Ericsson Order Care

Realize Higher Consistency for Faster Time-to-Revenue

Unified Workstation User Guide

7/1553 - CSH 109 420/1 Uen Rev A

Contents

1 Introduction

This document provides an introduction to using the Unified Workstation (UWS).

1.1 Purpose and Scope

The purpose of this document is to provide information on some basic Unified Workstation (UWS) concepts and help you to become familiar with the system. This guide describes how to access UWS through a computer and a Web browser.

Readers are not required to have any programming or software development knowledge, but should be comfortable with using a computer and a Web browser such as Microsoft Internet Explorer or Mozilla Firefox.

1.2 Reader’s Guideline

This section describes the version syntax covered in this document and any additional, required information.

Document names and sections within documentation are set in italics, such as the following:

For more information on making a copy of your project metadata, see the *Velocity Studio User Guide*, under *Velocity Studio User Interface > Common Actions Outside Service Designer*.

Note: To navigate the documentation, an arrow appears (>), which separates each hyperlink to be clicked.

2 UWS Overview

Unified Workstation (UWS) is an accelerator module that provides many out-of-the-box functionalities, but customization and integration is required before it can be deployed in production. Once properly deployed, UWS can be used by customer service representatives (CSRs) to assist customers when they call in for assistance with their account or to order new services. The CSR is able to view and update a customer’s profile and account details through the UWS and the same information can be updated and viewed by the customer through the Self-Care application. The UWS application is integrated to the Self-Care application by sharing the same customer information.

Once UWS is fully deployed, it will allow the CSR to do tasks such as:

- Search customer accounts

- Update a customer profile
- Create, change and track orders
- Enter and edit account information
- View account and payment status
- Disconnect and cancel services
- View and update services
- Review billing and payment information
- Process a top-up payment or a one-time payment
- View customer interactions information

3 Getting Started

This chapter explains how to access the UWS application and provides information on the following:

- Introduction
- Access UWS
- Multiple Browser Sessions
- Security

3.1 Before You Begin

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

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

3.2 Access UWS

To access the UWS application, enter the following Web address in your browser:

http://<hostname>:<port>/cwf/uws

If the login screen does not load, verify that the Web address is correct or contact the system administrator to verify that you have the correct address.

3.3 Multiple Browser Sessions

Opening multiple browser sessions may be helpful in certain situations. However, if multiple sessions are opened, do not inadvertently open a shared session.

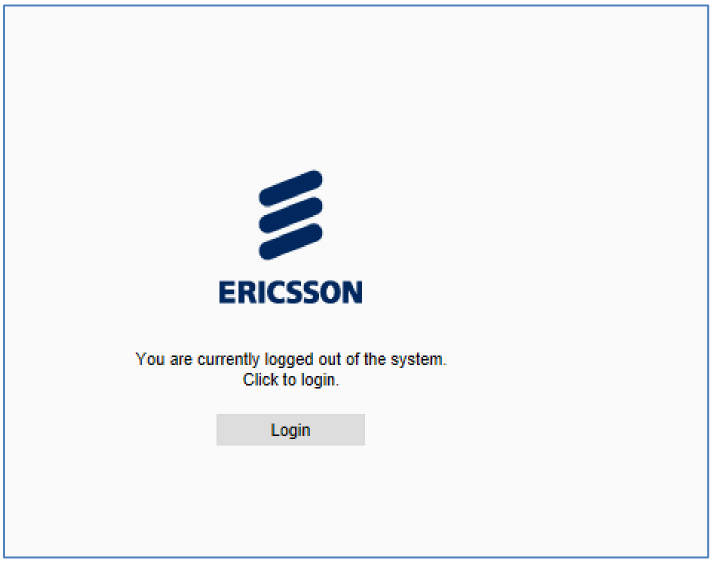
A **shared** session occurs if you open a second browser window by selecting **File** > **New** from the current browser session, or if you use shortcuts to access the application Web address that is not required to log into each instance separately.

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

If you must open multiple sessions, click **Start** > **Programs** > **Internet Explorer** or **Firefox** to open separate browser instances.

3.4 Security

For your security and privacy, after 30 minutes of screen inactivity, Unified Workstation automatically terminates your session by logging you out.



3.4.1 Automatic logout screen

To return to Unified Workstation, you can either click the **Login** button, or refresh your browser and log in again.

3.5 Unified Workstation's User Interface

The Unified Workstation application's user interface contains the following elements:

- Logout and Tools Bar
- Menu Bar
- Main Area
- Tooltips

3.5.1 Logout and Tools Bar

To log out of the Self-Care application at any time, click the **Logout** link located in the top right corner of the user interface.

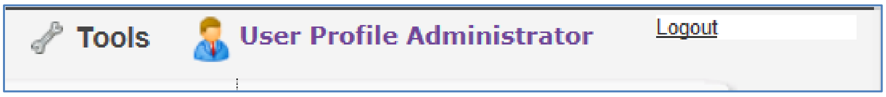


Figure 1 Logout and Tools bar

This section of the user interface shows the user currently logged in. In this case, the User Profile Administrator is logged in.

The **Tools** icon () indicates that you can perform a number of tasks by clicking the icon, depending on the privileges set for your username. As an example, you may have the ability to change your password.

To change your password:

1. Click the Tools icon () and select **Change Password**.
2. A dialog appears, prompting you to enter your **Current password**. Enter a **New** password, and then re-enter your new password in the **Verify new password** field.
3. Click the **Change Password** button to complete the process.

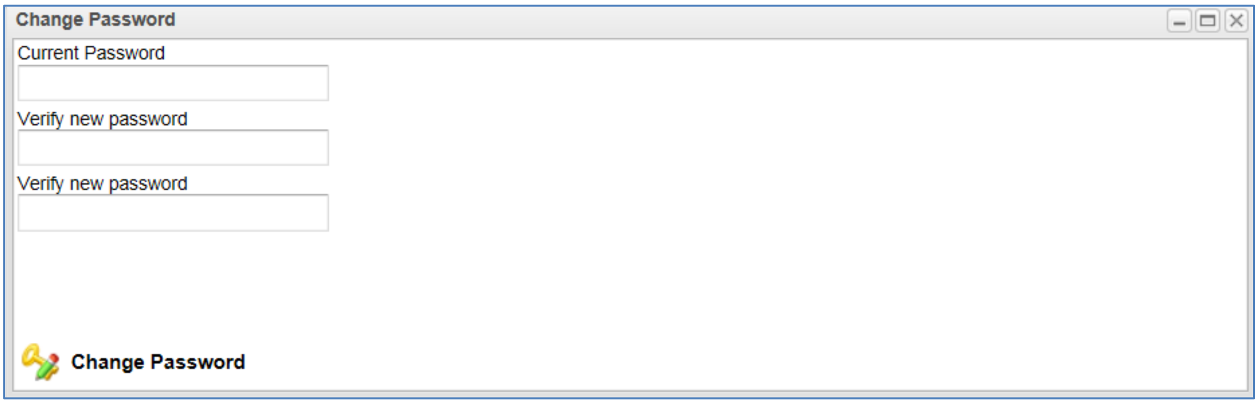


Figure 2 Change Password page

3.5.2 Menu Bar

The menu bar appears under the logout and tools bar of the application.

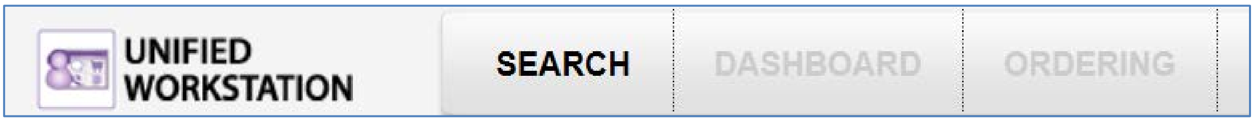


Figure 3 Menu bar

Once you have selected a customer from the Search page, you can click any of the buttons on the menu bar to be directed to the following sections:

- **Search** page, which is the default page or landing page.
- **Dashboard** page
- **Ordering** information

3.5.3 Main Area

The main area appears under the menu bar, which contains information pertaining to the page that you are on. For example, the Search page contains search criteria that you can specify to search for customers in the UWS application. Your search results also appear in the main area of the page.

