Ericsson Order Care

Realize Higher Consistency for Faster Time-to-Revenue

Order Negotiations User Guide

5/1553 - CSH 109 420/1 Uen Rev A

Contents

1 Introduction

1.1 Purpose and Scope

The purpose of this guide is to provide an introduction to Order Negotiations (ON) concepts and the ON system. It describes how to access ON through a personal computer and a Web browser to manage order entry.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and a Web browser such as Microsoft Internet Explorer or Mozilla Firefox.

2 Overview

Order Negotiations (ON) module is a tool for managing order entry.

- Create new orders (Move, Add, Disconnect)
- Review and modify existing orders (Change)

Order Negotiations can be integrated as a part of the front-end solution for CSRs and other user groups that need the capability to manager order entry. Order Negotiations is an out-of-the-box configurable solution that does not require any development effort. It is a generic solution with low-level use cases which can be packaged individually to meet the Service Provider's needs. The ON solution offers a starting point when performing order entry of any type of order: Add, Change, Move, and Disconnect.

It may interface directly with CIM, Contract Management, Service Inventory, Order Management and others:

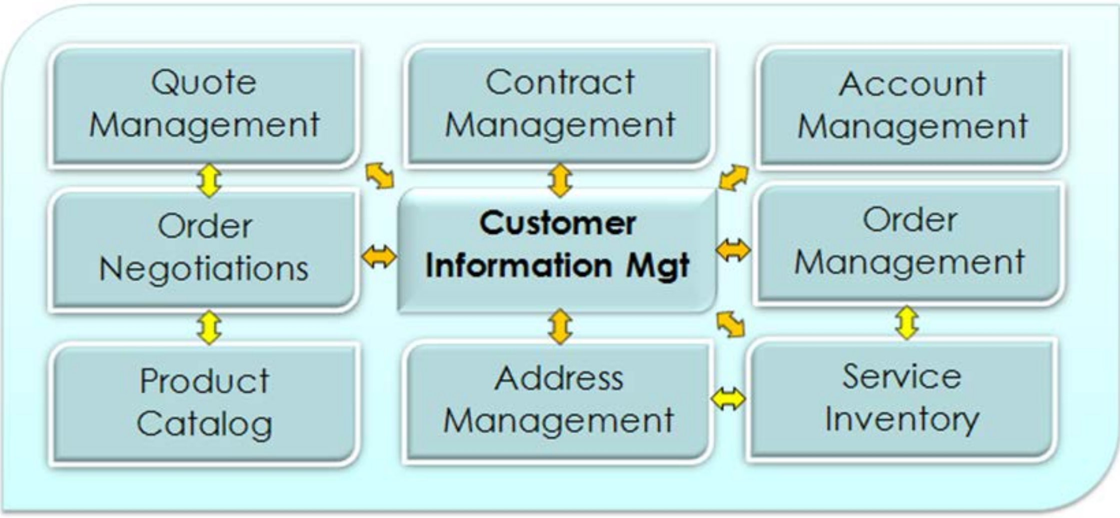

Figure 1 ON Module

The following diagram illustrates how ON fits into an overall OSS Architecture:

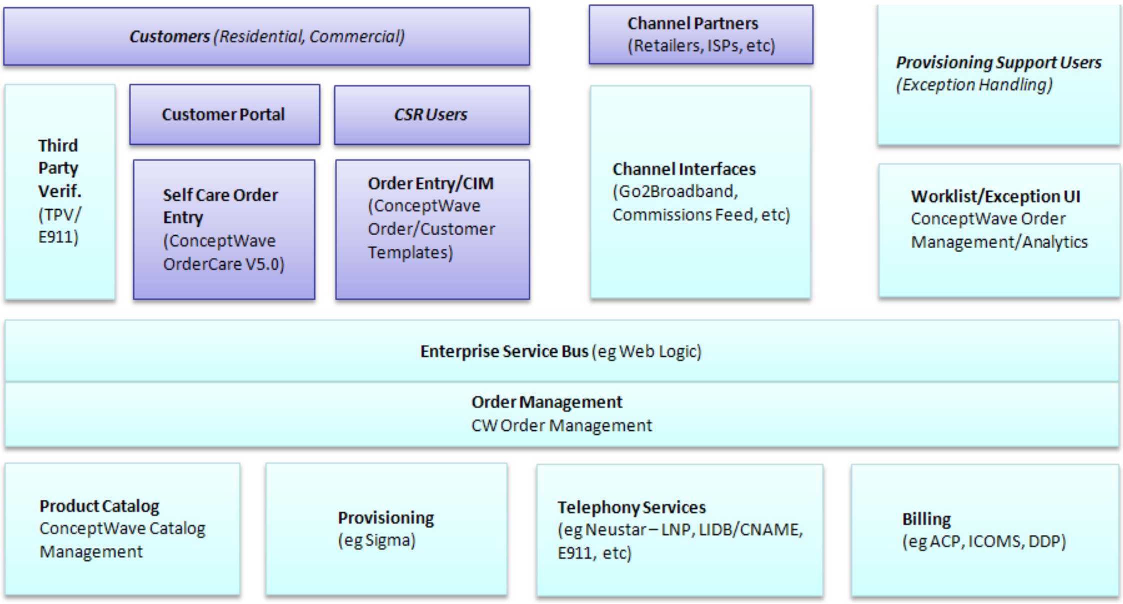

Figure 2 ON Architecture

2.1 ON Wizard Overview

The ON Wizard starts by opening an existing quotation or by creating a new quotation and leads the quotation process until the order is confirmed.
ON contains a simple Wizard-like infrastructure to ensure all conditions of the Order Entry are satisfied such as:

- Customer has agreed with the terms of Order
- Customer creditability
- Requested services technical availability

- Requested services configuration
    - Example: collect SIM card number, install date, channel packages, etc

ON Wizard typical steps are shown in the diagram, but they will vary based on the Order Type (e.g. MACD) and customer specifics.

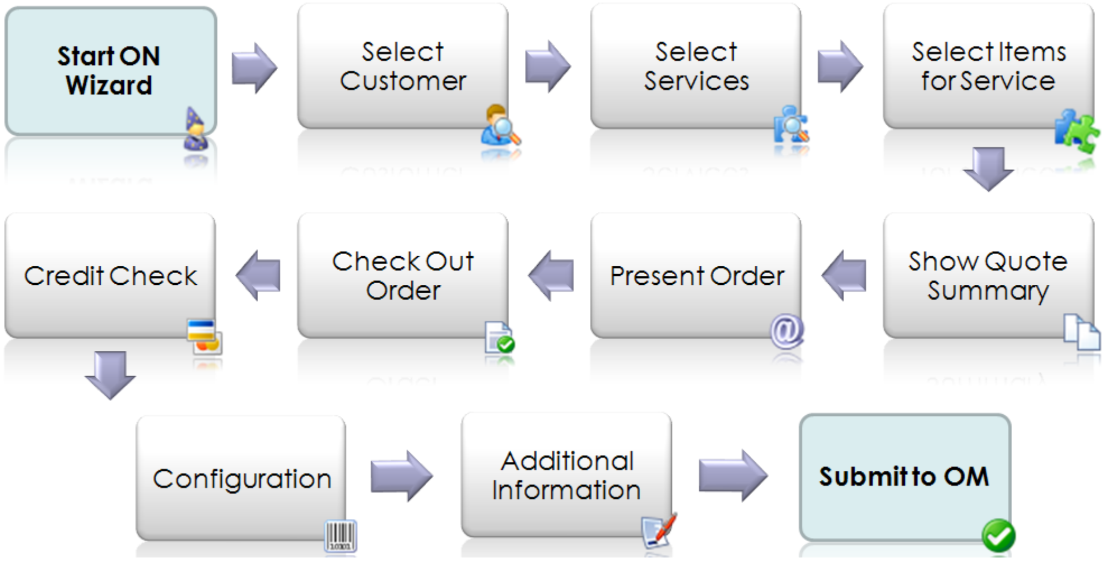

Figure 3 ON Wizard

Out-of-the-box solution

- May be used as-is; no programming or extensions are required
- Runtime Configuration

