall apply general logic already specified in product selection use case in addition of rules above.

CHA-3.7.4.250 Channel/CSR light application shall allow a user changing his primary offer and supplementary offers with respect of use case ‘change primary offer and supplementary offers’.

CHA-3.7.4.250.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.250.2 Channel/CSR light application shall allow by page flow configuration at design-time to enable/disable the ‘review existing account’ use case step (disable by default) in the use case ‘Change primary offer and supplementary offers’.

~~CHA-3.7.4.260 Channel/CSR light application shall allow user keeping the same primary offer and just changing his supplementary offers~~

CHA-3.7.4.270 Channel/CSR light application shall prevent changing primary offer and supplementary offers if there is a pending request for the subscriber implying a reconfiguration of the subscriber (‘swap’, add, modify, remove supplementary offers)

CHA-3.7.4.270.1 Channel/CSR light application shall display an error message to inform user of the reason preventing the change

CHA-3.7.4.280 Channel/CSR light application shall limit the list of candidate primary offers and subscriber bundles for the change.

CHA-3.7.4.280.1 Channel/CSR light application shall propose only primary offers or subscriber bundles declared in a transition rule associated to the source primary offer.

CHA-3.7.4.280.2 Channel/CSR light application shall allow enabling or disabling this rule for the migrate subscriber use case

CHA-3.7.4. 280.3 Channel/CSR light application shall propose only primary offers and subscriber bundles with a primary offer of the same payment domain as the source primary offer (prepaid to prepaid and postpaid to postpaid)

CHA-3.7.4. 280.4 Channel/CSR light application shall propose only primary offers and subscriber bundles with the same service category as the source primary offer

CHA-3.7.4. 280.5 Channel/CSR light application shall apply general logic already specified in product selection use case in addition of rules above.

CHA-3.7.4.290 Channel/CSR light application shall allow user swapping his primary offer and subscriber bundle to migrate or change his primary offer and supplementary offers with respect of use case ‘swap primary offer/subscriber bundle’.

CHA-3.7.4.300 Channel/CSR light application shall allow user reconfiguring line roles with respect of use case ‘Update subscriber external id’.

CHA-3.7.4.300.1 Channel/CSR light application shall display previous values configured when user is redirected from a basket option to reconfigure the associated selection.

CHA-3.7.4.300.2 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.300.3 Channel/CSR light application shall propose same facilities to configure the new external id as in use case Configure subscriber external id.

CHA-3.7.4.310 Channel/CSR light application shall displays F&F already configured with respect of use case ‘View and manage F&F list’ and thus similarly as described in FRS F&F for consumer 3.1.

CHA-3.7.4.320 Channel/CSR light application shall allow user reconfiguring F&F numbers for a subscriber with respect of use case ‘Reconfigure F&F list’ and thus similarly as described in FRS F&F for consumer 3.1.(V2)

CHA-3.7.4.320.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

~~CHA-3.7.4.330 Channel/CSR light application shall allow user viewing records history of an instantiated list with respect of use case ‘View F&F, FOA or FDA records history’ and thus similarly as described in FRS F&F.~~

CHA-3.7.4.350 Channel/CSR light application shall allow a user adding subscriber supplementary offers with respect of use case ‘Add subscriber supplementary offers’.

CHA-3.7.4.350.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.355 Channel/CSR light application shall allow user modifying offer parameters with respect of use case ‘Modify subscriber offer’.

CHA-3.7.4.355.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.360 Channel/CSR light application shall allow a user removing a subscriber supplementary offer with respect of use case ‘Remove subscriber supplementary offer’.

CHA-3.7.4.360.1 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.370 Channel/CSR light application shall allow a user reconfiguring list of subscriber supplementary offers with respect of use case ‘Reconfigure subscriber supplementary offers’.

~~CHA-3.7.4.370.1 Channel/CSR light application shall proposes the option only if there is a subscriber bundle subscribed on the subscriber and selective offers in the subscriber bundle definition.~~

CHA-3.7.4.370.2 Channel/CSR light application shall allow user to keep a selective offer but as optional only if the offer is hybrid and if the offer is still available.

CHA-3.7.4.370.3 Channel/CSR light application shall propose as candidate offers only offers valid (refer to select subscriber supplementary offers for ‘valid’ requirements).

CHA-3.7.4.370.4 Channel/CSR light application shall display and control offers rules similarly as in select subscriber supplementary offers.

CHA-3.7.4.370.5 Channel/CSR light application shall allow configuring at design-time the availability of this use case depending on the contextual subscriber current status.

CHA-3.7.4.400 Channel/CSR light application shall allow a user swapping an external id for another one with respect of use case ‘Swap an external id’

CHA-3.7.4.400.10 Channel/CSR light application shall respect the same requirements as defined in CHA-3.3.4.140.x

Capability Product Selection - PRS

### Capability Description

This capability is devoted to the browsing and selection of products the customer wants to subscribe

### Capability Assumptions/Dependencies

This capability is dependent on the creation of a new subscriber. A new subscriber can be achieved by creating a customer or creating an additional subscriber for a customer in creation (still in the basket) or creating an additional subscriber for an existing customer.

### Capability Use Cases

#### Use Case: Browse Catalog to inform (V2)

|  |  |  |
| --- | --- | --- |
| Browse catalog to inform | | PRS0010 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows user browsing the catalog just to give information about product and services to a customer/prospect | | |
| Pre-conditions | User isn’t in an acquisition or swap process | | |
| Trigger | Either:   * User has selected the browse catalog option from his home page * User has selected the browse catalog option in the context of an existing customer | | |
| Minimum guarantees | Only primary offers, subscriber bundles sellable by the dealer are displayed | | |
| Success guarantees: | Channel/CSR light application displays available primary offers and primary offers bundles | | |
| Normal Flow: | 1. Channel/CSR light application displays all the available currencies as selectable (A1) (A2) (A2.1) 2. User selects a currency 3. Channel/CSR light application redirects the user to the browse primary offers/ subscriber bundle use case (A3) | | |
| Alternative Flows: | A1: when a root account is contextual   1. Channel/CSR light application set the currency of the root account as the pre-selected currency 2. Next steps are similar to the nominal case (NF2)   A2: A design-time default currency exists or design-time configuration is mono-currency   1. Channel/CSR light application set the mono currency or design-time default currency as the pre-selected currency 2. Next steps are similar to the nominal case (NF2)   A2.1: Multiple currencies exist and no default has been defined.   1. Channel/CSR light application displays all the available currencies as selectable and the first one is pre-selected 2. Next steps are similar to the nominal case (NF2)   A3: Account pre-requisite rule are active   1. Channel/CSR light application redirects the user to the get account pre requisite criteria use case 2. Next steps are similar to the nominal case | | |

#### Use Case: Get account pre-requisite criteria (V2)

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| --- | --- | --- |
| Get account pre-requisite criteria | | PRS0020 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows user setting account pre requisite criteria value | | |
| Pre-conditions | User is browsing the catalog to inform customer/prospect | | |
| Trigger | Account prerequisite rule are active | | |
| Minimum guarantees |  | | |
| Success guarantees: | Account pre requisite criteria have been set | | |
| Normal Flow: | 1. Channel/CSR light application get account pre requisite criteria 2. User set visible criteria value 3. Channel/CSR light application completes with hidden account attributes default value 4. Channel/CSR light application redirects the user to the next step | | |
| Alternative Flows: | A1: User is in the context of an existing customer   1. Channel/CSR light application set account pre requisite criteria with account attributes 2. Channel/CSR light application redirects the user to the next step | | |

#### Use Case: Browse and select primary offers/subscriber bundles

|  |  |  |
| --- | --- | --- |
| Browse and select primary offers/subscriber bundles | | PRS0030 |
| Primary actors | Dealer User  CSR | | |
| Summary Goal | This use case allows dealer actors to browse primary offers and subscriber bundles | | |
| Pre-conditions | Either:   * User is acquiring a new customer * User is acquiring new subscribers for an existing customer * User is ‘swapping’ the primary offer or subscriber bundle of a specific subscriber * User wants to browse the catalog just to inform customer/prospect | | |
| Trigger | Either:   * User has been redirected to this use case after capturing or reviewing administrative data * User has selected an option when viewing basket that requires browsing again the catalog * User has selected an option to ‘swap’ a subscriber primary offer or subscriber bundle * User has selected the option to browse the catalog to inform the customer/prospect | | |
| Minimum guarantees | Only primary offers, subscriber bundles sellable by the dealer are displayed | | |
| Success guarantees: | Channel/CSR light application displays available primary offers and primary offers bundles | | |
| Normal Flow: | 1. Channel/CSR light application displays all primary offers and subscriber bundles sellable by user for one specific offer series, primary offer browsing category or all 2. User can filter the list of primary offers and subscriber bundles 3. User selects a primary offer or a subscriber bundle (A1)(A2)(A3) 4. Channel/CSR light application redirects the user to the next step of the process (A4) | | |
| Alternative Flows: | A1: User request details on a primary offer or subscriber bundle   1. Channel/CSR light application displays primary offer or subscriber bundle detail (refer to use case view subscriber bundle details and view primary offer details)   A2: User is in acquisition or swap process and has selected the test option   1. Channel/CSR light application redirects the user to the test primary offer/subscriber bundle serviceability use case   A3: User is browsing the catalog outside any acquisition context (free browsing) and has selected the test option   1. Channel/CSR light application redirects the user to the test primary offer/ subscriber bundle serviceability use case   A4: Serviceability is required for the selected primary offer or bundle   1. Channel/CSR light application redirects the user to the test primary offer/subscriber bundle serviceability use case | | |

#### Use Case: Browse and select account bundles

|  |  |  |
| --- | --- | --- |
| Browse and select account bundles | | PRS0040 |
| Primary actors | Dealer User  CSR user | | |
| Summary Goal | This use case allows dealer actors to browse account bundle | | |
| Pre-conditions | Either:   * User is acquiring a new customer * User is acquiring new subscribers for an existing customer * User is ‘swapping’ the primary offer or subscriber bundle of a specific subscriber | | |
| Trigger | Either:   * User has been redirected to this use case after capturing or reviewing administrative data * User has selected an option when viewing basket that requires browsing again the catalog * User has selected an option to ‘swap’ a subscriber primary offer or subscriber bundle | | |
| Minimum guarantees | Only account bundles sellable by the dealer are displayed | | |
| Success guarantees: | Channel/CSR light application displays available account bundle | | |
| Normal Flow: | 1. Channel/CSR light application displays all account bundles sellable by the dealer (A1)(A2) 2. User can filter the list of primary offers and subscriber bundles 3. User selects an account bundle 4. Channel/CSR light application displays all subscriber bundles available in the account bundle in the same way as in ‘Browse primary offer / subscriber bundles’ 5. User selects a subscriber bundle (A3)(A4) 6. Channel/CSR light application redirects the user to the add subscriber bundle use case | | |
| Alternative Flows: | A1: There is already an account bundle subscribed on the current account (either in the basket for a new account, on the existing account or in a pending order)   1. Channel/CSR light application displays all subscriber bundles available in the account bundle in the same way as in ‘Browse primary offer / subscriber bundles’ 2. User selects a subscriber bundle (A3)(A4) 3. Channel/CSR light application redirects the user to the subscriber creation   A2: Dealer request details on the account bundle   1. Channel/CSR light application displays account bundle details (refer to use case view account bundle details)   A3: Same testing options as for browse primary offer/ subscriber bundle are available and steps are similar.  A4: Selected primary offer/subscriber bundle requires serviceability testing   1. Channel/CSR light application redirects the user to the Test Serviceability use case | | |

#### Use Case: View account bundle details

|  |  |  |
| --- | --- | --- |
| View account bundle details | | PRS0050 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user to view account bundle details. | | |
| Pre-conditions | The user is browsing account bundles. | | |
| Trigger | User needs more details about a given account bundle. | | |
| Minimum guarantees | User can go back to the list of account bundles even if he has not found the information he was looking for. | | |
| Success guarantees: | User had found the information he was looking for in the detailed content of the account bundle. | | |
| Normal Flow: | 1. Channel/CSR light application displays:  * Name and description of the account bundle * Recurring cost and non recurring cost * Account bundle attributes * List of included account bundle offers * List of selective offers (with min and max) * List of optional offers  1. User goes back to the browse account bundle use case | | |
| Alternative Flows: | None | | |

#### Use Case: View subscriber bundle details

|  |  |  |
| --- | --- | --- |
| View subscriber bundle details | | PRS0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user to view subscriber bundle details. | | |
| Pre-conditions | The user is browsing subscriber bundles. | | |
| Trigger | User need more details about a given subscriber bundle. | | |
| Minimum guarantees | User can go back to the list of subscriber bundles even if he has not found the information he was looking for. | | |
| Success guarantees: | User had found the information he was looking for in the detailed content of the bundle. | | |
| Normal Flow: | 1. Channel/CSR light application displays:  * Name and description of the subscriber bundle * Recurring cost and non recurring cost of the bundle * Subscriber bundle engagement * Account bundle attributes * Detail of the Primary offer:   + - Name and description of the primary offer     - Primary offer attributes     - Primary offer Plans * List of included subscriber supplementary offers * List of selective subscriber supplementary offers (with min and max) * List of optional offers  1. User goes back to subscriber bundles list (A1) (A2) | | |
| Alternative Flows: | A1: User selects the subscriber bundle   1. Channel/CSR light application redirects the user to next steps for creating or migrating a subscriber (A3)   A2: Test option is available as for the browse primary offer/subscriber bundle use case and so same next steps  A3: Serviceability testing is required   1. Channel/CSR light application redirects the user to the test primary offer/subscriber bundle serviceability use case | | |

#### Use Case: View primary offer details

|  |  |  |
| --- | --- | --- |
| View primary offer details | | PRS0070 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user to view primary offer details. | | |
| Pre-conditions | The user is browsing primary offers. | | |
| Trigger | User has requested more details about a given primary offer. | | |
| Minimum guarantees |  | | |
| Success guarantees: | User had found the information he was looking for in the detailed content of the primary offer. | | |
| Normal Flow: | 1. Channel/CSR light application displays:  * Name and description of the primary offer * Recurring cost and upfront cost of the primary offer * Primary offer engagement * Primary offer attributes * Primary offer Plan * List of included subscriber supplementary offers * List of optional subscriber supplementary offers  1. User goes back to primary offers list (A1)(A2) | | |
| Alternative Flows: | A1: Dealer user selects the primary offer   1. Channel/CSR light application redirects the user to next steps for creating or migrating a subscriber (A3)   A2: Test option is available as for the browse primary offer/subscriber bundle use case and so same next steps  A3: Serviceability testing is required   1. Channel/CSR light application redirects the user to the test primary offer/subscriber bundle serviceability use case | | |

#### Use Case: Test primary offer/subscriber bundle serviceability

|  |  |  |
| --- | --- | --- |
| Test primary offer/subscriber bundle serviceability | | PRS0080 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case:   * Allows the user evaluating serviceability of a primary offer or subscriber bundle * Calculates information required to show serviceability of other primary offers and subscriber bundles with similar service category(ies) when browsing catalog | | |
| Pre-conditions | Selected primary offer or subscriber bundle requires serviceability testing | | |
| Trigger | User has selected a primary offer or subscriber bundle to either acquire a new subscription, swap it or just test its serviceability | | |
| Minimum guarantees | * The user can’t continue the acquisition process if primary offer/bundle is not available for his location * The user can’t continue the acquisition process if primary offer serviceability has not been evaluated | | |
| Success guarantees | * Selected Offer/bundle serviceability has been evaluated * Information required to show serviceability of other primary offers and subscriber bundles with similar service category(ies) have been calculated | | |
| Normal Flow | 1. Channel/CSR light application get all service ability criteria required for service categories requiring serviceability testing and according to the selected offer or bundle 2. Channel/CSR light application displays service ability criteria to set (A1)(A2)(A3)(A4) 3. User set service ability criteria value and submits 4. Channel/CSR light application validates service ability criteria(A6) 5. Channel/CSR light application processes service ability rule for the service categories 6. Channel/CSR light application validates selected offer or bundle is available according to result or rule processing 7. Channel/CSR light application redirect the user to the next step (A7)(A8) | | |
| Alternative Flows | A1: Channel/CSR light application can’t get service ability criteria for technical reason   1. Channel/CSR light application displays a message to inform the user the service is temporally unavailable and try later or call a CSR   A2 : No error is raised but no service ability criterion is returned  1. Channel/CSR light application displays a message to inform the user the service is temporally unavailable and try later or call a CSR.  A3: Testing Service ability requires accurate street address attributes   1. Channel/CSR light application requires from the customer to set the service address (refers to set service address use case) 2. Channel/CSR light application processes service ability rule for the selected primary offer 3. Channel/CSR light application redirects the user to the next step(A7)(A8)   A4 : Subscriber is already existing   1. Channel/CSR light application get service ability criteria values from the subscriber supplementary offer address (A5) 2. Channel/CSR light application processes service ability rule for the service categories 3. Channel/CSR light application validates selected offer or bundle is available according to result or rule processing 4. Channel/CSR light application redirect the user to the next step (A7)(A8)   A5 : Some required criteria are not already set in the service address:   1. Channel/CSR light application requires from the customer to set missing criteria 2. Channel/CSR light application validates service ability criteria(A6) 3. Next steps are similar to A4   A6 : Some attributes are not correctly set or mandatory and empty   1. Channel/CSR light application highlights mistakes and requests the user to set again the values   A7 : The user just wants to test the bundle/offer serviceability   1. Channel/CSR light application displays the result of the test   A8 : The user is in acquisition process (new or swap) and the offer/bundle is not available   1. Channel/CSR light application displays the result of the test. | | |

#### Use Case: Add account bundle

|  |  |  |
| --- | --- | --- |
| Add account bundle | | PRS0090 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user subscribing to an account bundle | | |
| Pre-conditions | There is no account bundle already subscribed for the account | | |
| Trigger | User has selected an account bundle | | |
| Minimum guarantees |  | | |
| Success guarantees: | New account bundle has been added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application proposes to the user to select account offers (refer to use case select account offers) 2. Channel/CSR light application adds the account bundle in the basket | | |
| Alternative Flows: | None | | |

#### Use Case: Browse and Select account offers

|  |  |  |
| --- | --- | --- |
| Browse and Select account offers | | PRS0100 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user selecting account offers | | |
| Pre-conditions |  | | |
| Trigger | Either:   * User is subscribing a new account bundle * User has selected the basket option to add account offers * User has selected the option to change account offers of an already existing account | | |
| Minimum guarantees | Only account offers sellable by the dealer are displayed | | |
| Success guarantees: | Requests to update List of account offers has been added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application displays the list of account offers the user can subscribe to (include mandatory offers if any just to inform the user) (A2) 2. Channel/CSR light application displays the list of account offers already in the basket if any 3. Channel/CSR light application displays the list of account offers already instantiated on the account 4. User selects selective offers he wants to add (if any) 5. User selects supplementary offers he wants to add 6. User selects supplementary offers already in the basket he wants to remove 7. User selects supplementary offers already instantiated he wants to remove 8. User submits 9. Channel/CSR light application validates consistence of the account configuration (A1) 10. User configures spending/credit limits if any (refer to use case configure spending/credit limits) 11. Channel/CSR light application adds the account new configuration to the basket | | |
| Alternative Flows: | A1: new configuration is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays to the user all rules that doesn’t match 2. User confirms 3. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list with the last user selection   A2: User selects reset option   1. Channel/CSR light application reinitializes the offers list as if it was the first time the user enters in the use case. 2. Next steps are similar to nominal case | | |

#### Use Case: Browse and Select subscriber supplementary offers

|  |  |  |
| --- | --- | --- |
| Select subscriber supplementary offers | | PRS0110 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user selecting subscriber supplementary offers | | |
| Pre-conditions | Either:   * User in the context of a new subscriber * User is in the context of ‘swapping’ primary offer or bundle of an existing subscriber | | |
| Trigger | There are at least one supplementary offer user can subscribe to.  And Either:   * Subscriber previous configuration step has been completed * User has selected an option in the basket to modify list of offers associated to the new or ‘swapped’ subscriber | | |
| Minimum guarantees | Only subscriber supplementary offers sellable by the dealer are displayed | | |
| Success guarantees: | New subscriber’s offers configuration is added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application proposes the list of subscriber supplementary offers the user can subscribe to and not already subscribed for the subscriber (include mandatory offers if any just to inform the user) (A3) 2. Channel/CSR light application specifies the list of subscriber supplementary offers already in the basket if any and still compatible with the primary offer (A1) 3. User selects selective offers he wants to add (if any) 4. User selects supplementary offers he wants to add 5. User selects offers already in the basket he wants to remove 6. User selects offers already instantiated he wants to remove 7. User submits (A3) 8. Channel/CSR light application validates consistence of the subscriber configuration (A2) 9. Channel/CSR light application adds the subscriber new configuration to the session | | |
| Alternative Flows: | A1: User is ‘swapping’ a subscriber   1. Channel/CSR light application displays the list of subscriber supplementary offers already instantiated on the subscriber and no longer valid/compatible with the primary offer to inform user he will lost them 2. Channel/CSR light application displays the list of subscriber supplementary offers already instantiated on the subscriber and still valid/compatible with the primary offer 3. Next steps are similar to nominal case   A2: new configuration is not correct due to exclusion, pre requisite rules or bundle configuration   1. Channel/CSR light application displays error message to the user with all rules that doesn’t match 2. User confirms 3. Channel/CSR light application redirects the user to first steps of the nominal case initializing the list with the last user selection   A3: User selects reset option   1. Channel/CSR light application reinitializes the offers list as if it was the first time the user enters in the use case. 2. Next steps are similar to nominal case | | |

#### Use Case: View supplementary offer details

|  |  |  |
| --- | --- | --- |
| View supplementary offer details | | PRS0120 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user viewing supplementary offer details. | | |
| Pre-conditions | The user is browsing account offers or subscriber supplementary offers. | | |
| Trigger | User needs more details about a given supplementary offer. | | |
| Minimum guarantees | User can go back to the list of supplementary offers even if he has not found the information he was looking for. | | |
| Success guarantees: | User had found the information he was looking for in the detailed content of the supplementary offer. | | |
| Normal Flow: | 1. Channel/CSR light application displays the supplementary offer detail:  * Name and description * Attributes * Plans * Offer options if any  1. User goes back to the supplementary offers list | | |
| Alternative Flows: | None | | |

#### Use Case: Configure offer parameters

|  |  |  |
| --- | --- | --- |
| Configure offer parameters | | PRS0130 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user configuring primary offer and subscriber supplementary parameters according to the subscriber primary offer and supplementary offers. | | |
| Pre-conditions | There is at least one parameter to configure | | |
| Trigger | Subscriber previous configuration step has been completed | | |
| Minimum guarantees |  | | |
| Success guarantees: | offers parameters have been configured and added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application displays list of parameters to configure propagated to parent 2. Channel/CSR light application displays list of parameters not propagated to parent grouped by the primary offer and every supplementary offer 3. User set parameters value 4. Channel/CSR light application validates set parameters (A1) 5. Channel/CSR light application adds offers parameters configuration to the shopping card | | |
| Alternative Flows: | A1: Some parameters are not correctly set   1. Channel/CSR light application inform user of mistakes done 2. User set new values 3. Next steps are similar to nominal case | | |

Channel/CSR light application requirements

CHA-3.8.4.1 Channel/CSR light application shall allow a user browsing the catalog to inform a customer/prospect with respect of use case ‘Browse catalog to inform’ (V2)

CHA-3.8.4.1.1 when this use case is triggered without any contextual customer, Channel application shall allow user to select the currency he wants to browse the catalog with.

CHA-3.8.4.5 In all browse and select use cases, Channel/CSR light application shall apply account pre requisite rules (if active)

CHA-3.8.4.5.1 In acquisition or swap process, Channel/CSR light application shall set account pre requisite rules criteria with data already set on the current account (existing account or new account)

CHA-3.8.4.5.2 when browsing catalog to inform customer/prospect, Channel/CSR light application shall set account pre requisite rules criteria with respect of use case ‘get account pre requisite criteria’. (V2)

CHA-3.8.4.8 Channel/CSR light application shall support at design time enabling or disabling account pre requisite rules (V2)

CHA-3.8.4.9 Channel/CSR light application shall support same requirements as in Consumer application to support serviceability for primary offers, subscriber bundles and subscriber supplementary offers

CHA-3.8.4.9.1 Channel/CSR light application shall test primary offer/subscriber bundle serviceability with respect of use case ‘Test primary offer/subscriber bundle serviceability’.

CHA-3.8.4.10 Channel/CSR light application shall allow a user browsing primary offers and subscriber bundles with respect of use case ‘Browse and select primary offer/subscriber bundles’

CHA-3.8.4.12 Channel application shall allow a dealer user to filter primary offer and subscriber bundles via their primary offer by Equipment Class, Equipment Type, Class of Service, Rate Class

CHA-3.8.4.30: Channel/CSR light application shall consider as postpaid any primary offer with a payment mode either postpaid, default postpaid or hybrid

CHA-3.8.4.40: Channel/CSR light application shall consider as prepaid any primary offer with a payment mode either prepaid or default prepaid

CHA-3.8.4.50 Channel/CSR light application shall display only primary offers sellable for by the dealer

CHA-3.8.4.20.1 Channel/CSR light application shall display only primary offers in a Channel/CSR light catalog (i.e. product group for dealer) associated to the dealer.

CHA-3.8.4.20.2 Channel/CSR light application shall display only primary offers in a commercial offer available to dealers (i.e. commercial offer.Channel/CSR light = ‘POS’).

CHA-3.8.4.20.3 Channel/CSR light application shall support configuring if primary offers must be filtered by Channel/CSR light catalog or commercial offer Channel/CSR light attribute

CHA-3.8.4.20.4 Channel/CSR light application shall display all primary offers in public commercial offer to CSR

CHA-3.8.4.60 Channel/CSR light application shall display only ‘prepaid’ primary offers if user has selected on option allowing only creating prepaid primary offers

CHA-3.8.4.90 If customer vetting value has been set, Channel/CSR light application shall display only ‘postpaid’ primary offers wit a credit class lesser or equal to this vetting value or null. (V2)

CHA-3.8.4.100 If customer vetting value has been set, Channel/CSR light application shall display only ‘postpaid’ primary offerss wit a credit class lesser or equal to this vetting value or null. (V2)

CHA-3.8.4.110 Channel/CSR light application shall apply same general availability rules as in consumer application

CHA-3.8.4.110.1 Channel/CSR light application shall display only primary offers with a valid start and end date (if set)

CHA-3.8.4.110.2 Channel/CSR light application shall display only primary offers with valid RC and NRC (if set)

CHA-3.8.4.110.3 Channel/CSR light application shall display only primary offers that are not requiring a subscriber bundle

CHA-3.8.4.120 Channel/CSR light application shall display only subscriber bundles sellable by a dealer

CHA-3.8.4.120.1 Channel/CSR light application shall display only subscriber bundles with a primary offer, mandatory offers and min bundle selective offers sellable by the dealer referring to Channel/CSR light catalog and Channel/CSR light attribute business logic specified above

CHA-3.8.4.120.2 Channel/CSR light application shall display only subscriber bundles sellable by a dealer referring to Channel/CSR light catalog and Channel/CSR light attribute business logic specified above

CHA-3.8.4.125 Channel/CSR light application shall display all subscriber bundles available for a CSR independently of dealer offering business logic

CHA-3.8.4.130 Channel/CSR light application shall display only subscriber bundles with a valid start and end date

CHA-3.8.4.140 Channel/CSR light application shall display only subscriber bundles with valid RC and NRC if set

CHA-3.8.4.150 Channel/CSR light application shall display only subscriber bundles with valid primary offer, mandatory offers and min bundle selective offers referring to general availability logic specified above

CHA-3.8.4.160 Channel/CSR light application should display a configurable number of primary offer and primary offers bundle on the same page

CHA-3.8.4.170 Channel/CSR light application should allow the user browsing primary offer and subscriber bundles page by page

CHA-3.8.4.180 Channel/CSR light application shall allow the user filtering primary offer and subscriber bundles by browsing categories (secondary browsing categories)

CHA-3.8.4.190 Channel/CSR light application shall allow the user filtering primary offer and subscriber bundles by offer series

~~CHA-3.8.4.192 Channel/CSR light application shall allow a user filtering primary offers and subscriber bundles on specific attributes configured at design time~~

CHA-3.8.4.194 OCM application shall allow an OCM user configuring primary offers and subscriber bundles ‘searchable’ attributes

CHA-3.8.4.195 Channel/CSR light application shall allow a user filtering primary offers and subscriber bundles by name and description including a free string set by the dealer

CHA-3.8.4.200 Channel/CSR light application shall display subscriber bundles just after their primary offer sellable outside the bundle.

CHA-3.8.4.210 Channel/CSR light application shall support browsing for one offer series to another one (similarly to consumer application)

CHA-3.8.4.220 Channel/CSR light application shall display primary offer and subscriber bundle RC and NRC similarly as in consumer application

CHA-3.8.4.220.1 Channel/CSR light application shall used account frequency and currency to display correct values of RC and NRC

CHA-3.8.4.230 Channel/CSR light application shall display for every primary offer the name, the payment mode, the engagement duration, the service category, the RC grouped by frequency, the NRC.

CHA-3.8.4.240 Channel/CSR light application shall display for every subscriber bundle the name, the engagement duration, the service category, the RC grouped by frequency, the NRC.

CHA-3.8.4.240.1 Channel/CSR light application shall display the primary offer engagement duration if not set at the bundle level

CHA-3.8.4.240.2 Channel/CSR light application shall display the sum of subscriber bundle and primary offer RC if RC are not overridden in the bundle configuration

CHA-3.8.4.240.3 Channel/CSR light application shall sum primary offers NRC to bundle NRC for type of NRC not overridden in the bundle configuration.

CHA-3.8.4.250 Channel/CSR light application shall allow a user browsing account bundles with respect of use case ‘browse and select account bundles’ use case

CHA-3.8.4.260 Channel/CSR light application shall display only account bundles sellable by a dealer

CHA-3.8.4.120.1 Channel/CSR light application shall display only account bundles with mandatory offers and min bundle selective offers sellable by the dealer referring to Channel/CSR light catalog and Channel/CSR light attribute business logic specified above

CHA-3.8.4.120.2 Channel/CSR light application shall display only account bundles sellable by a dealer referring to Channel/CSR light catalog and Channel/CSR light attribute business logic specified above

CHA-3.8.4.265 Channel/CSR light application shall display all account bundles available for a CSR independently of dealer offering business logic

CHA-3.8.4.270 Channel/CSR light application shall display only account bundle with valid RC and NRC (if set)

CHA-3.8.4.280 Channel/CSR light application shall display only account bundle with no mandatory or selective subscriber bundle (to be confirmed if we keep this limitation) for a new subscriber

CHA-3.8.4.290 Channel/CSR light application shall display only optional subscriber bundles for the account bundle when swapping primary offer or subscriber bundle of a subscriber.

CHA-3.8.4.300 Channel/CSR light application shall display for every account bundle the name, the RC and NRC if set

CHA-3.8.4.310 Channel/CSR light application shall display for every account bundle all subscriber bundles similarly to browse subscriber bundle use case

CHA-3.8.4.312 Channel application shall allow a dealer user to filter primary offer and subscriber bundles via their primary offer by Equipment Class, Equipment Type, Class of Service, Rate Class for every account bundle.

CHA-3.8.4.320 Channel/CSR light application shall allow filtering account bundles by browsing categories (secondary browsing categories).

CHA-3.8.4.330 Channel/CSR light application shall display only one account bundle if already subscribed on the account (in the basket or instantiated or in a pending order)

CHA-3.8.4.340 Channel/CSR light application shall support switching from browse account bundle to browse primary offer/subscriber bundle use case

CHA-3.8.4.350 Channel/CSR light application shall allow user viewing details of a primary offer with respect of ‘view primary offer details’ use case

CHA-3.8.4.360 Channel/CSR light application shall allow user viewing details of a subscriber bundle with respect of use case ‘view subscriber bundle details’

CHA-3.8.4.370 Channel/CSR light application shall allow user viewing details of an account bundle with respect of use case ‘view account bundle details’

CHA-3.8.4.380 Channel/CSR light application shall display in details of primary offers, subscriber bundles and account bundles only available offers (refer to select subscriber supplementary offers and account offers business logic)

CHA-3.8.4.390 Channel/CSR light application shall allow a user to subscribe to an account bundle with respect of use case add account bundle

CHA-3.8.4.400 Channel/CSR light application shall allow a user selecting account offers with respect of use case Browse and select account offers

CHA-3.8.4.410 Channel/CSR light application shall display only account offers sellable by the dealer according to Channel/CSR light catalog and Channel/CSR light attribute business logic described above.

CHA-3.8.4.415 Channel/CSR light application shall display all account offers available for a CSR independently of dealer offering business logic

CHA-3.8.4.420 Channel/CSR light application shall display only account offers with a valid start and end date if set

CHA-3.8.4.430 Channel/CSR light application shall display for every account offers its name, description, payment mode and RC and NRC.