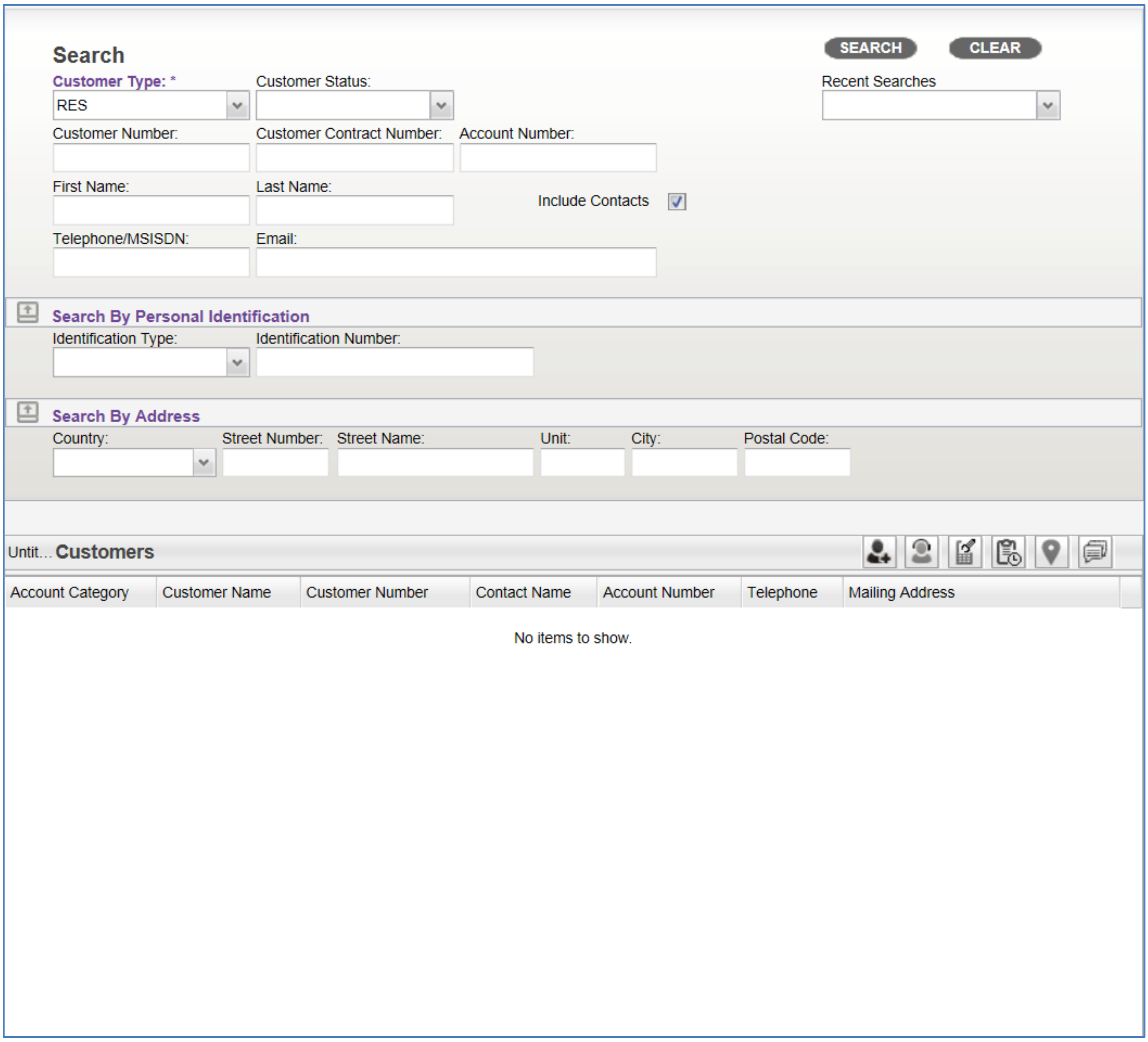


Figure 4 Search page – Main area

3.5.4 Tooltips

You can use your mouse cursor to hover over an icon or button to view its description before clicking it. Hovering your mouse pointer over the **Clear** button from the Search Customer finder indicates that your search criteria are cleared when you click the button.

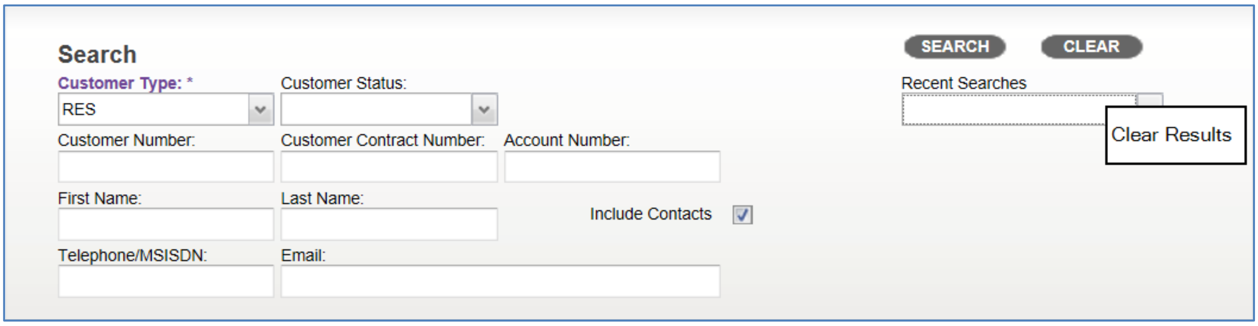


Figure 5 Tooltip - Clear button

3.5.5 User Privileges

The login credentials of each user are associated with certain privileges. Privileges are assigned through the Administration application. See **Product Documentation** > **System Administration Application User Guide** for more details.

This document assumes that the user has the appropriate privileges to perform the described actions. In particular, for performing most of the actions in this document, make sure that the following privileges are ***not*** assigned to the user, as these are read-only privileges:

- CWT – Address Read Only View
- CWT – Customer Read Only View
- CWT – Party Read Only View

3.5.6 Log in to UWS

To log in to the UWS application, complete these steps:

1. Access the following Web address in your browser:

   http://<hostname>:<port>/cwf/uws

2. On the login page, enter your **Username** and **Password** in their respective fields.

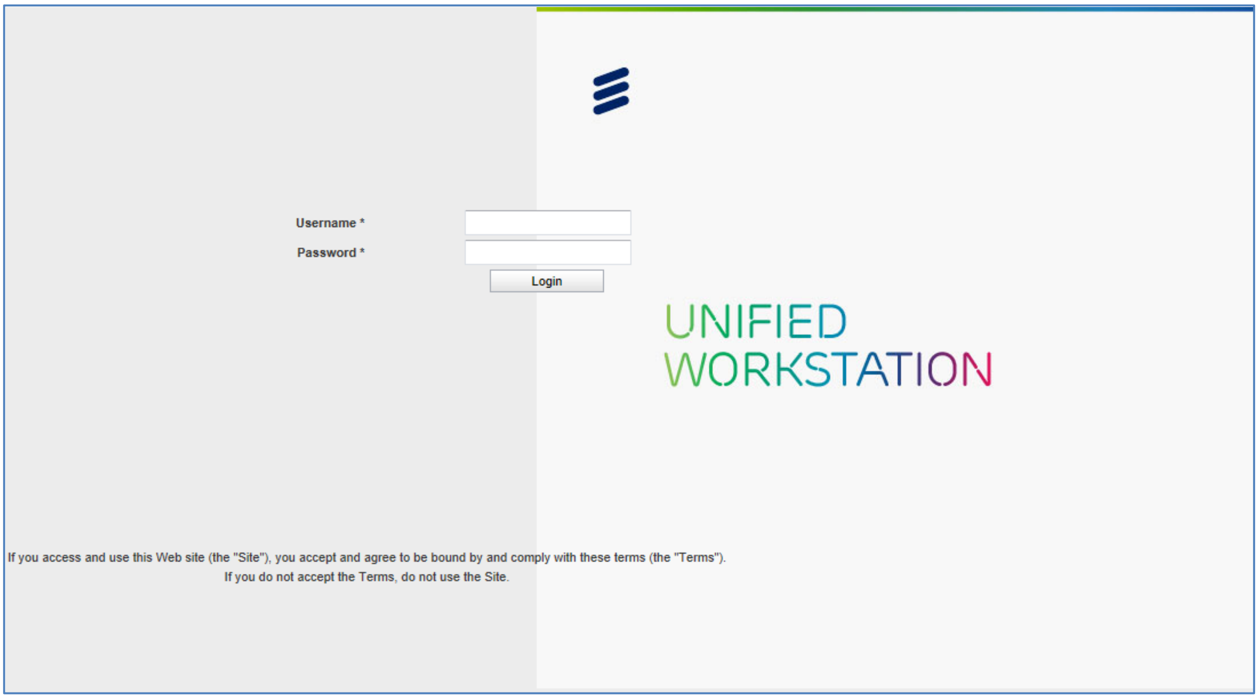


Figure 6 Login page

3 Click the **Login** button to log in to the UWS application's Search page.

3.6 Search Page

The Search page is the first page that you see after you have logged in to the UWS application. This page allows you to search for a customer record in the system. Accessing a customer record allows you to view that customer's billing, address, orders, and other information from the Dashboard and Ordering pages.