Ready-to-go user interface

- Full integration with an existing Velocity Studio® user- interface, with a simplified UI and intuitive forms and search tools

Data Validation

Performance

- Business rules prevent unrestricted searches

Provides Services to other systems

- Is an extension of the SID-based Customer module which has a full SID-facing API

Mapping to eTOM: Enhanced Telecom Operations Map

ON emphasis will be in the Selling/Order Handling, and Service Configuration & Activation areas. It will also touch upon:

- Service configuration and activation within service management and operations
- Resource provisioning within resource management and operations

- Supplier/partner requisition management within supplier/partner relationship management

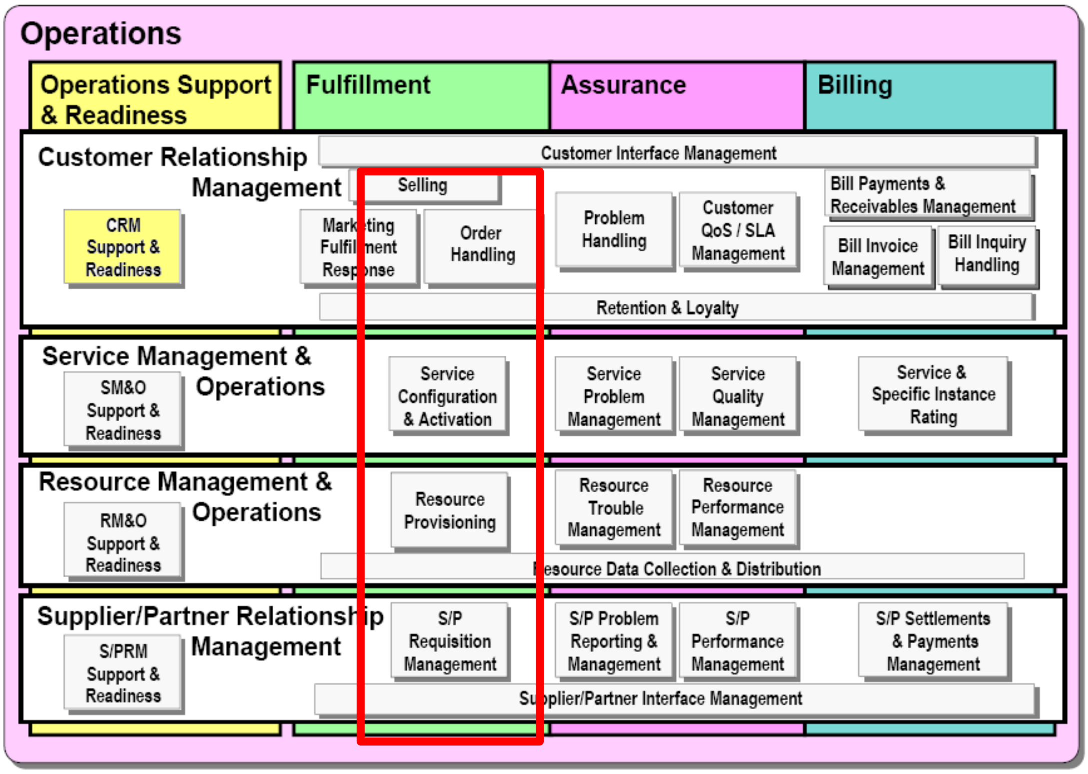

Figure A.1: The Operations End-To-End Process Breakdown

Figure 4 The Operation End-To-End Process Breakdown

ON quote/order states

ON may transition an order through the following states:

- Draft
- Presented
- Payment hold
- Configuration (R)
- Provisioning
- Error
- Completed
- Cancelled
- Submitted (R)
- Submitted
- Expired
- Configuration
- Accepted
- Revised-cancelled
- Abandoned
- Parked (sub-state of Submitted), for move-disconnect orders only
- Error – not running

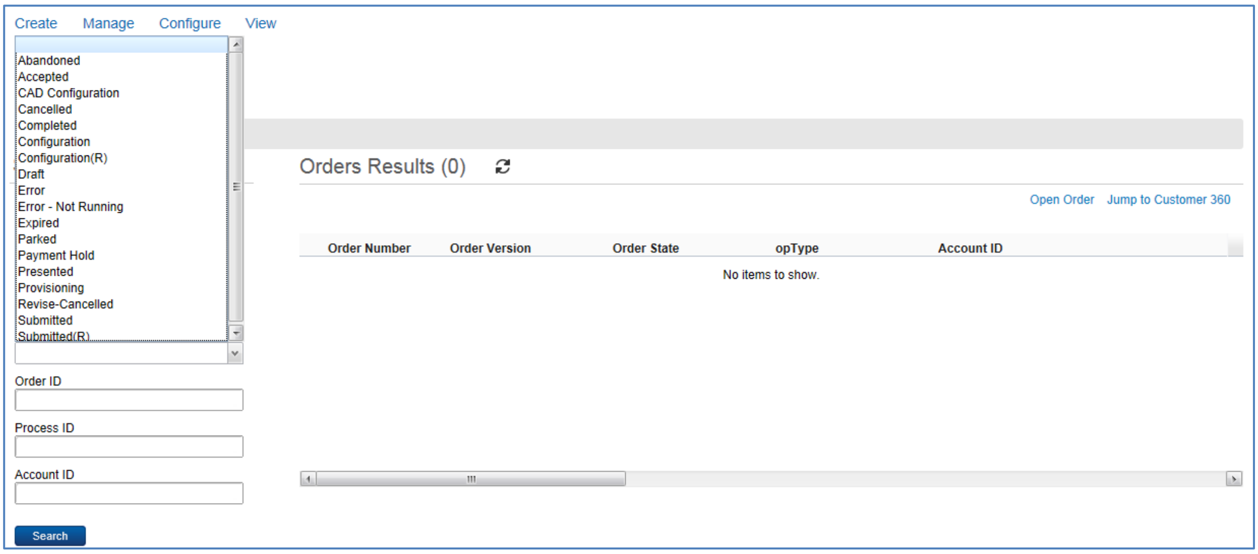

Figure 5 Order States

3 Getting started

This chapter explains how to access ON, and provides an orientation to basic ON screen navigation features. This section is broken down into the following topics:

- Before you begin
- Access ON
- Multiple browser sessions
- Application features
- Security

3.1 Before you begin

ON is a Web-based application that requires one of the following browsers. It will not work correctly with other browsers.

Web Browser	Version	URL
Microsoft Internet Explorer	7.0 or later	www.microsoft.com/ie
Mozilla Firefox	3.0 or later	www.mozilla.org/firefox

Before you can use ON, your administrator must assign a user ID and password, along with specific access privileges

- The user ID is stored in Active Directory and may be associated with multiple applications.
- Your password cannot be changed from within the application.
- Everyone accessing ON, regardless of job function, is a uniquely identified user.
- Each user is assigned to one or more workgroups.
- Each workgroup is allowed privileges to perform specific functions like New Add Order, New Move Order, New Disconnect Order, and so on.

3.2 Access ON

To log into the system, do the following:

1 Enter the URL in the address bar of your Web browser.

http://localhost:8080/cwf

The Login window displays on the page, and may differ, based on your customizations.