CHA-3.8.4.440 Channel/CSR light application shall display only mandatory account offers and selective account offers RC and NRC only if not overridden at bundle level

CHA-3.8.4.450 Channel/CSR light application shall display only account offers with a valid RC and NRC if set

CHA-3.8.4.460 Channel/CSR light application shall display first mandatory account offers, the selective account offer, then optional account offers grouped by offers category

CHA-3.8.4.470 Channel/CSR light application shall display a offer selective and optional both in selective list and in optional list but shall prevent the user of selecting it twice

CHA-3.8.4.480 Channel/CSR light application shall display exclusion and required rules logic similarly as in consumer application

CHA-3.8.4.490 Channel/CSR light application shall not display account offers incompatible with the account bundle if subscribed in the basket, already instantiated or in a pending order.

CHA-3.8.4.500 Channel/CSR light application shall not display account offers requiring an account bundle different from the one in the basket or already instantiated

CHA-3.8.4.510 Channel/CSR light application shall automatically swap to account bundle context offers already subscribed on the account and required as mandatory in case of subscription of an account bundle.

CHA-3.8.4.520 Channel/CSR light application shall propose offers already subscribed on the account as selective (and default) if declared as selective in the configuration of the new account bundle.

CHA-3.8.4.525 Channel/CSR light application shall propose offers as default according to their configuration in the account bundle.

CHA-3.8.4.530 Channel/CSR light application shall control the number of selected selective account offers is between the min and max of the account bundle configuration

CHA-3.8.4.540 Channel/CSR light application shall allow a user selecting subscriber supplementary offers with respect of use case Browse and select subscriber supplementary offers

CHA-3.8.4.540.1 Channel/CSR light application shall display offers already subscribed when swapping a subscriber primary offer and changing supplementary offers

CHA-3.8.4.540.2 Channel/CSR light application shall informs user of supplementary offers already instantiated on the subscriber and no longer valid or not compatible with the primary offer (swap and change supplementary offers use cases)

CHA-3.8.4.540.3 when target is a subscriber bundle, Channel/CSR light application shall ‘bundle as mandatory’ offers already instantiated and considered as mandatory in the target subscriber bundle

CHA-3.8.4.540.4 when target is a subscriber bundle, Channel/CSR light application shall ‘bundle as selective’ offers already instantiated and considered as selective or hybrid in the target subscriber bundle

CHA-3.8.4.540.5 when target is a subscriber bundle, Channel/CSR light application shall ‘bundle as optional’ offers already instantiated and considered as optional in the target subscriber bundle

CHA-3.8.4.540.6 when source is a subscriber bundle, Channel/CSR light application shall ‘unbundle’ offers already instantiated and in the context of the source subscriber bundle if not contradicting requirements above

CHA-3.8.4.550 Channel/CSR light application shall display only subscriber supplementary offers sellable by the dealer referring to Channel/CSR light catalog and Channel/CSR light attribute logic specified above

CHA-3.8.4.555 Channel/CSR light application shall display all subscriber supplementary offers available for a CSR independently of dealer offering business logic

CHA-3.8.4.560 Channel/CSR light application shall proposes only subscriber supplementary offers with a valid start and end date if set

CHA-3.8.4.570 Channel/CSR light application shall display for every subscriber supplementary offers its name, description, payment mode and RC and NRC.

CHA-3.8.4.580 Channel/CSR light application shall display only mandatory subscriber supplementary offers and selective subscriber supplementary offers RC and NRC only if not overridden at bundle level

CHA-3.8.4.590 Channel/CSR light application shall display only subscriber supplementary offers with a valid RC and NRC if set

CHA-3.8.4.600 Channel/CSR light application shall display first mandatory subscriber supplementary offers, then selective subscriber supplementary offers, then optional subscriber supplementary offers grouped by offer category

CHA-3.8.4.610 Channel/CSR light application shall display a subscriber supplementary offer selective and optional both in selective list and in optional list but shall prevent the user of selecting it twice

CHA-3.8.4.620 Channel/CSR light application shall display exclusion and required rules logic similarly as in consumer application

CHA-3.8.4.624 Channel/CSR light application shall apply exclusion rule logic and behavior for two offers providing the same balance but as shadow in one case and real in other case.

CHA-3.8.4.628 Channel/CSR light application shall not display subscriber supplementary offers providing the same balance as the primary offer but with a different instantiation mode (i.e. real versus shadow).

CHA-3.8.4.630 Channel/CSR light application shall not display subscriber supplementary offers incompatible with the primary offer.

CHA-3.8.4.640 Channel/CSR light application shall not display subscriber supplementary offers requiring a primary offer different from the one in the basket

CHA-3.8.4.650 Channel/CSR light application shall not display subscriber supplementary offers requiring a subscriber bundle different from the one in the basket

CHA-3.8.4.660 Channel/CSR light application shall control the number of selected selective subscriber supplementary offers is between the min and max of the subscriber bundle configuration

CHA-3.8.4.670 Channel/CSR light application shall display only subscriber supplementary offers in the primary offer compatibility template if any and not declared as sellable outside a bundle

CHA-3.8.4.670.1 Channel/CSR light application shall not apply logic above if there is no compatibility template associated to the primary offer

CHA-3.8.4.670.2 Channel/CSR light application shall not apply logic above if the primary offer has been subscribed in the context of a subscriber bundle

CHA-3.8.4.680 Channel/CSR light application shall display only subscriber supplementary offers in the primary offer’s offer series if no compatibility template associated to the primary offer (and supplementary offer is not ‘sellable outside a bundle’)

CHA-3.8.4.680.1 Channel/CSR light application shall display as mandatory, subscriber supplementary offers declared as mandatory in the primary offer’s offer series.

CHA-3.8.4.690 Channel/CSR light application shall display subscriber supplementary offers as default according to the context and their configuration in bundle, compatibility template or primary offer’s offer series.

CHA-3.8.4.695 Channel/CSR light application shall display all rules not satisfied similarly to consumer application (for account offers and subscriber supplementary offers).

CHA-3.8.4.700 Channel/CSR light application shall allow a user viewing account offer or subscriber supplementary offer details with respect of use case view supplementary offer details.

CHA-3.8.4.710 Channel/CSR light application shall allow a user configuring primary offer and subscriber supplementary offer parameters with respect of use case ‘configure offer parameters’.

CHA-3.8.4.720 Channel/CSR light application shall display first parameters declared as propagated to parent.

CHA-3.8.4.730 Channel/CSR light application shall display then parameters local to the primary offer and supplementary offer instance

CHA-3.8.4.740 Channel/CSR light application shall display current known parameters values for an existing subscriber

CHA-3.8.4.750 when integrated with Comverse One, Channel/CSR light application shall only display parameters defined as targeting CSR systems (and not ‘exposed to Self Service’, or not defined).

Capability 1 Basket Management - BKM

### Capability Description

This capability allows the user to be assisted by some basket capabilities such as storing the basket for later use, or reviewing it, or modifying the content of the basket before the order checkout.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View and manage basket

|  |  |  |
| --- | --- | --- |
| View and manage basket | | BKM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user to view and change the basket content, upon customer’s request. | | |
| Pre-conditions | User is logged in  The application is in the context of an existing or new customer.  Items have been added to the basket. | | |
| Trigger | Either:   * The user has been redirected to the view basket after completion of one acquisition process * The user has selected an option to view his basket | | |
| Minimum guarantees | If no items have been added, then the basket is displayed as empty. | | |
| Success guarantees: | Some basket items have been added and are displayed as part of the basket content. The customer agreed with the content basket and now wants to checkout. | | |
| Normal Flow: | 1. The application displays the basket, its content and its total price as described below: (A1)   Account information (new or existing, address, attributes)  Account related items and their price (recurring and/or non recurring plus periodicity)  Subscriber related items and their price (recurring and/or non recurring plus periodicity)  Lines configuration (value or selected item) respectively to their subscriber (A13)  When an item is paid on next bill, installment charge can be displayed split in first bill and next ones.  Basket charges summary   1. User checkouts the basket (Refer to use case checkout)(A2)(A3)(A4)(A5)(A6)(A7)(A8)(A9)(A10)(A11)(A12). | | |
| Alternative Flows: | A1: The basket content is empty   1. The application displays the basket content is empty   A2: User selects an item to remove   1. Channel/CSR light application redirects the user to the remove a basket item use case   A3: User selects a selection to modify its primary offer/supplementary offers parameters value   1. Channel/CSR light application redirects the user to the Configure primary offers parameters use case   A4: User selects the option to continue shopping   1. Channel/CSR light application redirects the user to the browse primary offer use case   A5: User selects the option to add a subscriber in the context of an account bundle   1. Channel/CSR light application redirects the user to the Browse account bundle use case   A6: User select a primary offer or subscriber bundle to select another one for the selection (new subscriber or ‘swap’ subscriber)   1. Channel/CSR light application redirects the user to the Change primary offer of a selection use case   A7: User select the option to modify list of account offers for a selection   1. Channel/CSR light application redirects the user to the Browse and Select account offers use case   A8: User select the option to modify list of subscriber supplementary offers for a selection   1. Channel/CSR light application redirects the user to the Browse and Select subscriber supplementary offers use case   A9: The user parks his basket   1. Channel/CSR light application redirects the use case to the Park basket use case   A10: The user decides to clear his basket   1. Channel/CSR light application redirects the use case to the Empty basket use case   A11: User selects the option to reconfigure subscriber external ids of a selection   1. Channel/CSR light application redirects the user to the ‘Configure subscriber external ids’ use case   A12: User selects the option to reconfigure subscriber information of a selection   1. Channel/CSR light application redirects the user to the ‘Set subscriber contact and set subscriber attributes’ use cases   A13: Basket has been resumed and some lines have been un-reserved   1. Channel application highlights the fact that some lines are not configured and invite the user to select the configure line option, in order to finalize lines configuration. | | |

#### Use Case: Empty basket

|  |  |  |
| --- | --- | --- |
| Empty Basket | | BKM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user to empty the content of the basket | | |
| Pre-conditions | The user is logged in.  The basket contains some items. | | |
| Trigger | The user has selected the option to clear the basket | | |
| Minimum guarantees |  | | |
| Success guarantees: | The basket has been cleared.  Customer administrative data and credit checking result are not lost | | |
| Normal Flow: | 1. Channel/CSR light application display a confirmation message 2. User confirms 3. Channel/CSR light application un-reserve all lines values, if any. 4. Channel/CSR light application clears the basket | | |
| Alternative Flows: |  | | |

#### Use Case: Remove a basket item

|  |  |  |
| --- | --- | --- |
| Remove a basket item | | BKM0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to remove a basket item. | | |
| Pre-conditions | Multiple basket items must exist and at least one item is removable. | | |
| Trigger | User selects an item to remove in the basket. | | |
| Minimum guarantees | Item can be removed only if it is a removable item. | | |
| Success guarantees: | The basket item has been removed. | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation page with the item label to remove and the potential consequences for the customer 2. Channel/CSR light application un-reserves the corresponding line and value, if any, and if not shared with another item. 3. Channel/CSR light application removes the item 4. Channel/CSR light application redirects the user to the view basket | | |
| Alternative Flows: |  | | |

#### Use Case: Change Primary offer of a selection

|  |  |  |
| --- | --- | --- |
| Change primary offer of selection | | BKM0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to select a new primary offer for an already configured selection | | |
| Pre-conditions | An already configured subscriber selection exists in the basket | | |
| Trigger | User selects the option to change the primary offer of the selection | | |
| Minimum guarantees |  | | |
| Success guarantees: | Subscriber selection configuration is updated in the basket | | |
| Normal Flow: | 1. Channel/CSR light catalog redirects the user to the initial step to select new primary offer according to the selection type 2. Next steps are similar too step executed to create the selection but takes into account information already set for the selection | | |
| Alternative Flows: |  | | |

#### Use Case: Save the current basket automatically

|  |  |  |
| --- | --- | --- |
| Save the current basket automatically | | BKM0050 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the application to save the current basket and prevents the user from data loss in case of failure. | | |
| Pre-conditions | Basket contains some items | | |
| Trigger | Either:   * Session expires * User logout * Specific points during acquisition process | | |
| Minimum guarantees | Basket is still available in the working session. | | |
| Success guarantees: | Basket content has been saved successfully  Basket is still available in the working session | | |
| Normal Flow: | 1. The application saves the active basket and replaces the current basket saved in the database. (A1) | | |
| Alternative Flows: | A1: Session is expiring or User has logged out   1. The application un-reserves all lines (having a value) in the basket that are configured “to be validated”, if any 2. The application saves the active basket and replaces the current basket saved in the database. | | |

#### Use Case: Manage an automatically saved basket

|  |  |  |
| --- | --- | --- |
| Manage an automatically saved basket | | BKM0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to manage a basket that has been saved automatically. It allows deciding to discard, restore or park this basket when reconnecting to the application. | | |
| Pre-conditions | User is logged in.  A basket has been saved automatically for this user in previous session | | |
| Trigger | User logs in successfully and an automatically saved basket is retrieved. | | |
| Minimum guarantees | If the basket is not valid anymore, it will be deleted. | | |
| Success guarantees: | The basket has been restored, or discarded or parked or deleted. | | |
| Normal Flow: | 1. The application indicates there is a saved basket from the previous session and prompts for choice. 2. The user decides to retrieve and activate this basket (A1), (A2) 3. The application validates the saved basket (A3) 4. The application removed the automatically saved basket. 5. The application sets the customer context based on the saved basket data. 6. The application sets the working session basket with retrieved data. 7. The application updates the basket according to current catalog data version. 8. The application redirects the user to the View basket use case | | |
| Alternative Flows: | A1: User discards the basket   1. The application prompts for confirmation. 2. The user confirms (A4) 3. The application deletes the saved basket.   A2: User parks the basket   1. Channel/CSR light application redirect the user to the Park basket use case 2. Channel/CSR light application deletes the saved basket   A3: Basket to retrieve is not valid   1. Channel/CSR light Application informs the user that an attempt to restore a basket has failed and informs the user of the reason. 2. The application deletes the saved basket.   A4: User cancels   1. Channel/CSR light Application prompts again the user for choice 2. Next steps are similar to nominal use case. | | |

#### Use Case: Park basket

|  |  |  |
| --- | --- | --- |
| Park basket | | BKM0070 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user to park the basket. | | |
| Pre-conditions | Either:   * A basket in the working session must exist. * An automatically saved basket exist | | |
| Trigger | User decides to park the basket. | | |
| Minimum guarantees |  | | |
| Success guarantees: | The basket has been successfully parked and user is informed.  Basket in current session is cleared | | |
| Normal Flow: | 1. The application prompts the user for entering an ID. 2. The user enters an ID (A1). 3. The application checks if the ID not already used (A2) 4. The application un-reserves all lines (having a value) in the basket that are configured “to be validated”, if any 5. The application parks the basket using the ID 6. The application clears the working session basket | | |
| Alternative Flows: | A1:The user cancels the action   1. Channel/CSR light application redirects the user to the step he was when selecting the park basket option   A2: The ID already exists.   1. The application prompts for a new value. | | |

#### Use Case: Resume a parked basket

|  |  |  |
| --- | --- | --- |
| Resume a parked basket | | BKM0080 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to resume a basket that has been parked. | | |
| Pre-conditions | A basket has been parked. | | |
| Trigger | User decides to resume a parked basket. | | |
| Minimum guarantees |  | | |
| Success guarantees: | The active basket has been loaded with items from the parked basked and the customer context has been set accordingly. | | |
| Normal Flow: | 1. The application displays the list of parked baskets (A1) 2. The user selects the basket to resume and submits. 3. The application prompts for confirmation. 4. The user confirms (A2). 5. The application retrieves the parked basket. 6. The application check parked basket validity (A3) 7. The application clears the active basket. 8. The application sets the customer context based on the basket data. 9. The application sets the active basket with retrieved data. 10. The application updates the basket according to current catalog data version. 11. The application removes the parked basket 12. The application redirects the user to the View basket use case. | | |
| Alternative Flows: | A1: There is no parked basket found   1. Channel/CSR light application displays an error message informing user there is no parked basked found   A2: User cancels   1. Channel/CSR light application redirects the user to the parked baskets list   A3: Basket is not valid   1. Channel/CSR light application informs the user the basket is no longer valid 2. Channel/CSR light application removes the parked basket | | |

#### Use Case: Delete parked basket

|  |  |  |
| --- | --- | --- |
| Delete parked basket | | BKM0090 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to delete baskets from parked baskets. | | |
| Pre-conditions | Some parked baskets exist. | | |
| Trigger | User decides to delete one or more parked baskets that are useless. | | |
| Minimum guarantees |  | | |
| Success guarantees: | Selected baskets have been purged. | | |
| Normal Flow: | 1. The application displays the list of parked baskets.(A1) 2. The user selects baskets to delete and submits. 3. The application prompts for confirmation. 4. The user confirms (A2). 5. The application deletes selected parked baskets. 6. The application displays the updated list of parked baskets. | | |
| Alternative Flows: | A1: There is no parked basket found   1. Channel/CSR light application displays an error message informing user there is no parked basked found   A2: User cancels   1. Channel/CSR light application redirects the user to the parked baskets list | | |

Channel/CSR light application requirements

CHA-3.9.4.10 Channel/CSR light application shall allow a user to manage a basket for a customer with respect of use case ‘view and manage basket’ described above.

CHA-3.9.4.10.1 Channel/CSR light application shall display if the basket (or order) applies to an existing account or a new account.

CHA-3.9.4.10.2 when order applies to an existing account, the impacted account reference shall be displayed.

CHA-3.9.4.20 in the view basket, the total section, at the bottom shall display the following information:

CHA-3.9.4.20.1 Sub total per periodicity for recurring prices (not displayed when one selection in the basket)

CHA-3.9.4.20.2 Sub total for upfront costs (not displayed when one selection in the basket)

CHA-3.9.4.20.3 Total per periodicity for recurring prices

CHA-3.9.4.20.4 Total for upfront costs

CHA-3.9.4.20.5 Total on subscription

CHA-3.9.4.40 on the view basket, Channel/CSR light application shall allow the user to remove an item with respect of use case remove basket item

CHA-3.9.4.50 on the view basket, Channel/CSR light application should always allow the user to remove an item except for specific case where the item is not removable

CHA-3.9.4.50.1 on the view basket, Channel/CSR light application should inform the user of the reason why a basket item is not removable.

CHA-3.9.4.50.2 on the view basket, Channel/CSR light application shall prevent a user from removing an account offer (basket item) declared as mandatory in a new account bundle.

CHA-3.9.4.50.3 on the view basket, Channel/CSR light application shall prevent a user from removing a subscriber supplementary offer (basket item) declared as mandatory in a new subscriber bundle (subscribed selective would be lower than min rule definition).

CHA-3.9.4.50.4 on the view basket, Channel/CSR light application shall prevent a user from removing a selective offer (basket item) that would not satisfy the selective rule definition once removed (subscribed selective would be lower than min rule definition).

CHA-3.9.4.50.5 on the view basket, Channel/CSR light application shall prevent a user from removing an account offer (basket item) with an instantiated regular balance, pointed by a shadow balance, if this account offer is the only one in the basket having this regular balance.

CHA-3.9.4.50.6 on the view basket, Channel/CSR light application shall prevent a user from removing an offer (account or subscriber) according to pre-requisite rules (both ‘and’ and ‘or’ operand)

CHA-3.9.4.55 Channel/CSR light application shall inform the user that when removing an account bundle, all subscribers subscribed in the context of the account bundle will be removed as well.

CHA-3.9.4.60 On the view basket, Channel/CSR light application shall display the option to modify the primary offer and supplementary offers parameters only if there is at least one parameter to configure

CHA-3.9.4.70 Channel/CSR light application shall allow a user reconfiguring primary offer and subscriber bundle of a selection with respect of use case ‘Change primary offer of a selection’.

CHA-3.9.4.90 Channel/CSR light application shall display new subscribers subscribed in the context of an account bundle grouped in a dedicated section.

CHA-3.9.4.100 Channel/CSR light application shall display a primary offer of a subscriber bundle under the same label when clicking on information icon.

CHA-3.9.4.200 Channel/CSR light application shall allow a user to empty a basket for a customer with respect of use case ‘empty basket’ describe above.

CHA-3.9.4.230 Channel/CSR light application shall save a basket automatically with respect of use case ‘save the current basket automatically’ describe above.

CHA-3.9.4.230.1 Channel/CSR light application shall by default automatically saved the basket just before entering in shopping domain after administrative steps.

CHA-3.9.4.230.2 Channel/CSR light application shall by default automatically saved the basket after adding or reconfiguring any selection to the basket.

CHA-3.9.4.240 Channel/CSR light application shall allow a user to manage an automatically saved basket for a customer with respect of use case ‘manage an automatically saved basket’ describe above.

CHA-3.9.4.250 When a saved or parked basket is retrieved and its management allowed, Channel/CSR light application shall make a basket invalid when there is an account bundle in the basket and the customer has already subscribed (including order in progress) to an account bundle.

CHA-3.9.4.260 When a saved or parked is retrieved and its management allowed, Channel/CSR light application shall make a basket invalid when there are account offers in the basket already subscribed (including request in progress) for the customer.

CHA-3.9.4.265 Channel/CSR light application shall re-apply catalog logic when resuming a basket.

CHA-3.9.4.270 Channel/CSR light application shall allow to park the current basket (working session) with respect of use case ‘park basket’ describe above.

CHA-3.9.4.280 Channel/CSR light application shall not change the customer context when the user triggers the use case ‘park the basket’ or ‘empty basket’.

CHA-3.9.4.290 Channel/CSR light application shall share all the parked baskets across a dealer organization and their users. A parked basket shall be visible and can be resumed by any users of the same dealer organization.

CHA-3.9.4.290.1 Channel/CSR light application shall by default filter basket parked by employees of the same level.

CHA-3.9.4.300 Channel/CSR light application shall prevent a user to park a basket with the same ID than another one already parked.

CHA-3.9.4.310 Channel/CSR light application shall allow to resume a parked basket (set as the working session basket) with respect of use case ‘resume a parked basket’ describe above.

CHA-3.9.4.310.10 once a basket has been resumed, the application automatically switches to the right context. .

CHA-3.9.4.320 Channel/CSR light application shall allow to delete parked basket with respect of use case ‘delete parked basket’ describe above.

Capability 1 Checkout - CHK

### Capability Description

This capability allows finalizing an order by getting confirmation to the customer, finalizing last configuration ~~and confirming amount directly collected by the dealer~~

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Checkout

|  |  |  |
| --- | --- | --- |
| Checkout | | CHK0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This Use Case allows the user to checkout his basket. | | |
| Pre-conditions | The basket content must be valid and contains at least one subscriber correctly configured. | | |
| Trigger | User has selected the checkout option | | |
| Minimum guarantees | The Dealer can cancel the checkout at any moment before the last confirmation step, the submission. | | |
| Success guarantees: | The Dealer has entered successfully all information required by the checkout and has submitted the order.  Channel/CSR light application has posted a new order with all the order information necessary to the backend.  Order number has been assigned and displayed | | |
| Normal Flow: | 1. Channel/CSR light application basket is ready for checkout (A2)~~(A3)~~ 2. Channel/CSR light application displays terms and conditions (A4) 3. User accepts terms and conditions for the customer (A5) 4. ~~Channel/CSR light application validates the dealer has collected deposit and immediate payment (Refer to review deposit an payment)~~ 5. Channel/CSR light application displays a confirmation of the order to review with the customer. Refer to use case Review order. (A1) 6. After getting customer agreement, user submits finally the order. (A6)(A7)(A8)(A9) 7. Channel/CSR light application displays a message informing the user that the order has been successfully submitted and an order number is returned. User must give this order number to the customer, for further communication with the CSR. | | |
| Alternative Flows: | A1: User cancels   1. Channel/CSR light application redirects the user to the view and manage basket use case   A2: The content of the basket is not valid for checkout   1. Channel/CSR light application displays an error message informing the user why the basket is not valid for checkout   ~~A3: There is a new account and there is at least one existing or new subscriber candidate as recipient for the account notification~~   1. ~~Channel/CSR light application redirects the user to the Configure account notification use case~~.   A4: No terms and conditions exist for any selected products   1. Channel/CSR light application redirects the user to the next nominal flow step 3   A5: User refuse terms and conditions after discussing them with the customer   1. User selects the deny option 2. Channel/CSR light application redirects the user to the ‘view and manage basket’ use case.   A6: User adds one deposit to the order   1. Channel application redirects user to add deposit use case 2. User sets deposit 3. Channel application adds the deposit to the order at the account level 4. Channel application redirects user to step 5 of nominal use case   A7: User removes a deposit from the order   1. Channel application removes the deposit from order 2. Channel application redirects user to step 5 of nominal use case   A8: User adds a prepayment to the order   1. Channel application redirects user to register prepayment use case 2. User registers the prepayment 3. Channel application adds the prepayment to the order at the account level 4. Channel application redirects user to step 5 of nominal use case   A9: User removes a prepayment from the order   1. Channel application removes the prepayment from order 2. Channel application redirects user to step 5 of nominal use case | | |

#### ~~Use Case: Review payment and deposit (V2)~~

~~To be reviewed~~

|  |  |  |
| --- | --- | --- |
| ~~Review payment and deposit~~ | | ~~CHK0020~~ |
| ~~Primary actors~~ | ~~Dealer user~~  ~~CSR user~~ | | |
| ~~Summary Goal~~ | ~~This use case allows a user to get the total amount he has to collect and optionally the deposit.~~ | | |
| ~~Pre-conditions~~ | ~~Some of the items in the basket have non recurring charges to pay immediately to the dealer and/or there is a deposit to collect.~~ | | |
| ~~Trigger~~ | ~~User has been redirected by Channel/CSR light application in checkout process~~ | | |
| ~~Minimum guarantees~~ |  | | |
| ~~Success guarantees:~~ | ~~Total NRC amount to collect has been displayed~~  ~~Deposit to collect has been displayed~~  ~~User has confirmed he has collected these amounts~~ | | |
| ~~Normal Flow:~~ | 1. ~~Channel/CSR light application displays list of items requiring immediate payment with item label, NRC label and amount~~ 2. ~~Channel/CSR light application displays the total amount to collect~~ 3. ~~Channel/CSR light application displays the deposit amount~~ 4. ~~User confirms he has collected theses amounts~~ | | |
| ~~Alternative Flows:~~ |  | | |

#### Use Case: Review order

|  |  |  |
| --- | --- | --- |
| Review order | | CHK0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to review the order for the last time before finalizing the checkout process. | | |
| Pre-conditions | A valid order is in the checkout process. | | |
| Trigger | User has been redirected by Channel/CSR light application in checkout process | | |
| Minimum guarantees | If the customer does not agree with the order, user can change the content of the order to satisfy the customer by returning on view Basket | | |
| Success guarantees: | User had the agreement of the customer on the order to review. | | |
| Normal Flow: | 1. Channel/CSR light application displays the order to review with following information:   New or Existing billing account reference  New or updated Billing account information  Basket or Order content:  New subscribers  Subscribers to migrate  Total Amount as in basket  ~~Total Amount already collected~~  ~~Deposit~~   1. User selects the pretty print option, prints the order and gives it to the customer for review. (A1) 2. User submits the order 3. Channel/CSR light application posts the order 4. Channel/CSR light application confirms the submission has been done and displays the order number | | |
| Alternative Flows: | A1: User does not select the pretty print option   1. User submits the order 2. Channel/CSR light application posts the order 3. Channel/CSR light application confirms the submission has been done and displays the order number | | |

Channel/CSR light application requirements

CHA-3.10.4.10 Channel/CSR light application shall a user to checkout a basket with respect of use case ‘Checkout’ describe above.

CHA-3.10.4.20 Channel/CSR light application shall validate the basket is ready to checkout

CHA-3.10.4.20.1 Channel/CSR light application shall validate there is at least one new subscriber or swap of an existing subscriber selection in the basket

CHA-3.10.4.20.2 Channel/CSR light application shall validate there is at least one postpaid subscriber in the basket if there is a postpaid account offer in the basket

CHA-3.10.4.20.3 Channel/CSR light application shall validate there is no line configured “to be validated” without having a value.

~~CHA-3.10.4.30 Channel/CSR light application shall allow a user to review payment to collect and deposit with respect of use case Review payment and deposit (V2) To be reviewed~~

~~CHA-3.10.4.30.1 Channel/CSR light application shall consider all NRC that has to be paid immediately according to same logic as in consumer application for Comverse one 3.1 (refer to quoting FRS)~~

~~CHA-3.10.4.30.2 Channel/CSR light application shall consider deposit returned by credit checking~~

1. Is there any deposit notion associated to an offer in PC?

No there isn’t

~~CHA-3.10.4.30.3 Channel/CSR light application shall send/provision these payment and deposit to Comverse One Billing~~

CHA-3.10.4.40 Channel/CSR light application shall allow a user to review the order and print it with respect of use case Review order

CHA-3.10.4.40.1 Channel/CSR light application shall display if the order applies to an existing account or a new account.

CHA-3.10.4.40.2 when order applies to an existing account, the impacted account reference shall be displayed.

~~CHA-3.10.4.50 Channel/CSR light application shall allow a user to configure account level notification with respect of use case Configure account notification~~

~~CHA-3.10.4.50.1 Channel/CSR light application shall respect same logic as in Consumer application (refer to Account Notification FRS)~~

CHA-3.10.4.60 Channel/CSR light application shall allow user to add deposits in the order

CHA-3.10.4.70 Channel/CSR light application shall allow user to remove a deposit from the order

CHA-3.10.4.80 Channel/CSR light application shall display for every deposit the deposit type, the deposit amount and the associated payment method.

CHA-3.10.4.90 Channel/CSR light application shall allow user to register prepayments in the order

CHA-3.10.4.100 Channel/CSR light application shall allow user to remove prepayments from the order

CHA-3.10.4.110 Channel/CSR light application shall display for every prepayment the prepayment amount.

Capability 1 Requests in referral Management – RRM

### Capability Description

This capability allows management of referral process between the dealer and the referral.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View list of requests in referral

|  |  |  |
| --- | --- | --- |
| View list of requests in referral | | RRM0010 |
| Primary actors | Dealer user  Telco Referral User  CSR user | |
| Summary Goal | This use case allows the referral users viewing a list of requests in referral | |
| Pre-conditions | The user is logged. | |
| Trigger | The user has selected the option to view the list of requests in referral | |
| Minimum guarantees |  | |
| Success guarantees: | List of requests in referral is displayed | |
| Normal Flow: | 1. Channel/CSR light application displays list of requests in referral sorted by status and referral date and time (A1).  * Channel/CSR light application displays following information   + Customer first/last name or company name   + Referral date and time   + Referral status | |
| Alternative Flows: | A1: User is a Telco referral user   1. Channel/CSR light application displays list of requests in referral by referred date and time by default. (A2) (A3)  * Channel/CSR light application displays following information * Customer first/last name or company name * Referral date and time * Credit checking return reason * Referral status   A2: Request in referral is locked   1. Channel/CSR light application prevents another referral user to select the request and displays following additional information:  * Login of referral user who lock the customer * Lock duration   A3: Request is locked and referral user selects the option to unlock it   1. Channel/CSR light application redirects the user to the unlock request in referral use case | |

#### Use Case: View details of request in referral

|  |  |  |
| --- | --- | --- |
| View details of request in referral | | RRM0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows users to viewing a request in referral and acting on it according to request in referral status | |
| Pre-conditions | User is logged in | |
| Trigger | User has selected a request in referral | |
| Minimum guarantees | Dealer user can’t do anything on the request if not in a final state and not in request for more information state | |
| Success guarantees: | Either   * User is redirected to continue shopping * Request in referral is canceled * Request in referral status is changed from required more information to referred | |
| Normal Flow: | 1. Channel/CSR light application displays the request in referral with following information   Customer information   * + Customer first/last name or company name   + Account information (contact, administrative data and billing information)   Referral information   * + Same information as in ‘View list of requests in referral’ use case   Deposit value (if required)  Credit checking error code and description  Vetting value  Requester free text note  Referral free text note   1. User optionally sets or updates ‘Requester free text note’ to inform referral user (e.g. additional information about the customer) 2. User selects the option to continue shopping. (A1)(A2)(A3)(A4) 3. Channel/CSR light application deletes the request in referral 4. Channel/CSR light application redirects the user to shopping | |
| Alternative Flows: | A1: request in referral is not in a final status   1. Channel/CSR light application prevents user to select the continue shopping option.   A2: request in referral is in accepted status but user has selected the cancel option (customer has gone)   1. Channel/CSR light application displays a confirmation message 2. User confirms 3. Channel/CSR light application deletes the request in referral.   A3: Request’s in referral status is rejected   1. Channel/CSR light application displays a message to inform the user he can continue shopping in prepaid mode 2. User confirms (A5) 3. Channel/CSR light application deletes the request in referral 4. Channel/CSR light application redirects the user to shopping in prepaid mode   A4: Request’s in referral status is request for more information   1. User confirms he has sent information 2. Channel/CSR light application set status to referred   A5: User cancels   1. Channel/CSR light application deletes the request in referral and redirects the user to the home page | |

#### Use Case: Handle Status of a request in referral

|  |  |  |
| --- | --- | --- |
| Handle Status of a request in referral | | RRM0030 |
| Primary actors | Telco Referral User | |
| Summary Goal | This use case allows the referral users viewing request in referral information and making a decision or requiring more information. | |
| Pre-conditions | The user is viewing list of requests in referral | |
| Trigger | The user has selected a request | |
| Minimum guarantees | If the request in referral is locked by another user, Channel/CSR light application prevent the user to change anything on it | |
| Success guarantees: | Either   * The referral user has taken a decision or has required more information from the dealer. * The request’s in referral status is set to unlock. | |
| Normal Flow: | 1. Channel/CSR light application locks the referred customer request to the user 2. Channel/CSR light application displays the request in referral with following information:  * Customer information   + - Customer first/last name or company name     - Account information (contact, administrative data and billing information) * Referral information   + - Same information as in ‘View list of requests in referral’ use case * Deposit value(if required) * Credit checking error code and description * Vetting value * Requester free text note * Referral free text note  1. Referral user optionally updates the vetting value 2. Referral user optionally set a deposit value 3. Referral user sets or updates ‘Referral free text note’ to inform dealer or CSR of potential restrictions 4. Referral user accepts the request in referral (A1)(A2)(A3)(A4) 5. Channel/CSR light application set the request’s in referral status to ‘accepted’ | |
| Alternative Flows: | A1. The referral user selects the option to get more information from the dealer (like send me a fax)   1. The referral user set information (Referral free text note) he wants the dealer or CSR to send him 2. The referral user submits 3. Channel/CSR light application set the request’s in referral status to ‘required more info’   A2: The referral user rejects the request in referral   1. Channel/CSR light application set the request’s in referral status to reject   A3: The request in referral is locked by another user and referral user selects the unlock option   1. Channel/CSR light application redirects the user to Unlock request in referral use case   A4: The user goes back to the list of requests in referral without changing request status   1. Channel/CSR light application unlocks the request in referral | |

#### Use Case: Unlock request in referral

|  |  |  |
| --- | --- | --- |
| Unlock Request in referral | | RRM0040 |
| Primary actors | Telco Referral User | |
|  | This use case allows a referral user to unlock a request in referral locked by another user | |
| Pre-conditions | * The user is logged in as a referral user * The request in referral is locked by another user | |
| Trigger | Referral user has selected the option to unlock a request in referral | |
| Minimum guarantees | If a referral user was accessing this request in referral, Channel/CSR light application displays a message informing the user the request has been unlocked by the administrator and that his modification won’t be effective | |
| Success guarantees: | The request is unlocked | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message 2. Referral user confirms 3. Channel/CSR light application unlocks the request in referral | |
| Alternative Flows: |  | |

Channel/CSR light application requirements

CHA-3.11.4.5 Channel/CSR light application shall allow a user to swap to another process and come back later when a request in referral has been sent to referral.