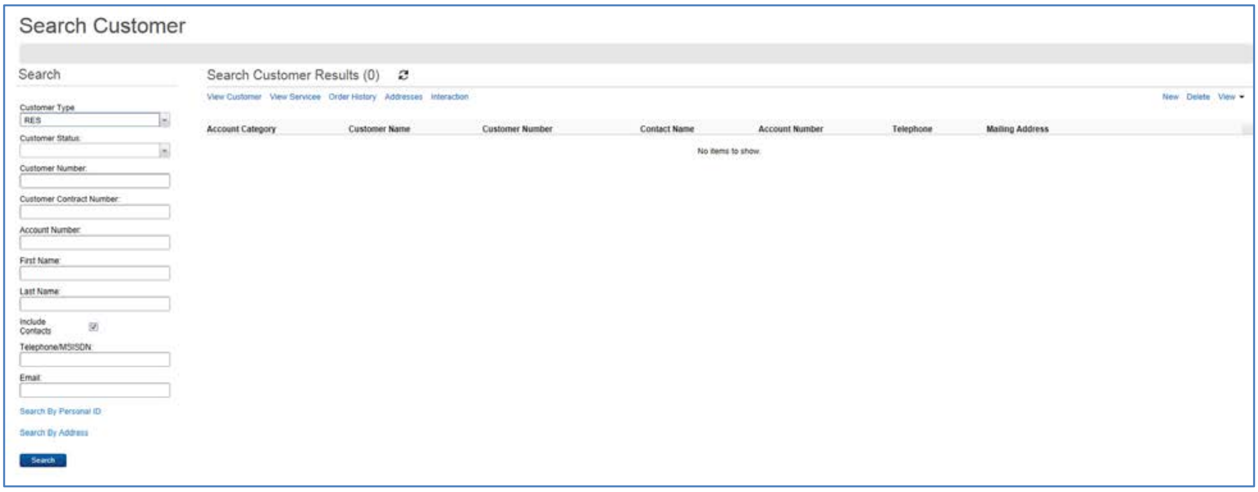


Figure 7 Search page

3.6.1 Perform a Customer Search

To search for a customer record in UWS:

1. In the Search Customer finder, enter your search criteria in any of the fields provided. You can search by customer contact information, personal identification or address.

Customer Contact Information:

The following fields are available at the top of the page to use as your search criteria:

Field	Description
Customer Type	Click the drop-down menu and select a customer type from the list (for example, Residential or Commercial). Mandatory field.
Customer Status	Click the drop-down menu and select Active Customer, Inactive Customer, or Prospect.
Customer Number	Enter the customer number.
Customer Contract Number	Enter the customer contract number.
Account Number	Enter the account number for the customer.
First Name	Enter the first name of the customer.
Last Name	Fill in the last name of the customer in this field.
Include Contacts	Select this option to perform a search that includes contacts.
Telephone/MSISDN	Enter the customer's telephone number or Mobile Subscriber Integrated Services Digital Network Number (MSISDN) in this field.
Email	Enter the email address of the customer.
Country	Select the country of the customer's address.
Street Number	Enter the street number of the customer's address.
Street Name	Enter the street of the customer's address.
Unit	Enter the customer's unit or apartment number.
City	Enter the city in which the customer resides.
Postal Code	Enter the customer's postal code.

Personal Identification Information:

The next section, **Search By Personal Identification**, allows you to search using a personal identification number of the customer.

Field	Description
Identification Type	Click the drop-down menu and select Credit Card, Driver's License, Passport, or SIN.
Identification Number	Enter the appropriate identification number for the selected Identification Type.

Address Information:

The next section, **Search By Address**, allows you to search using the customer's address details.

Field	Description
Country	Click the drop-down menu and select the country used in the customer's address.
Street Number	Enter the street number of the customer's address.
Street Name	Enter the street of the customer's address.
Unit	Enter the customer's unit or apartment number.
City	Enter the city in which the customer resides.
Postal Code	Enter the customer's postal code.

You can enter the information for one or more of these fields. The only mandatory field is Customer Type. For example, to search for all customers whose first name is Jennifer, you can choose the appropriate Customer Type and then enter `jen` in the **First Name** field. Otherwise, you can enter `%` in any field (for example, the **Last Name** field) to perform a wildcard search for all customers.

2 If you have previously completed a customer search, you can repeat that search by clicking the **Recent Searches** field's drop-down menu and selecting the customer from the list.

3 Click the **Search** button. Your search results appear under the **Customers** heading.

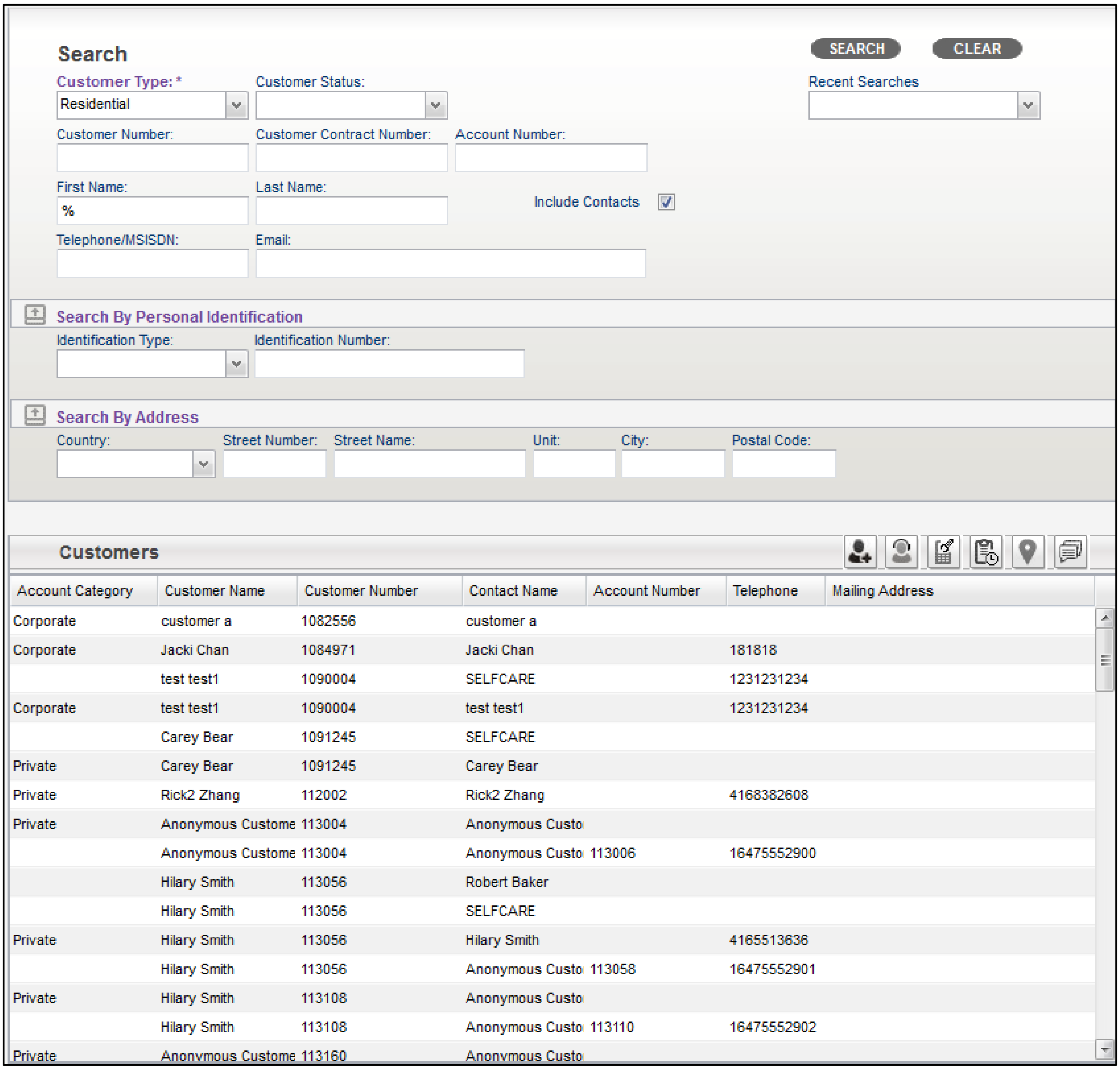


Figure 8 Search Customer - results

4 To clear your search results and begin a new search, click the **Clear** button.

3.7 Customer Search Results

The search results are displayed in a table format with the following search results columns:

- Account Category
- Customer Name
- Customer Number
- Contact Name

- Account Number
- Telephone
- Mailing Address

Each column in any table within the application displays a menu when you select the column arrow that allows search results to be sorted and filtered.