If the login screen does not display, verify that you have typed the URL correctly, or contact your system administrator to verify that you have the correct URL.

2 Enter your user name and password.

The system administrator assigns a user name and password to every system user.

If you have not received your user name and password, contact your system administrator.

If you cannot log in, take one of the following actions:

- Verify that the user name and password are correct (that is, case-sensitive).
- Verify with your system administrator that you have the correct user name and password.

3 Click **Login.**

You may have access to more than one application. To start ON, from the Application Selection page, click the Order Negotiations icon.

Alternatively, Order Negotiations can be started from Customer Management.

After selecting or creating the Customer from the Customer 360 view, the CSR is usually required to complete some steps before starting a quote.

Some of these steps might be:

- Verify the contact (using IDs)
- Add/Update Contact Info
- Add/Update Address Info
- Review/Create Notes
- View the Service Registry for existing Services
- Start a quote from Customer 360 View

After logging in, the following menu bar appears:

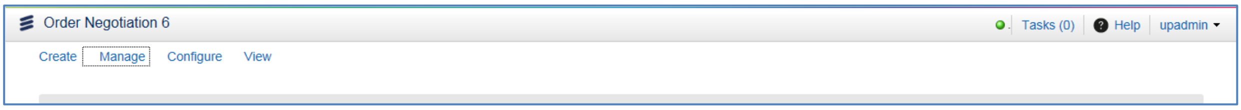

Figure 6 Menu Options

Note: It is possible that the application may take you directly to (based on your privileges and workgroup) one of the following:

- Select Customer (New Order)
- Home Screen
- Work list (inbox for tasks)
- Etc.

3.3 Multiple browser sessions

Opening multiple browser sessions may be helpful in certain scenarios. However, if you do open multiple sessions, be sure not to inadvertently open a *shared* session.
A *shared* session occurs if you open a second browser window by selecting File > New from your current browser session, or if you use shortcuts to access the Application URL that do not require you to log in to each instance separately.

If you have multiple windows open, but you logged in only once, then you are sharing sessions and will experience data corruption problems.

If you need to open multiple sessions, use the option from Start > Programs > Internet Explorer/Firefox to open separate browser instances.

3.4 Overview of the ON User Interface

This chapter describes the layout of the user interface and presents an overview of the functionality.

Topics are as follows:

- Application Layout
- Menu
- General types of UI Elements
- Understanding UI Field Masks

3.4.1 Application layout

The Application layout consists of the following general sections:

- Menu Bar
- View Options
- Search Filters
- Object Details
- Actions Menu

The specific available buttons and fields depend upon the function currently being used.

3.4.2 Menus

The menu bar consists of a row of menus near the top of the screen containing Order, Configuration, Favorites, Tools and Help.

Create

- **Create Anonymous Quote:** Creates an Anonymous Quote

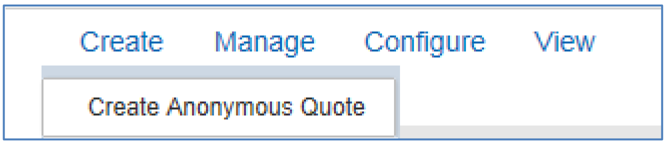

Figure 7 Menu Options

Manage

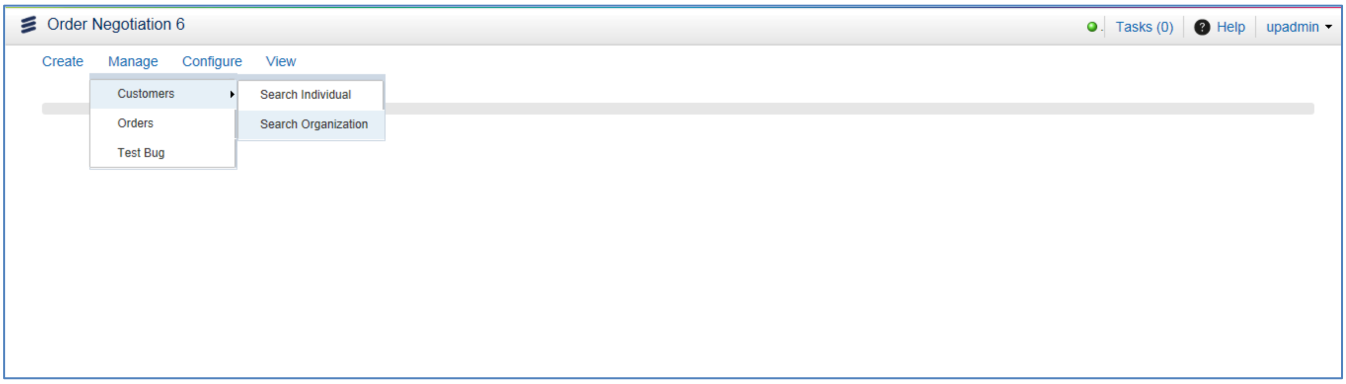

Figure 8 Manage Menu Options

Configure

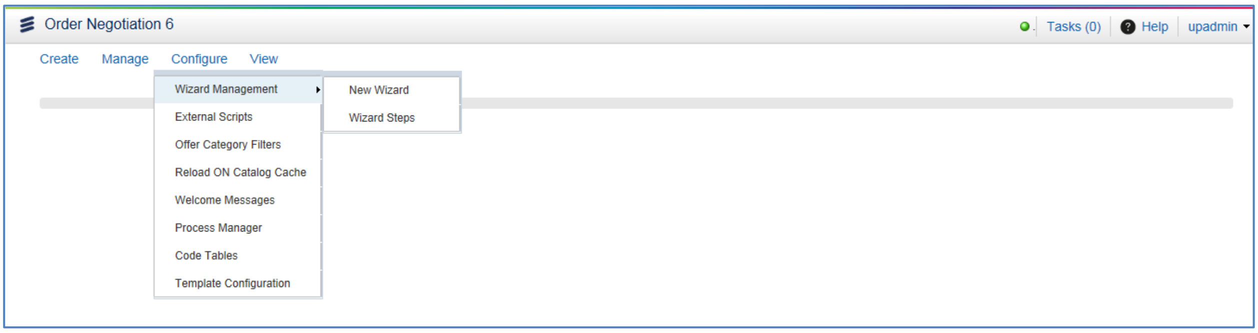

Figure 9 Configure Menu Options

View

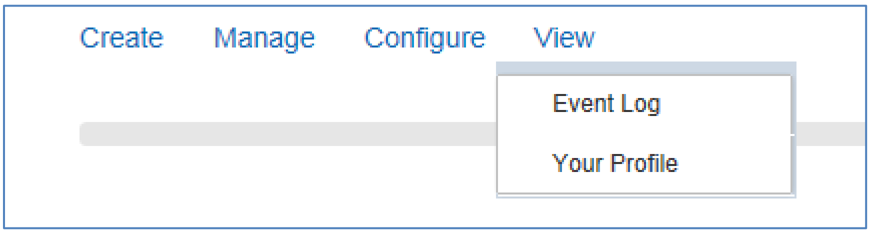

Figure 10 View Menu Options

3.4.3 General types of UI elements

Following general types of UI Elements are used in CIM.

Field Type	Description	Example
Data Display	Data display fields show data that cannot be modified. Right-click to copy	Party - Entity Type Individual
Text field	Text fields allow you to type any alphanumeric characters.	Last Name
Number field	Number fields only accept numeric characters 0–9	Phone Extension ######
Date field	Date fields allow you to type a date and time in numeric format. You may also select using the Calendar icon	Birth Date MM/dd/yyyy
Checkbox	Checkboxes can be selected or deselected to indicate a true/false flag	Add New Party
Radio button	Radio buttons allow you to choose between two or more mutually exclusive options	Phone Type Home Work Mobile
List box (dropdown)	List boxes allow you to select from a predefined list of options	Gender Male Female
Confirm box	When performing some of the tasks described in this guide, a confirmation dialog box may appear	
Button	Buttons accept user input to perform some predefined action	Next

Figure 11 Types of UI Elements

3.4.4 Understanding UI field masks

Following illustration shows some UI fields, where Symbols/Masks are defining formats for these field's values.