CHA-3.11.4.10 Channel/CSR light application shall manage request in referral lock-unlock life cycle with respect of state diagram described above



CHA-3.11.4.20 Channel/CSR light application shall manage request in referral status life cycle with respect of state diagram described above

CHA-3.11.4.30 Channel/CSR light application shall allow user viewing list requests in referral with respect of use case View list of request in referral

CHA-3.11.4.30.1 Channel/CSR light application shall refresh periodically list of requests in referral for referral user based on a design time parameter, the value will have to be set 1 minute by default

CHA-3.11.4.30.2 Channel/CSR light application shall allow user filtering requests in referral by referral status

CHA-3.11.4.30.3 for dealer or CSR user, Channel/CSR light application shall limit list of requests in referral to the ones that have been submitted by any user of a level.

CHA-3.11.4.30.4 for dealer or CSR user, Channel/CSR light application shall allow user filtering list of requests in referral the user has submitted (‘my requests’)

CHA-3.11.4.30.5 for dealer or CSR user, Channel/CSR light application shall filter by default requests in referral with referral status in ‘rejected’, ‘accepted’, ‘require more information’ and submitted by the user

CHA-3.11.4.30.6 for a referral user, Channel/CSR light application shall display by default requests in status referred and require more information

CHA-3.11.4.40 Channel/CSR light application shall allow user viewing a request in referral with respect of use case ‘View details of request in referral’.

CHA-3.11.4.50 Channel/CSR light application shall allow referral user handling status of a request in referral with respect of use case ‘Handle Status of request in referral’.

CHA-3.11.4.60 Channel/CSR light application shall allow referral user unlocking a request in referral with respect of use case ‘Unlock request in referral’.

CHA-3.11.4.60 Channel/CSR light application shall limit access to this use case to referral administrator

Capability 1 Dealer Registration - REG

### Capability Description

This capability allows a Telco Administrator or Dealer Administrator to register a new dealer in CSS.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Set up dealer locally

|  |  |  |
| --- | --- | --- |
| Set up Dealer locally | | REG0010 |
| Primary actors | Telco user | | |
| Summary Goal | This use case allows a user creating locally new dealer. | | |
| Pre-conditions | The user is logged in | | |
| Trigger | The user selects the option to set up locally a dealer | | |
| Minimum guarantees | The user can cancels the action at any steps and no entity is created in the system  If the user closes the window or logout, no entity is created in the system | | |
| Success guarantees: | A new dealer has been created locally. | | |
| Normal Flow: | 1. The user selects the dealer type. 2. The user sets the dealer legal contact (identity, address, phone & email) and reference (A1) 3. The User set the dealer profile information 4. Channel/CSR light application displays the dealer set information for review 5. The user confirms 6. Channel/CSR light application saves the dealer 7. Channel/CSR light application confirms to user the dealer has been registered and proposes to him to create a first employee(A3) 8. User decides to create the first login (A2) 9. Channel/CSR light application redirects the user to the Add employee use case to create a first user (refer to add employee use case) | | |
| Alternative Flows: | A1: user cancels dealer setup   1. Channel/CSR light application redirects the user to the step he was before starting creating the dealer   A2: user decides to create the first user later   1. Use case ends   A3: register login use case is not supported for dealers (refer to register login precondiftion):   1. Channel/CSR light doesn(t propose to the user to create a first login 2. Use case ends | | |

#### Use Case: Register dealer

|  |  |  |
| --- | --- | --- |
| Register dealer | | REG0020 |
| Primary actors | Telco user | | |
| Summary Goal | This use case allows the user to register and set up a dealer managed in an external system in the CID. | | |
| Pre-conditions | The user is logged in | | |
| Trigger |  | | |
| Minimum guarantees | An error message is displayed if the synchronization failed | | |
| Success guarantees: | A new dealer has been registered | | |
| Normal Flow: | 1. Channel/CSR light application displays a search dealer page with the following fields :  * Reference ID (A4) * Dealer name  1. User set either one of the criteria 2. Channel/CSR light application sends a synchronous search to the system in charge of managing dealers 3. Channel/CSR light application displays selected dealers with the following fields (A1)(A1bis)  * Reference ID (A5) * Dealer name * Dealer address  1. The user selects a dealer in the list 2. Channel/CSR light application displays the detail of the selected dealer (A6) 3. User set dealer profiles attributes managed locally in the CID 4. Channel/CSR light application displays the dealer set information for review 5. The user confirms 6. Channel/CSR light application registers the dealer in the CID 7. Channel/CSR light application confirms to user the dealer has been registered and proposes him to create a first login (A7) 8. Channel/CSR light application redirects the user to the Add employee use case to create a first user. (refer to add employee use case)(A8) | | |
| Alternative Flows: | A1: No dealer found   1. Channel/CSR light application displays an error message informing user there is no dealer found   A1bis: Two many dealers found   1. Channel/CSR light application displays a message to inform user there are to many dealers selected and to refine the search   A4. Dealer reference is managed locally   1. Channel/CSR light application doesn’t propose the search by reference 2. Next step is similar to nominal case   A5. Dealer reference is managed locally   1. Channel/CSR light application doesn’t display the reference column 2. Next step is similar to nominal case   A6. Either dealer type or dealer reference (or both) are managed locally   1. Channel/CSR light application proposes user to set locally managed information 2. Next step is similar to nominal case.   A7: register login use case is not supported for dealers (refer to register login precondition):   1. Channel/CSR light doesn(t propose to the user to create a first login 2. Use case ends   A8: User decides to create user later:   1. Use case ends | | |

Channel/CSR light application requirements

CHA-3.12.4.5 Channel/CSR light application shall support configuring at design time if dealer are setup locally or registered from an external system

CHA-3.12.4.5.1 Channel/CSR light application shall display only the available option according to the configured option

CHA-3.12.4.5.2 when integrated with Comverse one billing, Channel/CSR light application shall be configured by default in “register from external system’ mode.

CHA-3.12.4.10 Channel/CSR light application shall allow a Telco Administrator to create New Dealers Locally with respect of use case ‘set up dealer locally’.

~~CHA-3.12.4.10.1 Channel/CSR light application shall force user creating a first dealer Administrator~~

CHA-3.12.4.10.2 Channel/CSR light application shall allow user entering the dealer reference

CHA-3.12.4.10.3 Channel/CSR light application shall allow user to set dealer profile (refer to modify level profile requirements for more details)

CHA-3.12.4.20 Channel/CSR light application shall allow a Telco Administrator to register a dealer managed in an external system with respect of use case ‘Register dealer’.

CHA-3.12.4.20.1 Channel/CSR light application shall allow user to set dealer profile attributes managed locally (refer to modify level profile requirements for more details)

CHA-3.12.4.30 Channel/CSR light application shall allow a Telco Administrator to search dealer in the Back end System by Dealer Reference Id and Dealer Name using a synchronous call to setup dealer

CHA-3.12.4.30.1 Channel/CSR light application shall support configuring at design time a timeout value for the search

CHA-3.12.4.30.2 Channel/CSR light application shall support configuring at design time number max of dealers selected

CHA-3.12.4.30.3 Channel/CSR light application shall support wildcards

CHA-3.12.4.30.4 Channel/CSR light application shall not be case sensitive

CHA-3.12.4.30.5 Channel/CSR light application integration layer shall clearly log error message when errors occurs during search call

~~CHA-3.12.4.40 Channel/CSR light application shall display a waiting page until the dealer as been successfully synchronized.~~

~~CHA-3.12.4.40.1 Channel/CSR light application shall~~ ~~support configuring at design time a timeout value for the dealer synchronization~~

~~CHA-3.12.4.40.2 Channel/CSR light application integration layer shall clearly log error message when errors occurs during dealer synchronization~~

CHA-3.12.4.50 Channel/CSR light application shall support configuring if dealer reference is managed locally or in backend

CHA-3.12.4.50.1 Channel/CSR light application shall not propose the dealer reference as search criteria (in registration process) if dealer reference is managed locally

CHA-3.12.4.50.2 Channel/CSR light application shall not display the dealer reference in search result (in registration process) if dealer reference is managed locally

CHA-3.12.4.50.3 Channel/CSR light application shall allow user to set the dealer reference when registering a dealer if dealer reference is managed locally

CHA-3.12.4.60 Channel/CSR light application shall support configuring if dealer type is managed locally or in backend

CHA-3.12.4.50.3 Channel/CSR light application shall force user to set the dealer type when registering a dealer if dealer type is managed locally

Capability 1 Dealer Search - DLS

### Capability Description

This capability allows a Telco user searching dealers already setup or registered

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Search Dealer

|  |  |  |
| --- | --- | --- |
| Search Dealer | | DLS0010 |
| Primary actors | Telco Administrator | | |
| Summary Goal | This use case allows the user to search locally and select a dealer using dealer information. | | |
| Pre-conditions | The user is logged in. | | |
| Trigger |  | | |
| Minimum guarantees | An error message is displayed If no Dealer has been found | | |
| Success guarantees: | A Dealer has been found  Telco user is in the context of a dealer | | |
| Normal Flow: | 1. User set either dealer name or dealer reference 2. Channel/CSR light application search dealers locally 3. Channel/CSR light application displays dealers corresponding to the criteria entered for the search.(A1)(A2) with their name, reference, address and type 4. The user selects a dealer from the list.(A3) 5. Channel/CSR light application redirects the user to the dealer context | | |
| Alternative Flows: | A1. No dealer found   1. Channel/CSR light application displays an error message to inform user no dealer has been found   A2: Too many dealers found   1. Channel/CSR light application add a message at the end of the list to inform user there are more dealers matching criteria and he should refine his search   A3: User enters new criteria (he has not found the expected dealer)   1. Next steps are similar to nominal case | | |

Channel/CSR light application requirements

CHA-3.13.4.10 Channel/CSR light application shall allow a Telco Administrator to search dealers locally with respect of use case ‘Search dealer’.

CHA-3.13.4.20 Channel/CSR light application shall allow a Telco Administrator to enter wildcards in search criteria

CHA-3.13.4.20.10 Channel/CSR light application shall allow at design time to enable/disable the dealer reference criteria, by configuration.

CHA-3.13.4.30 Channel/CSR light application shall not be case sensitive

CHA-3.13.4.40 Channel/CSR light application shall support configuring at design time the max number of dealers retrieved.

Capability 1 Hierarchy Management - HYM

### Capability Description

This capability allows dealer and Telco user to manage locally their respective organization. A Telco administrator can also manage Dealers’ hierarchies

To be analyzed in which case an admin can create a user (regarding security)

### Capability Assumptions/Dependencies

It is assumed the dealer hierarchy is managed locally only. Only the hierarchy root will be synchronized with the PC module.

It is assumed the service provider (Telco) hierarchy is managed locally only.

### Capability Use Cases

#### Use Case: Browse hierarchy

|  |  |  |
| --- | --- | --- |
| Browse hierarchy | | HYM0010 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to view and browse the hierarchy below a specific level (or department) or root level. | | |
| Pre-conditions | User is logged in  User is in the context of a dealer or of a Telco | | |
| Trigger | User has selected the option to display the current hierarchy | | |
| Minimum guarantees |  | | |
| Success guarantees: | The selected hierarchy is displayed | | |
| Normal Flow: | 1. Channel/CSR light application displays levels of the whole hierarchy with the name of every level 2. Channel/CSR light application displays employees on the root level 3. Channel/CSR light application displays the root level as current context 4. User selects a level 5. Channel/CSR light application expends the level and displays its employees 6. Channel/CSR light application displays the selected level as current level | | |
| Alternative Flows: |  | | |

#### Use Case: Add level

|  |  |  |
| --- | --- | --- |
| Add Level | | HYM0020 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows a user adding a level in a hierarchy. | | |
| Pre-conditions | The user is logged in  The user is browsing the hierarchy | | |
| Trigger | The user selects the option add a Level | | |
| Minimum guarantees | The user can cancel the level addition. | | |
| Success guarantees: | User has created a new level in the hierarchy | | |
| Normal Flow: | 1. The user enters the new level’s legal contact (identity, address and phone and email) and level type (A1) 2. The user confirms the new level information(A1) 3. Channel/CSR light application creates the new level | | |
| Alternative Flows: | A1: The user cancels the level creation   1. Channel/CSR light application redirects the user to the hierarchy browsing | | |

#### Use Case: Move level

|  |  |  |
| --- | --- | --- |
| Move Level | | HYM0030 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows a user moving a level in his hierarchy. | | |
| Pre-conditions | The user is logged in  The use is browsing the hierarchy | | |
| Trigger | User selects the option to move a level | | |
| Minimum guarantees | The user can cancel the level move | | |
| Success guarantees: | The user has moved a level under another level in the same hierarchy | | |
| Normal Flow: | 1. The user selects the destination parent node (A1) 2. Channel/CSR light application moves the level. | | |
| Alternative Flows: | A1: The user cancel the move   1. Channel/CSR light application redirects the user to the hierarchy browsing | | |

#### Use Case: Remove level

|  |  |  |
| --- | --- | --- |
| Remove Level | | HYM0040 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows a dealer to remove a level from a hierarchy. | | |
| Pre-conditions | The user is logged in  The user is browsing a hierarchy | | |
| Trigger | User selects the option to remove a level | | |
| Minimum guarantees | The user can cancel the remove level | | |
| Success guarantees: | Level has been removed | | |
| Normal Flow: | 1. The system asks user confirmation to remove this level 2. User confirms (A1) 3. Channel/CSR light application moves the level and sub levels to the trash organization (A2) | | |
| Alternative Flows: | A1: User cancels the remove   1. Channel/CSR light application redirects the user to the hierarchy browsing   A2: There are still active users on the level or sub levels   1. Channel/CSR light application displays an error message to inform user he can’t remove a level with active users | | |

#### Use Case: View level contact

|  |  |  |
| --- | --- | --- |
| View Level Contact | | HYM0050 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to view contact information of a hierarchy level. | | |
| Pre-conditions | The user is logged in  The user is browsing a hierarchy | | |
| Trigger | The user selects the option to view a level contact information | | |
| Minimum guarantees |  | | |
| Success guarantees: | The level contact information are displayed | | |
| Normal Flow: | 1. The system displays the name, address and phone numbers of the level. (A1) | | |
| Alternative Flows: | A1: the level is a sub level   1. The type is displayed for sub levels | | |

#### Use Case: Modify level contact

|  |  |  |
| --- | --- | --- |
| Modify Level Contact | | HYM0060 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user modifying level contact | | |
| Pre-conditions | The user is logged in  The user is viewing a level contact | | |
| Trigger | The user selects the option to update a level contact information | | |
| Minimum guarantees |  | | |
| Success guarantees: | The level contact information are modified | | |
| Normal Flow: | 1. The user sets new identity, address, contact first name and last name and phone, fax, email,(A2) 2. The user confirms (A1). 3. Channel/CSR light application updates the Telco legal contact locally. 4. Channel/CSR light application displays a message to inform the user the contact has been changed. | | |
| Alternative Flows: | A1: The user cancels the edition.   1. Channel/CSR light application redirects the user to the step he was before starting the edition   A2: Contact is associated to dealer root level and reference is locally managed or dealers are not synchronized   1. The user sets new identity, address, contact first name last name and phone, fax, email and reference 2. Next step is similar to nominal case | | |

#### Use Case: View level profile

|  |  |  |
| --- | --- | --- |
| View Level Profile | | HYM0070 |
| Primary actors | Dealer Administrator | | |
| Summary Goal | This use case allows viewing dealer level profile. | | |
| Pre-conditions | User is browsing a dealer hierarchy | | |
| Trigger | The user selects the option to view a dealer level profile | | |
| Minimum guarantees |  | | |
| Success guarantees: | The level profile is displayed. | | |
| Normal Flow: | 1. The system displays the level profile | | |
| Alternative Flows: |  | | |

#### Use Case: Modify level profile

|  |  |  |
| --- | --- | --- |
| Modify Level Profile | | HYM0080 |
| Primary actors | Dealer Administrator | | |
| Summary Goal | This use case allows the user to modify profile | | |
| Pre-conditions | User is viewing profile of a dealer level | | |
| Trigger | The user selects the option to modify the level profile | | |
| Minimum guarantees |  | | |
| Success guarantees: | Level Profile is modified | | |
| Normal Flow: | 1. Channel/CSR light application displays the current dealer profile in edit mode 2. The user modifies the level profile information (A1) 3. Channel/CSR light application prompts the user to confirm changes 4. User confirms (A1) 5. Channel/CSR light application updates level profile information. 6. Channel/CSR light application displays the view level profile again. | | |
| Alternative Flows: | A1: User cancels the modification   1. Channel/CSR light application redirects the user to the step he was before starting the edition | | |

#### Use Case: Refresh dealer

|  |  |  |
| --- | --- | --- |
| Refresh dealer | | HYM0090 |
| Primary actors | Telco Administrator | | |
| Summary Goal | This use case allows the user to refresh a dealer contact and its association with product group for dealer | | |
| Pre-conditions | The user is logged in  The user is viewing a root level contact  Dealers are synchronized | | |
| Trigger | The user selects the option to refresh contact information of a dealer and its product group for dealer. | | |
| Minimum guarantees |  | | |
| Success guarantees: | User is informed that a request to refresh the dealer has been sent. | | |
| Normal Flow: | 1. The user selects the option to refresh a dealer (i.e. contact of a root level of a dealer) (A1) 2. Channel/CSR light application displays a message to inform the user a request has been sent to refresh the dealer. | | |
| Alternative Flows: | A1: An application error occurs   1. Channel/CSR light application informs the user that an error occurred. | | |

Channel/CSR light application requirements

CHA-3.14.4.10 Channel/CSR light application shall restrict Hierarchy Management use cases to Telco Administrator and Dealer Administrator

CHA-3.14.4.10.1 Channel/CSR light application shall restrict Hierarchy Management use cases for Dealer Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.14.4.10.2 Channel/CSR light application shall allow ‘Hierarchy Management’ use cases for Telco Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.14.4.10.3 Channel/CSR light application shall allow Hierarchy Management use cases for Telco Administrator managing a Dealer hierarchy.

CHA-3.14.4.10.4 Channel/CSR light application shall allow ‘Hierarchy Management’ use cases for CSR Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.14.4.10.5 Channel/CSR shall disable Telco hierarchy option if Telco users are managed in the security server in mode user discovery.

CHA-3.14.4.20 Channel/CSR light application shall allow a user browsing a hierarchy with respect of use case ‘Browse hierarchy’.

CHA-3.14.4.20.1 Channel/CSR light application shall display a caption for Hierarchy Management use cases for each different roles of employee.

CHA-3.14.4.30 Channel/CSR light application shall allow a user adding a level to the hierarchy with respect of use case ‘Add level’.

CHA-3.14.4.40 Channel/CSR light application shall allow a user moving a level in the hierarchy with respect of use case ‘Move level’.

CHA-3.14.4.40.1 Channel/CSR light application shall prevent a user moving a level to one of its sub level.

CHA-3.14.4.50 Channel/CSR light application shall allow a user removing a level in the hierarchy with respect of use case ‘Remove level’.

CHA-3.14.4.50.1 Channel/CSR light application shall prevent a user removing a level if there are still active users (i.e. login is active) on the level or in one of its sub level.

CHA-3.14.4.50.2 Channel/CSR light application shall prevent removing the root level.

CHA-3.14.4.50.3 Channel/CSR light application shall also remove all sub levels.

CHA-3.14.4.60 Channel/CSR light application shall allow a user viewing and modifying level contact with respect of use cases ‘View level contact’ and ‘Modify Level contact’.

CHA-3.14.4.60.1 Channel/CSR light application shall prevent user modifying the root level contact when dealer has been synchronized by registration (e.g. when integrated with Comverse One billing for instance).

CHA-3.14.4.60.2 Channel/CSR light application shall prevent user modifying the dealer reference when dealers are synchronized and dealer reference is not locally managed

CHA-3.14.4.60.3 Channel/CSR light application shall prevent user accessing this use case when both dealer reference is not locally managed and dealers are synchronized

CHA-3.14.4.70 Channel/CSR light application shall allow a user viewing and modifying level profile with respect of use cases ‘View level profile’ and ‘Modify Level profile’.

CHA-3.14.4.70.1 Channel/CSR light application shall restrict view and modify level profile for Dealer Administrator to their own Organization and only to their level or the levels below them

CHA-3.14.4.70.2 Channel/CSR light application shall allow viewing and modifying level profile information as in Channel/CSR light 3.10

CHA-3.14.4.70.3 In addition to that, when administered by a telco administrator, for a root dealer profile, Channel/CSR light shall allow user viewing and modifying the list of available Channel/CSR light catalogs if dealer are managed locally and if managing Channel/CSR light catalog is active in the shopping policy.

CHA-3.14.4.70.4 In addition to that, Channel/CSR light application shall allow Telco and dealer administrator setting product groups on a sub level.

CHA-3.14.4.70.4.1 Channel/CSR light shall limit candidate product groups to product groups available for its parent

CHA-3.14.4.70.4.2 If a level has no product group associated to it, all product group available for its parent level are reputed available (and thus recursively)

CHA-3.14.4.70.4.3 If a level has at least one product group associated to it, only these product groups are available and only if they are also available for its parent (and thus recursively)

CHA-3.14.4.70.4.4 Channel/CSR light shall take into account valid product groups for the user level when proposing offers and bundles.

CHA-3.14.4.80 Channel/CSR light application shall allow a user refreshing a dealer contact with respect of use cases ‘Refresh dealer’.

CHA-3.14.4.80.1 Channel/CSR light application shall prevent user accessing this use case when dealers are ‘locally managed’.

Capability 1 Employee Identification - EPI

### Capability Description

This capability groups all use cases allowing a telco or user to find, search or list employees belonging to a dealer, or a telco.

This capability allows a Telco administrator, Dealer administrator to find employees in their respective organizations.

In addition, a telco administrator will be able to identify dealer employees whatever their dealer organization is.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Search employees

|  |  |  |
| --- | --- | --- |
| Search Employees | | EPI0010 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to search an employee below a level. | | |
| Pre-conditions | * The user is logged in. * The user is in the context of a specific level. | | |
| Trigger | The user selects the option to search employees | | |
| Minimum guarantees | Channel/CSR light application displays a message if there is no employee found  Channel/CSR light application limits the number of employees returned | | |
| Success guarantees: | List of employees matching specified criteria is displayed. Every listed employee can be selected. | | |
| Normal Flow: | 1. The user specifies one of the following criteria  * Employee last name and first name * Employee login * Employee role * Employee login status  1. Channel/CSR light application searches and displays the employees (A1)(A2). 2. Channel/CSR light application displays employees (ordered by last name). For each employee it displays the first name, last name and login. | | |
| Alternative Flows: | A1: There is no employee selected   1. Channel/CSR light application displays an error message specifying there is no employee matching criteria set   A2: There are more employees selected than number of displayable employees   1. Channel/CSR light application displays a message there are more employees found and advises the user to refine his search 2. Next steps are similar to nominal cases | | |

#### Use Case: List employees of a level

|  |  |  |
| --- | --- | --- |
| List employees of a level | | EPI0020 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to list employees below a level. | | |
| Pre-conditions | * The user is logged in. * The user is in the context of a specific level. | | |
| Trigger | The user wants to list specific level employees | | |
| Minimum guarantees | A specific message is displayed if there is no employee in the level | | |
| Success guarantees: | * The list of employees below the current level is displayed. * Every listed employee can be selected. | | |
| Normal Flow: | 1. The user selects the View employees option. 2. Channel/CSR light application displays employees of this level ordered by last name. For each employee it displays first name, last name, role , login, and login status (A1) | | |
| Alternative Flows: | A1: There is no employee in the level   1. Channel/CSR light application displays a message specifying there is no employee in the level | | |

Channel/CSR light application requirements

CHA-3.15.4.1 Channel/CSR light application shall restrict ‘Employee Identification’ use cases to Telco Administrator, Dealer Administrator and CSR Administrator

CHA-3.15.4.1.1 Channel/CSR light application shall allow ‘Employee Identification’ use cases for Dealer Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.15.4.1.2 Channel/CSR light application shall allow ‘Employee Identification’ use cases for Telco Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.15.4.1.3 Channel/CSR light application shall allow ‘Employee Identification’ use cases for Telco Administrator on a Dealer hierarchy.

CHA-3.15.4.1.4 Channel/CSR light application shall allow ‘Employee Identification’ use cases for CSR Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.15.4.1.5 Channel/CSR light application shall allow ‘Employee Identification’ use cases for Telco Administrator on a CSR hierarchy.

CHA-3.15.4.10 Channel/CSR light application shall allow a user listing employees below a level with respect of use cases ‘List employees of a level’.

CHA-3.15.4.20 Channel/CSR light application shall allow user searching all the employees in his sub-hierarchy with respect of use case ‘Search employees’.

CHA-3.15.4.20.1 Channel/CSR light application shall allow wild cards in last name, in first name and in login search attributes.

CHA-3.15.4.20.2 Channel/CSR light application shall allow multiple roles selection as search criteria

CHA-3.15.4.20.3 Channel/CSR light application shall allow multiple login statuses selection as search criteria

Capability 1 Employee Management - EPM

### Capability Description

This capability allows a Telco administrator a dealer administrator to manage their employee in their respective organization

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Add employee

|  |  |  |
| --- | --- | --- |
| Add employee | | EPM0010 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to create a new local employee. | | |
| Pre-conditions | * The user is logged in. * The user is in the context of a specific level. | | |
| Trigger | The user select the option to add a new employee | | |
| Minimum guarantees | The new employee is not created | | |
| Success guarantees: | The new employee is created locally | | |
| Normal Flow: | 1. The user provides following information about the employee:   Employee identity  Employee phones and email  Employee address   1. The user confirm entered information(A1) 2. The user registers an employee login. Refer to “Register Login” use case in Managing User Access (A2)(A3) 3. The user reviews and confirms identity, address, phone & email and optionally login information.(A1) 4. Channel/CSR light application created the employee locally(A4) | | |
| Alternative Flows: | A1. The user cancels the creation.   1. Channel/CSR light application redirect the user to the step he was before starting employee creation   A2. The User choose “[Thanks, but I will create a login later](http://fr-par-rgueho2:8080/myshapepos310/jfn) ” and continue without creating a login for the employee   1. Login creation step is skipped   A3: User is setting up a new dealer   1. Channel/CSR light application forces the user creating a first login   A4: User is setting up a new dealer   1. Channel/CSR light application will confirms employee creation only at the end of the dealer set up process | | |

#### Use Case: Move employee

|  |  |  |
| --- | --- | --- |
| Move employee | | EPM0020 |
| Primary actors | Telco Administrator  Dealer Administrator | | |
| Summary Goal | This use case allows the user to move an employee from a level to another level of the same hierarchy. | | |
| Pre-conditions | * The user is logged in. * The user has access to both levels * The user is viewing employees | | |
| Trigger | The user has selected the employee to move it | | |
| Minimum guarantees |  | | |
| Success guarantees: | The dealer employee is moved from one level to another | | |
| Normal Flow: | 1. The user selects the employee. 2. The user selects the level to which the user will be assigned. 3. Channel/CSR light application request user confirmation 4. The user confirms (A1) 5. The user is moved locally to the new level | | |
| Alternative Flows: | A1. The user cancels the action.   1. Channel/CSR light application redirects the user to the step he was before starting employee move | | |

#### Use Case: View employee contact

|  |  |  |
| --- | --- | --- |
| View employee contact | | EPM0030 |
| Primary actors | Telco User  Dealer User | | |
| Summary Goal | This use case allows the user to view the legal contact of an employee. | | |
| Pre-conditions | Either   * The user is logged in and is the contextual employee. * The user is in the context of another employee than himself (administrating an employee). | | |
| Trigger | The user selects the option to view the employee contact | | |
| Minimum guarantees |  | | |
| Success guarantees: | The user views employee Legal Contact information | | |
| Normal Flow: | 1. Channel/CSR light application displays the employee identity, address, and phone & email. | | |
| Alternative Flows: |  | | |

#### Use Case: Modify employee contact

|  |  |  |
| --- | --- | --- |
| Modify employee contact | | EPM0040 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to edit the legal contact of an employee. | | |
| Pre-conditions | * The user is logged in and is viewing his own employee contact * The user is viewing an employee contact in the context of another employee than himself (administrating an employee). | | |
| Trigger | The user choose the option to modify the employee contact | | |
| Minimum guarantees | The Employee contact information are not modified | | |
| Success guarantees: | The employee legal contact is modified locally. | | |
| Normal Flow: | 1. Channel/CSR light application displays identity, address, and phone & email in edition mode. 2. The user modifies any information. 3. The user reviews and confirms changes. (A1) 4. Channel/CSR light application modifies locally the employee contact | | |
| Alternative Flows: | A1. The user cancels the action   1. Channel/CSR light application redirects the user to the step he was before starting employee move | | |

#### Use Case: View employee profile

|  |  |  |
| --- | --- | --- |
| View employee profile | | EPM0050 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to view the profile of an employee (own profile or administered employee). | | |
| Pre-conditions | * The user is logged in and is the contextual employee. * The user is in the context of another employee than himself (administrating an employee). | | |
| Trigger | The user selects the option to view the profile | | |
| Minimum guarantees |  | | |
| Success guarantees: | The profile of the employee is displayed. | | |
| Normal Flow: | 1. Channel/CSR light application displays the employee profile. | | |
| Alternative Flows: |  | | |

#### Use Case: Modify employee profile

|  |  |  |
| --- | --- | --- |
| Modify employee profile | | EPM0060 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to modify the personal profile of an employee (own profile or administered employee). | | |
| Pre-conditions | * The user is logged in and is viewing his own employee profile (restricted to user actor) * The user is viewing an employee profile in the context of another employee than himself (administrating an employee). | | |
| Trigger | The user selects the option to modify the profile | | |
| Minimum guarantees |  | | |
| Success guarantees: | The employee profile has been updated. | | |
| Normal Flow: | 1. Channel/CSR light application displays the personal profile in edition mode. 2. The user modifies any information (A1). 3. Channel/CSR light application modifies the profile locally. | | |
| Alternative Flows: | A1: The user can cancel the action.   1. Channel/CSR light application redirects the user to the step he was before starting profile modification | | |

Channel/CSR light application requirements

CHA-3.16.4.1 Channel/CSR light application shall restrict ‘Employee Management’ use cases to Telco Administrator, CSR Administrator and Dealer Administrator

CHA-3.16.4.1.1 Channel/CSR light application shall allow ‘Employee Management’ use cases for Dealer Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.16.4.1.2 Channel/CSR light application shall allow ‘Employee Management’ use cases for Telco Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.16.4.1.3 Channel/CSR light application shall allow ‘Employee Management’ use cases for Telco Administrator on a Dealer hierarchy.

CHA-3.16.4.1.4 Channel/CSR light application shall allow ‘Employee Management’ use cases for CSR Administrator in their own hierarchy limited to their level and sub-levels.