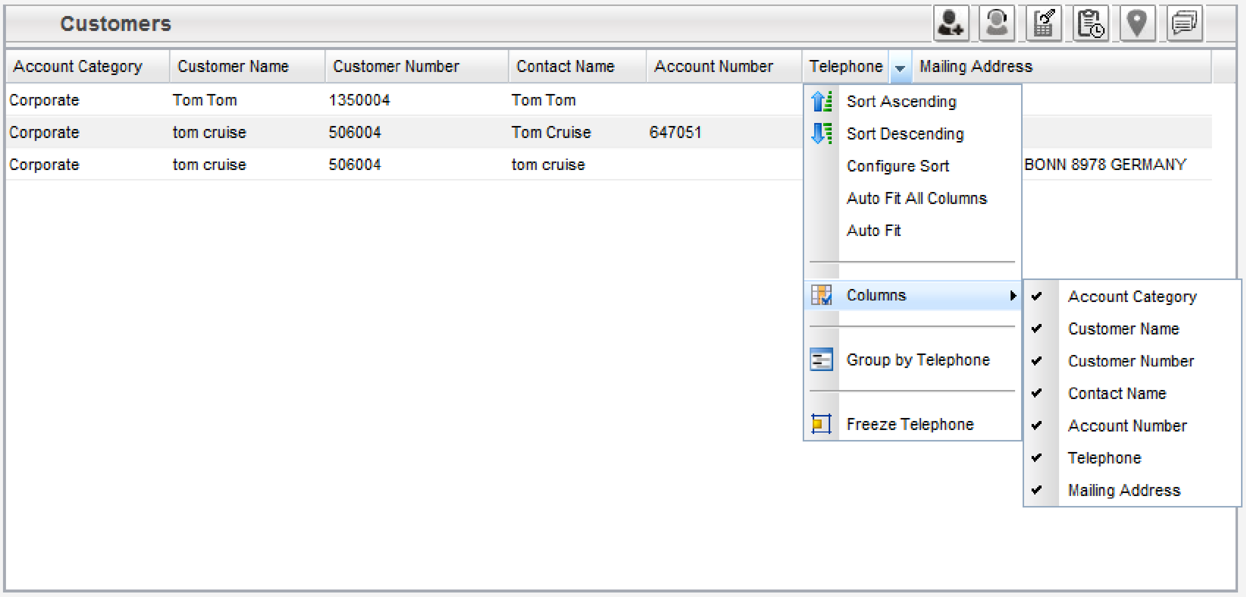
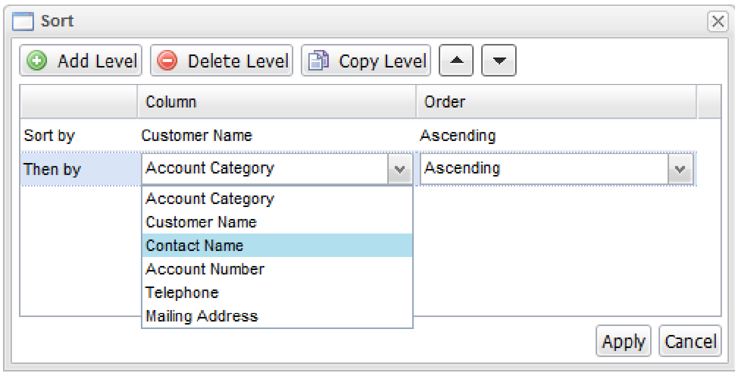


Figure 9 Table menu - Telephone column

Table Column Options

The table menu contains the following options:

Field	Description
Sort Ascending	This menu item arranges column data into a sequence from the lowest to the highest values.
Sort Descending	This menu item arranges column data into a sequence from the highest to lowest values.
Configure Sort	Selecting this option launches the Sort dialog, allowing you to specify the order in which your table columns are sorted.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>


You can perform the following actions:

Add a sorting level by clicking the Add Level button. Click the Column drop-down menu and select the column name, and then click the Order drop-down menu to specify whether to sort the data in either ascending or descending order. Numbers appears in the column headings, indicating the order in which the columns are sorted.
Remove a sorting level by selecting a level from the table and then clicking the Delete Level button.
Copy a sorting level by selecting a level from the table and then clicking the Copy Level button.
Move a sorting level up or down in the sorting configuration by clicking the Up and Down arrow buttons, respectively.

When you have finished configuring your sort, click the Apply button to save your changes.</td></tr>
<tr><td>Clear Sort</td><td>This menu item allows you to clear your previously configured sort.</td></tr>
<tr><td>Auto Fit All Columns</td><td>This menu item ensures that all data automatically fits within all table columns.</td></tr>
<tr><td>Auto Fit</td><td>This menu item ensures that all data automatically fits within the specified table column.</td></tr>
<tr><td>Columns</td><td>This column item hides or shows column data.</td></tr>
<tr><td>Group by <column name></td><td>This menu item groups results based on the value of the column. For example, if the column is set by a date type, the information is grouped by calendar specifics.</td></tr>
<tr><td>Freeze <column name></td><td>The menu item freezes the indicated table so that it remains in place and visible when horizontal scrolling occurs. The column that is frozen is moved into the first column position (far left of the table). After the column is</td></tr>
</table>

Field	Description
	frozen, you can select the unfreeze option to return the column to its previous state.

3.7.1 View Customer Information from Search Results

You can view a customer's information in one of the following ways:

- Double-click a customer name from the search results, which launches the Dashboard page.
- Highlight a customer name from the search results and click one of the action icons in the Customers heading, including View Customer ( ), View Service ( ), Order History ( ), Addresses ( ) and Interactions ( ).

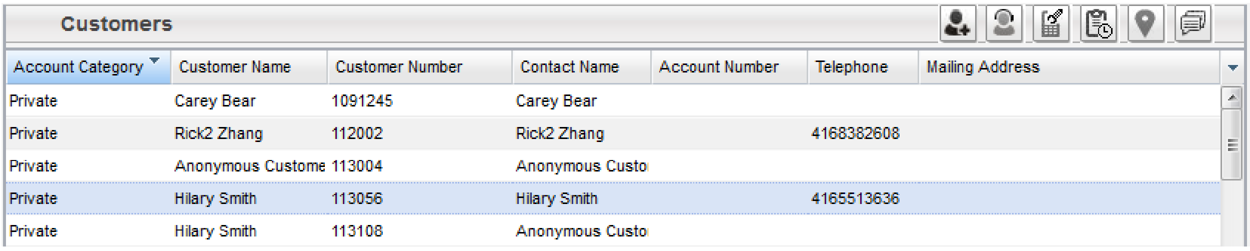


Figure 10 Search Customer – select customer from results

3.7.2 View Customer Information from Search Results

You can view a customer's information in one of the following ways:

- Double-click a customer name from the search results, which launches the Dashboard page.
- Highlight a customer name from the search results and click one of the action icons in the Customers heading.

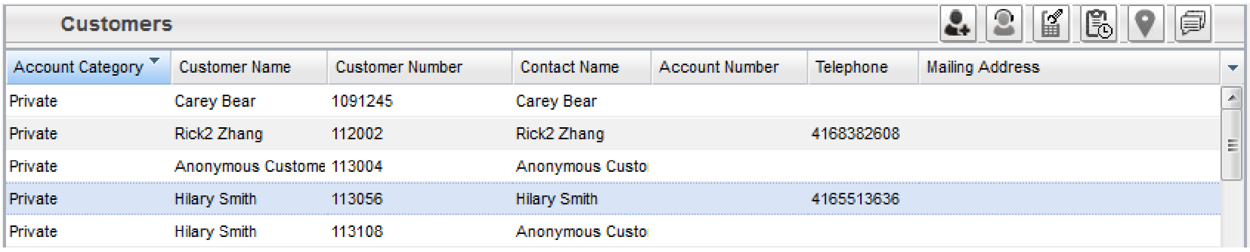


Figure 11 Search Customer – select customer from results

Action Icons

The following icons are available from the Customers results section:

Field	Description
Add Customer	Click this button to launch the **Add Customer** page, which allows you to complete details for a new customer.
View Customer	Click this button to launch the Dashboard. The **General Info** – Customer Info section automatically opens, allowing you to review and change the customer's information.
View Service	Click this button to launch the Dashboard. The **Services** section automatically opens, which allows you to review the service details.
Order History	Click this button to launch the Dashboard. The **Order History** section automatically opens, allowing you to search for, open, and change orders.
Addresses	Click this button to launch the Dashboard. The **Addresses** section automatically opens, where you can specify primary mailing and billing addresses.
Interactions	Click this button to launch the Dashboard. The **Interactions** section shows all notes recorded by customer service representatives whenever they have interacted with the customer by phone, e-mail, and so on.

3.8 Add a Customer

You can add a customer by doing the following:

1. Click the **Add Customer** button ( ) from the Search page to open the Add Customer page.

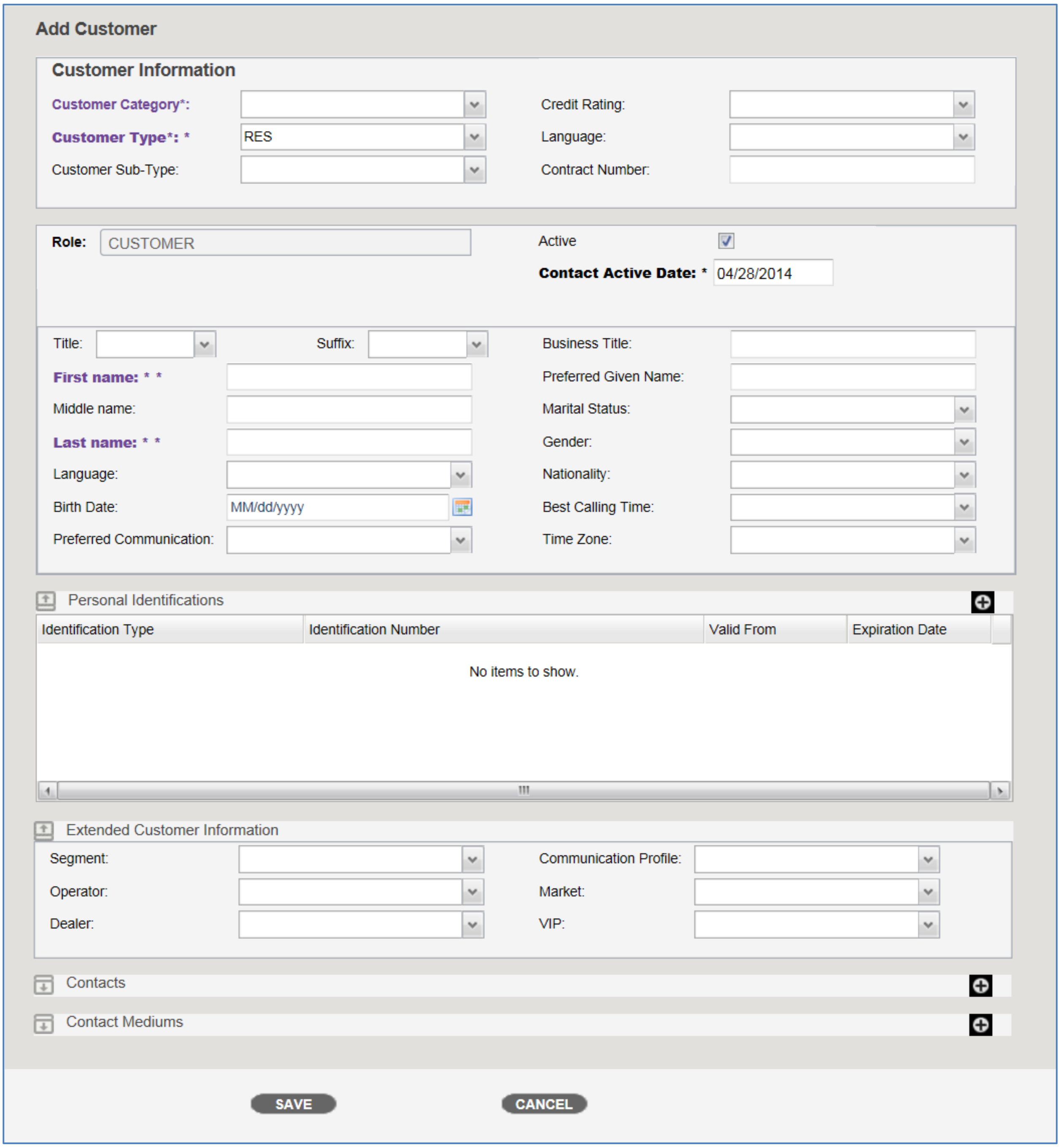


Figure 12 Add Customer page

2 Complete the pertinent fields on the Add Customer page.

Notes:

- The Customer Information, Personal Identifications, and Extended Customer Information sections automatically expand.
- To view or fill out the Contacts and Contact Mediums sections, expand these sections by clicking the **Expand** button ( ).

- To add a contact, expand the Contacts section and click the **Add** button ( ) that appears to the right of the Contacts section heading. A dialog displays where you can enter your information. Click the **Save** button when you have finished entering your information. See Contacts section for more details.

3 When you have finished entering your information, click the **Save** button to save your changes and create a new customer record.

Notes:

- You can collapse a section by click the **Collapse** button ( ).
- To edit a field, such as the mailing address, click the **Edit** button ( ). A finder is displayed, where you can search for the mailing address. Select the one that you want to edit, and make your changes.
- To delete information, such as a contact medium, highlight the contact that you want to delete and select the **Delete** button ( ).
- When a customer is first created, it’s a Prospect customer. When an order is successfully submitted for that customer, the customer will become an Active customer. When the customer is disconnected, the customer will be an Inactive customer.
- Once a customer is created in UWS, you cannot delete the customer using UWS.

4 Dashboard

The Dashboard page contains customer specific information organized into six sections:

- General InfoGeneral Info
- Accounts Info
- Services
- Order History
- Addresses
- Interactions

To view the information in each section, click the **Expand** button ( ) that is located on the right side of each section heading. You can collapse a section by clicking the **Collapse** button ( ). Similarly, you can expand all sections on the Dashboard that contain information by clicking the **Expand All** button ( ). You can collapse all sections by clicking the **Collapse All** button ( ).

4.1 Access the Dashboard

Once a specific customer has been selected, you can click on the **Dashboard** tab from the main navigation tabs. You can also access the Dashboard by doing one of the following from the Search page:

- Double-click a customer name from the search results.
- Highlight a customer name from the search results and click one of the action icons in the Customers heading.

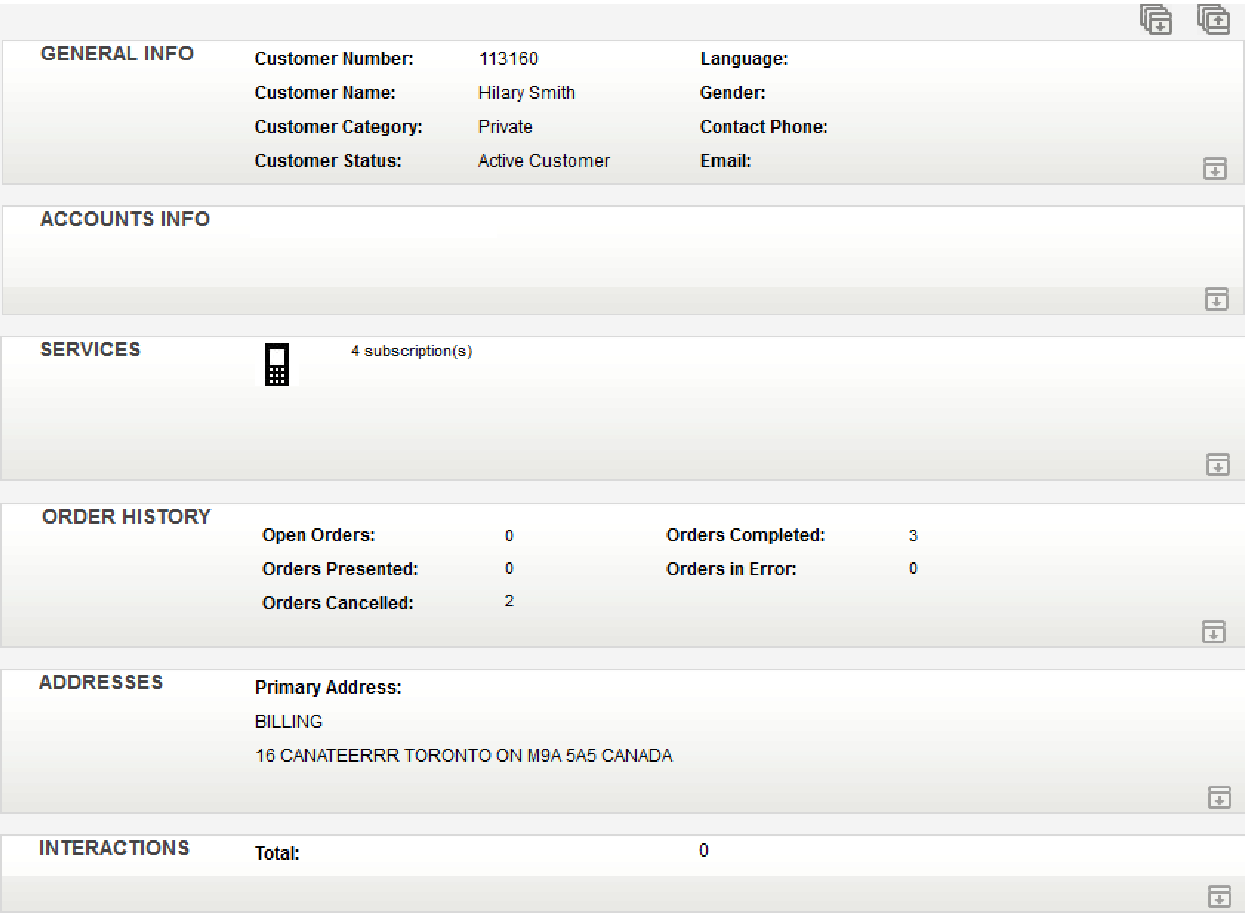


Figure 13 Dashboard page

4.2 General Info

The General Info section displays the following at-a-glance information:

- Customer Number
- Customer Name
- Customer Category
- Customer Status
- Language
- Gender
- Contact Phone

- Email

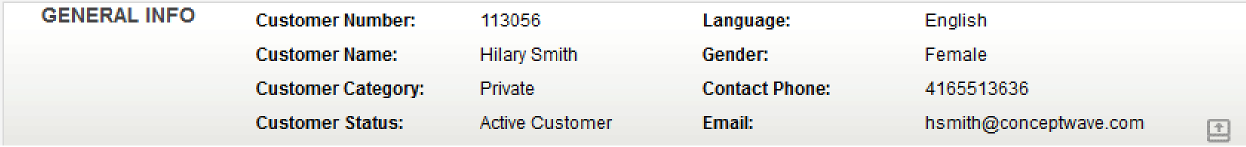


Figure 14   General Info section

Expanding the General Info section shows the Customer Info and the Owner Profile sections.