Type	Symbol/Mask	Example
▪ Mandatory field	*	Postal/Zip Code * L5B2C7
▪ Date	MM/DD/YYYY	End Service Date MM/dd/yyyy
▪ Date/Time	MM/DD/YYYY hh:mm:ss	
▪ Numeric	#(N) where N denotes the number of digits. Ex. #(5) captures up to 5 digits	Distance from CO #(5)
▪ Percentage	###, takes values up to 100 **Note**: usually the label will let you know the type is a percentage (%)	Signal Quality ###

Figure 12 UI fields

3.4.5 Finder options

A Finder is a search and retrieval tool and usually has the following view options.

Tip: Click the column header to sort any column (2x to sort descending)

From the **Configure** menu, you can choose to do the following:

- Create wizards
- Import or export an external script
- Work with offer category scripts
- Reload the ON Catalog cache
- Review welcome messages
- Work with the Process Manager
- Work with code tables
- Perform template configuration

From the **Create** menu, you can create an anonymous quote.

From **Manage** menu, you can search for an individual or organization, or find an existing order, create new orders, or jump to Customer 360 view.

The **Tools** menu is where you can:

- Access the Event Log
- Go to your profile

The result column headers can be arranged and rearranged to display your results optimally for you.

You can customize the displaying of specific columns, as well as their fit and sort order.

Hover over a column and click the down arrow icon, or right-click a column, then navigate down to **Columns,** and then select or unselect columns to view.

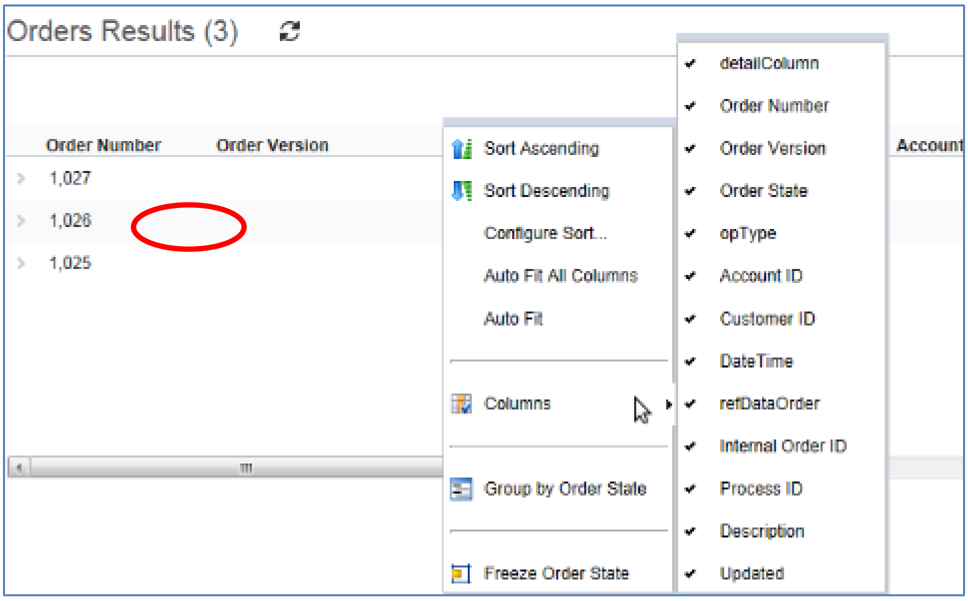

Figure 13 Column View

3.5 Security

As a security and privacy precaution, after 30 minutes with no screen activity, ON will automatically terminate your session (logout)

- If your session ends, your browser displays a message similar, indicating that you have been logged out of the system.
- To return, click your browser's **Refresh** button and log in again. To log out of ON, click **Tools > Logout**.
- Permissions can be assigned to each user to limit access to data for **security purposes,** and to control their immediate access to their own **specific tasks**. For example, only administrator users are able to change the Wizard Flow and External Scripts.

4 Use Order Negotiations

This chapter describes the process to create and manage quotes with the Order Negotiations (ON) application. When you first log in to ON, you are taken immediately to the default search individual screen.

You may also begin a new instance of the New Order wizard at any time from the menu bar by clicking **Select** > **Create Anonymous Quote**.

4.1 Select Customer

The Customer Finder (Individual and Organization) is driven by CIM, or by starting the ON application.

Results of this finder should open the Customer 360 View of the Customer by:

- Double-clicking any row.
- Clicking the **New Customer** button, opens the New Customer screen. Customer 360 View will be triggered after a new customer is created (see the *CIM User Guide* for more details).

4.2 Before starting a quote

After selecting/creating the Customer, from Customer 360 view, the CSR completes these steps before starting a quote:

- Verify the contact (using IDs)
- Add/Update Contact info
- Add/Update Address Info
- Review/Create Notes
- View the Service Registry for existing Services

4.3 Create a new quote or order

You can create a new quote/order from an existing customer or from a new (anonymous) customer.
To create a new quote/order

1. Click **Manage** in the menu.

   a. Click **Customers** > **Search Individual**
   b. Or, click **Customers** > **Search Organization**

2. Enter the customer details in the **Individual Result** or **Organization Result** fields that are now displayed.
3. After all of the fields are populated, click the **Search** button (at the bottom).
4. Select the customer from the list of items or continue to refine your search parameters.

   Note: If there is no existing customer from which to create an order, click the **New Customer** button (at the bottom) to begin creating the customer.

5. Edit the details of the quote/order.

4.4 Open an existing quote or order

To open an existing quote/order:

1. Click **Order** > **Orders** from the menu. The Order Finder opens.
2. Enter the required information in the fields and click **Search**.
3. A list of results displays under Order Number, as shown in the following figure.

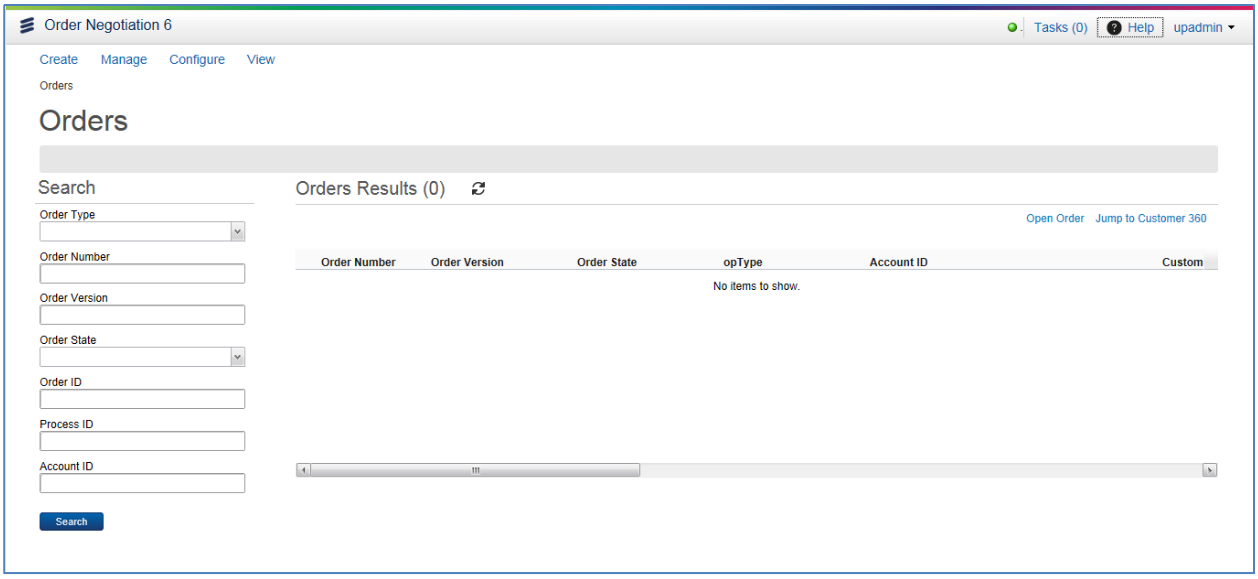

Figure 14 Order Number List

4 Select the order number that you want to work with and then click **Open Order** at the bottom of the screen. The details of the order are displayed.