CHA-3.16.4.1.5 Channel/CSR light application shall allow ‘Employee Management’ use cases for Telco Administrator on a CSR hierarchy.

CHA-3.16.4.30 Channel/CSR light application shall allow a user registering a new employee with respect of use case ‘Add employee’.

CHA-3.16.4.30.1 Channel/CSR light application shall authorize Telco Administrator and Dealer Administrator to add a new employee only on their sub-hierarchy.

CHA-3.16.4.30.2 Channel/CSR light application shall force the user to enter a title, first name, last name and email address (by default) for the employee (mandatory fields).

CHA-3.16.4.30.3 Channel/CSR light application shall detect a key error when entering the email address by forcing the user to enter email address twice.

~~CHA-3.16.4.30.4 Channel/CSR light application shall allow to configure at design-time if email address is a mandatory field or not when adding an employee for a dealer organization.~~

~~CHA-3.16.4.30.5 Channel/CSR light application shall allow to configure at design-time if email address is a mandatory field or not when adding an employee for a telco organization.~~

CHA-3.16.4.50 Channel/CSR light application shall allow a user moving employees from a level to another level with respect of use cases ‘Move employee’.

CHA-3.16.4.50.1 Channel/CSR light application shall prevent a user moving all the employees from the root level, At least 1 admin shall remain on the root level.

CHA-3.16.4.50.2 Channel/CSR light application shall prevent a user moving himself.

CHA-3.16.4.60 Channel/CSR light application shall allow user viewing an employee contact information with respect of use cases ‘View employee contact’.

CHA-3.16.4.70 Channel/CSR light application shall allow user modifying an employee contact information with respect of use cases ‘Modify employee contact’.

CHA-3.16.4.70.1 Channel/CSR light application shall force the user to enter a title, first name, last name and email address (by default) for the employee (mandatory fields).

CHA-3.16.4.70.2 Channel/CSR light application shall respect and apply the behavior defined in requirements CHA-3.16.4.30.3 and CHA-3.16.4.30.4 when modifying an employee contact.

CHA-3.16.4.70.3 Channel/CSR light application shall detect a key error when entering or modifying the email address by forcing the user to enter or modify email address twice.

CHA-3.16.4.100 Channel/CSR light application shall display dealer employee profile attributes with respect of use case ‘view employee profile’ describe above.

CHA-3.16.4.100.1 Channel/CSR light application shall display Time Zone as a single choice list attribute.

CHA-3.16.4.110 Channel/CSR light application shall propose an option to modify dealer employee profile attributes with respect of use case ‘Modify employee profile’ describe above.

~~CHA-3.16.4.120 Channel/CSR light application shall allow to configure which attributes are enabled in use case ‘View and modify employee profile’.~~

~~CHA-3.16.4.120.1 Channel/CSR light application shall have a default configuration with Time Zone attribute enabled at design time in the application for a dealer employee.~~

Capability 1 User Session Management - USM

### Capability Description

This capability provides use cases required to establish a dealer or telco user session (login) and close it properly (logout and session expires). To be reviewed according to security

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Login

|  |  |  |
| --- | --- | --- |
| Login | | USM0010 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to log into the application. | | |
| Pre-conditions | The user must have a login name and password. | | |
| Trigger | The user access the application | | |
| Minimum guarantees | An error message is displayed to indicate invalid login/password | | |
| Success guarantees: | The welcome page appears and the user is authenticated. | | |
| Normal Flow: | 1. The user enters the login name, the realm, and password and submits. (A11) 2. Channel/CSR light application verifies the couple login name and password is valid (A1)(A2)(A2.1)(A3)(A4)(A7)(A7.1)(A8) 3. Channel/CSR light application redirects the user to the dealer or Telco home page | | |
| Alternative Flows: | A1: The couple login and password is not valid   1. Channel/CSR light application informs the user that the login or password is incorrect and warns the user that the login will be locked after three attempts (A10) (A10.1)   A2: The login is no longer active   1. Channel/CSR light application informs the user he can’t log in and he should contact his administrator   A2.1: User access is disabled   1. Channel/CSR light application informs user access to application has been disabled and he should contact his administrator or a CSR.   A3. The login is locked   1. Channel/CSR light application informs the user he can’t log in and he should contact his administrator.   A4. The user is forced to change passwords   1. Channel/CSR light application redirects the user to Change password on first login use case.   A5. the user is a Dealer user and a special agreement exists   1. Channel/CSR light application displays an intermediary page: “Please note that your use of this website, and ordering of products and services via this website is subject to the Terms & Conditions of the [insert name of Agreement] (Agreement) between [insert dealer name] (Company) and Shape Telecom. By accessing and using this website, you acknowledge and agree that: you are authorized to use this website and to order products and services for and on behalf of the Company; the order of products and services via this website is subject to the Terms & Conditions of the Agreement; and you have read and understood and agree to be bound by the Terms & Conditions of the Agreement.” 2. User confirms (A6) 3. Next steps are similar to nominal use case   A6: The dealer cancels   1. Channel/CSR light application logs the user out   A7: The password has expired and user is managed locally   1. Channel/CSR light application locks the login 2. Channel/CSR light application displays an error message informing the user the login is locked and he should call his administrator   A7.1: The password has expired and user is managed in security server and is not already locked   1. Channel/CSR light application will force user to change password   A8: The password in in the warn expiration period   1. Channel/CSR light application display a warning message to inform the user his password will expire in X days 2. Channel/CSR light application propose the user to change his password 3. User confirms and changes his password (refer to use case change password)(A9)   A9: User cancels   1. Channel/CSR light application redirects the user to the home page   A10: Login-value is incorrect for the third time and user is managed locally   1. Channel/CSR light application locks the login 2. Channel/CSR light application displays an error message informing the user his login has been locked and he should contact his administrator   A10.1: User is managed in security server, Login value is incorrect and implies user locking according to security server policy   1. Channel/CSR light application displays an error message informing the user his login has been locked and he should contact his administrator   A11: All users of the application have roles of the same realm   1. Channel/CSR light application hides the realm to the user | | |

#### Use Case: Logout

|  |  |  |
| --- | --- | --- |
| Logout | | USM0020 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to log out of the application. | | |
| Pre-conditions | The user is logged in. | | |
| Trigger | * The user click Logout * The session expires | | |
| Minimum guarantees |  | | |
| Success guarantees: | For a user, his current basket is automatically saved  The user is no longer authenticated and logged out. | | |
| Normal Flow: | 1. The system logs the user out.(A1) | | |
| Alternative Flows: | A1. The user is a dealer and basket is not empty   1. Channel/CSR light application saves the current basket automatically. Refer to ‘Save the current basket automatically’ use case. 2. The system logs the user out. | | |

#### Use Case: User session expires

|  |  |  |
| --- | --- | --- |
| User Session Expires | | USM0030 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the system to automatically end the session after a configurable period. | | |
| Pre-conditions | The user is logged in | | |
| Trigger | Session expired | | |
| Minimum guarantees |  | | |
| Success guarantees: | The user is no longer logged in the system  If there is a non empty current basket in user session, it is automatically saved | | |
| Normal Flow: | 1. The user lets the session inactive for a certain period of time. By default, 30 minutes for users and four hours for Telco users. 2. Channel/CSR light application logs the user out (A1) | | |
| Alternative Flows: | A1: there is a non empty basket   1. Channel/CSR light application saves the basket automatically. Refer to ‘Save the current basket automatically’ use case. 2. Channel/CSR light application logs the user out | | |

#### Use Case: Display home page for a Telco

|  |  |  |
| --- | --- | --- |
| Display home page for a Telco | | USM0040 |
| Primary actors | Telco user | | |
| Summary Goal | This use case displays the Telco home page | | |
| Pre-conditions | User has logged in the application | | |
| Trigger | Either:   * Telco user has just logged in * Telco user has been redirected to the home page after end of another use case * Telco user has selected the home option | | |
| Minimum guarantees |  | | |
| Success guarantees: | Home page is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays user first name and last name 2. Channel/CSR light application displays last login date and time 3. Channel/CSR light application displays a message informing the user of the session expiration period 4. Channel/CSR light application displays the user location in the Telco organization 5. Channel/CSR light application displays a top menu bar for the main domains the user can access to: Telco management, Dealer management, user information, and requests (A1)(A2)(A3)(A4) | | |
| Alternative Flows: | A1: User is a referral user   1. Channel/CSR light application displays a top menu bar for the main domains the user can access to: manage referred customers and his user information   A2: User is an administrator   1. Channel/CSR light application displays an additional main menu bar option to manage Telco organization   A3: User is a CSR   1. Channel/CSR light application displays shortcuts to create a new postpaid, new prepaid customer by organization type, to add prepaid and postpaid subscribers by organization type and to manage an existing customer 2. Channel/CSR light application displays an option to browse the catalog to inform customer/prospect. (This option must be also accessible after the dealer has identified a customer) 3. Channel/CSR light application displays a top menu bar for the main domains the user can access to: parked baskets management, user information, requests and referred customers (A5)(A6) 4. Channel/CSR light application displays an additional domain to search customers 5. Channel CSR light application doesn’t display domain to manage dealers   A4: User is a referral   1. Channel/CSR light application displays an additional domain to manage requests in referral. 2. Channel CSR light application doesn’t display domain to manage dealers   A5. A basket has been saved in previous user session and user has been redirected to the home page at the end of the login process   1. Channel/CSR light application warns the user there is a basket that has been saved automatically 2. Channel/CSR light application redirects the user to use case retrieve the basket that has been saved automatically   A6: User is a CSR administrator   1. Channel/CSR light application displays an additional main menu bar option to manage the dealer sub hierarchy | | |

#### Use Case: Display home page for a dealer

|  |  |  |
| --- | --- | --- |
| Display home page for a dealer | | USM0050 |
| Primary actors | Dealer user | | |
| Summary Goal | This use case displays the dealer home page | | |
| Pre-conditions | User has logged in the application | | |
| Trigger | Either:   * User has just logged in * User has been redirected to the home page after end of another use case * User has selected the home option | | |
| Minimum guarantees |  | | |
| Success guarantees: | Home page is displayed to the user | | |
| Normal Flow: | 1. Channel/CSR light application displays user first name and last name 2. Channel/CSR light application displays last login date and time 3. Channel/CSR light application displays a message informing the user of the session expiration period 4. Channel/CSR light application displays the user location in the dealer organization 5. Channel/CSR light application displays shortcuts to create a new postpaid, new prepaid customer by organization type, to add prepaid and postpaid subscribers by organization type and to manage an existing customer 6. Channel/CSR light application displays an option to browse the catalog to inform customer/prospect. (This option must be also accessible after the dealer has identified a customer) 7. Channel/CSR light application displays a top menu bar for the main domains the user can access to: parked baskets management, user information, requests and referred customers (A1)(A2) | | |
| Alternative Flows: | A1. A basket has been saved in previous user session and user has been redirected to the home page at the end of the login process   1. Channel/CSR light application warns the user there is a basket that has been saved automatically 2. Channel/CSR light application redirects the user to use case retrieve the basket that has been saved automatically   A2: User is a dealer administrator   1. Channel/CSR light application displays an additional main menu bar option to manage the dealer sub hierarchy | | |

Channel/CSR light application requirements

CHA-3.17.4.3 Channel/CSR light application shall support in the same application users managed in security server and users managed locally

CHA-3.17.4.3.1 Channel/CSR light application shall support two users in two different realms to have the same login

CHA-3.17.4.3.2 Channel/CSR light application shall support one and only one realm by role.

CHA-3.17.4.5 Channel/CSR light application shall support in the same application users managed in security server and users managed locally

CHA-3.17.4.5.1 Channel/CSR light application shall allow configuring at design time which realm are managed locally and which realm are managed in an external repository

CHA-3.17.4.5.2 For realms managed in an external repository, Channel/CSR light application shall allow configuring at design time if user life cycle is managed in the external repository only or through channel/CSR light application.

CHA-3.17.4.10 Channel/CSR light application shall allow user logging in the application with respect of use case ‘Login’

CHA-3.17.4.10.1 Channel/CSR light application should allow to define design time an expiration period for passwords by realm

~~CHA-3.17.4.10.2 Channel/CSR light application shall not allow Telco Administrator password expiration~~

CHA-3.17.4.10.3 Channel/CSR light application shall warn the user before password expiration

CHA-3.17.4.10.4 Channel/CSR light application shall allow to define design time a ‘never expire’ expiration period for a specific realm.

CHA-3.17.4.10.5 Channel/CSR light application shall hide realm to user if there is only one realm managed in the application.

CHA-3.17.4.20 Channel/CSR light application shall allow user logging out the application with respect of use case ‘Logout’

CHA-3.17.4.21 Channel/CSR light application shall save current basket when the user logout or the session expires

CHA-3.17.4.30 Channel/CSR light application shall manage session expiration with respect of use case ‘User Session expires’

CHA-3.17.4.110.1 Channel/CSR light application should manage two configurable different session expiration period for Telco users and users

CHA-3.17.4.40 Channel/CSR light application shall Display home page for Telco user with respect of use case ‘Display home page for Telco user’

CHA-3.17.4.50 Channel/CSR light application shall Display home page for User with respect of use case ‘Display home page for User’

Capability 1 User Management - UAM

### Capability Description

This capability groups all use cases required for the Telco and dealer managing Telco and Users.

To be reviewed according to security

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View login information

|  |  |  |
| --- | --- | --- |
| View Login Information | | UAM0010 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to view the login information of an employee. | | |
| Pre-conditions | The user is in the context of a Dealer or Telco employee. | | |
| Trigger | The user choose the option to view employee login information | | |
| Minimum guarantees | A message is displayed if the user doesn’t have a login | | |
| Success guarantees: | Login information of the employee is displayed. | | |
| Normal Flow: | 1. The system displays the employee user role (A1) | | |
| Alternative Flows: | A1. The system displays a message specifying that the user has no login. | | |

#### Use Case: Edit login information

|  |  |  |
| --- | --- | --- |
| Edit Login Information | | UAM0020 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to modify role. | | |
| Pre-conditions | The user is in the context of a Dealer or Telco employee. | | |
| Trigger | The user choose selects the option to edit login information | | |
| Minimum guarantees | Login information is not modified | | |
| Success guarantees: | Login information of the employee is only modified locally. | | |
| Normal Flow: | 1. Channel/CSR light application displays available roles for the user 2. The user selects a new role. 3. The user confirms.(A1) | | |
| Alternative Flows: | A1. The user cancels the modification.   1. Channel/CSR light application redirects the user to the previous step | | |

#### Use Case: Change password

|  |  |  |
| --- | --- | --- |
| Change Password | | UAM0030 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to change his password. | | |
| Pre-conditions | The user is viewing login information | | |
| Trigger | The user choose the option to modify the password | | |
| Minimum guarantees | Password is not modified | | |
| Success guarantees: | The password has been changed locally | | |
| Normal Flow: | 1. The user enters his current password. 2. The user enters the new password twice. 3. Channel/CSR light application validates entered password (A1) 4. Channel/CSR light application validates password validity (A1)(A2)(A3) (A4) 5. The system changes the current password and stores the old one in the password history. | | |
| Alternative Flows: | A1: The password entered is not valid   1. Channel/CSR light application display an error message to inform user the password is wrong   A2: Both two new passwords are not equal   1. Channel/CSR light application highlights to the user he has not entered the same password twice   A3: New password does not conform to one of the password rules. By default, the password has a minimum length of 6 characters and a maximum of 10 characters   1. Channel/CSR light application displays an error message indicating rules that must be respected   A4: The password is already in password history   1. Channel/CSR light application asks for a new one. | | |

#### Use Case: Reset password of another user

|  |  |  |
| --- | --- | --- |
| Reset Password of another User | | UAM0040 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to reset the password of a user. | | |
| Pre-conditions | The user is in the context of a Dealer, Telco employee. | | |
| Trigger | The user choose the option to change the password of a user | | |
| Minimum guarantees | Password is not modified | | |
| Success guarantees: | 1. The password has been reset. 2. The new password has been sent by email to the user 3. The employee will have to change it at next login. | | |
| Normal Flow: | 1. The user selects the login information option. 2. The user selects the change password option. 3. The user enters his password. 4. Channel/CSR light application generates a temporary password automatically 5. Channel/CSR light application sends the new password to the employee using his email (A2) 6. The system sets the temporary employee password and the flag “must change password on next login” to true. | | |
| Alternative Flows: | A1 The password entered is not valid   1. Channel/CSR light application display an error message to inform user the password is wrong   A2: The employee has no email address or sending password by email is not active   1. Channel/CSR light application displays the temporary generated password 2. Next steps are similar to the nominal case | | |

#### Use Case: Change secret question and answer

|  |  |  |
| --- | --- | --- |
| Change Secret Question and Answer | | UAM0050 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user changing the secret question and answer. | | |
| Pre-conditions | The user is logged in  User has a role belonging to a realm managed locally or not in mode user discovery | | |
| Trigger | The user selects the option to change his secret question and answer | | |
| Minimum guarantees | The secret question and answer has not been changed. | | |
| Success guarantees: | The secret question and answer has been changed locally | | |
| Normal Flow: | 1. User enters the secret question and secret answer 2. User enters his current password 3. Channel/CSR light application validates current password (A1) 4. Channel/CSR light application changes locally the secret question and answers (A2) | | |
| Alternative Flows: | A1. password is not valid   1. Channel/CSR light application displays an error message informing user password is not correct 2. User set again his password 3. Next steps are similar to nominal case   A2. Secret answer is empty   1. Channel/CSR light application displays an error message informing user the secret answer is mandatory 2. User set the secret answer 3. Next steps are similar to nominal case | | |

#### Use Case: Lock login manually

|  |  |  |
| --- | --- | --- |
| Lock Login Manually | | UAM0060 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows a user to lock the login of an employee user. | | |
| Pre-conditions | The user is logged in. | | |
| Trigger | The user selects the option to lock a login | | |
| Minimum guarantees | User can’t lock his own login | | |
| Success guarantees: | The Login is locked | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message. 2. The user confirms the lock. (A1) 3. Channel/CSR light application confirms the login has been locked | | |
| Alternative Flows: | A1: user cancels   1. Channel/CSR light application redirects the user to previous step. | | |

#### Use Case: Unlock login

|  |  |  |
| --- | --- | --- |
| Unlock Login | | UAM0070 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to unlock an employee user login that has been locked out. | | |
| Pre-conditions | 1. The user is logged in. 2. The user is in the context of a Dealer or Telco employee with a locked login. | | |
| Trigger | The user selects the option to unlock the login | | |
| Minimum guarantees | The Login is not unlocked | | |
| Success guarantees: | * The Dealer or Telco employee has an unlocked login. * The Dealer or Telco employee has to change the password at the first login. | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message. 2. The user confirms the action. (A1) 3. Optionally, the user resets the password of the locked login. Refer to “Reset Password of another User” use case. 4. Channel/CSR light application unlocks the login and set the change password on next login option 5. The system informs the user the login has been unlocked. | | |
| Alternative Flows: | A1. The user cancels the unlock action.   1. Channel/CSR light application redirects the user to previous step | | |

#### Use Case: Register login

|  |  |  |
| --- | --- | --- |
| Register Login | | UAM0080 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This Use Case allows the user to set login information to a Dealer or Telco employee. | | |
| Pre-conditions | Either   * The user is in the context of a Dealer or Telco employee with no login. * The user is creating a new employee | | |
| Trigger | Either   * The user selects the option to create a new login * The user is at the login creation step when creating a new employee. | | |
| Minimum guarantees |  | | |
| Success guarantees: | The employee has an active login only created locally. | | |
| Normal Flow: | 1. The user selects the language for this new user 2. The user enters the new Login value 3. The selects a role (A3) 4. The user confirms. 5. Channel/CSR light application validates information set (A1) 6. Channel/CSR light application generates a temporary password 7. Channel/CSR light application sends the temporary password on the user email (A2) 8. Channel/CSR light application creates the new login and set the change password at first login option | | |
| Alternative Flows: | A1. The login is already used in the system   1. Channel/CSR light application displays an error message informing the user he must set another login value 2. User set a new login 3. Next steps are similar to nominal case   A2: The employee has no email address or sending password by email is not active   1. Channel/CSR light application displays the temporary generated password 2. Next steps are similar to the nominal case   A3: The user is setting up a dealer   1. Channel/CSR light application only proposes the dealer administrator role | | |

#### Use Case: Get forgotten password

|  |  |  |
| --- | --- | --- |
| Get Forgotten Password | | UAM0100 |
| Primary actors | Dealer user | | |
| Summary Goal | This use case allows the user getting a new password when forgotten. | | |
| Pre-conditions | * The user is not logged in. * The user has a valid login. * Their must be at least one realm supported by the application managed locally or not in mode user discovery | | |
| Trigger | The user has requested the forgotten password page flow. | | |
| Minimum guarantees |  | | |
| Success guarantees: | User has received a new temporary password | | |
| Normal Flow: | 1. The user enters the login and the realms (A8) 2. The user selects the forgotten password option. 3. The system verifies that the realm is managed locally or not in mode user discovery (A9) 4. The system verifies that the login is not empty, exists, and is not deactivated or locked. (A1)(A2)(A3) 5. The user enters the answer to the secret question(A4) 6. Channel/CSR light application validates the secret answer (A5) 7. Channel/CSR light application generates a temporary password 8. Channel/CSR light application sends the temporary password on the user email (A6)(A7) 9. The system sets the new temporary password similarly as in change password use case 10. The system sets the new password similarly as in change password use case | | |
| Alternative Flows: | A1: Login is empty   1. Channel/CSR light application warns the user that a login must be entered.   A2: Login is deactivated or locked   1. Channel/CSR light application warns the user request cannot be answered and he should contact his administrator   A3: Login is incorrect   1. Channel/CSR light application informs the user the login is incorrect   A4: There is no secret question or answer specified for the user   1. Channel/CSR light application displays an error message informing the user he should contact his administrator.   A5: Secret answer value set by user is invalid (or null)   1. Channel/CSR light application warns user the answer is incorrect and tells the number of attempts left. 2. After three attempts, Channel/CSR light application locks the login   A6: There is no email set for the user   1. Channel/CSR light application displays an error message informing the user he can’t get a new password and shall contact his administrator   A7: email service is not active   1. Channel/CSR light application displays the temporary password   A8: Only one realm is managed by the application   1. The application hides the realms to the user   A9: Realm is in mode user discovery   1. Channel/CSR light application displays an error message informing user he has to contact his administrator to get a new password. | | |

#### Use Case: Change password on first login

|  |  |  |
| --- | --- | --- |
| Change Password on First Login | | UAM0110 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case forces the user to change his password on first login. | | |
| Pre-conditions | The user login flag “Must change password on next login” is set to true. | | |
| Trigger | The user logs in | | |
| Minimum guarantees |  | | |
| Success guarantees: | The password has been reset. | | |
| Normal Flow: | 1. The user re-enters his current password. 2. The user enters the new password twice. 3. The user selects the secret question and provides the answer.(A1) 4. Channel/CSR light application validates current password (A2) 5. Channel/CSR light applications validates information set (A3)(A4) 6. Channel/CSR light application changes the password. 7. Channel/CSR light application continues the login process. | | |
| Alternative Flows: | A1: The user has a role associated to a realm managed in an external system in mode user discovery   1. Channel/CSR light application skips this step   A2: Password is not correct   1. Channel/CSR light application informs user password is incorrect 2. user set new password value 3. Next steps are similar to nominal case   A3. User is a dealer and secret answer is empty   1. Channel/CSR light application displays an error message informing user the secret question is mandatory 2. User set secret answer value 3. Next steps are similar to nominal case   A4. New password doesn’t match password rules or both values are not equal   1. Channel/CSR light application displays an error message similarly to change password use case 2. User set new value for new password (twice) 3. Next steps are similar to the nominal case | | |

#### Use Case: Deactivate login

|  |  |  |
| --- | --- | --- |
| Deactivate Login | | UAM0120 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows the user to deactivate another user login | | |
| Pre-conditions | The user is in the context of a Dealer or Telco employee with an active login. | | |
| Trigger | The user has selected the option to deactivate a login | | |
| Minimum guarantees | User can’t deactivate his own login | | |
| Success guarantees: | The employee login is deactivated. | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message. 2. The user confirms the deactivation. (A1) 3. Channel/CSR light application confirms the login has been deactivated | | |
| Alternative Flows: | A1. The user cancels the action.   1. Channel/CSR light application redirects the user to the previous step | | |

#### Use Case: Reactivate login

|  |  |  |
| --- | --- | --- |
| Reactivate Login | | UAM0130 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows a user to reactivate another login | | |
| Pre-conditions | * The user is logged in. * The user is in the context of a Dealer or Telco employee with a deactivated login | | |
| Trigger | The user selects the option to reactivate a login | | |
| Minimum guarantees |  | | |
| Success guarantees: | * The employee has an active login. * The employee has to change the password at the first login. | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message. 2. The user confirms the activation. (A1) 3. The user resets the password of the deactivated login. Refer to “Reset Password of another User” use case. (A2) 4. Channel/CSR light application informs the user the login has been activated. | | |
| Alternative Flows: | A1. The user cancels the action.   1. Channel/CSR light application redirects the user same step where he selected the option   A2. The user cancels the reset.   1. Channel/CSR light application redirects the user same step where he selected the option | | |

#### Use Case: Force user to change password on first login

|  |  |  |
| --- | --- | --- |
| Force user to changer password on first login | | UAM0140 |
| Primary actors | Telco user  Dealer user | | |
| Summary Goal | This use case allows a user to force another user to change his password on first login | | |
| Pre-conditions | * The user is logged in. * The user is in the context of a Dealer or Telco employee with a login | | |
| Trigger | The user selects the option to force the user to change his password on first login | | |
| Minimum guarantees | The user can’t activate this use case for himself | | |
| Success guarantees: | User will have to change his password on next login | | |
| Normal Flow: | 1. Channel/CSR light application displays a confirmation message. 2. The user confirms (A1) 3. Channel/CSR light application set the change password on first login flag to true 4. Channel/CSR light application informs the user will have to change his password on next login | | |
| Alternative Flows: | A1. The user cancels the action.   1. Channel/CSR light application redirects the user same step where he selected the option | | |

Channel/CSR light application requirements

CHA-3.18.4.1 Channel/CSR light application shall allow a Telco administrator managing any user

CHA-3.18.4.5 Channel/CSR light application shall allow a Telco administrator managing any Telco user of his sub hierarchy

CHA-3.18.4.7 Channel/CSR light application shall allow a Dealer administrator managing any user of his sub hierarchy

CHA-3.18.4.8 Channel/CSR light application shall allow configuring at design time if sending temporary password by email is active or not.

CHA-3.18.4.8.1 Channel/CSR light application shall generate a random temporary password that doesn’t have to match with password validity rule but shall match the password validity when login procedure (max size and authorized characters).

CHA-3.18.4.8.2 Channel/CSR light application shall provide OOTB an interface to send the password by email.

CHA-3.18.4.8.3 Channel/CSR light application shall allow configuring at design time the email content and object.

CHA-3.18.4.8.4 Channel/CSR light application shall allow configuring at design time the destination email (e.g. CSR administrator) in case of failure when sending the email.

CHA-3.18.4.8.5 Channel/CSR light application shall allow configuring at design time a different temporary password expiration duration for Dealer and Telco user.

CHA-3.18.4.8.6 Channel/CSR light application shall not add temporary password to password history.

CHA-3.18.4.8.7 Channel/CSR light application shall encrypt temporary password in CSS.

CHA-3.18.4.8.8 Channel/CSR light application shall send message in employee language if set (else default language).

CHA -3.18.4.10 Channel/CSR light application shall allow user accessing user login information with respect of use case ‘view login information’.

CHA -3.18.4.10.1 Channel/CSR light application shall display login role.

CHA-3.18.4.20 Channel/CSR light application shall allow user to modify login information with respect of use case edit login information.

CHA-3.18.4.20.1 Channel/CSR light application shall allow an administrator user to modify user login role.

CHA-3.18.4.20.2 Channel/CSR light application shall prevent a user modifying his own role.

CHA-3.18.4.20.3 Channel/CSR light application shall allow a Telco administrator user to assign any new Telco role for a Telco user

CHA-3.18.4.20.4 Channel/CSR light application shall allow a Telco administrator user to assign any new Dealer role for a user

CHA-3.18.4.20.5 Channel/CSR light application shall allow a Dealer administrator user to assign any new Dealer role for a user

CHA-3.18.4.30 Channel/CSR light application shall allow a user changing his password with respect of use case ‘Change password’.

CHA-3.18.4.30.1 Channel/CSR light application shall allow configuring the password validity rule.

CHA-3.18.4.30.2 Channel/CSR light application shall allow configuring the message explaining to the user the password validity rule.

CHA-3.18.4.30.3 Channel/CSR light application shall encrypt new password and password history.

CHA-3.18.4.40 Channel/CSR light application shall allow user to change password of another user with respect of use case ‘reset password of another user’.

CHA-3.18.4.40.1 Channel/CSR light application shall allow user to access to this use case only if the user can ‘manage’ this employee.

CHA-3.18.4.40.2 Channel/CSR light application shall respect the password management policy as defined in requirement CHA-3.18.4.8.x.

CHA-3.18.4.50 Channel/CSR light application shall allow User changing secret question and answer with respect of use case ‘Change secret question and answer’

CHA-3.18.4.50.2 Channel/CSR light application shall allow User changing his own secret question and answer.

CHA-3.18.4.50.3 Channel/CSR light application shall prevent accessing this use case for a Telco user (secret question and answer are not managed for a Telco user)

CHA-3.18.4.60 Channel/CSR light application shall allow Telco Administrator and dealer administrator manually locking employees they have access to with respect of use case ‘Lock login manually’

CHA-3.18.4.60.1 Channel/CSR light application shall allow user to access to this use case only if the user can ‘manage’ this employee.

CHA-3.18.4.60.2 Channel/CSR light application shall prevent a user from locking his own login.

CHA-3.18.4.70 Channel/CSR light application shall allow Telco Administrator and dealer administrator unlocking employees they have access to with respect of use case ‘Unlock login’

CHA-3.18.4.70.1 Channel/CSR light application shall allow user to access to this use case only if the user can ‘manage’ this employee.

CHA-3.18.4.70.2 Channel/CSR light application shall prevent a user from unlocking his login.

CHA-3.18.4.70.3 Channel/CSR light application shall set the flag “Must change password on next login” to true when unlocking a login

CHA-3.18.4.80 Channel/CSR light application shall allow Telco administrator and Dealer administrator creating login for employees they have access to with respect of use case ‘Register login’.

CHA-3.18.4.80.1 Channel/CSR light application shall allow to access to this use case only if user can ‘manage’ the employee.

CHA-3.18.4.80.2 Channel/CSR light application shall set the new login as active, with the flag “change password on next login” to true and set the expiration date according to temporary expiration duration depending on the user organization.

CHA-3.18.4.80.3 Channel/CSR light application shall respect the password management policy as defined in requirement CHA-3.18.4.8.x.

CHA-3.18.4.80.4 Channel/CSR light application shall raise an error if the user tries to create a login for a dealer organization not completely registered (refer to dealer registration use case).

CHA-3.18.4.80.5 Channel/CSR light application shall propose different roles for Dealer or Telco login creation similarly as in change role use case

CHA-3.18.4.100 Channel/CSR light application shall allow a user getting his forgotten password with respect of use case ‘get forgotten password’

CHA-3.18.4.100.1 Channel/CSR light application shall respect the password management policy as defined in requirement CHA-3.18.4.8.x

CHA-3.18.4.110 Channel/CSR light application shall force user changing his password with respect of use case ‘Change password on first login’

CHA-3.18.4.120 Channel/CSR light application shall allow Telco administrator and Dealer administrator deactivating employee’s login they have access to with respect of use case ‘Deactivate login’

CHA-3.18.4.130 Channel/CSR light application shall allow Telco administrator and Dealer administrator reactivating employee’s login they have access to with respect of use case ‘Reactivate login’.

CHA-3.18.4.130.1 Channel/CSR light application shall allow user to access to this use case only if the user can ‘manage’ this employee.

CHA-3.18.4.140 Channel/CSR light application shall allow Telco administrator and Dealer administrator forcing user changing their password on first login for employees they have access to with respect of use case ‘Force user to change his password on first login’.

CHA-3.18.4.140.1 Channel/CSR light application shall allow user to access to this use case only if the user can ‘manage’ this employee.

CHA-3.18.4.140.2 Channel/CSR light application shall prevent a user accessing this use case for himself.