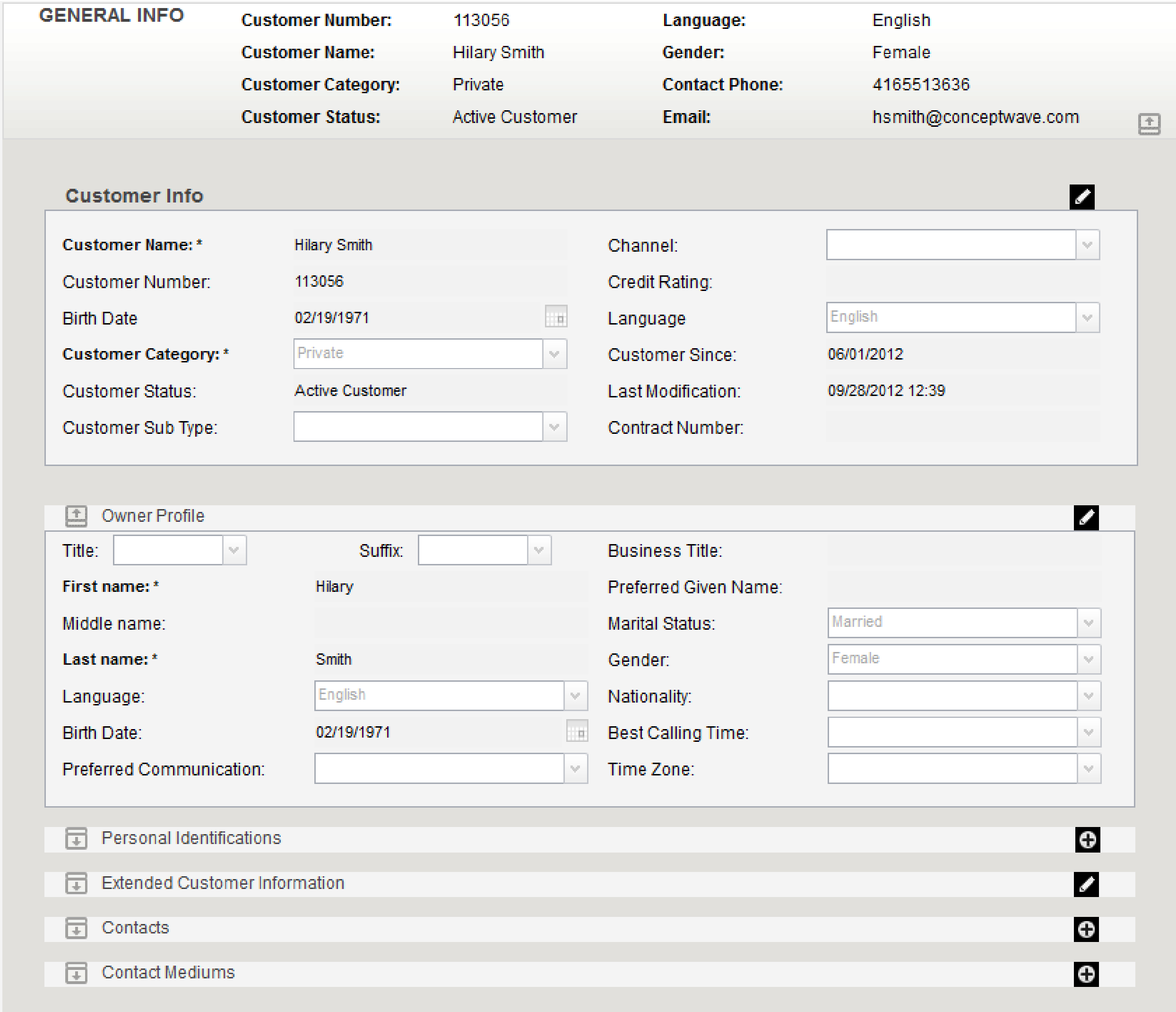


Figure 15   General Info section expanded

4.2.1 Customer Info

The Customer Info section allows you to enter and edit the basic information about a customer, such as Customer Name, Customer Number, Customer Category, and so on. To edit the customer information, follow

1. Click the **Edit** button ( ) to edit the data in the Customer Information section.
2. The New Customer Account dialog appears.

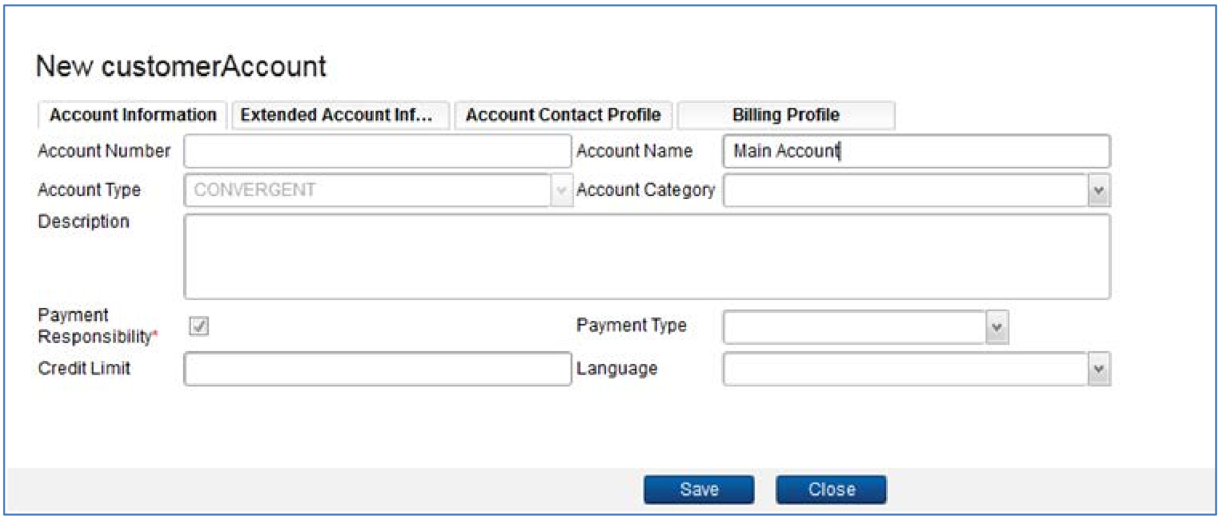


Figure 16 Edit Customer Info

3. Edit the information and then click the Save button.
4. Click the Close button to close the dialog

4.2.2 Owner Profile

The Owner Profile section displays information about the main owner profile. This section contains language preference, date of birth, business title, marital status, gender, nationality, and calling preference.

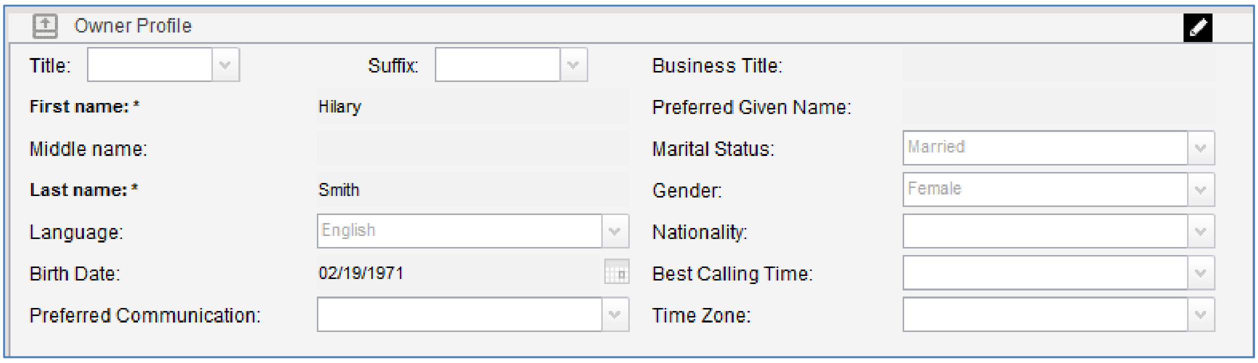


Figure 17 Owner Profile section

Click the **Edit** button ( ) to edit the information in this section. When you have completed making your changes, click the **Save** button ( ). Otherwise, to cancel any changes that you have made, click the **Cancel** button ( ).

4.2.3 Personal Identifications

The Personal Identification section allows you to enter the customer's personal identifications, such as credit card, driver's license, passport, and social insurance number (SIN).

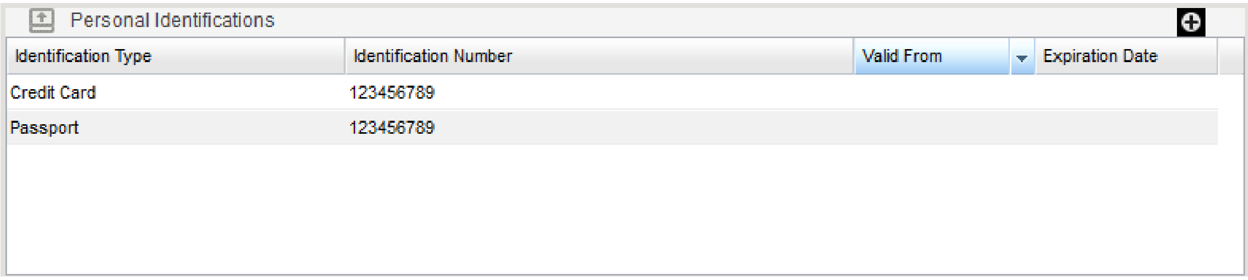


Figure 18 Personal Identifications section

To add a new identification for the customer, click the **Add** button ( ) to the right of the Personal Identifications heading and then enter the appropriate information.