The Customer must have:

- 1 Account
- 1 Service Address (Site)

*A site and account must be created. Navigate to the menu tree and select the Accounts and Site nodes to create new accounts and sites.

Depending on the implementation, there may be a Service Availability check which is performed at this time which checks the account for:

- Service Registry for exclusions
- Service Address availability

These rules may come from the Catalog. This particular functionality is performed in the background of this application when certain products/services are already available for that particular individual/organization according to the service offering of the service provider.

ON supports all four order types, commonly known as "MACD"

- Add
- Change
- Disconnect
- Move
    - Step 1: Move
    - Step 2: Move-Disconnect
    - Step 3: Move-Add

If the Account selected did not have any previous services at the correlated Service Address, this selection will default to **Add** (that is, new services).

The CSR will also have the choice to select **Change**, **Disconnect**, **Move, Move-Disconnect and Move-Add**.

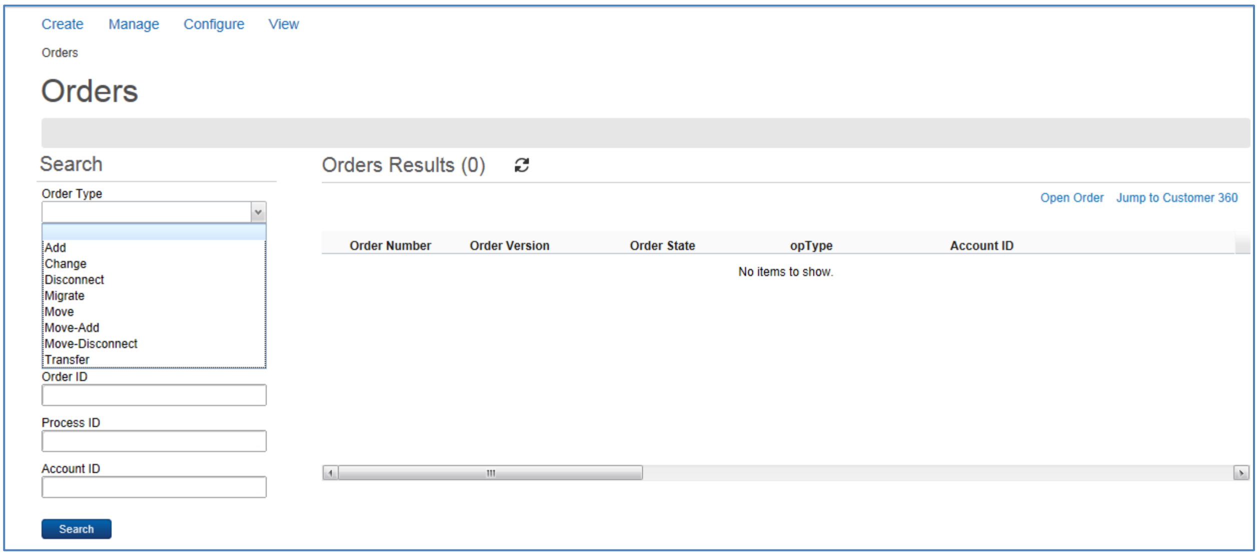

Figure 15 Order Options

4.5 Order Entry

4.5.1 General Layout

Clicking New Order/Open Order takes you to the Quote Summary.

4.5.2 Context Frame

The Context Frame appears upon creation or opening of any Order. The frame stays on screen through the ON process and displays:

- Order Number #
- Customer Name
- Account ID #
- Monthly Charges (based on the items which have been ordered/configured)
- One Time Charges (based on the items which have been ordered/configured)
- Hide Context: Hides this frame to preserve screen area

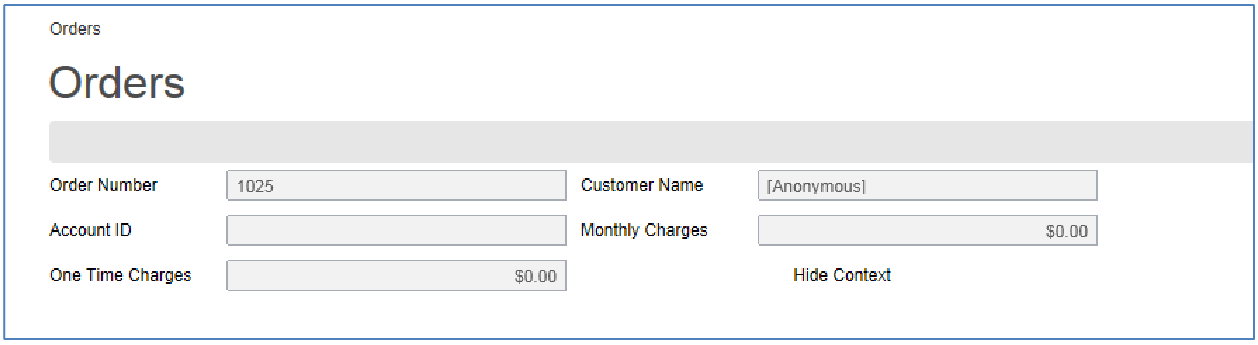

Figure 16 Hide Context View

4.5.3 Order Items Tree

The top node displays the **Order Type** / **ID** / and **State**.

- **Add, Change**, **Move**, **Move**-**Disconnect** and **Move**-**Add**, which will also display an order version number when there are changes or additions to the order itself.

Parsing through the nodes on the Order Items tree shows the Added items per Category.

There is also the consideration of the following active signs for **Service Categories** according to the following information:

( ) It is an active service in SR.
(+) It is a newly added service and when deleting this service will completely remove it from the order itself.
(-) It is an active service in SR process under deletion.
(*) It is an active service in SR whose attributes was changed.

Note: Any item with a count (quantity in brackets) is considered a 'container' or 'collection' node and will not have any Order Item associated to it, i.e. **Site** (**1**) node, **Services** (**2**) node, etc.

4.5.4 Action Bar

From the Order Entry view, the Actions bar has the following options:

- Back/Next
    - Moves you up and down the Order Item Category nodes
    - If at the top node, takes you back to Customer 360
- Action
    - Dropdown for functions such as Cancel or Revise Order (in-flight)
- Add Items
    - Opens the Catalog Item Pick List (for selecting offers)
- Jump to

        - Customer 360: Takes you back to Customer 360 for this Customer.
        - Select Application: Brings up the Application Selector
        - Both options will leave the Quote in 'Draft' status
- Present Order
    - Flags the Quote as 'Presented' (state transition)
- Check Out
    - Submits the order to OM to finalize the quote configurations prior to provisioning process

4.5.5 High Level Node – Quote Summary

The Quote Summary is the main page by default. The high level node of the Quote Summary tree contains the following fields on the right side for further detail information of Quote Summary:

- Customer Info:
    - Name
    - Phone #
    - Billing Address
- Order Info
    - **Order Number**: Auto-populated sequence
    - **Order Type**: Add, Change, Disconnect, Move, Move-Disconnect, Move-Add
    - **Hide Details**: Hides the 'Customer Info' section to create space
- Summary table:
    - When there are no items on the order, by default only the header of the table will display. Once there is an order, the details of all order items and recurring charges in total will be available for display.