Capability Real time Balance management – RBM

### Capability Description

This capability allows a user viewing and configuring balances

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Configure spending/credit limits

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| --- | --- | --- |
| Configure spending/credit limits | | RBM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user configuring spending and/or credit limits either for an account or for a subscriber in acquisition or migration process | | |
| Pre-conditions | Either:   * User is configuring a new subscriber * User is migrating or swapping a subscriber * User is adding supplementary offers for an account (new or existing)   There are spending or credit limits associated to offers of the subscriber/account | | |
| Trigger | User has been redirected by Channel/CSR light application in one of the process mentioned in pre condition | | |
| Minimum guarantees |  | | |
| Success guarantees: | New balances configuration has been added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application displays spending and/or credit limits that can be configured with all information to guide the user 2. User set optionally limits and submits 3. Channel/CSR light application validates spending/credit limits are set correctly between min and max value (A1) 4. Channel/CSR light application add the new balance configuration to the shopping basket | | |
| Alternative Flows: | A1: values are not set correctly   1. Channel/CSR light application displays an error message and highlights mistakes 2. User set spending/credit limit values and submits 3. Next steps are similar to nominal cases | | |

#### Use Case: Configure shadow balances

|  |  |  |
| --- | --- | --- |
| Configure shadow balances | | RBM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user configuring shadow balances for a subscriber in acquisition or migration process | | |
| Pre-conditions | Either:   * User is configuring a new subscriber * User is migrating or swapping a subscriber   There are shadow balances ‘configurable’ associated to offers of the subscriber. | | |
| Trigger | User has been redirected by Channel/CSR light application in one of the process mentioned in pre condition | | |
| Minimum guarantees |  | | |
| Success guarantees: | New balances configuration has been added to the basket | | |
| Normal Flow: | 1. Channel/CSR light application displays shadow balances that can be configured with all information to guide the user 2. User set optionally shadow balances limit and submits 3. Channel/CSR light application validates limits are set correctly between min and max value (A1) 4. Channel/CSR light application add the new balance configuration to the shopping basket | | |
| Alternative Flows: | A1: values are not set correctly   1. Channel/CSR light application displays an error message and highlights mistakes 2. User set shadow balance values and submits 3. Next steps are similar to nominal cases | | |

#### Use Case: Display balances

|  |  |  |
| --- | --- | --- |
| Display balances | | RBM0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing current balance instances on his subscriber/account | | |
| Pre-conditions | Either:   * User is in the context of a billing account * User is in the context of a subscriber   Service to get balances is enable | | |
| Trigger | User has selected the view balances option | | |
| Minimum guarantees |  | | |
| Success guarantees: | User views subscriber/account balances | | |
| Normal Flow: | 1. Channel/CSR light application call the billing to get account/subscriber balances 2. Channel/CSR light application displays a waiting message if process is too long (A1)(A2) 3. Channel/CSR light application displays ‘normal’ real time balance instances 4. Channel/CSR light application displays spending and credit limit instances 5. Channel/CSR light application displays shadow balance instances | | |
| Alternative Flows: | A1: Timeout is reached   1. Channel/CSR light application displays an error message informing the user the service is temporally unavailable and to try later   A2: There are no balances to display   1. Channel/CSR light application displays an error message informing the user there is no balance to display | | |

#### Use Case: Display balance details

|  |  |  |
| --- | --- | --- |
| Display balances details | | RBM0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user viewing details of a specific balance instances on his subscriber/account | | |
| Pre-conditions | User is viewing balances  For a shadow balance, the balance is configured | | |
| Trigger | User has selected the view details option for a specific balance | | |
| Minimum guarantees |  | | |
| Success guarantees: | User views balance details of a specific balance | | |
| Normal Flow: | 1. Channel/CSR light application displays details of the balance according to his nature (normal or shadow) 2. User goes back to the balance lists (A1)(A2)(A3) | | |
| Alternative Flows: | A1: User wants to see the account balance pointed by the shadow balance   1. Channel/CSR light application redirects the user to the view balances of the account owning the balance   A2: User wants to see one of shadow balances pointing to the displayed account balance   1. Channel/CSR light application redirects the user to the details of the shadow balance   A3: User wants to re configure the shadow balance or the spending limit or the credit limit   1. Channel/CSR light application redirects the user to the balance configuration (refer to reconfigure shadow balance and reconfigure spending/credit limit use cases) | | |

#### Use Case: Reconfigure spending/credit limit

|  |  |  |
| --- | --- | --- |
| Reconfigure spending/credit limit | | RBM0050 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user reconfiguring a spending and/or credit limit for an account or a subscriber in existing customer management domain | | |
| Pre-conditions | User is viewing balances  Service to configure balance is enable | | |
| Trigger | User has selected the configure option for a specific spending and/or credit limit | | |
| Minimum guarantees | User is informed if configuration can’t be done  User can cancel the configuration (before submitting) | | |
| Success guarantees: | Balance is configured | | |
| Normal Flow: | 1. Channel/CSR light application displays details of the limit similarly as in display balance details use case 2. User set the limit for the next period (A3) 3. Channel/CSR light application validates the limit set is between max and min value (A1) 4. Channel/CSR light application calls the billing to set the new limit value 5. Channel/CSR light application displays a waiting page(A2) 6. Channel/CSR light application display a message to confirm the new configuration has been done 7. User confirms 8. Channel/CSR light application redirects the user to the list of balances updated with the new balance configuration | | |
| Alternative Flows: | A1: User has not set a correct limit value   1. Channel/CSR light application displays an error message informing the limit value is not correct 2. User set a new value and submits 3. next steps are similar to the nominal cases   A2: Timeout has been reached or an error has occurred   1. Channel/CSR light application displays an error message informing the service is temporally unavailable and to try later   A3: User set the limit to Unlimited   1. Channel/CSR light application calls the billing to set the limit for next period to unlimited 2. Next steps are similar to nominal case.   A4: User wants to increase temporally (i.e. for the current period) the remaining value   1. User set the number of units he wants to add 2. Channel/CSR light application validates the value to add is consistent with the max balance value(A5) 3. Channel/CSR light application calls the billing to set the new balance value 4. Next steps are similar to the nominal cases   (A5) value to add has not been set correctly   1. Channel/CSR light application displays an error message informing the added value is not correct 2. User set a new value 3. Next steps are similar to A4 | | |

#### Use Case: Reconfigure shadow balance

|  |  |  |
| --- | --- | --- |
| Reconfigure shadow balance | | RBM0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user reconfiguring a shadow balance for a subscriber in existing customer management domain | | |
| Pre-conditions | User is viewing balances  Service to configure balance is enable | | |
| Trigger | User has selected the configure option for a specific shadow balance | | |
| Minimum guarantees | User is informed if configuration can’t be done  Dealer can cancel the configuration (before submitting) | | |
| Success guarantees: | Balance is configured | | |
| Normal Flow: | 1. Channel/CSR light application calls billing to get candidate account balances for the shadow balance 2. Channel/CSR light application displays a waiting page(A2)(A6) 3. Channel/CSR light application displays details of the shadow balance similarly as in display balance details use case 4. User set the limit for the next period (A3) 5. User selects a candidate account balance 6. Channel/CSR light application validates the limit set is between max and min value (A1) 7. Channel/CSR light application calls the billing to set the new limit value and the new pointed account balance 8. Channel/CSR light application displays a waiting page(A2) 9. Channel/CSR light application displays a message to confirm the new configuration has been done 10. User confirms 11. Channel/CSR light application redirects the user to the list of balances updated with the new balance configuration | | |
| Alternative Flows: | A1: User has not set a correct limit value   1. Channel/CSR light application displays an error message informing the limit value is not correct 2. User set a new value and submits 3. next steps are similar to the nominal cases   A2: Timeout has been reached or an error has occurred   1. Channel/CSR light application displays an error message informing the service is temporally unavailable and to try later   A3: User set the limit to Unlimited   1. Channel/CSR light application calls the billing to set the limit for next period to unlimited 2. Next steps are similar to nominal case.   A4: User wants to increase temporally (i.e. for the current period) the remaining value and the shadow balance is already configured   1. User set the number of units he wants to add 2. Channel/CSR light application validates the value to add is consistent with the max balance value(A5) 3. Channel/CSR light application calls the billing to set the new balance value 4. Next steps are similar to the nominal cases   A5: value to add has not been set correctly   1. Channel/CSR light application displays an error message informing the added value is not correct 2. User set a new value 3. Next steps are similar to A4   A6: There is no account balance candidate   1. Channel/CSR light application display an error message to inform the user there is no candidate account balance and the shadow balance can’t be configured | | |

Channel/CSR light application requirements

CHA-3.19.4.10 Channel/CSR light application shall allow a user configuring spending and/or credit limits for an account or a subscriber with respect of use case configure spending/credit limits’

CHA-3.19.4.10.1 Channel/CSR light application shall support configuring if credit limits can be configured and thus depending on actor categories (Dealers versus CSR)

CHA-3.19.4.20 Channel/CSR light application shall apply same logic as in consumer application to select spending limits to configure

CHA-3.19.4.20.1 in addition, when ‘swapping a subscriber’ or changing supplementary offers for account/subscriber, Channel/CSR light application shall propose all spending limits regarding new subscriber/account configuration.

CHA-3.19.4.20.2 in addition, when adding supplementary offers or reconfiguring selective offers to account/subscriber, Channel/CSR light application shall propose only spending limits regarding new added offers.

CHA-3.19.4.25 Channel/CSR light application shall apply the same logic for selecting a credit limit to configure than the one for spending limit.

CHA-3.19.4.30 Channel/CSR light application shall display for every spending/credit limit, the spending/credit limit name, the min and max values and the unit/currency

CHA-3.19.4.30.1 Channel/CSR light application shall apply same logic as in consumer application to get the min and max authorized value for the spending limit

CHA-3.19.4.30.2 If the balance unit is currency, Channel/CSR light application shall use the subscriber/account currency as balance currency

CHA-3.19.4.40 Channel/CSR light application shall allow a user configuring subscriber shadow balances when acquiring a new subscriber or swapping an existing one with respect of use case ‘configure shadow balances’.

CHA-3.19.4.50 Channel/CSR light application shall apply same logic as in consumer application to select shadow balance to configure.

CHA-3.19.4.50.1 in addition, when ‘swapping a subscriber’, Channel/CSR light application shall propose for already instantiated shadow balances (independently if they are or not in the context of an account bundle) to configure only the limit

CHA-3.19.4.50.2 in addition, when adding supplementary offers or reconfiguring selective offers to subscriber, Channel/CSR light application shall propose only shadow balances regarding new added offers.

CHA-3.19.4.50.3 in addition, when ‘swapping a subscriber’, Channel/CSR light application shall propose configuring limit of new shadow balances only in case the subscriber bundle has been subscribed in the context of an account bundle and there is a default configuration for the shadow balance pointing to an account balance

CHA-3.19.4.60 For new subscriber, Channel/CSR light application shall propose to configure shadow balances limit only in case the subscriber bundle has been subscribed in the context of an account bundle and there is a default configuration for the shadow balance pointing to an account balance

CHA-3.19.4.70 Channel/CSR light application shall display for every shadow balance, the shadow balance name, the min and max value, the unit/currency, the name of the pointed account balance.

CHA-3.19.4.70.1 Channel/CSR light application shall apply same logic as in consumer application to get the min and max authorized value for the shadow balance limit

CHA-3.19.4.70.2 if the balance unit is currency, Channel/CSR light application shall use the subscriber currency as balance currency

CHA-3.19.4.80 Channel/CSR light application shall allow a user viewing account and subscriber balances with respect of use case view balances

CHA-3.19.4.85 Channel/CSR light application shall display an option to view balances only if the service to get them is enabled

CHA-3.19.4.85.1 Channel/CSR light application shall support at design phase to enable or disable the service to get balances.

CHA-3.19.4.90 Channel/CSR light application shall display for a spending/credit or postpaid limit, the limit name, the limit type, the remaining value (i.e. balance value), the limit value, the currency and the next reset date.

CHA-3.19.4.90.1 Channel/CSR light application shall display unlimited instead of the limit value if the limit value is unlimited

CHA-3.19.4.90.2 Channel/CSR light application shall display unlimited instead of the remaining value if the balance value is of an order of magnitude of the unlimited system value.

CHA-3.19.4.100 Channel/CSR light application shall display for a shadow balance, the balance name, the remaining value (i.e. balance value), the limit value, the unit/currency and the next reset date plus option to configure it.

CHA-3.19.4.100.1 Channel/CSR light application shall display unlimited instead of the limit value if the limit value is unlimited

CHA-3.19.4.100.2 Channel/CSR light application shall display unlimited instead of the remaining value if the balance value is of an order of magnitude of the unlimited system value.

CHA-3.19.4.110.3 Channel/CSR light application shall highlight shadow balance with no account balance configured.

CHA-3.19.4.100 Channel/CSR light application shall display for a ‘normal’ balance, the balance name, the balance value, the unit/currency and the expiration date.

CHA-3.19.4.110 Channel/CSR light application shall allow a user viewing balance details with respect of use case display balance details

CHA-3.19.4.120 Channel/CSR light application shall display for a limit the same information as in view balances plus the balance description.

CHA-3.19.4.130 Channel/CSR light application shall display for shadow balance details, the same information as in the view balances plus the balance description and the target account balance name.

CHA-3.19.4.130.1 Channel/CSR light application shall display for every shadow balance, the subscriber primary identifier owning the shadow balance, the shadow balance name, the next spending limit, the next credit limit and its unit/currency.

CHA-3.19.4.140 Channel/CSR light application shall display for a ‘normal balance’ same information as in the view balances plus balance description, active grants and shadow balances pointing to it (account balance case)

CHA-3.19.4.140.1 Channel/CSR light application shall display for every grant, the grant active date, the grant expiration date, the grant initial value and unit/currency

CHA-3.19.4.150 Channel/CSR light application shall allow a user reconfiguring a spending and/or credit limit with respect of use case reconfigure spending/credit limit

CHA-3.19.4.150.1 Channel/CSR light application shall support configuring if credit limits can be reconfigured and thus depending on actor categories (Dealers versus CSR)

CHA-3.19.4.160 Channel/CSR light application shall not display any configure option if the service is not enabled

CHA-3.19.4.160.1 Channel/CSR light application shall support enabling and disabling at design time balance reconfiguration services

CHA-3.19.4.180 Channel/CSR light application shall allow a user reconfiguring the spending limit for the next period and increasing the remaining limit for the current period

CHA-3.19.4.182 Channel/CSR light application shall support to set the limit to unlimited

CHA-3.19.4.190 Channel/CSR light application shall validates that units added to increase the remaining value are less or equal than the max balance value minus the current remaining value.

CHA-3.19.4.200 Channel/CSR light application shall allow a user reconfiguring a shadow balance with respect of use case reconfigure shadow balance

CHA-3.19.4.210 Channel/CSR light application shall allow a user reconfiguring the shadow balance for the next period and increasing the remaining limit for the current period

CHA-3.19.4.210.1 Channel/CSR light application shall allow a user increasing the shadow balance remaining limit for the current period only if the shadow balance is already pointing to an account balance

CHA-3.19.4.220 Channel/CSR light application shall support to set the shadow balance limit to unlimited

CHA-3.19.4.230 Channel/CSR light application shall validates that units added to increase the shadow balance remaining value are less or equal than the max balance value minus the current remaining value.

CHA-3.19.4.240 If the shadow balance is already configured, Channel/CSR light application shall select by default the current configured account balance as candidate account balance.

Capability 1 Recharge – RCH

### Capability Description

This capability allows a dealer to recharge an account or a subscriber using a voucher or through a non voucher recharge

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Recharge

|  |  |  |
| --- | --- | --- |
| Recharge | | RCH0005 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user recharging an account or a subscriber | | |
| Pre-conditions | User is in the context of a customer account/subscriber  Account/subscriber is rechargeable | | |
| Trigger | User has selected the option to do a recharge | | |
| Minimum guarantees | User is informed why the recharge has failed | | |
| Success guarantees: | The account/subscriber is recharged | | |
| Normal Flow: | 1. Channel/CSR light application proposes available and supported recharge methods 2. User selects one recharge method (A1) 3. Depending on selected recharge method, Channel/CSR light application redirects user to either Recharge by Voucher or Non Voucher | | |
| Alternative Flows: | A1: the user cancels the recharge process   1. Channel/CSR light application redirects user to the context before he selects the recharge option | | |

#### Use Case: Non voucher recharge

|  |  |  |
| --- | --- | --- |
| Non voucher recharge | | RCH0010 |
| Primary actors | CSR user  Dealer user | | |
| Summary Goal | This use case allows a user doing a non voucher recharge for an account or a subscriber creating a new payment profile or using an existing one | | |
| Pre-conditions | Either:   * User is in a specific account context * User is in a specific subscriber context   The entity (account/subscriber) is rechargeable  Non voucher recharge mode is available | | |
| Trigger | User has selected the non voucher recharge option | | |
| Minimum guarantees | User is informed of the reason why the recharge can’t be performed | | |
| Success guarantees: | User is informed the recharge has been successfully processed and can see the impact on the balances | | |
| Normal Flow: | 1. User set the recharge amount 2. Channel/CSR light application validates the recharge value is between min and max allowed value (A1) 3. User selects the payment methods between the ones supported (A6) 4. Channel/CSR light application asks for a confirmation for the recharge (A5) 5. User confirms (A2) 6. Channel/CSR light application calls billing to process the recharge 7. Channel/CSR light application displays a confirmation page to informed user recharge has been successfully processed (impacted account or subscriber, amount, payment method, transaction number if a payment has been processed (e.g. by credit card) and the impact on balances (A3)(A4) | | |
| Alternative Flows: | A1: Amount is not valid   1. Channel/CSR light application displays an error message and highlights mistakes 2. User set new amount 3. Next steps are similar to nominal cases   A2: User cancels   1. Channel/CSR light application redirects the user to the previous step   A3: Timeout is reached   1. Channel/CSR light application displays a warning message to inform user must contact CSR or goes to view balances features to confirm recharge has been correctly done (A8)   A4: The recharge service is not available for a technical reason   1. Channel/CSR light application displays an error message explaining why the recharge can’t be done accordingly to the returned error. (A8)   A5: User has selected credit card payment method:   1. Channel/CSR light application redirects user to use case Non voucher recharge by credit card   A6: User has selected an already existing payment profile   1. Channel/CSR light application displays details of the payment profile and requests confirmation (A6.1) 2. User confirms (A2) 3. Channel/CSR light application calls billing to process the recharge 4. Channel/CSR light application displays a confirmation page to informed has been successfully processed and the impact on balances (A3)(A4)(A7)   A6.1 User has selected credit card payment profile   1. Channel/CSR light application redirects user to use case Non voucher recharge by credit card   A7: Recharge was requiring an immediate payment (credit card) and payment has failed   1. Channel/CSR light application displays an error message specifying the payment has failed   A8: User retries to recharge   1. Channel/CSR light application redirects the user to step 5 of the normal flow | | |

#### Use Case: Non voucher recharge by credit card

|  |  |  |
| --- | --- | --- |
| Non voucher recharge by credit card | | RCH0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows a user recharging a customer’s account or a subscriber by credit/debit card | | |
| Pre-conditions | User is in the context of an account/subscriber | | |
| Trigger | User has decided to recharge by credit card | | |
| Minimum guarantees | If recharge fails, the user is not debited  If payment fails, the account is not recharged | | |
| Success guarantees: | The subscriber/account is recharged | | |
| Normal Flow: | 1. User sets his credit card information (A1)(A2)  * Card type * Card number * Card expiration date * Cardholder first name * Cardholder last name * Card secret code * Email * Address line 1 * Zip/Post code * City * Country * State (optional)  1. Channel/CSR light application does basic validation based on Luhn algorithm (A2)(A3) 2. Channel/CSR light application asks user if he wants to process the payment in real time (A4) 3. Channel application displays page for confirmation 4. User confirms 5. Channel/CSR light application calls external API to process the recharge and debit the customer (A5) 6. Channel/CSR light application waits answer from the external services 7. Channel/CSR light application displays the payment transaction information and impacted balances by the recharge (A6)(A7)(A8)(A9) | | |
| Alternative Flows: | A1: User has selected an already existing payment profile   1. Channel/CSR light application asks user if he wants to process the payment in real time (A4) 2. Channel/CSR light application displays details of the payment profile and requests confirmation 3. User confirms 4. Next steps are similar to nominal case   A2: Card information set are not correct   1. Channel/CSR light application displays an error message inviting the user to reenter them   A3: Control is turned off for testing purpose   1. Channel/CSR light application doesn’t process any control   A4: Either payment profile doesn’t support real time payment processing or application doesn’t support/forces real time payment processing   1. This step is skipped 2. Channel application forces payment processing mode without asking user 3. Next steps are similar to nominal case   A5: The recharge service is not available for a technical reason   1. Channel/CSR light application displays an error message advising the user that for technical reason, the recharge can’t be processed and to try later   A6: Time out is reached without answer   1. Channel/CSR light application displays a warning message to inform user must contact CSR or goes to view balances features to confirm recharge has been correctly done   A7: Service returns an error code specifying payment has failed   1. Channel/CSR light application displays an error message specifying the payment has failed   A8: Service returns an error code specifying the recharge has failed   1. Channel/CSR light application displays an error message specifying Why recharge can’t be done   A9: Payment has not been processed in real time   1. Channel/CSR light application display balances impacted by the recharge | | |

#### Use Case: Recharge by voucher

|  |  |  |
| --- | --- | --- |
| Recharge by voucher | | RCH0030 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user recharging an account or a subscriber by voucher | | |
| Pre-conditions | User is in the context of an account/subscriber | | |
| Trigger | User has decided to recharge by voucher | | |
| Minimum guarantees |  | | |
| Success guarantees: | The subscriber/account is recharged | | |
| Normal Flow: | 1. User enters the voucher code 2. Channel/CSR light application calls external services to process the recharge (A1) 3. Channel/CSR light application Displays balances impacts of the recharge (A2)(A3) | | |
| Alternative Flows: | A1: Service is not available   1. Channel/CSR light application displays an error message to inform user service is temporally unavailable and to try later   A2: Time out is reached without answer   1. Channel/CSR light application displays a warning message to inform user must contact CSR or goes to view balances features to confirm recharge has been correctly done   A3: Service has returned an error code   1. Channel/CSR light application displays an error message according to the returned error code | | |

#### Use Case: View recharge history

|  |  |  |
| --- | --- | --- |
| View recharge history | | RCH0040 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user viewing recharge history for an account or a subscriber and for a period of time | | |
| Pre-conditions | User is in the context of an account/subscriber | | |
| Trigger | User has selected the option to view recharge history | | |
| Minimum guarantees | * Channel/CSR light application displays message advising user there is no recharge for the considered time period * Channel/CSR light application displays message advising user there are two many recharge for the considered time period and to refine his criteria | | |
| Success guarantees: | Channel/CSR light application displays account/subscriber recharge history | | |
| Normal Flow: | 1. Channel/CSR light application sets default time period (from today) and validates 2. Channel/CSR light application displays recharges done in the considered time period (A1)(A2)(A3)(A4) 3. User returns from the use case (A5) | | |
| Alternative Flows: | A1: User wants to view recharge history for another time period   1. User set new time period and validates 2. Next step are similar to nominal case   A2: Service is not available or API returns an error   1. Channel/CSR light application displays an error message to inform user service is temporally unavailable and to try later   A3: There is no recharge done during the considered time period   1. Channel/CSR light application displays a message there is no recharge done for the considered time period   A4: There are two many recharge done during the considered time period   1. Channel/CSR light applications displays an error message to inform user there are two many recharges for the considered period and to refine his search   A5: User selects a recharge from the history to view balances impact   1. Channel/CSR light displays impacted balances with the impact of the recharge | | |

Channel/CSR light application requirements

CHA-3.20.4.5 Channel/CSR light application shall allow user to recharge account and subscriber with respect of use case ‘Recharge’.

CHA-3.20.4.5.10 Channel/CSR light application shall support configuring at design time recharge mode supported per product (i.e. voucher and/or non voucher).

CHA-3.20.4.5.15 Channel/CSR light application shall support configuring at design time if selecting already existing payment profiles is supported

CHA-3.20.4.5.20 Channel/CSR light application shall display same error message as Consumer application when recharge fails.

CHA-3.20.4.5.30 For every recharge page for an account, Channel/CSR light application shall display the account reference.

CHA-3.20.4.5.40 For every recharge page for a subscriber, Channel/CSR light application shall display the subscriber primary identifier.

CHA-3.20.4.20 Channel/CSR light application shall propose recharge option only if the account is rechargeable

CHA-3.20.4.20.1 Channel/CSR light application shall propose recharge option only if there is at least one balance instantiated as prepaid for the account

CHA-3.20.4.30 Channel/CSR light application shall propose recharge option only if the subscriber is rechargeable

CHA-3.20.4.30.1 Channel/CSR light application shall propose recharge option only if there is a max recharge amount value set on the primary offer

CHA-3.20.4.30.2 Channel/CSR light application shall propose recharge option only if either there is at least one prepaid balance for the subscriber or the primary offer is configured as rechargeable

CHA-3.20.4.40 Channel/CSR light application shall propose a min and max authorized amount for the recharge

CHA-3.20.4.40.1 Channel/CSR light application shall support configuring a min recharge amount value by currency for account and subscriber

CHA-3.20.4.40.2 Channel/CSR light application shall support configuring a max recharge amount value by currency for account

CHA-3.20.4.40.3 Channel/CSR light application shall use primary offer max recharge value as max recharge amount for a subscriber

CHA-3.20.4.40.4 Channel/CSR light application shall support modifying these values without requiring new application deployment

CHA-3.20.4.50 Channel/CSR light application shall use account currency for recharge at account level

CHA-3.20.4.60 Channel/CSR light application shall use subscriber currency for recharge at subscriber level

CHA-3.20.4.70 Channel/CSR light application shall display balances impacted by the recharge similarly to display balances use case.

CHA-3.20.4.80 Channel/CSR light application shall not propose recharge option if recharge service is not enabled

CHA-3.20.4.90 Channel/CSR light application shall support enabling or disabling at design time recharge service.

CHA-3.20.4.100 Channel/CSR light application shall allow user doing non voucher recharge with respect of use case non voucher recharge

CHA-3.20.4.100.10 Channel/CSR light application shall support a different configuration per application, respecting the requirements CHA-3.20.4.100.10.xCHA-3.20.4.100.10.1 Channel/CSR light application shall support configuring payment modes supported for non voucher recharge

CHA-3.20.4.100.10.2 Channel/CSR light application shall propose by default Cash, Check, Credit card and direct debit payment mode.

CHA-3.20.4.100.10.3 Channel/CSR light application shall support declaring a new payment mode if not requiring parameters (e.g. money order)

CHA-3.20.4.100.10.4 Channel/CSR light application shall support selecting an already existing payment profile to process the recharge

CHA-3.20.4.100.10.5 Channel/CSR light application shall allow configuring payment methods supporting a payment limited to existing payment profile only (creation of a new payment profile is not possible)CHA-3.20.4.100.20 Channel/CSR light application shall adopt the same naming convention for a payment profile than in CSM application (e.g. type and a bank account number for direct debit).CHA-3.20.4.100.30 for a credit card payment profile, Channel/CSR light application shall display in any case the whole credit card number but only the last four digits.

CHA-3.20.4.100.40 for an existing payment profile, Channel/CSR light application shall allow configuring payment profile parameters to be reviewed before submitting the recharge.

CHA-3.20.4.100.40.1 Channel/CSR light application shall respect the same configuration than when setting the payment method of a new account (refer to Capture billing information use case).

CHA-3.20.4.120 Channel/CSR light application shall allow user doing non voucher recharge by credit card with respect of use case ‘Non voucher recharge by credit card’.

CHA-3.20.4.120.1 Channel/CSR light application shall guarantee that if Payment fails, recharge is not processed.

CHA-3.20.4.120.2 Channel/CSR light application shall guarantee that if Recharge fails, payment is not processed.

CHA-3.20.4.120.5 Channel/CSR light application shall use primary offer max recharge value as maximum value for a recharge at subscriber level.

CHA-3.20.4.120.6 Channel/CSR light application shall support configuring by application if recharge by credit card can be processed in real time only, not in real time only.

CHA-3.20.4.120.7 Channel/CSR light application shall support processing the payment in real-time/not real time according to application configuration.

CHA-3.20.4.120.10 Channel/CSR light application shall pre-populates credit card information with the impacted account billing contact (first name, last name, email, address line 1, zip, city, country, state).

CHA-3.20.4.120.15 when payment and recharge have been processed successfully, Channel/CSR light application shall display the payment transaction number to the user.

CHA-3.20.4.130 Channel/CSR light application shall allow user recharging by voucher with respect of use case Recharge by voucher.

CHA-3.20.4.140 Channel/CSR light application shall allow user viewing recharge history for an account or a subscriber with respect of use case view recharge history.

CHA-3.20.4.140.1 Channel/CSR light application shall support configuring at design time the maximum number of rows to display that can be supported by the recharge history use case.

CHA-3.20.4.140.2 Channel/CSR light application shall allow user configuring in days the default period of time to view recharge history (starting from now – default nb of days is 180)

CHA-3.20.4.140.3 Channel/CSR light application shall allow user view for every impacted balance, the balance name, the recharge impact value and the new balance value

Capability 1 View Real time promotions - RTP

### Capability Description

This capability allows user to view real time promotions and associated accumulators for an account or a subscriber

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View Real time promotions

|  |  |  |
| --- | --- | --- |
| View Real time promotions | | RTP0010 |
| Primary actors | Dealer users  CSR user | | |
| Summary Goal | This use case allows the user to view real time promotions he can pretend to. | | |
| Pre-conditions | The user is either in the context of a subscriber or of an account | | |
| Trigger | The user selects the option to view real time promotion associated to the account/subscriber | | |
| Minimum guarantees |  | | |
| Success guarantees | Real time promotions and associated information are displayed | | |
| Normal Flow | 1. Channel/CSR light application Call synchronously billing to get real time promotions associated to the account/subscriber and associated facts 2. Channel/CSR light applications displays a summary of all unit/monetary accumulators 3. Channel/CSR light application displays real-time promotions and associated information (A1)(A2). | | |
| Alternative Flows | A1: Channel/CSR light application can’t access to billing for any technical reason   1. Channel/CSR light application displays on error message to inform the user the service is temporally unavailable and to try later   A2: There is neither real time promotions nor accumulators associated to the account/subscriber   1. Channel/CSR light application displays a message to inform user there is no real time promotion active for his account or subscriber | | |

Channel/CSR light application requirements

CHA-3.21.4.10 Channel/CSR light application shall allow a user displaying real time promotions for account and subscriber with respect of use case View real time promotions

CHA-3.21.4.10.1 Channel/CSR light application shall display them similarly as in consumer application and in life time bonus FRS.

Capability 1 Case Management – PBM

### Capability Description

Refer to Case management and CIT FRS

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Create Case

Refer to DR-4-004-255 – Comverse 3.2

#### Use Case: View existing Cases and details

Refer to DR-4-004-255 – Comverse 3.2

#### Use Case: Update Case

Refer to DR-4-004-255 – Comverse 3.2

Channel/CSR light application requirements

Refer to DR-4-004-255 – Comverse 3.2

Capability 1 Request Management - RQM

### Capability Description

This capabilities mainly allows a user to follow requests he has posted

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View Dealer/CSR Requests

|  |  |  |
| --- | --- | --- |
| View Dealer/CSR requests | | RQM0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows the user viewing submitted requests. | |
| Pre-conditions | The user has entered menu Requests/Search Requests. | |
| Trigger | The user run a search query for request | |
| Minimum guarantees | User will be limited to requests submitted by a user in the shop | |
| Success guarantees: | The Channel/CSR light application displays list of requests corresponding to the filtering criteria | |
| Normal Flow: | 1. The application displays requests search criteria 2. The user sets search criteria and clicks Search button or (A1). 3. The application displays the list of requests or (A2). | |
| Alternative Flows: | A1. The user clicks “Reset” button.   1. Channel/CSR light application displays the last successful search result page with criteria.   A2. There is no request to list.   1. Channel/CSR light application displays an error message informing the user there is no requests matching search criteria | |

#### Use Case: View Request Details

|  |  |  |
| --- | --- | --- |
| View Request Details | | RQM0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to view details of a request. | |
| Pre-conditions | User is listing requests | |
| Trigger | The user choose a request to view the details | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays request details | |
| Normal Flow: | 1. The application displays details. They include:    * Context information    * Request type, objects and parameters involved in the request    * For account management requests, details indicate involved subscriber/member in addition to the request information.    * ~~For new customer, it indicates customer details and subscriber details.~~    * For dealer hierarchy management requests, details indicate involved level or member. 2. The user clicks “Return to List” and returns to the list of requests (can be cascaded). | |
| Alternative Flows: |  | |

#### Use Case: View Requests Impacting a Customer

|  |  |  |
| --- | --- | --- |
| View Requests Impacting a Customer | | RQM0030 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to view submitted requests that apply to any entity of a specific customer. | |
| Pre-conditions | The user is in the context of a customer | |
| Trigger | The user has chosen to view the customer requests | |
| Minimum guarantees |  | |
| Success guarantees: | The application has displayed list of requests. | |
| Normal Flow: | 1. The application displays the list of requests impacting the customer filter by default to 10 days (submission date) 2. The user sets search criteria (A1) 3. The application displays the list of requests (A2). | |
| Alternative Flows: | A1. The user clicks the “Reset” button.   1. The application displays the last successful search result page with criteria.   A2. There is no request to list.   1. The application displays the last successful search result page with criteria. 2. Channel/CSR light application displays an error message informing the user there is no request matching criteria | |

Channel/CSR light application requirements

CHA-3.23.4.10 Channel/CSR light application shall allow user to view requests submitted by user with respect of use case ‘view dealer requests’.