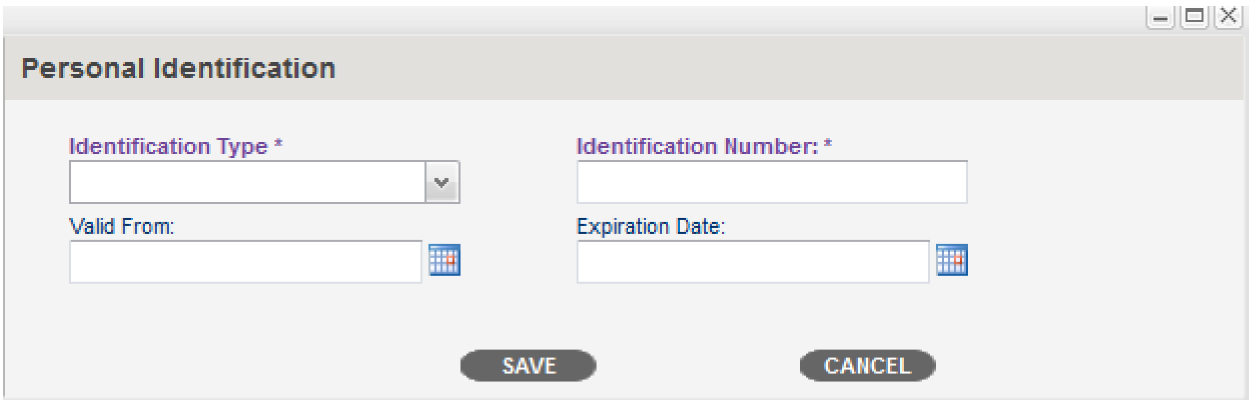


Figure 19 Personal Identification dialog

4.2.4 Extended Customer Information

The Extended Customer Information section contains additional information about the customer, such as whether the customer is a VIP. It also contains information about who the customer has interacted with such as the Operator and Dealer and includes information such as the Segment, Communication Profile and Market.

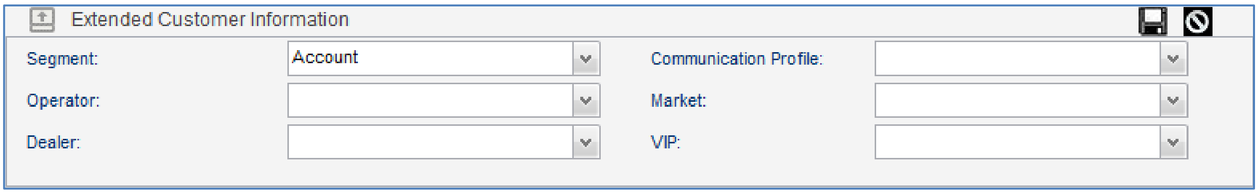


Figure 20 Extended Customer Information section

Click the **Edit** button () to edit the information in this section. When you have completed making your changes, click the **Save** button (). Otherwise, to cancel any changes that you have made, click the **Cancel** button ().

4.2.5 Contacts

A customer contact is an individual who is a contact within the customer account. The contact could be a subscriber on the account or have access to the account (like a spouse). A customer service representative may look at the contact list to determine the amount of authority the caller has on the account.

To add a contact, do the following:

1 Click the **Add** button () to the right of the Contacts heading.

Figure 21 Contacts - Add button

2 The Contact dialog appears. Enter details about your contact.

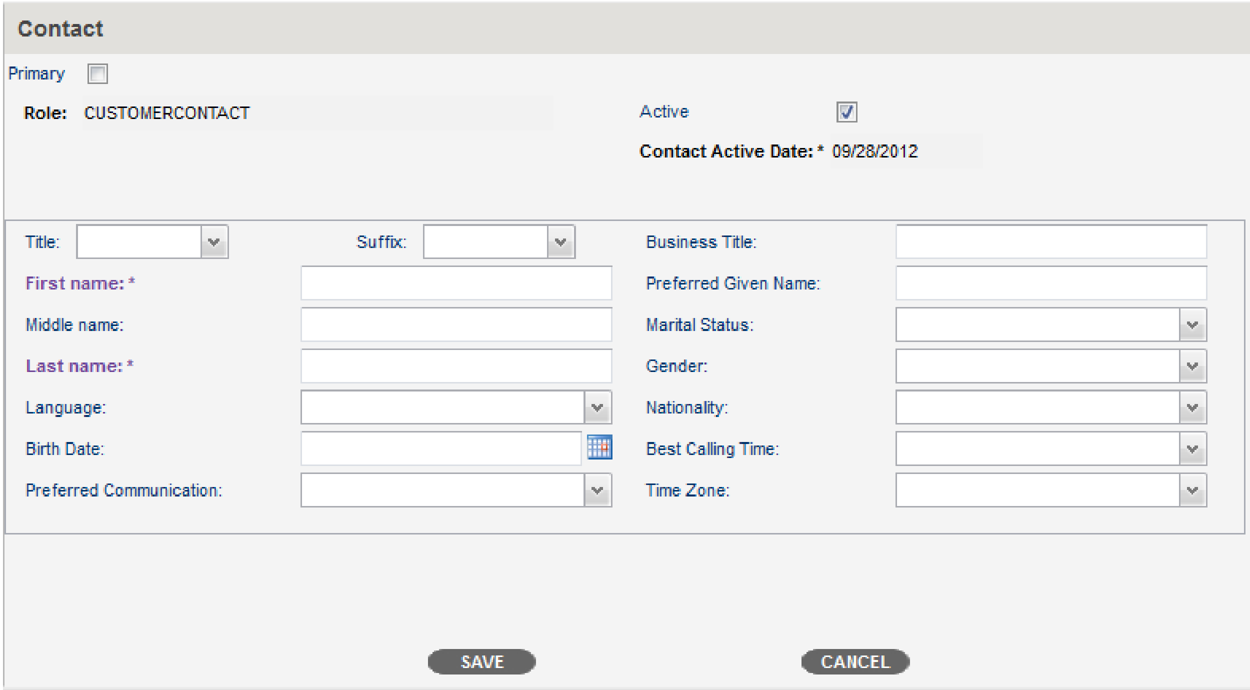


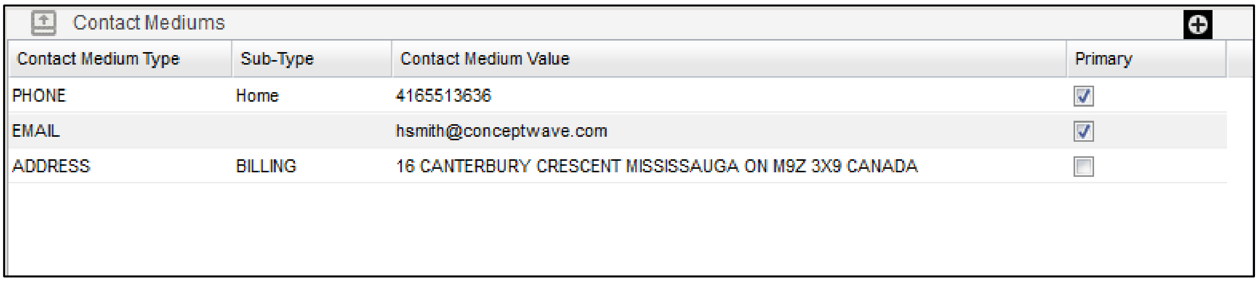
Figure 22 Contact dialog

3 When you have completed entering your contact information, click the **Save** button. Your new contact appears in the Contact section.

Note: The **Primary** flag indicates the contact that is the primary account holder on the account.

4.2.6 Contact Mediums

The Contact Mediums section allows you to specify the customer's method of contact (for example, phone numbers, e-mail address, and addresses (service, billing, and mailing).


Contact Mediums

Contact Medium Type	Sub-Type	Contact Medium Value	Primary
PHONE	Home	4165513636	☑
EMAIL		hsmith@conceptwave.com	☑
ADDRESS	BILLING	16 CANTERBURY CRESCENT MISSISSAUGA ON M9Z 3X9 CANADA	☐

Figure 23 Contact Mediums section

4.2.6.1 Add a Contact Medium

To add a contact medium, do the following:

1 Click the **Add** button (⊕) to the right of the Contact Mediums heading.

2 The Contact Medium dialog appears. Enter the method in which the customer wants to be contacted by clicking the **Contact Type** field and selecting from the list. Proceed to enter your customer's contact medium information in the fields provided.