4.5.6 Site

This is an important feature for an order. A single **Site** or **Multiple Sites** can be assigned for each individual order/quote.

4.5.7 Add Items to a Quote

To open **"Catalog Item Pick List Wizard"** and add items to the quote:

1 Click the **Add** icon in the Actions bar to add offers, bundles and products.

2 The Catalog Item Pick List dialog box will open to Select Account, Site and Access.

3 Filter your catalog pick list by selecting a service from the filter drop down menu (e.g. IPTV, HSI, etc. types of services).

The dropdown at the top of this box drives the Item's Category filter.

4.5.7.1 Add Service Offerings to a Quote

To Add a Service Offering to an Order:

1 Navigate to the Quote Summary and click the Add Offers from the action bar.
2 Once a (**Catalog Item Pick List**) window opens up, select the Account, Site and Access.
3 Select the row to be added and click the Add icon in the Actions bar, or double-click the item row.
4 **Close** the Pick List form. The selected rows will now appear in the Quote Summary page.

4.5.7.2 Add Products to a Quote

To add a Product to an Order:

1 Navigate to the Quote Summary and click the Add Products from the action bar.
2 From the **Catalog Product Pick List** screen, select the Site and Offer. Filter the Pick List by Category and Family.
3 Select the row to be added and click the Add icon in the Actions bar, or double-click the item row.
4 **Close** the Pick List form. The selected rows will now appear in the Quote Summary page.

4.5.7.3 Use the Catalog Item Pick List

The Catalog Item Pick List is a widget used to give a 'view' into the Product Catalog. In other words this particular functionality is performed in the background of this application when certain products/services are already available for that particular individual/organization according to the service offering of the service provider.

Catalog offerings may appear in more than one Category, such as IPTV and HSI as offerings.

4.5.7.4 Catalog Item Detailed Info

Double-click the Info and URL icons for detailed product and manufacturer information popups, or both. This information will be presented when there is an informative data defined in the catalog. In other words, the catalog displays this information according to the defined definition.

Figure 17 Catalog Item Detailed Info

4.5.8 Quote Summary

The Quote Summary is on the Order Header and displays all items selected with their related fees and terms.

The Quote Summary columns are:

- **Site:** identifies the location of the service including an associated site ID
- **Family/Category/Description**: fields to describe the offers selected
- **Status**: will display whether it is an added or removed service
- **Info/URL**: Popup details on the specific item
- **Term**: the length of the contract term (years)
- **Recurring (Frequency) / Non-Recurring (One-time) Prices**: in dollars
- **Charge Totals:** there may be 1 or 2 summary rows showing the total fees

4.5.9 Remove items from a Quote

To remove items from a Quote:

1 Select the related Service node.
2 This will display a listing of the items selected in that service category.
3 To remove an item from your order, **double-click** the Delete icon for that specific item row.
4 The entire offerings can be deleted by selecting only the actual (Ex. IPTV) service node which will delete all the corresponding offers associated with that service offering.

5 The result of all items you have *not* deleted appears on the screen.

To remove items from the Quote Summary, perform these steps:

1. There is another way to delete (**remove**) the items from the Quote Summary screen when selecting the top node “**Draft**”.
2. The Quote Summary screen appears. The items available to be deleted have a delete icon on the Action column. Double-click the delete icon to remove the row.

4.5.10 Present Order

Once the order items have been selected, priced, and agreed upon

1. Mark the Drafted quote as ‘Presented’ by clicking the Present Order button from the action menu.
2. This step locks-in the quote and no further changes can be made.
3. Once Presented:
   - The quote transitions to the **Presented** state and the visual label changes to indicate the new state.
   - No changes to the Quote can be made once it is **Presented (only via Revision)**. Otherwise, a message appears, indicating that you cannot change the order once it has been accepted (that is, you must create a new quote).

4.5.10.1 Present Order Validations

When you click the **Present Order** button, logical validations are performed on the Quote

- Logical validations are rules that exist on the product/service/offer level which may indicate pre-requisites, dependencies or exclusions
- Example: To order VOIP, the customer must either
  - Already have Hi-Speed Internet at the Service Address
  - Have Hi-speed Internet on the current order

Any validation message appears in a popup window that may stay open. The reason is so the CSR can resolve each of the issues before re-presenting.

4.5.10.2 Jump to 360 view

To fix missing configurations to successfully present a draft Quote, use **Jump to** > **Customer 360 view.**

After completing required configurations, re-open the quote and resume with quotation processing.

4.5.10.3 Check Out Order

After Presenting the Order, the Quote is fixed and Customer may have a window of time to determine whether to **accept** the Order or to **cancel**.
To check out the order, do the following:

1. Click the **Check Out** button in the Actions bar.
2. The Order state changes to the Configuration state.
3. The Order proceeds to the Check Out procedure which may include Credit Check, additional configurations, and so on.

Note: Beyond this point ordered items cannot be removed. Changes to the order must be done through an Order Revision process.

4.5.11 Credit Check

Credit Check is a standard procedure in Order Capture process.
ON provides a framework for Credit Check. However, because it varies, it must be customized per deployment. For example, it may be done as manual task, swivel-chair operation, external interface call, and so on.

4.5.12 Payment On-Hold

This step is done as a manual or automatic operation.

<u>**Manual Option:**</u>

The following steps are performed:

1. CSR will save a quote with PAYMENT HOLD state by selecting the **Credit Failed** radio button and clicking Next during Checkout.
2. When payment is received by the customer, CSR will re-open the existing quote and resume the order creation process.
3. CSR will enter required data upon completion of this step.

Note: Any user with OA module (out of the box) can report on orders with this state, and detect overdue held orders.

<u>**Automatic Option**</u>

For the automatic pre-payment, the CSR may request the payment to the external system or/and the customer will be charged upon his agreement immediately for the required pre-payment. It may be required to have quote expiration:

- If customer disagreed after his credit authorization was rejected to perform payment, then there is no reason to save a quote with PAYMENT HOLD state. The quote will be CANCELLED by CSR instead.
- If the customer agrees, after his credit check was rejected, to perform payment, then the CSR saves the quote with PAYMENT HOLD state. But, if the customer did not perform the payment on time the quote should change state automatically to EXPIRED.

4.6 Configuration

Configuration of products/services/offerings requires the CSR/sales representative to provide variable values such as MAC Address, PPV Account Credit, SIM card number, etc.
To perform Order Configuration:

1. During the Checkout process, the CSR clicks the **Credit Passed** radio button, which takes the CSR to the Configuration stage. The state of the quote appears as "Configuration".
2. Enter the Configuration screen:

   a. Select the **Configuration node** on the Order Item tree and notice the Order State as **'Configuration'**

   Or…

   b. Alternatively, **after Credit Check** operation, the ON Wizard automatically brings you to the configuration screen to continue processing the order.

3. The Product Configuration list appears.
4. Set an Attribute Value by double-clicking the row and enter the value.

Note: Some attributes are shown, but they may be **read only.**

5. Click the **Save** button.
6. Click the **Next** button to proceed to the next step.

4.6.1 Additional Information

Like Credit Check, this framework is provided by ON, but is meant to be extended for each specific deployment.