~~CHA-3.23.4.10.1 Channel/CSR light application shall select only requests submitted by a user of the same shop as user (i.e. same level)~~

CHA-3.23.4.10.2 Channel/CSR light application shall display requests sorted by submission date in a descending order

CHA-3.23.4.10.3 Channel/CSR light application shall support configuration at design-time the maximum number of requests retrieved.

~~CHA-3.23.4.10.4 Channel/CSR light application shall allow the user selecting only requests he has submitted~~

CHA-3.23.4.10.5 Channel/CSR light application shall allow the user filtering requests by submission date on a specific time period

CHA-3.23.4.10.6 Channel/CSR light application shall allow the user filtering by request type he is looking for

CHA-3.23.4.10.7 Channel/CSR light application shall allow the user filtering the requests by their status

CHA-3.23.4.10.8 Channel/CSR light application shall display by default the X last new customer requests until now in all statuses and submitted by the user where X is a configured design-time parameter.

CHA-3.23.4.10.9 Channel/CSR light application shall display for every request the submission date, the user login having submitted the request, the request type, the impacted item, the requested object when relevant and the request status and order reference if any (for acquisition requests)

CHA-3.23.4.10.9.1 Channel/CSR light application shall allow the user to access directly to the order details by selecting the order reference (if any) of the displayed request.

CHA-3.23.4.10.10 Channel/CSR light application shall allow a dealer administrator to view the requests submitted by a user he administrates.

CHA-3.23.4.10.10.1 Channel/CSR light application shall allow a dealer administrator filtering the requests by user login.

CHA-3.23.4.10.10.2 Channel/CSR light application shall allow a dealer administrator filtering the requests to only viewing requests he has submitted.

CHA-3.23.4.10.12 Channel/CSR light application shall allow a dealer non administrator (simple user) to access to the requests he has submitted.

CHA-3.23.4.10.13 when consumer application co-exists with Channel/CSR light application, user shall be able to access to requests submitted by the customer users.

CHA-3.23.4.30.13.1 when Channel/CSR light application displays a request submitted by a customer user (through consumer application) then Channel/CSR light application shall hide the name of the user submitter of the request.

CHA-3.23.4.20 Channel/CSR light application shall allow user viewing details of a request with respect of use case view request details

CHA-3.23.4.20.1 Channel/CSR light application shall allow user viewing all the sub requests involved in the submitted request for composite requests

CHA-3.23.4.30 Channel/CSR light application shall allow user viewing requests impacting a customer and any object of the customer hierarchy (i.e. accounts and subscribers) in the respect of use case view requests impacting a customer

~~CHA-3.23.4.30.1 Channel/CSR light application shall select only requests submitted by a user of the same level or levels below as user~~

CHA-3.23.4.30.2 Channel/CSR light application shall displays requests sorted by submission date in a descending order

CHA-3.23.4.30.3 Channel/CSR light application shall allow support configuration at design-time the maximum number of requests retrieved.

CHA-3.23.4.30.7 Channel/CSR light application shall allow to search requests for the X last days until now in all statuses.

CHA-3.23.4.30.7.1 Channel/CSR light application shall allow to configure at design-time the default value of X (last days).

CHA-3.23.4.30.7.2 Channel/CSR light application shall propose to the user to search request by X last days with X as a pre-populated value.

CHA-3.23.4.30.8 Channel/CSR light application shall display for every request same information as in view dealer acquisition request

CHA-3.23.4.30.9 Channel/CSR light application shall display all the requests impacting a customer whatever the user at the origin of the request.

CHA-3.23.4.30.9.1 Channel/CSR light application shall display the name of the user submitter of the request, only if the logged user is or administrates the submitter user.

CHA-3.23.4.30.10 when consumer application co-exists with Channel/CSR light application, user shall be able to access to requests submitted by the customer users.

CHA-3.23.4.30.10.1 when Channel/CSR light application displays a request submitted by a customer user (through consumer application) then Channel/CSR light application shall hide the name of the user submitter of the request.

CHA-3.23.4.30.12 Channel/CSR light application shall prevent a user accessing to request details or order details of a request submitted by another user he does not administrate.

Capability 1 Electronic Bill Presentation and Payment - EBP

### Capability Description

This capability provides all use cases to allow a user viewing a customer invoice, calls detail and finally register bill payment.

This capability allows also user to dispute the bill or specific calls.

### Capability Assumptions/Dependencies

It is assumed a SAPI will allow getting the last X invoices of an account with minimum information required by the list invoice use case

It is assumed a SAPI will allow getting the list of subscribers billed on a specific invoice

It is assumed that either IGEN has been updated and is able to provide PDF format to CSS or the PWR for UTS to display invoices as PDF in Consumer Self Service has been implemented as a core feature of the Consumer Self Service application (CBS 3).

### Capability Use Cases

#### Use Case: List Invoices

|  |  |  |
| --- | --- | --- |
| List Invoices | | EBP0010 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to list available invoices | |
| Pre-conditions | The user is in the context of a customer | |
| Trigger | The user choose the invoice menu | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays the last X invoices of the customer | |
| Normal Flow: | 1. User selects an account (A1) 2. Channel/CSR light application get the last X invoices for this account (A2)(A3) 3. Channel/CSR light application displays a summary of the last X invoice highlighting the last bill  * Invoice Reference * Invoice date * New charge amount including taxes * Balance due * Payment Due Date * Total adjustments (V2) | |
| Alternative Flows: | A1. There is only one account for the customer   1. Channel/CSR light application get the last X invoices for the root account 2. Next steps are similar to nominal case   A2. There is No invoice available for the account   1. Channel/CSR light application displays a message specifying there is no invoice for the account   A3: Channel/CSR light application can’t get the invoices for technical reason   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: View invoice details

|  |  |  |
| --- | --- | --- |
| View invoice details | | EBP0015 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to view details of an invoice by invoice balance and access to Billed RC/NRC, billed calls, payment distributions,,billed MTR, ‘billed recharges’ and billed adjustments | |
| Pre-conditions | The user is in the context of a customer | |
| Trigger | The user has selected the option to view details of a specific invoice | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays the invoice details | |
| Normal Flow: | 1. Channel CSR light displays invoice details and balances (by Open Item id in integrated mode) (A1) 2. Users select the options to get more details 3. Channel CSR light displays grouped by account and subscriber: (A1)  * Payment distributions (account only) * Billed RC/NRC (account and subscriber) * Billed recharges (account and subscriber) * Billed MTR (account and subscriber) * Billed adjustments (account only) | |
| Alternative Flows: | A1: Channel/CSR light can’t retrieve the information:   1. Channel/CSR light displays an error message informing user of a technical error and he should try later | |

#### Use Case: View invoice balance details

|  |  |  |
| --- | --- | --- |
| View invoice balance details | | EBP0018 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to view details of an invoice balance and access to invoice balance adjustments | |
| Pre-conditions | The user is in the context of an invoice | |
| Trigger | The user has selected the option to view details of a specific invoice balance | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays the invoice balance details | |
| Normal Flow: | 1. Channel CSR light displays invoice balance details and adjustment lists applying to the balance | |
| Alternative Flows: |  | |

#### Use Case: View Invoice image

|  |  |  |
| --- | --- | --- |
| View Invoice image | | EBP0020 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to view an invoice | |
| Pre-conditions | The user is in the context of a customer  The user is viewing account invoices list  There is an external repository with formatted invoice available | |
| Trigger | The user has selected an invoice on the list invoice page | |
| Minimum guarantees | When integrated with Comverse One, if the PDF format has not already been generated, user can request its generation. | |
| Success guarantees: | Channel/CSR light application displays the invoice selected by the user according to format expected by the user | |
| Normal Flow: | 1. Channel/CSR light application displays the status of each invoice image in PDF and proposes to the user which format of invoice he wants (PDF or Text) and in case of PDF if he wants a summary of detailed invoice (A1) (A2) (A5) (A12) 2. User selects a PDF invoice (summary or detailed)(A3) 3. Channel/CSR light application gets the invoice PDF (A4) 4. Channel/CSR light application displays the PDF invoice | |
| Alternative Flows: | A1: Invoice PDF is neither already generated nor in progress   1. Channel/CSR light displays an option to request PDF generation instead of view PDF option 2. User selects the option (detail or summary) 3. Channel/CSR light application requests for generation of the invoice (A11) 4. Channel/CSR light proposes to the user to wait for generation and come back later(A4) 5. Billing generates the PDF   A11: Invoice PDF generation is in error   1. Channel/CSR light advises user last PDF generation has failed and asks him to confirm he wants to request the generation again 2. User confirms 3. Next steps are similar to alternate flow A1   A12: Generation has failed   1. Channel/CSR light displays an error message to inform him generation has failed   A2: Invoice PDF generation is in progress   1. Channel/CSR light application displays a in progress option for an invoice in the dislayed list 2. User refreshes the list invoice screen (browser refresh) 3. Channel/CSR light application checks if cache needs to be refreshed (configured cache ‘time to live’ parameter) and if yes, refreshes the statuses of the invoices (A21) 4. Channel/CSR light application tries to get the invoices and their up to date statuses 5. Channel/CSR light application updates the cache with the new statuses. 6. Channel/CSR light application displays invoice list and their pdf generation status from the cache   A21: Cache time to live has not been reached   1. Channel/CSR light application displays invoice list and their pdf generation status from the cache   A3: User has selected the simple text option   1. Channel/CSR light gets the invoice as simple text format from billing 2. Channel/CSR light displays the invoice as simple text (A4)   A4: Channel/CSR light application can’t access to formatted invoice for technical reason   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later   A5: Generation is disabled (max period of time allowing PDF generation is over)   1. Channel/CSR light displays a message to inform the user that PDF generation is disabled for this invoice image | |

#### Use Case: List Payments

|  |  |  |
| --- | --- | --- |
| List Payments | | EBP0030 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to view the payments associated to an account or an invoice. | |
| Pre-conditions | The user is in the context of a customer | |
| Trigger | The user has chosen to view the payment associated to an account or an invoice | |
| Minimum guarantees | Channel/CSR light application will warn the user if no payment is available | |
| Success guarantees: | Channel/CSR light Application displays Payment list | |
| Normal Flow: | 1. Channel/CSR light application get the payments for the invoice or the last X payments for the account (A1)(A2) 2. Channel/CSR light application displays the found payments with following information   Payment reference  Payment type (deposit, normal payment, reversal..)  Payment date  Payment amount (negative for reversal)  Related invoice(s) number | |
| Alternative Flows: | A1. No payment found   1. Channel/CSR light application displays a message informing the user there is no payments for this account or invoice   A2. Channel/CSR light application can’t get payments for technical reason   1. Channel/CSR light application displays a message informing the user the service is temporally unavailable and to try later | |

#### Use Case: View payment distributions

|  |  |  |
| --- | --- | --- |
| View payment distributions | | EBP0035 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to view the payments done since the last bill and appearing on the invoice | |
| Pre-conditions | The user is in the context of one invoice | |
| Trigger | The user has chosen to view the payments distribution | |
| Minimum guarantees | Channel/CSR light application will warn the user if no payment is available | |
| Success guarantees: | Channel/CSR light Application displays Payment distributions list | |
| Normal Flow: | 1. Channel/CSR light application get the payments appearing on the invoice (A1)(A2) 2. Channel/CSR light application displays the found payments with following information   Payment reference  Payment type (deposit, normal payment, reversal..)  Payment date  Payment amount (negative for reversal) | |
| Alternative Flows: | A1. No payment found   1. Channel/CSR light application displays a message informing the user there is no payments for this account or invoice   A2. Channel/CSR light application can’t get payments for technical reason   1. Channel/CSR light application displays a message informing the user the service is temporally unavailable and to try later | |

#### Use Case: View billed usage

|  |  |  |
| --- | --- | --- |
| View billed usage | | EBP0040 |
| Primary actors | Dealer user  CSR user  Referral user | |
| Summary Goal | This use case allows a user to view billed usage for account’s subscribers and for a specific invoice | |
| Pre-conditions | User is viewing list of invoices | |
| Trigger | The user has chosen to view billed usage | |
| Minimum guarantees | Channel application will prevent retrieving too many calls (configurable) | |
| Success guarantees: | Channel/CSR light Application display billed usage | |
| Normal Flow: | 1. Channel CSR/light displays search criteria to the user 2. User set criteria 3. Channel/CSR light application get the list of calls available for the invoice and matching entered criteria (A2)(A3) 4. Channel/CSR light application displays the list of returned calls(A4) | |
| Alternative Flows: | A2. There is no details for this invoice for entered criteria   1. Channel/CSR light application displays a call informing user there is no usage founds   A3. Channel/CSR light application can’t get usage due to technical reasons   1. Channel/CSR light application display a message informing user the service is temporally unavailable and to try later | |

#### Use Case: View usage detail

|  |  |  |
| --- | --- | --- |
| View usage detail | | EBP0045 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view detail of a specific usage record | |
| Pre-conditions | The User is in viewing a list of usage records | |
| Trigger | The user has selected the option to view detail of a specific usage record | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application display usage details | |
| Normal Flow: | 1. Channel/CSR light application displays detail of the usage record, balances impacted by the call and list of adjustments | |
| Alternative Flows: |  | |

#### ~~Use Case: Query Invoice~~

|  |  |  |
| --- | --- | --- |
| ~~Query Invoice~~ | | ~~EBP0050~~ |
| ~~Primary actors~~ | ~~Dealer user~~ | |
| ~~Summary Goal~~ | ~~This use case allows a user to create a Trouble Ticket from on an invoice~~ | |
| ~~Pre-conditions~~ | ~~The user is in the context of a customer~~  ~~The user is viewing an invoice~~ | |
| ~~Trigger~~ | ~~The user choose to create a trouble ticket on the invoice~~ | |
| ~~Minimum guarantees~~ | ~~The user can cancel the creation and return on the invoice~~ | |
| ~~Success guarantees:~~ | ~~Channel/CSR light application has submitted a trouble ticket related to an invoice~~ | |
| ~~Normal Flow:~~ | 1. ~~The user enters a description of the query~~ 2. ~~The user confirms the Contact Information, which has been pre-filled by the Customer information (First Name, Last Name, or company name, Phone Number, Fax Number, Email address)~~ 3. ~~The user selects a subtype of problem~~ 4. ~~The user submits the query~~ 5. ~~Channel/CSR light application validates information have been set correctly (A1)~~ 6. ~~Channel/CSR light application confirms the submission.~~ | |
| ~~Alternative Flows:~~ | ~~A1. Information has not been correctly set~~   1. ~~Channel/CSR light application highlights mistakes~~ 2. ~~User set new values~~ 3. ~~next steps are similar to the nominal case~~ | |

#### ~~Use Case: Query itemized bill~~

|  |  |  |
| --- | --- | --- |
| ~~Query Itemized bill~~ | | ~~EBP0060~~ |
| ~~Primary actors~~ | ~~Dealer user~~ | |
| ~~Summary Goal~~ | ~~This use case allows a user to select bill detail lines for creation of a trouble ticket from an itemized bill viewing context~~ | |
| ~~Pre-conditions~~ | ~~The user is in the context of a customer~~  ~~The user is viewing an itemized bill.~~ | |
| ~~Trigger~~ | ~~The user choose to query the bill details~~ | |
| ~~Minimum guarantees~~ | ~~Channel/CSR light application force the user to select at list one call~~ | |
| ~~Success guarantees:~~ | ~~A trouble ticket is created to dispute specific calls~~ | |
| ~~Normal Flow:~~ | 1. ~~Channel/CSR light applications displays the itemized bill with selection capability~~ 2. ~~User selects calls he wants to dispute~~ 3. ~~The user submits the selection.~~ 4. ~~The user enters a description of the query~~ 5. ~~The user confirms the Contact Information, which has been pre-filled by the Customer information (First Name, Last Name, or company name Phone Number, Fax Number, Email address)~~ 6. ~~The user selects a subtype of problem~~ 7. ~~The user submits the query~~ 8. ~~Channel/CSR light application validates information have been set correctly (A1)~~ 9. ~~Channel/CSR light application confirms the submission.~~ | |
| ~~Alternative Flows:~~ | ~~A1. Information has not been correctly set~~   1. ~~Channel/CSR light application highlights mistakes~~ 2. ~~User set new values~~ 3. ~~Next steps are similar to the nominal case~~ | |

#### Use Case: Register Bill Payment

|  |  |  |
| --- | --- | --- |
| Register Bill Payment | | EBP0070 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to register payment for a specific invoice. | | |
| Pre-conditions: | * The user is in the context of a customer * The user is viewing list of invoices * Invoice to pay has a positive balance due | | |
| Trigger: | The user selects the Pay bill option of a specific invoice | | |
| Minimum guarantees: | Channel/CSR light application warns the user if the payment can’t be register correctly | | |
| Success guarantees: | Channel/CSR light application correctly registers the bill payment in the back end system. | | |
| Normal Flow: | 1. The user selects the pay bill option 2. Channel/CSR light application displays the balance due and the account total balance due to the user 3. User set the amount he wants to register 4. Channel/CSR light application validates that the payment amount is not greater than total balance due for the account (A3) (A4) 5. User selects the payment mode 6. User set attributes relevant for the selected payment mode (A1)(A2) 7. Channel/CSR light application submits payment to the billing system 8. Channel/CSR light application displays a confirmation message indicating that payment has been taken into account(A5)(A6) 9. Channel/CSR light displays a refreshed invoice list | | |
| Alternative Flows: | A1: User has selected Credit/debit card payment mode   1. Channel/CSR light proposes to user to process payment immediately (A11) 2. User selects to process payment immediately (A11) 3. User enters credit/debit card information (A12) 4. Channel/CSR light application does basic validation based on Luhn algorithm (A13) 5. Channel/CSR light application calls external API to process the bill payment 6. Channel/CSR light application confirms payment processing and displays the payment transaction (A5)(A6) 7. Channel/CSR light displays a refreshed invoice list   A11: User has decided to not process payment immediately or immediate online payment is not available in billing   1. User set basic information about credit/debit card transaction 2. Next step is similar to step 6 of nominal case   A12: User selects an already existing credit/debit card payment profile   1. Channel/CSR light application calls external API to process the bill payment specifying the used payment profile 2. Next step is similar to step 8 of nominal case   A13: Luhn algorithm fails   1. Channel/CSR light informs user credit card number is incorrect and invites user to set it again   A2: Payment mode supports payment profile selection and user has selected a payment profile   1. Channel application displays details of the payment profile and requests confirmation from user 2. User confirms(A21) 3. Channel/CSR light application calls external API to process the bill payment specifying the used payment profile 4. next step is similar to step 8 of nominal case   A21: User cancels   1. User is redirected to step 2 of nominal case   A3: Payment amount is greater that total balance due for the account   1. Channel/CSR light application displays a warning message to the user and requests confirmation. 2. User confirms (A31) 3. Next step is similar to step 5 of nominal use case   A31: User cancels   1. User is redirected to step 2 of nominal case   A4: The user cancels   1. Channel/CSR light application redirects the user to the view invoice   A5: Channel/CSR light application can’t process the payment for technical reason   1. Channel/CSR light application displays an error message suggesting to the user to try later   A6: Payment registration fails   1. Channel/CSR light display an error message informing user payment has failed (allowing to identify if failure is due to real time payment, incorrect voucher id or other failures) | | |

#### Use Case: View Billed RC/NRC

|  |  |  |
| --- | --- | --- |
| View billed RC/NRC | | EBP0080 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view billed RC/NRC for a specific invoice | | |
| Pre-conditions: | * The user is in the context of a customer * The user is viewing list of invoices | | |
| Trigger: | User selects the option to view Billed RC/NRC for a specific invoice | | |
| Minimum guarantees: | Channel/CSR light application informs user if there is no billed RC and NRC for the invoice | | |
| Success guarantees: | Channel/CSR light application displays Billed RC and NRC for the invoice | | |
| Normal Flow: | 1. Channel/CSR light application fetches in billing system list of charges associated to the invoice 2. Channel/CSR light application displays charges (A1)(A2) | | |
| Alternative Flows: | A1: Application can’t access to the service for technical reason   1. Channel/CSR light informs user service is temporally unavailable and to try later   A2: There is no billed RC/NRC to display   1. Channel/CSR light informs user there is no term to display | | |

#### Use Case: View RC/NRC Detail

|  |  |  |
| --- | --- | --- |
| View RC/NRC detail | | EBP0090 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view detail of one RC/NRC | | |
| Pre-conditions: | * The user is viewing list of RC/NRC | | |
| Trigger: | User selects the option to view RC/NRC detail | | |
| Minimum guarantees: |  | | |
| Success guarantees: | Channel/CSR light application displays RC/NRC detail | | |
| Normal Flow: | 1. Channel/CSR light application displays details of the RC/NRC, associated balances impact and adjustments list | | |
| Alternative Flows: |  | | |

#### Use Case: View ‘billed’ recharges

|  |  |  |
| --- | --- | --- |
| View ‘billed’ recharges | | EBP0094 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user viewing recharge history associated to a bill or statement | | |
| Pre-conditions | User is in the context of a specific invoice (or statement) | | |
| Trigger | User has selected the option to view recharge history | | |
| Minimum guarantees | * Channel/CSR light application displays message advising user there is no recharge for the invoice | | |
| Success guarantees: | Channel/CSR light application displays recharges associated to the invoice/statement | | |
| Normal Flow: | 1. Channel/CSR light application retrieves recharges associated to the invoice (or statement) from billing (A1) 2. Channel/CSR light application displays list of recharges associated to the invoice (or statement) (A2) | | |
| Alternative Flows: | A1: Service is not available or API returns an error   1. Channel/CSR light application displays an error message to inform user service is temporally unavailable and to try later   A2: User selects a recharge from the history to view balances impact   1. Channel/CSR light displays impacted balances with the impact of the recharge | | |

#### Use Case: View ‘billed’ MTR

|  |  |  |
| --- | --- | --- |
| View ‘billed’ MTR | | EBP0096 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view MTR history for a associated to a specific invoice (or statement). In other words MTR generated since the previous invoice | |
| Pre-conditions | User is in the context of one invoice (or statement) | |
| Trigger | User has selected the view MTR option | |
| Minimum guarantees | Channel application will prevent retrieving too many MTR records (configurable) | |
| Success guarantees: | Channel/CSR light Application displays MTR associated to the invoice | |
| Normal Flow: | 1. Channel/CSR light application get the list of records associated to the invoice (A1)(A2) 2. Channel/CSR light application displays the list of selected MTR records (A3) | |
| Alternative Flows: | A1. There is no records associated to the invoice   1. Channel/CSR light application displays a message informing user there is no MTR for this invoice   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later   A3: user selects one MTR   1. Channel CSR light displays MTR details plus impact on balances (if any) | |

#### Use Case: Register prepayment

|  |  |  |
| --- | --- | --- |
| Register prepayment | | EBP0100 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to register prepayment either during checkout process or directly on one account | | |
| Pre-conditions: | Either user is in the context of a customer or user in the context of an already existing account | | |
| Trigger: | The user selects the option to register a prepayment | | |
| Minimum guarantees: | Channel/CSR light application warns the user if the prepayment can’t be register correctly | | |
| Success guarantees: | Channel/CSR light application correctly registers the prepayment in the back end system (through the order if prepayment has been registered in checkout process). | | |
| Normal Flow: | 1. User set the prepayment information 2. User selects the payment mode 3. User set attributes relevant for the selected payment mode (A1)(A2) 4. Channel/CSR light application submits prep payment to the billing system (A3) 5. Channel/CSR light application displays a confirmation message indicating that prepayment has been taken into account(A4)(A5) | | |
| Alternative Flows: | A1: User has selected Credit/debit card payment mode and user is not in checkout process   1. Channel/CSR light proposes to user to process payment immediately (A11) 2. User selects to process payment immediately (A11) 3. User enters credit/debit card information (A12) 4. Channel/CSR light application does basic validation based on Luhn algorithm (A13) 5. Channel/CSR light application calls external API to process the bill payment 6. Channel/CSR light application confirms payment processing and displays the payment transaction (A5)(A6) 7. Channel/CSR light displays a refreshed invoice list   A11: User has decided to not process payment immediately or immediate online payment is not available in billing   1. User set basic information about credit/debit card transaction 2. Next step is similar to step 4 of nominal case   A12: User selects an already existing credit/debit card payment profile   1. Channel/CSR light application calls external API to process the prepayment specifying the used payment profile 2. Next step is similar to step 5 of nominal case   A13: Luhn algorithm fails   1. Channel/CSR light informs user credit card number is incorrect and invites user to set it again   A2: Payment mode supports payment profile selection and user has selected a payment profile   1. Channel application displays details of the payment profile and requests confirmation from user 2. User confirms(A21) 3. Channel/CSR light application calls external API to process the bill payment specifying the used payment profile 4. Next step is similar to step 8 of nominal case   A21: User cancels   1. User is redirected to step 2 of nominal case 2. Owed amount is not greater then 0 3. Channel/CSR light application displays an error message specifying there is no amount owed for this invoice   A3: User is in checkout process   1. Channel/CSR light application register the prepayment in the order   A4: Channel/CSR light application can’t process the prepayment for technical reason   1. Channel/CSR light application displays an error message suggesting to the user to try later   A5: Prepayment registration fails   1. Channel/CSR light display an error message informing user prepayment has failed (allowing to identify if failure is due to real time payment or other failures) | | |

#### Use Case : View Unbilled RC/NRC

|  |  |  |
| --- | --- | --- |
| View Unbilled RC/NRC | | EBP0110 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view unbilled RC/NRC for a specific account | | |
| Pre-conditions: | * The user is in the context of an account | | |
| Trigger: | User selects the option to view Unbilled RC/NRC for a specific account | | |
| Minimum guarantees: | Channel/CSR light application informs user if there is no unbilled RC and NRC for the account | | |
| Success guarantees: | Channel/CSR light application displays Unbilled RC and NRC for the account | | |
| Normal Flow: | 1. Channel/CSR light application fetches in billing system list of unbilled charges associated to the account 2. Channel/CSR light application displays charges (A1)(A2) | | |
| Alternative Flows: | A1: Application can’t access to the service for technical reason   1. Channel/CSR light informs user service is temporally unavailable and to try later   A2: There is no unbilled RC/NRC to display   1. Channel/CSR light informs user there is no term to display | | |

#### Use Case: View Unbilled usage

|  |  |  |
| --- | --- | --- |
| View unbilled usage | | EBP0130 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view unbilled usage for account’s subscribers | |
| Pre-conditions | User is in account context | |
| Trigger | The user has chosen to view unbilled usage | |
| Minimum guarantees | Channel application will prevent retrieving too many calls (configurable) | |
| Success guarantees: | Channel/CSR light Application displays unbilled usage | |
| Normal Flow: | 1. Channel CSR/light displays search criteria to the user 2. User set criteria 3. Channel/CSR light application get the list of unbilled calls for the account and matching entered criteria (A2)(A3) 4. Channel/CSR light application displays the list of returned calls(A4) | |
| Alternative Flows: | A2. There is no details for this invoice for entered criteria   1. Channel/CSR light application displays a call informing user there is no usage founds   A3. Channel/CSR light application can’t get usage due to technical reasons   1. Channel/CSR light application display a message informing user the service is temporally unavailable and to try later | |

#### Use Case: View ‘unbilled’ recharges

|  |  |  |
| --- | --- | --- |
| View ‘unbilled’ recharges | | EBP0140 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows user viewing unbilled recharge history for an account | | |
| Pre-conditions | User is in the context of a specific account | | |
| Trigger | User has selected the option to view unbilled recharge history | | |
| Minimum guarantees | * Channel/CSR light application displays message advising user there is no unbilled recharge for the account | | |
| Success guarantees: | Channel/CSR light application displays unbilled recharges associated to the account | | |
| Normal Flow: | 1. Channel/CSR light application retrieves unbilled recharges associated to the account from billing (A1) 2. Channel/CSR light application displays list of unbilled recharges associated to the account (A2) | | |
| Alternative Flows: | A1: Service is not available or API returns an error   1. Channel/CSR light application displays an error message to inform user service is temporally unavailable and to try later   A2: User selects a recharge from the history to view balances impact   1. Channel/CSR light displays impacted balances with the impact of the recharge | | |

#### Use Case: View ‘unbilled’ MTR

|  |  |  |
| --- | --- | --- |
| View ‘unbilled’ MTR | | EBP0150 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view unbilled MTR for a specific account | |
| Pre-conditions | User is in the context of one account | |
| Trigger | User has selected the view unbilled MTR option | |
| Minimum guarantees | Channel application will prevent retrieving too many MTR records (configurable) | |
| Success guarantees: | Channel/CSR light Application displays unbilled MTR associated to the account | |
| Normal Flow: | 1. Channel/CSR light application get the list of unbilled MTR associated to the account (A1)(A2) 2. Channel/CSR light application displays the list of selected MTR records (A3) | |
| Alternative Flows: | A1. There is no records associated to the account   1. Channel/CSR light application displays a message informing user there is no MTR for this invoice   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later   A3: user selects one MTR   1. Channel CSR light displays MTR details plus impact on balances (if any) | |

Channel/CSR light application requirements

CHA-3.24.4.10 Channel/CSR light application shall allow user to view invoices of a customer with respect of use case ‘List invoices’.

CHA-3.24.4.10.2 Channel/CSR light application shall allow the user to choose an account

CHA-3.24.4.10.3 Channel/CSR light application shall display invoices sorted by date in descending order

CHA-3.24.4.10.4 Channel/CSR light application shall display the invoice reference similarly as the one that will be displayed on the paper invoice

CHA-3.24.4.10.5 Channel/CSR light application shall allow configuring the minimum period of time during two refreshments of the invoice list (cache time to live in seconds).

CHA-3.24.4.10.6 Channel/CSR light application shall allow configuring the maximum number of invoice that can be displayed (e.g default value would be last 6 invoices)

CHA-3.24.4.15 Channel/CSR light application shall allow user to view invoice details of a specific invoice with respect of use case ‘View invoice detail’.

CHA-3.24.4.15.1 Channel/CSR light application shall remind invoice data already presented in the list plus Statement start and end dates and Next bill date

CHA-3.24.4.15.2 Channel/CSR light application shall display invoice balances with for every balance, balance name (Open item id name), new charges amount, Balance due and Total due.

CHA-3.24.4.18 Channel/CSR light application shall allow user to view invoice balance details of a specific invoice balance with respect of use case ‘View invoice balance detail’.

CHA-3.24.4.18 Channel/CSR light application shall remind invoice balance attributes already specified in the list plus the adjustable amount, the list of adjustments and the total adjustments

CHA-3.24.4.20 Channel/CSR light application shall allow user to view an invoice image with respect of use case ‘View invoice’.

~~CHA-3.24.4.20.1 Channel/CSR light application shall allow configuring at design time access to this use case depending if an external repository is available or not~~

CHA-3.24.4.20.2 Channel/CSR light application shall support displaying invoice as PDF format assuming that billing system can generate PDF format

CHA-3.24.4.20.3 Channel/CSR light application shall allow user to select either summary invoice or detailed invoice as PDF

CHA-3.24.4.20.3.1 Channel/CSR light application shall support to configure at design time if summary invoice as PDF is available (in batch and hot mode) and if detailed invoice as PDF is available (in batch and hot mode)

CHA-3.24.4.20.3.2 Channel/CSR light application shall propose only valid options according to the configuration

CHA-3.24.4.20.4 Channel/CSR light application shall support displaying invoice as simple text format assuming that billing system can generate simple text format

CHA-3.24.4.20.5 Channel/CSR light application shall allow configuring the period of time, in days, starting from now, where PDF generation can be requested.

CHA-3.24.4.30 Channel/CSR light application shall allow user to list payments of a customer with respect of use case ‘List payment’.

CHA-3.24.4.30.1 Channel/CSR light application shall support configuring the maximum number of payments that will be retrieved for an account or an invoice.

CHA-3.24.4.30.2 Channel/CSR light application shall allow user configuring in days the default period of time to list payments (starting from now – default nb of days is 180)

CHA-3.24.4.35 Channel/CSR light application shall allow user to view payments appearing on one specific invoice with respect of use case View payments distribution

CHA-3.24.4.60 Channel/CSR light application shall allow user to view the billed call of one invoice with respect of use case view billed usage.

CHA-3.24.4.60.1 Channel/CSR light application shall propose several filter criteria to user

CHA-3.24.4.60.1.1 Channel/CSR light application shall support filtering usage by one or more subscriber (mandatory criteria)

CHA-3.24.4.60.1.2 Channel/CSR light application shall support configuring at design time the maximum number of subscriber user can select

CHA-3.24.4.60.1.3 Channel/CSR light application shall support filtering usage by one or more usage type (optional criteria)

CHA-3.24.4.60.2 Channel/CSR light application shall support configuring at design time the maximum number of calls that can be retrieved

CHA-3.24.4.60.3 Channel/CSR light application shall display for every call: Call date time, Usage type, Subscriber primary identifier, origin, target, unit type and quantity, amount, .

CHA-3.24.4.60.4 Channel/CSR light application shall allow defining a mask to apply on origin and target for confidentiality reason. CHA-3.24.4.60.5 Channel/CSR light application shall allow user grouping calls by usage type, subscriber, unit type and sum number of calls and amount

CHA-3.24.4.60.7 Channel/CSR light application shall allow user sorting calls on any attribute

CHA-3.24.4.70 Channel/CSR light application shall allow user to view detail of a specific usage record with respect of use “view usage detail’.

CHA-3.24.4.70.1 For Billed usage, Channel/CSR light application shall remind information already in the list (minus the amount) plus Time zone, Units credited, country origin and target, region origin and target, postpaid amount, prepaid amount, postpaid amount credited, discount, tax, total amount adjustable, list of adjustments and balances impact.

CHA-3.24.4.70.2 For Unbilled usage, Channel/CSR light application shall remind information already in the list (minus the amount) plus Time zone, Units credited, country origin and target, region origin and target, postpaid amount, prepaid amount, postpaid amount credited, Base rate, tax, total amount adjustable, list of adjustments and balances impact.

CHA-3.24.4.70.3 For usage history record, Channel/CSR light application shall remind information already in the list (minus the amount) plus Time zone, Units credited, country origin and target, region origin and target, postpaid amount, prepaid amount, postpaid amount credited and balances impact.

~~CHA-3.24.4.80 Channel/CSR light application shall allow dealer to create a trouble ticket on an invoice with respect of use case ‘Query an invoice’.~~

~~CHA-3.24.4.80.1 Channel/CSR light application shall support configuring at design time which trouble ticket type is used to query an invoice~~

~~CHA-3.24.4.110 Channel/CSR light application shall allow dealer to create trouble tickets for itemized items with respect of use case ‘Query itemized bill’.~~

~~CHA-3.24.4.110.1 Channel/CSR light application shall support configuring at design time which trouble ticket type is used to query an itemized bill~~

~~CHA-3.24.4.110.2 Channel/CSR light application shall not display the column corresponding to the numbers acting as identifier of the caller or emitter (e.g. MSISDN) to preserve user from viewing customer confidential information (i.e. destination number).~~

CHA-3.24.4.120 Channel/CSR light application shall allow user to register a customer payment related to an invoice with the respect of use case ‘Register Bill Payment’.

CHA-3.24.4.120.1 Channel/CSR light application shall propose to pay an invoice only if balance due is positive

CHA-3.24.4.120.1 Channel/CSR light shall allow configuring at design time payment mode supported to register a bill payment

CHA-3.24.4.120.2 Channel/CSR light shall support by default cash, check, credit card, debit card, direct debit and voucher invoice payment mode

CHA-3.24.4.120.3 For check payment mode, Channel/CSR light shall force user to enter check number and optionally MICR DDA number and MICR bank number

CHA-3.24.4.120.4 For credit/debit card and non real time payment, Channel/CSR light shall force user to enter credit card authentication date and optionally credit card authentication number

CHA-3.24.4.120.5 For Direct debit, Channel/CSR light shall force user to enter direct debit information similarly as setting billing information for direct debit on the account and thus to be able to create a direct debit payment profile.

CHA-3.24.4.120.6 Channel/CSR light shall support configuring at design time parameters to set for payment tracking purpose to register a payment not processed by the billing depending on the payment mode and shall deliver by default the configuration matching requirements CHA-3.24.4.120.3 to CHA-3.24.4.120.4.

CHA-3.24.4.120.7 Channel/CSR light shall authorize user to select an already existing payment profile for payment methods direct debit, credit card and debit card

CHA-3.24.4.120.8 Channel/CSR light shall support to configure at design time for the application if user can select an already existing payment profile

CHA-3.24.4.120.9 Channel/CSR light shall mask credit card number and display only last four digit when displaying a credit card/debit card payment profile

CHA-3.24.4.120.10 Channel/CSR light shall display the total balance due for the account.

CHA-3.24.4.120.11 Channel/CSR light shall support configuring if real time payment is enable or not and thus in real time

CHA-3.24.4.120.12 Channel/CSR light shall propose by default the invoice balance due

CHA-3.24.4.130 Channel/CSR light application shall allow user to display billed RC and NRC for a specific invoice with respect of use case View billed RC/NRC

CHA-3.24.4.130.1 Channel/CSR light application shall display for every RC/NRC, the subscriber primary external id if any, the offer/bundle label if any, NRC/RC display value, NRC effective date, RC start and end date, RC/NRC amount

CHA-3.24.4.130.2 Channel/CSR light application shall allow user identifying RC from NRC.

CHA-3.24.4.140 Channel/CSR light application shall allow user to display detail of a RC or NRC with respect of use case View RC/NRC detail

CHA-3.24.4.140.1 For a billed RC, Channel/CSR light application shall display same information as in the list of billed RC/NRC plus Postpaid discount, prepaid discount, postpaid amount, prepaid amount, postpaid tax, prepaid tax, postpaid inclusive tax, prepaid inclusive tax, amount, annotation, total amount adjustable and adjustments list associated to the charge and impacted balances

CHA-3.24.4.140.2 For a billed NRC, Channel/CSR light application shall display same information as in the list of billed RC/NRC plus Postpaid discount, prepaid discount, postpaid amount, prepaid amount, postpaid tax, prepaid tax, postpaid inclusive tax, prepaid inclusive tax, rated amount, annotation, total amount adjustable and adjustments list associated to the charge and impacted balances

CHA-3.24.4.140.3 For unbilled RC, Channel/CSR light application shall display same information as in the list of unbilled RC/NRC plus award amount, postpaid amount, prepaid amount, total tax, adjustable amount and adjustments list associated to the charge and impacted balances

CHA-3.24.4.140.4 For unbilled RC, Channel/CSR light application shall display same information as in the list of unbilled RC/NRC plus installment number, rate, postpaid amount, prepaid amount, total tax, adjustable amount and adjustments list associated to the charge and impacted balances

CHA-3.24.4.140.5 For RC history record, Channel/CSR light application shall display same information as in the list of RC history plus from date to date, number of days, postpaid amount, prepaid amount, total tax and impacted balances

CHA-3.24.4.140.5 For NRC history record, Channel/CSR light application shall display same information as in the list of NRC history plus installment number, postpaid amount, prepaid amount, total tax and impacted balances

CHA-3.24.4.140.2 Channel/CSR light application shall display for every balance impacted by the charge, the balance name and transaction impact

CHA-3.24.4.144 Channel/CSR light application shall allow user viewing recharge history associated to an invoice (or statement) with respect of use case view ‘billed’ recharges

CHA-3.24.4.144.1 Channel/CSR light application shall display for every recharge the recharge date, the subscriber if any and the recharge face value

CHA-3.24.4.144.2 Channel/CSR light application shall allow user to display detail of a specific recharge history with impacted balance.

CHA-3.24.4.144.3 Channel/CSR light application shall allow user view for every impacted balance, the balance name, the recharge impact value and the new balance value

CHA-3.24.4.146 Channel/CSR light application shall allow user to display MTR history for a specific invoice with respect of use case View ‘billed’ MTR

CHA-3.24.4.146.1 Channel/CSR light application shall display for every MTR record, the MTR type, the transaction date, the billed ‘amount’ and the subscriber primary external id when relevant

CHA-3.24.4.146.2 Channel/CSR light application shall allow user to access to detail of one MTR with for every MTR record, the charge amount, write off amount, grant amount, bonus item, bonus awarded, discount item, discount awarded, plust the list of impacted balances

CHA-3.24.4.146.3 Channel/CSR light application shall display for for every impacted balance, the balance name, transaction impact and new balance value

CHA-3.24.4.150 Channel/CSR light application shall allow user to register a prepayment with respect of use case register prepayment

CHA-3.24.4.150.1 Channel/CSR light application shall request from user the prepayment amount (in account currency and mandatory), the open item id (optional), the payment method (mandatory) and the transaction date (by default the current date and mandatory for a prepayment directly done on the account)

CHA-3.24.4.150.2 In checkout process, only cash and check method will be supported and payment profiles are not proposed.

CHA-3.24.4.150.3 Channel/CSR light shall support configuring at design time parameters to set for prepayment tracking purpose to register a prepayment not processed by the billing depending on the payment mode and shall deliver by default the configuration matching requirements CHA-3.24.4.120.3 to CHA-3.24.4.120.4.

CHA-3.24.4.160 Channel/CSR light application shall allow user to display unbilled RC and NRC for a specific account with respect of use case View unbilled RC/NRC

CHA-3.24.4.160.1 Channel/CSR light application shall display for every unbilled RC/NRC, the NRC/RC display value, NRC/RC apply date, Subscriber primary external id when relevant and NRC/RC amount and currency

CHA-324.4.160.2 Channel/CSR light application shall allow user identifying unbilled RC from unbilled NRC.

CHA-3.24.4.180 Channel/CSR light application shall allow user to view the unbilled call for one account with respect of use case view unbilled usage.

CHA-3.24.4.180.1 Channel/CSR light application shall propose several filter criteria to user

CHA-3.24.4.180.1.1 Channel/CSR light application shall support filtering usage by one or more subscribers (mandatory criteria)

CHA-3.24.4.180.1.2 Channel/CSR light application shall support configuring at design time the maximum number of subscribers user can select

CHA-3.24.4.180.1.3 Channel/CSR light application shall support filtering usage by one or more usage type (optional criteria)

CHA-3.24.4.180.2 Channel/CSR light application shall support configuring at design time the maximum number of calls that can be retrieved

CHA-3.24.4.180.3 Channel/CSR light application shall display for every call: Call date time, Service name (i.e. FAUT application name) Usage type, Subscriber primary identifier, origin, target, unit type and quantity, amount.

CHA-3.24.4.180.4 Channel/CSR light application shall allow defining a mask to apply on origin and target for confidentiality reason. This mask could be different in Channel and CSR light

CHA-3.24.4.180.5 Channel/CSR light application shall allow user grouping calls by service usage type, subscriber, unit and unit type and sum number of calls and amount

CHA-3.24.4.180.7 Channel/CSR light application shall allow user sorting calls on any attribute

CHA-3.24.4.190 Channel/CSR light application shall allow user viewing unbilled recharge history associated to one account with respect of use case view ‘unbilled’ recharges

CHA-3.24.4. 190.1 Channel/CSR light application shall display for every recharge the recharge date, the subscriber if any and the recharge face value

CHA-3.24.4.190.2 Channel/CSR light application shall allow user to display detail of a specific recharge history with impacted balance.

CHA-3.24.4.190.3 Channel/CSR light application shall allow user view for every impacted balance, the balance name, the recharge impact value and the new balance value

CHA-3.24.4.190 Channel/CSR light application shall allow user to display unbilled MTR for a specific account with respect of use case View ‘unbilled’ MTR

CHA-3.24.4.190.1 Channel/CSR light application shall display for every MTR record, the MTR type, the transaction date and the subscriber primary external id when relevant

CHA-3.24.4.190.2 Channel/CSR light application shall allow user to access to detail of one MTR with for every MTR record, the charge amount, write off amount, grant amount, bonus item, bonus awarded, discount item, discount awarded, plus the list of impacted balances

CHA-3.24.4.190.3 Channel/CSR light application shall display for every impacted balance, the balance name, transaction impact and new balance value

Capability 1 Order Follow-up - OFU

### Capability Description

This capability allows user to follow up submitted orders.

### Capability Assumptions/Dependencies

It is assumed system in charge of order management (order management module in Comverse One billing) notifies Channel/CSR light Self-Service of order status update.

### Capability Use Cases

#### Use Case: Search orders

|  |  |  |
| --- | --- | --- |
| Search orders | | OFU0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to retrieve some orders | |
| Pre-conditions |  | |
| Trigger | User has selected the option to search orders | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays list of orders found | |
| Normal Flow: | 1. User set search criteria and submits (A1) 2. Channel/CSR light application displays list of selected orders (A2)(A3)(A4) | |
| Alternative Flows: | A1: User selects the reset option   1. Channel/CSR light application reinitializes search criteria value with last values used in last search.   A2: There is no order found   1. Channel/CSR light application display an error message informing user there is no order found   A3: There are too many orders found   1. Channel/CSR light application displays orders list with maximum of orders allowed in a search 2. Channel/CSR light application displays an error message informing user there are too many orders selected and he should refined his criteria   A4: User set new search criteria and submits   1. Next steps are similar to nominal case | |

#### Use Case: View order

|  |  |  |
| --- | --- | --- |
| View order | | OFU0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to view a submitted order | |
| Pre-conditions | User has retrieved a list of orders | |
| Trigger | User has selected the option to view a specific order | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light application displays the order | |
| Normal Flow: | 1. Channel/CSR light application displays the order 2. User returns to the list | |
| Alternative Flows: |  | |

Channel/CSR light application requirements

CHA-3.25.4.10 Channel/CSR light application shall allow user searching orders with respect of use case ‘Search orders’.

CHA-3.25.4.20 Channel/CSR light application shall filter list of orders selected according to user role.

CHA-3.25.4.20.1 Channel/CSR light application shall allow a user accessing to orders he has submitted.

CHA-3.25.4.20.2 Channel/CSR light application shall allow a dealer administrator accessing to any orders submitted by a user he can access to.

CHA-3.25.4.30 Channel/CSR light application shall display in the list the order submission date, the order purchase number, the order self service number.

CHA-3.25.4.40 Channel/CSR light application shall allow user searching orders by a combination of following criteria.

CHA-3.25.4.40.1 Channel/CSR light application shall support searching orders submitted during a period of time (from date to date).

CHA-3.25.4.40.2 Channel/CSR light application shall initialize this period of time by default to now minus one week.

CHA-3.25.4.40.3 Channel/CSR light application shall support searching orders by order status.

CHA-3.25.4.40.4 Channel/CSR light application shall support searching orders by order self service reference.

CHA-3.25.4.60 Channel/CSR light application shall support configuring at design time the maximum number of orders that can be retrieved.

CHA-3.25.4.70 Channel/CSR light application shall allow user viewing a submitted order with respect of use case view order.

CHA-3.25.4.80 Channel/CSR light application shall display order similarly as in review order use case in checkout domain plus the order status and the order self service reference.

Capability 1 Subscriber life cycle management

### Capability Description

This capability allows user to suspend, resume, fraud lock, unlock and disconnect subscriber



### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Suspend subscriber

|  |  |  |
| --- | --- | --- |
| Suspend subscriber | | CLM0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to suspend a subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option to suspend the subscriber | |
| Minimum guarantees | Channel/CSR light application advises user why subscriber can’t be suspended | |
| Success guarantees: | Subscriber suspension order has been created in billing | |
| Normal Flow: | 1. User set suspension date time, suspension reason (selected from list) and submits (A1)(A2) 2. Channel/CSR light application displays which RC/NRC will continue to be billed, engagement duration impact and requests user to confirm 3. User confirms (A3) 4. Channel/CSR light application submits the suspension request to billing | |
| Alternative Flows: | A1: Subscriber can’t be suspended (see detailed requirements)   1. Channel/CSR light displays reason why subscriber can’t be suspended   A2: User wants to already specify the resume date   1. User set suspension date, suspension reason (selected from list), resume date time and submits 2. Next step is similar to step 2 of nominal case   A3: User cancels   1. Channel/CSR light application redirects user to the subscriber summary | |

#### Use Case: Resume subscriber

|  |  |  |
| --- | --- | --- |
| Resume subscriber | | CLM0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to resume a subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option to resume the subscriber | |
| Minimum guarantees | Channel/CSR light application advises user why subscriber can’t be suspended | |
| Success guarantees: | Subscriber resume order has been created in billing | |
| Normal Flow: | 1. User set resume date time, resume reason (selected from list) and submits (A1) 2. Channel/CSR light application requests user to confirm 3. User confirms (A2) 4. Channel/CSR light application submits the resume request to billing | |
| Alternative Flows: | A1 Subscriber can’t be resumed (see detailed requirements)   1. Channel/CSR light displays reason why subscriber can’t be resumed   A2: User cancels   1. Channel/CSR light application redirects user to the subscriber summary | |

#### Use Case: Fraud lock subscriber

|  |  |  |
| --- | --- | --- |
| Fraud lock subscriber | | CLM0030 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to fraud lock a subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option to fraud lock the subscriber | |
| Minimum guarantees | Channel/CSR light application advises user why subscriber can’t be fraud locked | |
| Success guarantees: | Subscriber is fraud locked in billing | |
| Normal Flow: | 1. User set fraud lock reason (selected from list) and submits (A1) 2. Channel/CSR light application displays which RC/NRC will continue to be billed, engagement duration impact and requests user to confirm 3. User confirms (A2) 4. Channel/CSR light application submits the fraud lock request to billing | |
| Alternative Flows: | A1 Subscriber can’t be fraud locked (see detailed requirements)   1. Channel/CSR light displays reason why subscriber can’t be fraud locked   A2: User cancels   1. Channel/CSR light application redirects user to the subscriber summary | |

#### Use Case: Unlock fraud locked subscriber

|  |  |  |
| --- | --- | --- |
| Unlock Fraud locked subscriber | | CLM0040 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to unlock a fraud locked a subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option to un locked fraud locked subscriber | |
| Minimum guarantees | Channel/CSR light application advises user why subscriber can’t be unlocked | |
| Success guarantees: | Fraud locked Subscriber is unlocked in billing | |
| Normal Flow: | 1. User set unlock reason (selected from list) and submits (A1) 2. Channel/CSR light application requests user to confirm 3. User confirms (A2) 4. Channel/CSR light application submits the unlock request to billing | |
| Alternative Flows: | A1 Subscriber can’t be unlocked (see detailed requirements)   1. Channel/CSR light displays reason why subscriber can’t be unlocked   A2: User cancels   1. Channel/CSR light application redirects user to the subscriber summary | |

#### Use Case: Disconnect subscriber

|  |  |  |
| --- | --- | --- |
| Fraud lock subscriber | | CLM0050 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to disconnect a subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option to disconnect the subscriber | |
| Minimum guarantees | Channel/CSR light application advises user why subscriber can’t be disconnected | |
| Success guarantees: | Disconnect Subscriber order is provisioned in billing | |
| Normal Flow: | 1. User set disconnect reason (selected from list), disconnect date and submits (A1) 2. Channel/CSR light application displays disconnect impacts and potential disconnection charges (refer to use case charge administrative event) 3. Channel/CSR light application asks user if unbilled installment charges must be rolled up to next bill or waived 4. Channel/CSR light application asks user if termination fees must be waived 5. Channel/CSR light application asks user if unmet obligation fees must be waived 6. User set requested information and confirms (A2)(A3) 7. Channel/CSR light application submits the disconnect request to billing | |
| Alternative Flows: | A1 Subscriber can’t be disconnected (see detailed requirements)   1. Channel/CSR light displays reason why subscriber can’t be disconnected   A2: User cancels   1. Channel/CSR light application redirects user to the subscriber summary   A3: charge associated to disconnect event has been found   1. Channel/CSR light will ask the user if he wants to waive it | |

Channel/CSR light application requirements

CHA-3.26.4.10 Channel/CSR light application shall allow user suspending a subscriber with respect of use case suspend subscriber

CHA-3.26.4.20 Channel/CSR light application shall validate the subscriber can be suspended

CHA-3.26.4.20.1 Channel/CSR light application shall validate the current subscriber billing status allows to transition to suspend state

CHA-3.26.4.20.2 When integrated with Comverse one billing, current subscriber billing status shall be Active.

CHA-3.26.4.20.3 Channel/CSR light shall support configuring which subscriber statuses allows to transition to suspend state

CHA-3.26.4.20.4 Channel/CSR light shall validate there is no other pending life cycle order preventing the suspension (typically an already suspend subscriber order)

CHA-3.26.4.20.5 Channel/CSR light shall display reason why the subscriber can’t be suspended

CHA-3.26.4.30 Channel/CSR light application shall allow user to set the suspension reason

CHA-3.26.4.30.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.40 Channel/CSR light application shall force user to set the suspension start date

CHA-3.26.4.40.1 Channel/CSR light application shall propose by default the current date time

CHA-3.26.4.40.2 Channel/CSR light application shall not allow user setting a suspension date time in the past

CHA-3.26.4.50 Channel/CSR light application shall allow user to set a resume date when suspending a subscriber

CHA-3.26.4.50.1 Channel/CSR light application shall validate the resume date is not before the suspension date

CHA-3.26.4.60 Channel/CSR light application shall allow user resuming a subscriber with respect of use case resume subscriber

CHA-3.26.4.70 Channel/CSR light application shall validate the subscriber can be resumed

CHA-3.26.4.70.1 Channel/CSR light application shall validate either one of the following conditions is true: the current subscriber billing status is suspended, there is a pending or in progress suspend order

CHA-3.26.4.70.2 Channel/CSR light shall support configuring which subscriber statuses identified a ‘suspended’ subscriber

CHA-3.26.4.70.3 Channel/CSR light shall validate there is no other pending life cycle order preventing to resume the subscriber (typically an already resume subscriber order)

CHA-3.26.4.70.5 Channel/CSR light shall display reason why the subscriber can’t be resumed

CHA-3.26.4.80 Channel/CSR light application shall allow user to set the resume reason

CHA-3.26.4.80.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.90 Channel/CSR light application shall force user to set the resume date

CHA-3.26.4.90.1 If there is no pending or in progress suspend subscriber order, Channel/CSR light application shall propose by default the current date time

CHA-3.26.4.90.2 If there is already a pending or in progress suspend subscriber order, Channel/CSR light application shall propose by default the suspend date

CHA-3.26.4.90.3 Channel/CSR light application shall not allow user setting a resume date time in the past

CHA-3.26.4.90.4 Channel/CSR light application shall not allow user setting a resume date before suspend date of in progress or pending suspend subscriber order (for the same subscriber)

CHA-3.26.4.100 Channel/CSR light application shall allow user fraud locking a subscriber with respect of use case fraud lock subscriber

CHA-3.26.4.110 Channel/CSR light application shall validate the subscriber can be fraud locked

CHA-3.26.4.110.1 Channel/CSR light application shall validate the current subscriber billing status allows to transition to fraud lock state

CHA-3.26.4.110.2 When integrated with Comverse one billing, current subscriber billing status shall be Active or Suspended

CHA-3.26.4.110.3 Channel/CSR light shall support configuring which subscriber statuses allows to transition to fraud lock state

CHA-3.26.4.110.4 Channel/CSR light shall validate there is no other pending life cycle order preventing to fraud lock the subscriber (typically an already fraud lock subscriber order)

CHA-3.26.4.110.4 Channel/CSR light shall display reason why the subscriber can’t be fraud locked

CHA-3.26.4.120 Channel/CSR light application shall allow user to set the fraud lock reason

CHA-3.26.4.120.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.130 Channel/CSR light application shall allow user unlocking a fraud locked subscriber with respect of use case unlock fraud locked subscriber

CHA-3.26.4.140 Channel/CSR light application shall validate the subscriber can be unlocked

CHA-3.26.4.140.1 Channel/CSR light application shall validate the current subscriber billing status allows to unlocked a subscriber

CHA-3.26.4.140.2 When integrated with Comverse one billing, current subscriber billing status shall be fraud locked

CHA-3.26.4.140.3 Channel/CSR light shall support configuring which subscriber statuses allows to unlock a fraud locked subscriber

CHA-3.26.4.140.4 Channel/CSR light shall validate there is no other pending life cycle order preventing to unlock the subscriber (typically an already unlock subscriber order)

CHA-3.26.4.140.5 Channel/CSR light shall display reason why the subscriber can’t be unlocked

CHA-3.26.4.150 Channel/CSR light application shall allow user to set the unlock reason

CHA-3.26.4.150.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.160 Channel/CSR light application shall allow user disconnecting a subscriber with respect of use case disconnect subscriber

CHA-3.26.4.170 Channel/CSR light application shall validate the subscriber can be disconnected

CHA-3.26.4.170.1 Channel/CSR light application shall validate the current subscriber billing status allows to transition to disconnect state

CHA-3.26.4.170.2 When integrated with Comverse one billing, current subscriber billing status shall be Active, Suspended or Fraud locked

CHA-3.26.4.170.3 Channel/CSR light shall support configuring which subscriber statuses allows to transition to disconnected

CHA-3.26.4.170.4 Channel/CSR light shall validate there is no other pending life cycle order preventing to disconnect the subscriber (typically an already disconnect subscriber order)

CHA-3.26.4.170.4 Channel/CSR light shall display reason why the subscriber can’t be disconnected

CHA-3.26.4.180 Channel/CSR light application shall allow user to set the disconnect reason

CHA-3.26.4.180.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.190 Channel/CSR light application shall allow user to set the disconnect reason

CHA-3.26.4.190.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.26.4.200 Channel/CSR light shall display impact of disconnecting the subscriber (when the disconnection date will be reached)

CHA-3.26.4.200.1 Channel/CSR light shall display prepaid balances that will be confiscated

CHA-3.26.4.200.2 Channel/CSR light shall display accumulators that will be lost

CHA-3.26.4.200.3 Channel/CSR light shall display unbilled installment charges that will be billed on the final bill

CHA-3.26.4.200.4 Channel/CSR light shall display Subscriber engagement termination fees that will be applied

CHA-3.26.4.200.5 Channel/CSR light shall display Subscriber engagement unmet obligation fees that will be applied

CHA-3.26.4.210 Channel/CSR light shall propose user to waive unbilled installment charges

CHA-3.26.4.210.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.26.4.210.2 Channel/CSR light shall not display this option is there is no unbilled installment charges

CHA-3.26.4.220 Channel/CSR light shall propose user to waive Termination fees

CHA-3.26.4.220.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.26.4.220.2 Channel/CSR light shall not display this option is there is no termination fee to apply

CHA-3.26.4.230 Channel/CSR light shall propose user to waive unmet obligation fees

CHA-3.26.4.230.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.26.4.230.2 Channel/CSR light shall not display this option is there is no unmet obligation fee to apply

CHA-3.26.4.500 When integrated with Comverse one, Channel/CSR light application shall allow configuring if a workflow must be generated (default configuration) or not

Capability 1 Account life cycle management

### Capability Description

This capability allows user to disconnect one account

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Disconnect account

|  |  |  |
| --- | --- | --- |
| Disconnect account | | AML0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This Use Case allows user to disconnect an account | |
| Pre-conditions | User is in context of a specific account | |
| Trigger | User has selected the option to disconnect the account | |
| Minimum guarantees | Channel/CSR light application advises user why account can’t be disconnected | |
| Success guarantees: | Account disconnect order has been created in billing | |
| Normal Flow: | 1. User set disconnect date time, disconnect reason (selected from list) and submits (A1) 2. Channel/CSR light application displays impacts for the accounts and for all subscribers that will be disconnected 3. User confirms(A2) 4. User specifies optionally a final billing address (A3) 5. Channel/CSR light application asks user if unbilled installment charges must be rolled up to next bill or waived 6. Channel/CSR light application asks user if refinance plan must be rolled up or billed as schedule 7. Channel/CSR light application asks user if termination fees must be waived 8. Channel/CSR light application asks user if unmet obligation fees must be waived 9. User set requested information and confirms (A2) 10. Channel/CSR light application submits the account disconnect request to billing | |
| Alternative Flows: | A1: Account can’t be disconnected (see detailed requirements)   1. Channel/CSR light displays reason why account can’t be disconnected   A2: User cancels   1. Channel/CSR light application redirects user to the account summary   A3: there is a pending address modification request for the account:   1. Channel/CSR light application advises user there is a pending address modification instead of proposing to change the address 2. Next steps are similar to nominal cases | |

Channel/CSR light application requirements

CHA-3.27.4.10 Channel/CSR light application shall allow user disconnecting one account with respect of use case disconnect account

CHA-3.27.4.20 Channel/CSR light application shall validate the account can be disconnected

CHA-3.27.4.20.1 Channel/CSR light application shall validate the current account billing status allows to transition to disconnect state

CHA-3.27.4.20.2 When integrated with Comverse one billing, current account billing status shall be Active

CHA-3.27.4.20.3 Channel/CSR light shall support configuring which account statuses allows to transition to disconnected

CHA-3.27.4.20.4 Channel/CSR light shall validate there is no child accounts in a status different from disconnected

CHA-3.27.4.20.5 Channel/CSR light shall validate there is no account/offers prerequisite rules preventing account disconnection

CHA-3.27.4.20.6 Channel/CSR light shall validate there is no other pending life cycle order preventing to disconnect the account (typically an already disconnect account order)

CHA-3.27.4.20.7 Channel/CSR light shall display reason why the account can’t be disconnected

CHA-3.27.4.30 Channel/CSR light application shall allow user to set the disconnect reason

CHA-3.27.4.30.1 When integrated with Comverse one billing, Channel/CSR light application shall propose OOTB same reasons as the ones proposed in CSM

CHA-3.27.4.40 Channel/CSR light application shall propose current date time as default to disconnect the account

CHA-3.27.4.50 Channel/CSR light shall display impact of disconnecting the account both for the account and for subscribers that will be disconnected (when the disconnection date will be reached)

~~CHA-3.27.4.50.1 Channel/CSR light application shall display list of subscribers that will be disconnected~~

CHA-3.27.4.50.2 Channel/CSR light shall display prepaid balances that will be confiscated (account balances and account’s subscribers’ balances)

CHA-3.27.4.50.3 Channel/CSR light shall display accumulators that will be lost

CHA-3.27.4.50.4 Channel/CSR light shall display unbilled installment charges that will be billed on the final bill

CHA-3.27.4.50.5 Channel/CSR light shall display refinance plans still due

~~CHA-3.27.4.50.6 Channel/CSR light shall display Subscriber engagement termination fees that will be applied~~

~~CHA-3.27.4.50.7 Channel/CSR light shall display Subscriber engagement unmet obligation fees that will be applied~~

CHA-3.27.4.60 Channel/CSR light shall propose user to waive unbilled installment charges

CHA-3.27.4.60.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.27.4.60.2 Channel/CSR light shall not display this option is there is no unbilled installment charges

CHA-3.27.4.60 Channel/CSR light shall propose user to waive Termination fees

CHA-3.27.4.60.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.27.4.60.2 Channel/CSR light shall not display this option is there is no termination fee to apply

CHA-3.27.4.70 Channel/CSR light shall propose user to waive unmet obligation fees

CHA-3.27.4.70.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.27.4.70.2 Channel/CSR light shall not display this option is there is no unmet obligation fee to apply

CHA-3.27.4.80 Channel/CSR light shall propose user to Billed refinance plan as initially scheduled (default option) or to roll them up to final bill

CHA-3.27.4.80.1 Channel/CSR light shall support configuring (at least at application level) if this option is available

CHA-3.27.4.80.2 Channel/CSR light shall not display this option is there is no refinance plan still due

CHA-3.27.4.90 Channel/CSR light shall propose user to set a final billing address

CHA-3.27.4.100 When integrated with Comverse one, Channel/CSR light application shall allow configuring if a workflow must be generated (default configuration) or not

Capability 1 Account/subscriber activity history view

### Capability Description

This capability provides all use cases to allow a user analyzing account/subscriber activity history

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View usage history

|  |  |  |
| --- | --- | --- |
| View usage history | | ACA0010 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view usage history for account’s subscribers | |
| Pre-conditions | User is in account or subscriber context | |
| Trigger | The user has chosen to view usage history | |
| Minimum guarantees | Channel application will prevent retrieving too many calls (configurable) | |
| Success guarantees: | Channel/CSR light Application displays usage history | |
| Normal Flow: | 1. Channel CSR/light displays search criteria to the user 2. User set criteria 3. Channel/CSR light application get usage history for the account/subscriber and matching entered criteria (A1)(A2) 4. Channel/CSR light application displays the list of returned calls(A3) | |
| Alternative Flows: | A1. There is no usage history matching the entered criteria   1. Channel/CSR light application displays a call informing user there is no usage founds   A2. Channel/CSR light application can’t get usage due to technical reasons   1. Channel/CSR light application display a message informing user the service is temporally unavailable and to try later   A3. There are two records matching set criteria:   1. Channel/CSR light displays a message informing user there are two many calls to display and he should refines his criteria | |

#### Use Case: View MTR history

|  |  |  |
| --- | --- | --- |
| View MTR history | | ACA0020 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user to view MTR history for a specific account or subscriber | |
| Pre-conditions | User is in the context of an account or of a subscriber | |
| Trigger | User has selected the view MTR option | |
| Minimum guarantees | Channel application will prevent retrieving too many MTR records (configurable) | |
| Success guarantees: | Channel/CSR light Application displays MTR history | |
| Normal Flow: | 1. User set criteria to retrieve MTR records and submit 2. Channel/CSR light application get the list of records according to set criteria (A1)(A2) 3. Channel/CSR light application displays the list of selected MTR records (A3)(A4) | |
| Alternative Flows: | A1. There is no records matching set criteria   1. Channel/CSR light application displays a call informing user there is no record matching set criteria   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later   A3: There are two many records to return   1. Channel CSR light returns max numbers of records and displays a warning specifying there are more results available but user should refine his criteria   A4: user selects one MTR   1. Channel CSR light displays impact on balances (if any) | |

#### Use Case : View RC history

|  |  |  |
| --- | --- | --- |
| View RC history | | ACA0030 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view RC history for a specific account or subscriber | | |
| Pre-conditions: | * The user is in the context of an account or subscriber | | |
| Trigger: | User selects the option to view RC history | | |
| Minimum guarantees: | Channel/CSR light application informs user if there is no RC | | |
| Success guarantees: | Channel/CSR light application displays RC history | | |
| Normal Flow: | 1. User set criteria to retrieve RC history and submits 2. Channel/CSR light application fetches in billing system list of RC matching criteria 3. Channel/CSR light application displays RC history (A1)(A2)(A3) | | |
| Alternative Flows: | A1: Application can’t access to the service for technical reason   1. Channel/CSR light informs user service is temporally unavailable and to try later   A2: There is no RC to display   1. Channel/CSR light informs user there is no term to display   A3: There are two many rows returned   1. Channel/CSR light advises user there are two many rows selected and he should refine his criteria | | |

#### Use Case : View NRC history

|  |  |  |
| --- | --- | --- |
| View NRC history | | ACA0040 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view NRC history for a specific account or subscriber | | |
| Pre-conditions: | * The user is in the context of an account or subscriber | | |
| Trigger: | User selects the option to view NRC history | | |
| Minimum guarantees: | Channel/CSR light application informs user if there is no NRC | | |
| Success guarantees: | Channel/CSR light application displays NRC history | | |
| Normal Flow: | 1. User set criteria to retrieve NRC history and submits 2. Channel/CSR light application fetches in billing system list of NRC matching criteria 3. Channel/CSR light application displays NRC history (A1)(A2)(A3) | | |
| Alternative Flows: | A1: Application can’t access to the service for technical reason   1. Channel/CSR light informs user service is temporally unavailable and to try later   A2: There is no NRC to display   1. Channel/CSR light informs user there is no term to display   A3: There are two many rows returned   1. Channel/CSR light advises user there are two many rows selected and he should refine his criteria | | |

#### Use Case : View subscriber combined history

|  |  |  |
| --- | --- | --- |
| View subscriber combined history | | ACA0050 |
| Primary actors | Dealer User  CSR user | | |
| Summary: | This use case allows a user to view subscriber history of all transactions billed or unbilled applied to a balance (MTR, Recharge, RC, NRC, adjustments and usage) | | |
| Pre-conditions: | * The user is in the context of a subscriber | | |
| Trigger: | User selects the option to view combined history | | |
| Minimum guarantees: | Channel/CSR light application informs user if there is no transactions for specified criteria | | |
| Success guarantees: | Channel/CSR light application displays transactions history | | |
| Normal Flow: | 1. User set criteria to retrieve transaction history and submits 2. Channel/CSR light application fetches in billing system transactions matching criteria 3. Channel/CSR light application displays transactions history (A1)(A2)(A3)(A4) | | |
| Alternative Flows: | A1: Application can’t access to the service for technical reason   1. Channel/CSR light informs user service is temporally unavailable and to try later   A2: There is no transaction to display   1. Channel/CSR light informs user there is no transaction to display   A3: There are two many rows returned   1. Channel/CSR light advises user there are two many rows selected and he should refine his criteria   A4: User selects one row:   1. Channel/CSR light displays details of the transaction depending on its type | | |

Channel/CSR light application requirements

CHA-3.28.4.10 Channel/CSR light application shall allow user to view usage history for one account or a specific subscriber with respect of use case view usage history.