This form may capture any Additional Information required for the Order or for the Provisioning. For example:

- Requested Due Date
- Installation Date
- Billing Account Information
- Initial Payment
- Etc.

Fill out any fields provided. They will be automatically saved.

4.6.2 Order Submission to provisioning

To submit Order to OM for provisioning, do the following:

1. Click **Submit** from the Actions bar.
2. Click the **OK** button to complete the order entry and submit your order for provisioning.

Submitting the Order will:

- Proceed in the OM Workflows
- Set the Order Status to Submitted
    - It will eventually transition to Provisioning once the workflows have begun, and then Completed once OM is completed
- Set any prior un-submitted Orders on the Account switch to the **Abandonned** state (for example, any orders that were Draft, in Partial Configuration, or underwent a Revision.)

4.7 Revise Order

It is possible to revise a quotation in several different stages. The following revision scenarios are explained in this section:

- After Presentation
- After Check Out (In-Flight Revise)
- After Final Submission (Change Order)
- Passed the ‘point of no return’

4.7.1 Revise a Presented Order

To revise a presented order, complete these steps:

1. Navigate to **Customer 360**.
2. Select **Manage > Open Existing Order**.
3. Select the presented Order and Open it
4. From the menu bar, click **Actions > Revise Order**.
5. A ‘clone’ of the original Order will be created, in the “**Draft**” state
6. A version number will appear in the Order Header visual key. And the original Order will still be in the Quotes/Orders folder of Customer 360 and marked as **Revised.**

Note: You may further revise if needed the original order, or the revised version (1). It creates a new Order in the Draft state, with version number (2)

7. Assign or Remove your desired changes then click **Present** to proceed to “Check Out”

4.7.1.1 In-Flight Revisions

Revisions can be done on In-Flight Orders. In terms of ON there is not much of a difference, but in terms of OM there may be rollbacks and undo’s occurring in the background, depending on what type of Revisions are done.

To Revise an In-Flight Order:

1. Go to Customer 360
2. **Manage > Open Existing Order**
3. Select the ‘In Provisioning’ Order
4. Select **Actions > Revise Order**
5. Revise the Order as seen in previous scenarios
    - You will notice after Presenting/Check Out/Credit Check, that the Configuration parameters are carried over

Note: If the Order has reached the Completed state this is no longer considered a **Revision** and must be changed through a **Change** Order.

4.7.2 Revise CAD (Committed Activation Date)

To revise the CAD for an **Add**, **Change** and **Revise** Orders, for every order, it is possible to assign a CAD. This information is then available to OM as part of the order and indicates CADs for every offer associated with an order.
To revise the CAD, do the following:

1 Go to Customer 360.

2 From the menu bar, click **Manage > Open Existing Order**.

3 Select the "In Provisioning" during the following statuses **Presented** or **Configuration** (before it reached point of no return).

4 From the menu bar, click **Actions > Revise CAD**

- Revise the dates on the Order to any date
- Notice that the once the CAD is selected, all offers are assigned to that particular **Effective Date** automatically as default date.

Note: If the Order has reached the Completed state this is no longer considered a **Revision** and must be changed through a **Change** Order.

4.8 Cancel Order

At any point of time after starting quotation process until the order was submitted to ON, the user should be able to cancel the quote states in which the quote can be cancelled:

- Draft
- Presented
- Configuration
- Payment Hold

In all **other** states, cancel should not be possible, unless redefined.

To cancel an order, complete these steps:

1 CSR clicks "**Cancel"** button.
2 Verification message appears to confirm order cancellation.
3 CSR confirms the action.
4 The order state is set to **CANCELLED** and user presented with the main page.

.
Note: CSR does not confirm the action (step 3 in the description) and click the **Cancel** button. The action should be abandoned and the order should remain in previous state.

4.9 Change Order

Change Orders are considered Changes on an Account with existing services. Change Orders can be identified in their visual key with "Change''.

To create a Change Order from Customer 360:

1 From the menu bar, click **Manage** > **New Order**.

2 If more than one Account exists, select the Account with the Services that you want to change.

3 The **Order Type** defaults to **Change**.

4 Services existing at the Site display.

5 Use Add Items to add services or use Order Item nodes to Delete Services (left side)

6 The Order Summary table indicates if services are being Added or Deleted in the Status column.

7 Present the Order to proceed, then Check Out.

8 Proceed with the remaining screens - Check Credit/Configuration/Additional Info, and Final Submission. They are all the same as for New Order.

Note: Revisions are allowed on a Change Order :

a After Presentation
b In-Flight

4.10 Disconnect Order

Disconnect Orders are considered a full termination of all existing services on an Account. Disconnect Orders can be identified in their visual key with **Disconnect.**

To create a Disconnect Order from Customer 360, perform these steps:

1 From the menu bar, click **Manage** > **New Order**. If more than one Account exists, select the Account with the Services that you want to disconnect.
2 Due to the existing services, the **Order Type** defaults to **Change**. Set the Order type to "**Disconnect**".
3 All Services Items are set to Deleted.
4 When you are selecting to disconnect the services, make sure to select the correct site to be disconnected from the Site Selector List.
5 Present the Order.
6 Check Out.

7 Perform Final Submission.

Note: There is no Configuration, Credit Check, or Additional Info on a Disconnect.

4.11 Relocate

The relocate function allows services and offers to move between sites. The service, offer or item can be moved from one site to another site. For example, when a customer moves or is relocated, then the services and offerings can be relocated in a simple click of a button to a new location or address.

To relocate a customer's services:

1 Begin with a customer account. Use an existing account from Customer 360.

2 Create a New Order by selecting **Manage > New Order**. If more than one Account exists, select the Account with the Services that you want to relocate.

3 The Quote Summary page should appear, as shown in the following figure. Change the **Order Type** to **Move**.

4 When changing the **Order Type** to **Move**, a message appears, indicating that to move offers automatically, you must select the site that you want to move on the order tree's left menu, and then specify the destination before clicking the **Move Offers** button.

5 From the tree node, select the site from which you want to move the services. The Site Summary page appears.

6 In the **Move Services to Site** field, select the destination site. Click the **Move Offers** button to proceed.

7 A popup message appears, indicating that the move was completed.

8 To complete the order, continue with the order processing steps: **Present** > **Check Out** > **Submit**.

4.12 Transfer Order

It is possible to transfer the ownership of items from one account to another for a given customer. A transfer can be performed on a service or offer level. During the transfer, you are prompted to provide a destination account. The transfer function is only available for existing customers with existing services and multiple accounts. The billing information is transferred from one account to another.

- First, the services are deleted from the o**riginal account**

- Second, the services are added to the **new account**

To transfer a service or offer between accounts, complete these steps:

1 Begin with a customer account. Use an existing account from the customer 360.

2 Create a New Order by selecting **Manage > New Order**. The Quote Summary page appears with the **Order Type** set to **Change**.

3 Change the **Order Type** to **Transfer**. Proceed to select a service or offer from the Quote Summary page to transfer by double-clicking the row.

4 The Offer Configuration page appears. The **Bill To** address defaults to the existing billing address. Change the **Billing To** address to the new address or transferred address.

5 Click the **Save & Close** button to continue. A confirmation message appears, indicating that the transfer operation completed successfully. Click the **OK** button to continue.

6 Continue with the order processing steps: **Present** > **Checkout** > **Submit**.

To Undo Move

It is possible to undo the relocation before presenting the order:

1 Navigate to the Quote node and change the **Order Type** from **Move** back to **Change**.

2 Undo the changes by clicking each action icon within the Action column.

Figure 18 click action icon

4.13 Migrate Order

When you want to upgrade or downgrade a service offering, use the **Migrate** order option. The migration process provides a list of available replacement offerings containing the same Access. Once you have selected the replacement item and the quote is presented and completed, the system updates the upgraded or downgraded offering and any changes associated with billing.