CHA-3.28.4.10.1 Channel/CSR light application shall propose several filter criteria to user

CHA-3.28.4.10.1.1 Channel/CSR light application shall support filtering usage by one or more subscribers (optional criteria)

CHA-3.28.4.10.1.2 Channel/CSR light application shall support filtering usage by one or more usage type (optional criteria)

CHA-3.28.4.10.1.3 Channel/CSR light application shall support filtering usage for a period of time (mandatory criteria)

CHA-3.28.4.10.1.4 Channel/CSR light application shall propose by default the current date and minus a configurable number of day (five by default)

CHA-3.28.4.10.2 Channel/CSR light application shall support configuring at design time the maximum number of calls that can be retrieved

CHA-3.28.4.10.3 Channel/CSR light application shall display for every call: Call date time, Service name (i.e. FAUT application name) Usage type, Subscriber primary identifier, origin, target, unit type and quantity, amount.

CHA-3.28.4.10.4 Channel/CSR light application shall allow defining a mask to apply on origin and target for confidentiality reason. This mask could be different in Channel and CSR light

CHA-3.28.4.10.5 Channel/CSR light application shall allow user grouping calls by service usage type, subscriber and unit type and sum number of calls (or record) and amount (i.e. pre credit amount)

CHA-3.28.4.10.7 Channel/CSR light application shall allow user sorting calls on any attribute

CHA-3.24.4.190 Channel/CSR light application shall allow user to display unbilled MTR for a specific account with respect of use case View ‘unbilled’ MTR

CHA-3.24.4.190.1 Channel/CSR light application shall display for every MTR record, the MTR type, the transaction date and the subscriber primary external id when relevant

CHA-3.24.4.190.2 Channel/CSR light application shall allow user to access to detail of one MTR with for every MTR record, the charge amount, write off amount, grant amount, bonus item, bonus awarded, discount item, discount awarded, plus the list of impacted balances

CHA-3.24.4.190.3 Channel/CSR light application shall display for every impacted balance, the balance name, transaction impact and new balance value

CHA-3.28.4.20 Channel/CSR light application shall allow user to display MTR history for a specific account/subscriber with respect of use case View MTR history

CHA-3.28.4.20.1 Channel/CSR light application shall support configuring at design time the maximum number of MTR records that can be retrieved

CHA-3.28.4.20.2 Channel/CSR light application shall display for every MTR record, the MTR type, the transaction date and the subscriber primary external id when relevant

CHA-3.28.4.20.3 Channel/CSR light application shall allow user to access to detail of one MTR with for every MTR record, the charge amount, write off amount, grant amount, bonus item, bonus awarded, discount item, discount awarded, plus the list of impacted balances

CHA-3.28.4.20.4 Channel/CSR light application shall display for every impacted balance, the balance name, transaction impact and new balance value

CHA-3.28.4.20.5 Channel/CSR light application shall allow user filtering MTR records by period of time (from date time, to date time)

CHA-3.28.4.20.6 Channel/CSR light application shall allow configuring at application level default period of time (from now) to process the search (default will be 5 days)

CHA-3.28.4.30 Channel/CSR light application shall allow user to display RC history for a specific account or subscriber with respect of use case View RC history

CHA-3.28.4.30.1 Channel/CSR light application shall support configuring at design time the maximum number of RC that can be retrieved

CHA-3.28.4.30.2 Channel/CSR light application shall display for every RC the RC display value, RC apply date, Subscriber primary external id when relevant and RC amount and currency

CHA-3.28.4.30.3 Channel/CSR light application shall allow user filtering RC records by period of time (from date time, to date time)

CHA-3.28.4.30.4 Channel/CSR light application shall allow configuring at application level default period of time (from now) to process the search (default will be 5 days)

CHA-3.28.4.40 Channel/CSR light application shall allow user to display NRC history for a specific account or subscriber with respect of use case View NRC history

CHA-3.28.4.40.1 Channel/CSR light application shall support configuring at design time the maximum number of NRC that can be retrieved

CHA-3.28.4.40.2 Channel/CSR light application shall display for every NRC the NRC display value, NRC apply date, Subscriber primary external id when relevant and NRC amount and currency

CHA-3.28.4.40.3 Channel/CSR light application shall allow user filtering NRC records by period of time (from date time, to date time)

CHA-3.28.4.40.4 Channel/CSR light application shall allow configuring at application level default period of time (from now) to process the search (default will be 5 days)

CHA-3.28.4.50 Channel/CSR light application shall display transactions combined history for a specific subscriber with respect of use case ‘View subscriber combined history’

CHA-3.28.4.50.1 Channel/CSR light application shall allow configuring at desing time the maximum number of transactions that will be displayed

CHA-3.28.4.50.2 Channel/CSR light application shall display for every transaction the transaction type, the transaction FAUT when applicable, the transaction description, the transaction unit value and type when applicable, the amount charged to the core balance, the value of the core balance after the transaction, the total monetary amount of the transaction, the total non monetary amount and unit type of the transaction.

CHA-3.28.4.50.2.1 for usage, Channel/CSR light application shall display the usage application display value as transaction type or ‘usage’ if application id is null

CHA-3.28.4.50.2.2 for MTR, Channel/CSR light application shall display the MTR type/subtype as transaction type

CHA-3.28.4.50.2.3 for RC, NRC, Recharges and adjustments, Channel/CSR light application shall display static localized strings ‘RC’, ’NRC’, ’Recharge’, ‘adjustments’ as transaction type

CHA-3.28.4.50.2.4 Channel/CSR light application shall display FAUT value for usage transactions and null otherwise

CHA-3.28.4.50.2.5 Channel/CSR light application shall display in description column NRC/RC display value for NRC/RC transaction, Adjustments description for adjustments, b-number for usage transactions and null for other transaction types

CHA-3.28.4.50.2.6 Channel/CSR light application shall display units and unit type only for usage transactions and null otherwise

CHA-3.28.4.50.2.7 Channel/CSR light application shall display total non monetary amount value if transaction impacts non monetary balances of the same type, ‘see detail’ if the transaction impacts non monetary balances of different unit type, null if the transaction doesn’t impact any non monetary balances

CHA-3.28.4.50.3 Channel/CSR light application shall support sorting transactions by type and date

CHA-3.28.4.50.4 Channel/CSR light application shall support grouping/ungrouping transactions by type and sum the impact on the core balance and the total monetary amount of transactions

CHA-3.28.4.50.5 Channel/CSR light application shall support searching transaction by transaction date (from date to date), transaction type, Application id and 0 amount transaction (yes/no)

~~CHA-3.28.4.50.5.1 Channel/CSR light application shall propose selecting FAUT by first selecting application~~

CHA-3.28.4.50.5.2 Channel/CSR light application shall propose by default current date for today criteria minus a configurable number of days for from date criteria.(default will be 5 days)

CHA-3.28.4.50.6 Channel/CSR light application shall support printing and exporting as CSV selected transactions

CHA-3.28.4.50.7 Channel/CSR light application shall support filtering returned transaction by FAUT found in returned transactions

Capability 1 Usage and charge adjustment

### Capability Description

This capability allows user to view usage and charge adjustment, to create new one and delete or reverse them.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View adjustments appearing on one invoice

|  |  |  |
| --- | --- | --- |
| View adjustments appearing on one invoice | | UCD0010 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user viewing adjustments created previously and appearing in a specific invoice | |
| Pre-conditions | User is in the context of one invoice | |
| Trigger | User has selected the option to view adjustments appearing on the invoice | |
| Minimum guarantees | Channel application will display a message informing user there is no adjustments appearing on this invoice | |
| Success guarantees: | Channel/CSR light application displays adjustments appearing on the invoice | |
| Normal Flow: | 1. Channel/CSR light application displays list of adjustments appearing on the invoice (A1)(A2) | |
| Alternative Flows: | A1. There is no adjustments for the invoice   1. Channel/CSR light application displays a message informing user there is no adjustments for the invoice   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: View account unbilled adjustments

|  |  |  |
| --- | --- | --- |
| View account unbilled adjustments | | UCD0020 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user viewing unbilled adjustments for a specific account | |
| Pre-conditions | User is in the context of one account | |
| Trigger | User has selected the option to view unbilled adjustments for a specific account | |
| Minimum guarantees | Channel application will display a message informing user there is no unbilled adjustments for this account | |
| Success guarantees: | Channel/CSR light Application displays unbilled adjustments | |
| Normal Flow: | 1. Channel/CSR light application displays list of unbilled adjustments for the account (A1)(A2) | |
| Alternative Flows: | A1. There is no unbilled adjustments for the account   1. Channel/CSR light application displays a message informing user there is no unbilled adjustments for the account   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### ~~Use Case: View invoice originally created adjustments~~

|  |  |  |
| --- | --- | --- |
| ~~View invoice originally created adjustments~~ | | ~~UCD0030~~ |
| ~~Primary actors~~ | ~~Dealer user~~  ~~CSR user~~ | |
| ~~Summary Goal~~ | ~~This use case allows a user viewing adjustments originally created for one invoice~~ | |
| ~~Pre-conditions~~ | ~~User is in the context of one invoice~~ | |
| ~~Trigger~~ | ~~User has selected the option to view adjustments originally created on one invoice~~ | |
| ~~Minimum guarantees~~ | ~~Channel application will display a message informing user there is no adjustments created for this invoice~~ | |
| ~~Success guarantees:~~ | ~~Channel/CSR light Application displays all adjustments created on invoice balances, RC/NRC and Usage of a specific invoice~~ | |
| ~~Normal Flow:~~ | 1. ~~Channel/CSR light application displays list of adjustments created for the invoice~~ | |
| ~~Alternative Flows:~~ | ~~A1. There is no adjustments created for the invoice~~   1. ~~Channel/CSR light application displays a message informing user there is no created adjustments for the invoice~~   ~~A2. Channel/CSR light application can’t access to records due to technical reasons~~   1. ~~Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later~~ | |

#### Use Case: View invoice balance,/usage,/charge adjustments

|  |  |  |
| --- | --- | --- |
| View invoice balance/usage/charge adjustments | | UCD0040 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user viewing adjustments for a specific invoice balance or specific billed/unbilled usage record, or for a specific billed/unbilled RC/NRC | |
| Pre-conditions | User is in the context of an invoice balance or of a billed/unbilled usage record or of a billed/unbilled RC/NRC | |
| Trigger | User has selected the option to view adjustments | |
| Minimum guarantees | Channel application will display a message informing user there is no adjustments created for this entity | |
| Success guarantees: | Channel/CSR light Application displays adjustments | |
| Normal Flow: | 1. Channel/CSR light application displays list of adjustments created for the selected entity | |
| Alternative Flows: | A1. There is no adjustments created for the selected entity   1. Channel/CSR light application displays a message informing user there is no created adjustments for the entity   A2. Channel/CSR light application can’t access to records due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: View adjustment detail

|  |  |  |
| --- | --- | --- |
| View adjustment detail | | UCD0050 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user viewing detail of a specific usage/charge adjustment | |
| Pre-conditions | User is viewing adjustments list | |
| Trigger | User has selected the option to view adjustment detail | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application displays adjustment detail | |
| Normal Flow: | 1. Channel/CSR light application displays adjustment details | |
| Alternative Flows: |  | |

#### Use Case: Create invoice balance/usage/charge adjustment

|  |  |  |
| --- | --- | --- |
| Create invoice balance/usage/charge adjustment | | UCD0060 |
| Primary actors | CSR user | |
| Summary Goal | This use case allows a user creating a new adjustment for a specific invoice balance, usage record (billed/unbilled), RC or NRC (billed/unbilled) | |
| Pre-conditions | User is viewing adjustments list | |
| Trigger | User has selected the option to add adjustment | |
| Minimum guarantees | Channel application prevents user of creating a new adjustment if adjustable amount is null | |
| Success guarantees: | Channel/CSR light Application creates a new adjustment | |
| Normal Flow: | 1. Channel/CSR light application displays entity initial amount, total of adjustments already created for this entity and the total adjustable amount (A1) 2. User specifies the adjustment type, the adjustment reason, annotation (optional), and the adjustment amount (with adjustment calculation method) 3. Channel/CSR light application displays adjustment calculated amount and request user confirmation (A3)(A4) 4. Use confirms (A2) 5. Channel/CSR light application confirms adjustment has been created and redirects user to the adjustment list showing the new adjustment (A5) | |
| Alternative Flows: | A1: the authorized amount to adjust is null   1. Channel/CSR light application displays an error message to inform user he can’t adjust the entity.   A2: User cancels   1. Channel/CSR light application redirects user to the adjustments list   A3: According to adjustment amount and user configuration, adjustment need to be approved by supervisor   1. Channel/CSR light application requests user confirmation and advises him, adjustment will need to be approved by supervisor   A4: User has entered an invalid amount   1. Channel/CSR light informs user the entered amount is too large   A5: Channel/CSR lights can’t create the adjustment   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: Delete adjustment

|  |  |  |
| --- | --- | --- |
| Delete adjustment | | UCD0070 |
| Primary actors | CSR user | |
| Summary Goal | This use case allows a user deleting an unbilled adjustment created for an invoice balance, usage and RC/NRC | |
| Pre-conditions | User is in the context of an unbilled adjustment | |
| Trigger | User has selected the option to delete the adjustment | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application deletes the adjustment | |
| Normal Flow: | 1. Channel/CSR light application requests user confirmation to delete the adjustment 2. User confirms (A1) 3. Channel/CSR light application deletes the adjustment 4. Channel/CSR light confirms adjustment has been deleted and redirects user to the adjustments list (A2) | |
| Alternative Flows: | A1: user cancels   1. Channel/CSR light redirects user to the previous steps before entering in the use case   A2: Channel/CSR light can’t delete the adjustment   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: Reverse adjustment

|  |  |  |
| --- | --- | --- |
| Reverse adjustment | | UCD0080 |
| Primary actors | CSR user | |
| Summary Goal | This use case allows a user reversing a billed adjustment created for an invoice balance, usage and RC/NRC | |
| Pre-conditions | User is in the context of a billed adjustment | |
| Trigger | User has selected the option to reverse the adjustment | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application reverses the adjustment | |
| Normal Flow: | 1. User selects the reason to reverse the adjustment 2. Channel/CSR light application requests user confirmation to reverse the adjustment 3. User confirms (A1) 4. Channel/CSR light application reverses the adjustment 5. Channel/CSR light confirms adjustment has been reversed and redirects user to the adjustments list (A2) | |
| Alternative Flows: | A1: user cancels   1. Channel/CSR light redirects user to the previous steps before entering in the use case   A2: Channel/CSR light can’t delete the adjustment   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

Channel/CSR light application requirements

CHA-3.29.4.10 Channel/CSR light application shall display adjustments appearing on a specific invoice with respect of use case view adjustments appearing on one invoice

CHA-3.29.4.10.1 Channel/CSR light application shall display for every adjustment, the adjustment label appearing on the invoice, the adjustment date, adjustment amount (without tax) and tax.

CHA-3.29.4.20 Channel/CSR light application shall display unbilled adjustments for a specific account with respect of use case view account unbilled adjustments

CHA-3.29.4.20.1 Channel/CSR light application shall display for every adjustment, the adjustment type, the adjustment reason, the effective date, the original invoice reference if any, the amount (without tax) and tax

~~CHA-3.29.4.30 Channel/CSR light application shall display invoice originally created adjustments with respect of use case view invoice originally created adjustments~~

~~CHA-3.29.4.30.1 Channel/CSR light application shall display for every adjustment, the adjustment type, the adjustment reason, the effective date, the amount (without tax) and tax~~

CHA-3.29.4.40 Channel/CSR light application shall display created adjustments for invoice balance, usage, RC and NRC with respect of use case view invoice balance/usage/charge adjustments

CHA-3.29.4.40.1 Channel/CSR light application shall display for every adjustment, the adjustment type, the adjustment reason, the effective date, the amount (without tax) and the tax

CHA-3.29.4.50 Channel/CSR light application shall display adjustment detail with respect of use case view adjustment detail

CHA-3.29.4.50.1 Channel/CSR light application shall display for every adjustment, the adjustment type, the adjustment reason, the adjustment status, the submitter user, the reviewer user, the review date, annotation if any, the adjusted amount, if the adjustment is billed or not and if billed the invoice number.

CHA-3.29.4.60 Channel/CSR light application shall allow user to create a new adjustment for an invoice balance, a specific billed/unbilled usage record and a specific billed/unbilled RC/NRC with respect of use case Create invoice balance/usage/charge adjustment

CHA-3.29.4.60.1 Channel/CSR light application shall propose the correct list of adjustment types according to adjustment types configuration in product catalog and entity selected

CHA-3.29.4.60.2 Channel/CSR light application shall propose the same list of adjustment reasons as the one configured in the product catalog

CHA-3.29.4.60.3 Channel/CSR light application shall always force user entering a positive value whatever the adjustment is positive or negative

CHA-3.29.4.60.4 For an invoice balance, Channel/CSR light shall allow user to enter directly the amount value and to enter a percentage of the adjustable amount

CHA-3.29.4.60.5 For an invoice balance, Channel/CSR light shall advise user he has to enter a post tax value

CHA-3.29.4.60.6 For usage, Channel/CSR light shall allow user to enter directly the amount and a percentage and a number of units

CHA-3.29.4.60.7 For RC, Channel/CSR light shall allow user to enter directly the amount and a percentage and a number of days

CHA-3.29.4.60.8 For NRC, Channel/CSR light shall allow user to enter directly the amount and a percentage

CHA-3.29.4.60.9 For RC, Channel/CSR light shall allow user to enter directly the amount and a percentage and a number of days

CHA-3.29.4.60.10 For billed usage, RC and NRC Channel/CSR light shall advise user amount to enter is pre tax.

CHA-3.29.4.70 Channel/CSR light application shall allow user to delete an unbilled adjustment for an invoice balance, a specific usage record and a specific RC/NRC with respect of use case Delete adjustment

CHA-3.29.4.80 Channel/CSR light application shall allow user to reverse a billed adjustment for an invoice balance, a specific usage record and a specific RC/NRC with respect of use case Reverse adjustment

Capability 1 Balance adjustment

### Capability Description

This capability allows user to adjust balance value.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Adjust balance

|  |  |  |
| --- | --- | --- |
| Adjust balance | | ADB0010 |
| Primary actors | CSR user | |
| Summary Goal | This use case allows a user adjusting the balance value | |
| Pre-conditions | User is viewing balance list either at account or subscriber level | |
| Trigger | User has selected the option to adjust a specific balance | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application adjusts the balance value | |
| Normal Flow: | 1. User set the delta value he wants to add or remove from the balance 2. Channel/CSR light displays what will be the new balance value and request confirmation from user 3. User confirms(A1) 4. Channel/CSR light application updates the balance value (A2)(A3)(A4) 5. Channel/CSR light application redirects the user to current context before selecting the balance to adjust and display new balance(s) value | |
| Alternative Flows: | A1: User cancels   1. Channel/CSR light application redirects the user to current context before selecting the balance to adjust   A2: Channel/CSR light application can’t process the update due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later   A3: User has entered a credit and new value is greater then the max balance value:   1. Channel/CSR light application informs user the new balance value can’t be greater then the Max balance value 2. User entered a new value, next steps are similar to nominal case   A4: User has entered a debit and new balance value is lesser then the Min balance value   1. Channel/CSR light application informs user the new balance value can’t be lesser then the Min balance value 2. User entered a new value, next steps are similar to nominal case | |

Channel/CSR light application requirements

CHA-3.30.4.10 Channel/CSR light application shall allow user adjusting value of a real balance at account and subscriber level with respect of use case Adjust balance

Capability 1 Deposit management

### Capability Description

This capability allows user to view already existing deposits and to add a new deposit either during checkout of an order or directly to an existing account

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View deposits

|  |  |  |
| --- | --- | --- |
| View deposits | | DPM0010 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows a user viewing deposits already on the account | |
| Pre-conditions | User is in context of a specific account | |
| Trigger | User has selected the option to view deposits | |
| Minimum guarantees | Channel/CSR light application advises user if there is no deposit on the account | |
| Success guarantees: | Channel/CSR light Application displays deposits associated to the account | |
| Normal Flow: | 1. Channel/CSR light application fetches deposits associated to the account tin billing 2. Channel/CSR light application displays list of deposits associated to the account (A1)(A2) | |
| Alternative Flows: | A1: There is no deposit for the account   1. Channel/CSR light application informs user there is no deposit for the account   A2: Channel/CSR light application can’t get deposits due to technical reasons   1. Channel/CSR light application displays a message informing user the service is temporally unavailable and to try later | |

#### Use Case: Add Deposit

|  |  |  |
| --- | --- | --- |
| Add Deposit | | DPM0020 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows a user adding a deposit either to a new order during checkout or directly to an existing account | |
| Pre-conditions | User is in context of a specific account or user is in the context of checkout process | |
| Trigger | User has selected the option to add a deposit | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application adds the deposit to the order or directly to the account | |
| Normal Flow: | 1. User enters deposit information 2. Channel/CSR light application request confirmation by user (A1) 3. User confirms(A2) 4. Channel/CSR light application provisions deposit in billing 5. Channel/CSR light application displays a confirmation message (A3) 6. Channel/CSR light application redirects user to the view deposits use case | |
| Alternative Flows: | A1: User is in checkout process   1. Channel/CSR light application adds the deposit to the order 2. Channel/CSR light redirects user to the review order use case | |

Channel/CSR light application requirements

CHA-3.31.4.10 Channel/CSR light application shall allow user viewing deposits of a specific account with respect of use case view deposits

CHA-3.31.4.10.1 Channel/CSR light application shall display for every deposit the deposit type, the open item id (if any), the received date, the returned date (if any), the deposit amount and the associated payment method

CHA-3.31.4.20 Channel/CSR light application shall allow user to add a deposit with respect of use case add deposit

CHA-3.31.4.20.1 Channel/CSR light application shall request from user to enter deposit type (mandatory), Open item id (optional), Deposit amount (mandatory), Payment method for the deposit and associated parameter if any

CHA-3.31.4.20.2 Channel/CSR light application shall manage a specific list of payment method supported for deposit

CHA-3.31.4.20.3 When integrated with Comverse one, Channel/CSR light shall support out of the box deposit types defined in PC

CHA-3.31.4.20.4 When integrated with Comverse one, Channel/CSR light shall propose by default payment method supported by billing

CHA-3.31.4.20.5 When integrated with Comverse one and for credit card payment method, Channel/CSR light shall request Credit card authentication number and Credit card authentication date parameters.

Capability 1 Stand alone charge management

### Capability Description

This capability allows user to add stand alone charge on a specific account and subscriber

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: Add stand alone charge

|  |  |  |
| --- | --- | --- |
| Add stand alone charge | | ASC0010 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows a user adding a stand alone charge on an account/subscriber | |
| Pre-conditions | User is in context of a specific account or in context of a specific subscriber | |
| Trigger | User has selected the option to add stand alone charge | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application provisions the NRC on the account/subscriber | |
| Normal Flow: | 1. User selects the event type and the relevant NRC type regarding the selected event type 2. Channel/CSR light application displays the NRC value according to account/subscriber currency 3. User set the effective date (defaulted to current date time) and submit (A1) 4. Channel/CSR light application requests confirmation from user 5. User confirms (A2) 6. Channel/CSR light application provision the NRC on the account/Subscriber 7. Channel/CSR light display a confirmation message(A3) | |
| Alternative Flows: | A1: Stand alone NRC supports installments and user decides to configure them   1. User set the number of installment, the effective date of the first installment and the remaining amount and submits 2. Next steps are similar to nominal case   A2: User cancels   1. Channel/CSR light application redirects user to the use case he was before deciding to add a stand alone charge   A3: Channel/CSR light can’t provision the charge for any reason   1. Channel/CSR light application displays en error message specifying the service is not available and to try later | |

#### Use Case: Charge admin event

|  |  |  |
| --- | --- | --- |
| Charge admin event | | ASC0020 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows advising user that some charge is associated to an administrative event and to allow him to waive it or not | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User is either:  Reconfiguring F&F  Modifying happy hour or special days subscriber attributes  Disconnecting a subscriber | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application provisions the NRC on the account/subscriber | |
| Normal Flow: | 1. User set the event reason 2. Channel/CSR light application fetch billing to identify if there is any charge associated to the billing 3. Channel/CSR light application displays the charge(s) and propose to the user to waive them (A1) 4. User decides to apply the charge (A2) 5. Channel/CSR light application provisions the charge(s) when processing the event | |
| Alternative Flows: | A1: There is no charge associated to the event   1. Use case ends   A2: User waives the charge   1. Channel/CSR light application doesn’t provision the charge when processing the event | |

Channel/CSR light application requirements

CHA-3.32.4.10 Channel/CSR light application shall allow user adding a stand alone charge on a specific account and subscriber with respect of use case Add stand alone charge

CHA-3.32.4.20 when integrated with Comverse one, Channel/CSR light application shall propose to user event types and NRC types declared in Product catalog

CHA-3.32.4.20.1 Channel/CSR light application shall propose relevant NRC types for account and subscriber according to the provisioning level of the NRC types

CHA-3.32.4.30 Channel/CSR light shall allow user configuring installments if max number of installments charge attribute is greater than zero.

CHA-3.32.4.30.1 Channel/CSR light shall validate number of installments set by user is less or equal to the Max number of installments

CHA-3.32.4.30.2 Channel/CSR light shall validate the remaining value is not greater then the charge value

CHA-3.32.4.30.3 Channel/CSR light shall validate the first effective date is greater or equal to the current date.

CHA-3.32.4.40 Channel/CSR light shall apply currency of the account/subscriber

CHA-3.32.4.50 For charge at subscriber level, Channel/CSR light shall apply rating according to subscriber attributes.

CHA-3.32.4.60 Channel/CSR light application shall charge admin event with respect of use case charge admin event

CHA-3.32.4.60.1 Channel/CSR light application shall send the application channel to the billing to retrieve associated charge (channel for channel and CSM for CSR light)

CHA-3.32.4.60.2 Channel/CSR light application shall support disabling at application level and design time the capability of waiving the charge

Capability 1 Get PUK - PBM

This capability allow user retrieving PUK code for a specific subscriber in case of GSM market

#### Use Case: Get PUK

|  |  |  |
| --- | --- | --- |
| Get PUK | | PUK0010 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows a user retrieving PUK code for a specific subscriber | |
| Pre-conditions | User is in context of a specific subscriber | |
| Trigger | User has selected the option Get PUK for a contextual subscriber | |
| Minimum guarantees |  | |
| Success guarantees: | Channel/CSR light Application displays PUK code of a specific subscriber | |
| Normal Flow: | 1. Channel/CSR light application displays the PUK code | |
| Alternative Flows: |  | |

Channel/CSR light application requirements

CHA-3.33.4.10 Channel/CSR light application shall allow user retrieving PUK of a specific subscriber with respect of use case Get PUK

CHA-3.33.4.20 Channel/CSR light application shall limit the access to this use case to the contextual subscribers holding a PUK security identifier.

Capability 1 Customer Interaction Tracking – PBM

### Capability Description

Refer to Case management and CIT FRS

### Capability Assumptions/Dependencies

### Capability Use Cases

#### Use Case: View existing Sessions for an Account

Refer to DR-4-004-255 – Comverse 3.2

#### Use Case: View details of a Session

Refer to DR-4-004-255 – Comverse 3.2

#### Use Case: Create Session Notes

Refer to DR-4-004-255 – Comverse 3.2

Channel/CSR light application requirements

Refer to DR-4-004-255 – Comverse 3.2

~~Capability 1 Manage Up Sell lead - USL~~

# Requirements - Non-functional

Deployment, Integration and platform consideration

CHA-4.1.10 Channel/CSR light application shall support working in trust mode with an authentication delegation to a portal or single sign on system.

CHA-4.1.20 Channel/CSR light application shall support being deployed in such a way of working in HTTPS mode

CHA-4.1.30 Channel/CSR light application shall support being deployed with consumer application on the same system

CHA-4.1.30.1 Channel/CSR light application shall support being deployed with consumer application on the same CID

CHA-4.1.30.2 Channel/CSR light application shall support being deployed with same Comverse one billing instance

CHA-4.1.35 Channel product and CSR light product shall support being deployed on the same system as with consumer

CHA-4.1.40 Channel/CSR light application shall support following transports for integration purpose:

CHA-4.1.40.1 Channel/CSR light application shall support JMS

CHA-4.1.40.2 Channel/CSR light application shall support MQ Series (PM will determine which version is required)

CHA-4.1.50 Channel/CSR light application shall be integrated with Comverse one security server (UPM – formerly named FX)

CHA-4.1.50.1 Channel/CSR light application shall authenticate in the Comverse One security server the dealer the user is employed by before processing any call (to be confirmed) and asynchronous request.

CHA-4.1.60 Channel/CSR light application shall provide an ‘out of the box’ integration with Comverse One Billing but also support to be deployed and integrated with other billing systems.

CHA-4.1.70 Channel product and CSR light product shall support being deployed on different network segments.

Reliability, Availability, and Maintainability Requirements

Operation, Administration, Maintenance and Provisioning Requirements

Acceptance Test Primary offer Considerations

Cost of Goods Sold Considerations

Performance Considerations

Documentation Considerations

# Requirements Summary

## Requirements List Grouped by “Capability”

[3.1 General Requirements 56](#_Toc253578348)

[CHA-3.1.10 Channel/CSR light application shall support multi language 56](#_Toc253578349)

[CHA-3.1.20 Channel/CSR light application shall support multi currency 56](#_Toc253578350)

[CHA-3.1.30 Channel/CSR light application shall support recording user activities in the application 56](#_Toc253578351)

[CHA-3.1.30.1 Channel/CSR light application shall provide OOTB only events tracked by the Self service platform 56](#_Toc253578352)

[CHA-3.1.30.2 Channel/CSR light application shall allow an integrator to customize Channel/CSR light application to track any event he wants to track. 56](#_Toc253578353)

[CHA-3.1.100 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-249 about Serviceability feature support in Comverse One 56](#_Toc253578354)

[CHA-3.1.110 Channel/CSR light application shall include impacts on Channel/CSR light application listed in DR-4-004-484 about Additional Support of extended Data in Comverse One 56](#_Toc253578355)

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[CHA-3.9.4.200 Channel/CSR light application shall allow a user to empty a basket for a customer with respect of use case ‘empty basket’ describe above. 150](#_Toc253578819)

[CHA-3.9.4.230 Channel/CSR light application shall save a basket automatically with respect of use case ‘save the current basket automatically’ describe above. 150](#_Toc253578820)

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## Additional Requirements Information

| **Requirement** | **Priority** | **Target Phase** | **Comments** |
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