To migrate an item, complete these steps:

1 Begin with a customer account. Use an existing account from the customer 360.
2 Create a New Order by selecting **Manage > New Order**. The Quote Summary page appears with the **Order Type** set to **Change**.

3 Change the **Order Type** to **Migrate**. Select the offer that is to be upgraded or downgraded from the Quote Summary page by double-clicking the row.
4 The Offer Configuration page appears, containing the offer details.

5 Click the Migrate button on the Offer Configuration page.
The Migrate Item Pick List appears. This page contains all appropriate offers/items with the same access as the offer to be replaced. Select the replacement offer and click the **Select** button.

6 The Quote Summary page reappears with the replacement offer appearing in green with the status “Add(Mig)” and the replaced item appearing in red with the status “Del(Mig)”.

7 Continue with the order processing steps: Present > Checkout > Submit.

4.14 Create a Bundle Offer

To create a bundle offer, complete these steps:

1 Log in to Catalog Velocity Studio as upadmin / upadmin.
2 Click the **Projects** icon. Locate your project in the left menu and click the **Open Project** icon. Your project appears as the **Current Project** at the top of your screen.
3 From the menu bar, click **Catalog Velocity Studio** > **Items**.
4 Click the **Add** button (+) next to the **Items** root node.
5 In the Item Detail pane, do the following:

   a Click the **Item Type** drop-down field and select **Offer**.
   b In the **Base Item** field, select **baseOffer**.
   c Fill in all other mandatory fields, such as **Status**, **Code**, and **Name**.
   d Click the **Save** button.

6 Click the **Search** icon to search the Item that you have created. In the left pane, expand the **Attribute** node. The **family** and **category** fields are read-only and the **Default Value** is null. To assign values, you must override these fields.

7 Override the **category** field by doing the following:

   a Select the **Attribute** node, and click **Add** icon. In the right pane, a screen opens that allows you to define attributes. Click the **Search** icon to provide an **Attribute** value.
   b In the Attribute Finder, set the **Name** field to **OFFER_CATEGORY** and click the **Search** icon.
   c In the result set, only one record appears. Select this record, which returns you to the Attribute definition screen. Define these field values:

   - **Code** = **category**
   - **Name** = **category**
   - **Label** = **category**
   - **IsProperty** = **checked**

  - **Default value** = **BUNDLE**

d Click the **Save** button.

8 Override the **family** field by doing the following:

a Select the **Attribute** node, and click the **Add** icon. In the right pane, a screen opens that allows you to define attributes. Click the **Search** icon to provide an **Attribute** value.
b In the Attribute Finder, set the **Name** field to **OFFER_FAMILY** and click the **Search** icon. In the result set, only one record appears. Select this record, which returns you to the Attribute definition screen. Define these field values:
  - **Code** = **family**
  - **Name** = **family**
  - **Label** = **family**
  - **IsProperty** = **checked**
  - **Default value** = **MULTI**

c Set the status of these fields to **Active**.
d Click the **Save** button.

9 Add offers in the bundle by following these steps:

a Select the **Relation** node and click the **Add** button. In the right pane, a screen opens that allows you to add offers in a bundle.
b Select an offer using the **Target** field and provide other fields values.
c Set the **Type** field to **contains**, set the **Status** field to **Active**, and then click the **Save** button.

Note: After activating, you cannot change the values of these fields.

10 Add as many offers in the bundle as you want.

Note: There must be at least one access in the bundle.

4.14.1 Group Sequence field

On the screen that allows you to add offers in the bundle, there is a **Group Sequence** field. This field allows you to relate an offer with access. As an example, add an access **TSTT HSI** in the bundle and set value of **Group Sequence = HSI** (can be any string). Then, add an offer **4 Email Address** and set the value of **Group Sequence = HSI.**, meaning that the offer **4 Email address** belongs to access **TSTT HSI.**

4.14.2 Bundle Types

There are two types of bundles:

- BUNDLE
- GROUP

It can be differentiate by the value of **Default Value** field of the **category** attribute.

If the **Default Value** field is set to **BUNDLE** in the category attribute, it is of type Bundle. Similarly, if the **Default Value** field is set to **GROUP** in the category attribute, it is of type Group.

The difference between the **Bundle** and **Group** types of the bundle offer occurs when you add a bundle offer in the dataorder. For a **Bundle** type, the bundle offer with all its child offers persists (are added) in the dataorder. In the case of a **Group** type, only the child offers are added in the dataorder.

5 Configure

This menu has the following options:

- Wizard Management
- External Scripts
- Reload On Catalog Cache
- Process Manager
- Code Tables
- Template Configuration

5.1 Template Configuration

This option allows you to configure the template with subscriptions, components, offers, and so on. You can use the configurable Item types from Catalog to be classified as Subscription, Offer, Product, and Components. The following steps describe how to configure the template:

1. Click **Configure** > **Template Configuration** option from the menu bar.

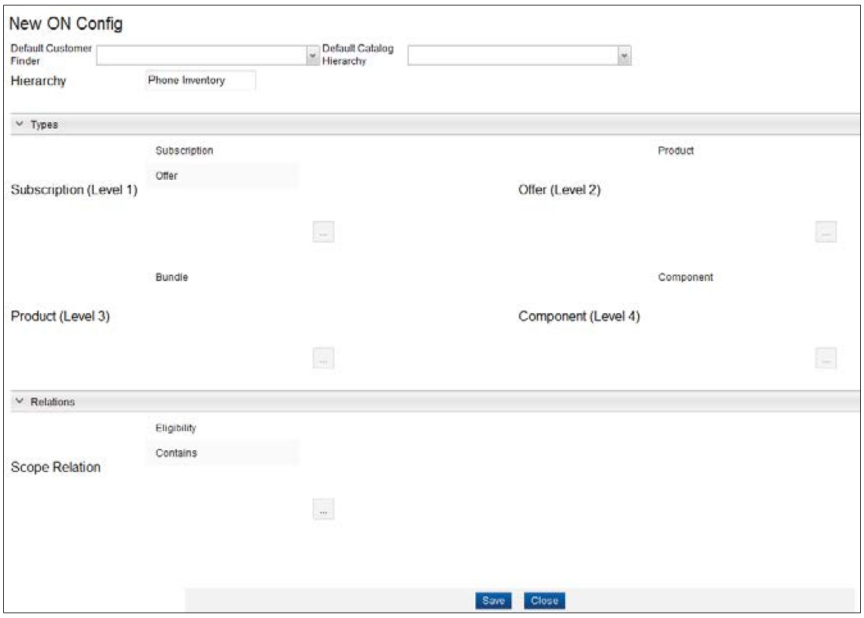

Figure 1 New ON Config Dialog

2. The New ON Config page appears.
3. Enter or select the information for the following fields:

Field	Description
Default Customer Finder	This field's drop down list contains two options, individual and organizational.
Default Customer Hierarchy	This field allows you to select the default hierarchy. The value for this field is based on the hierarchies defined in the Catalog.
Hierarchy	This field allows you to enter the name of the hierarchy

3. Click the Select button (...) for the Subscription (Level1) option in the Types section.
4. A list of values appears; select the check box for the values you want to include and then click the **Save** button.
5. Follow the same steps to add values for Offer (Level2), Product (Level3), and Component (Level4) options.
6. Click the **Select** button for the Scope Relation option in the Relations section, and select the relation you want to add for the new configuration.

Note: The values for these options come dynamically from the Ericsson Catalog Manager (ECM) application.

7. Click the **Save** button to save the settings for new ON Configuration.

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