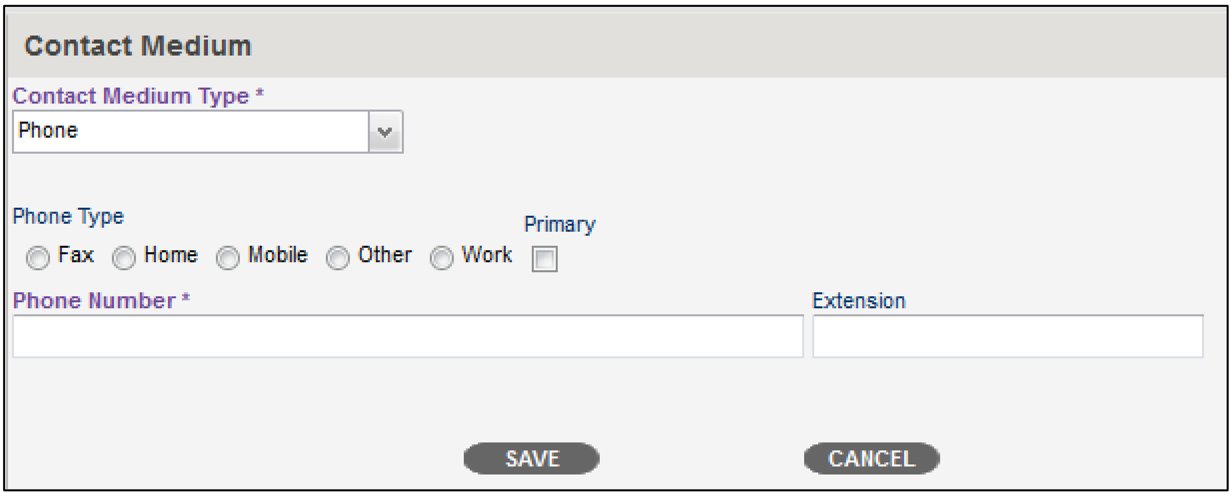


Figure 24 Add a Contact Medium

3 When you have completed entering your information, click the **Save** button. Your new contact medium appears in the Contact Medium section.

4.2.6.1.1 Add an Address Contact Medium

Note: Being able to add an address contact medium requires the appropriate privileges. In particular, the **CWT – Address Read Only View** privilege needs to be **removed** from the privileges assigned to the user.

To add an address contact medium for a particular customer, do the following:

1 Display the customer's details on the Dashboard.

2 Expand the **General Info** section.

3 Click the **Add Contact Medium** button ( ) to the right of the Contact Mediums heading.

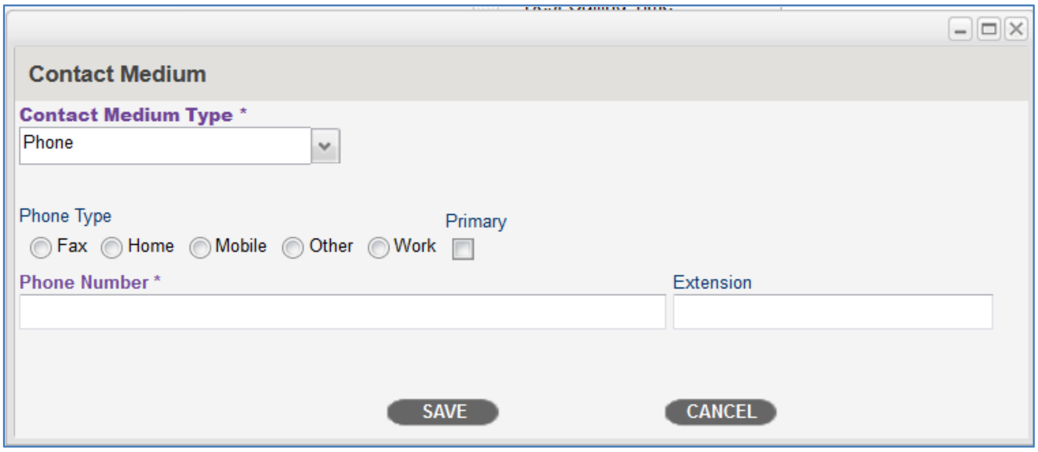


Figure 25 Contact Medium dialog

4 From **Contact Medium Type**, select **Address**.

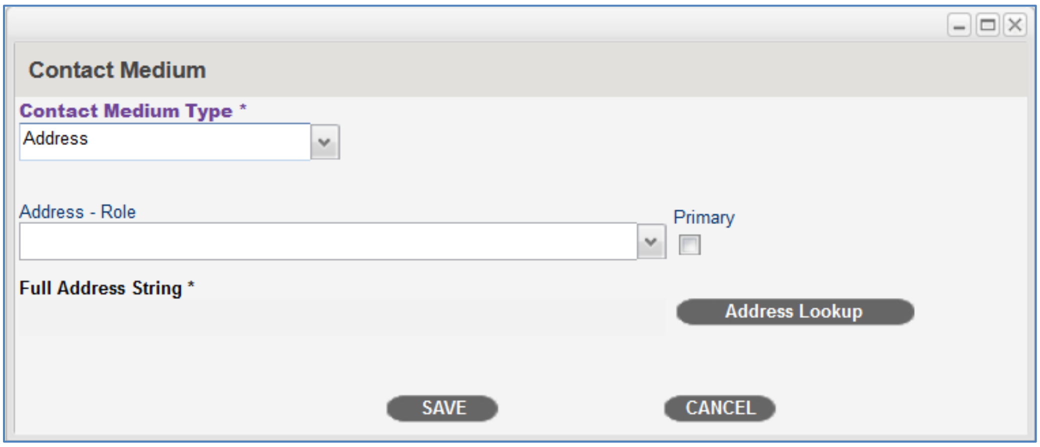


Figure 26 Contact Medium Type – Address

5 Click the **Address Lookup** button, which opens the following dialog.

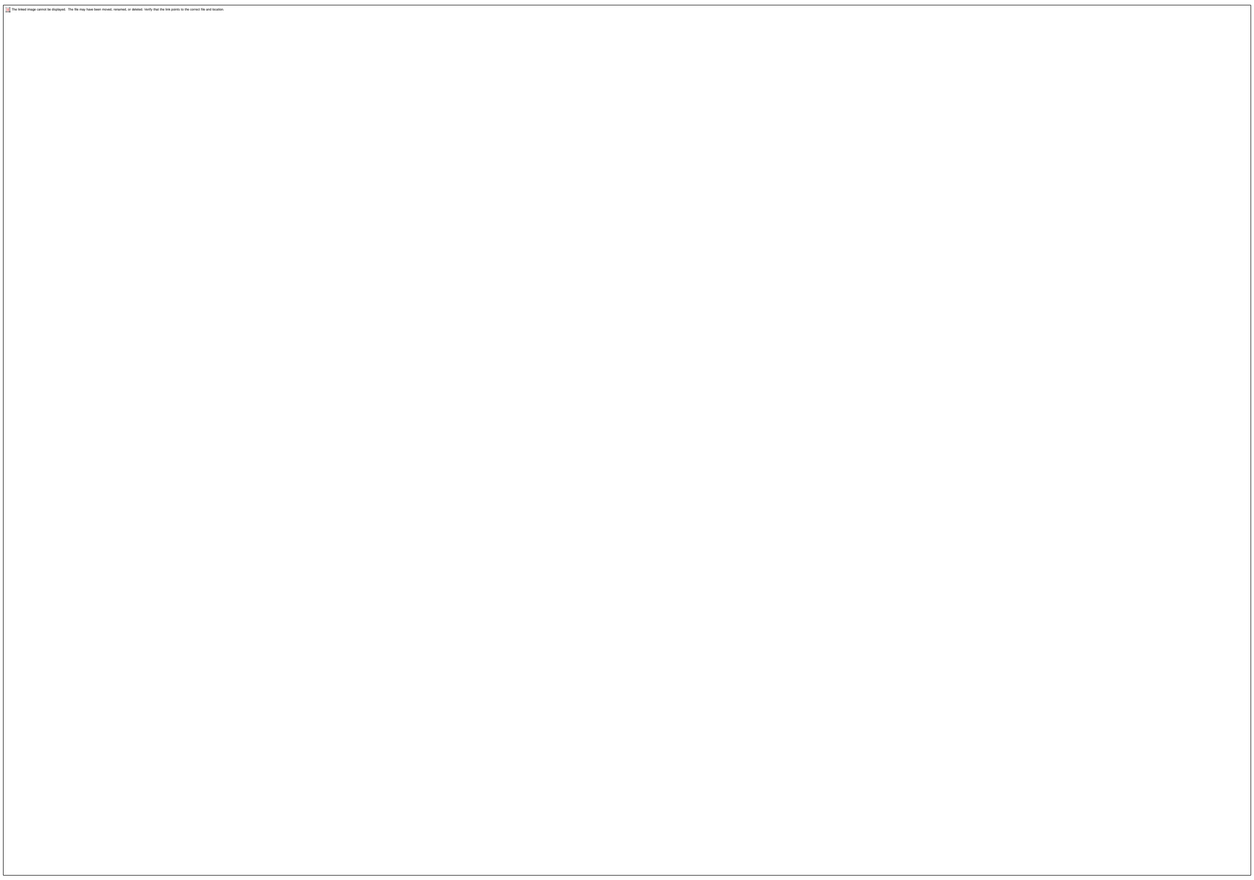


Figure 27 Address Master Finder dialog

6 If the address is already saved in the system, you can click the **Search** button to search for it and then select it. For a typical CSR, these addresses will already be in the system.

7 To add an address that is not in the system, click the **Add** button, which displays the following screen.

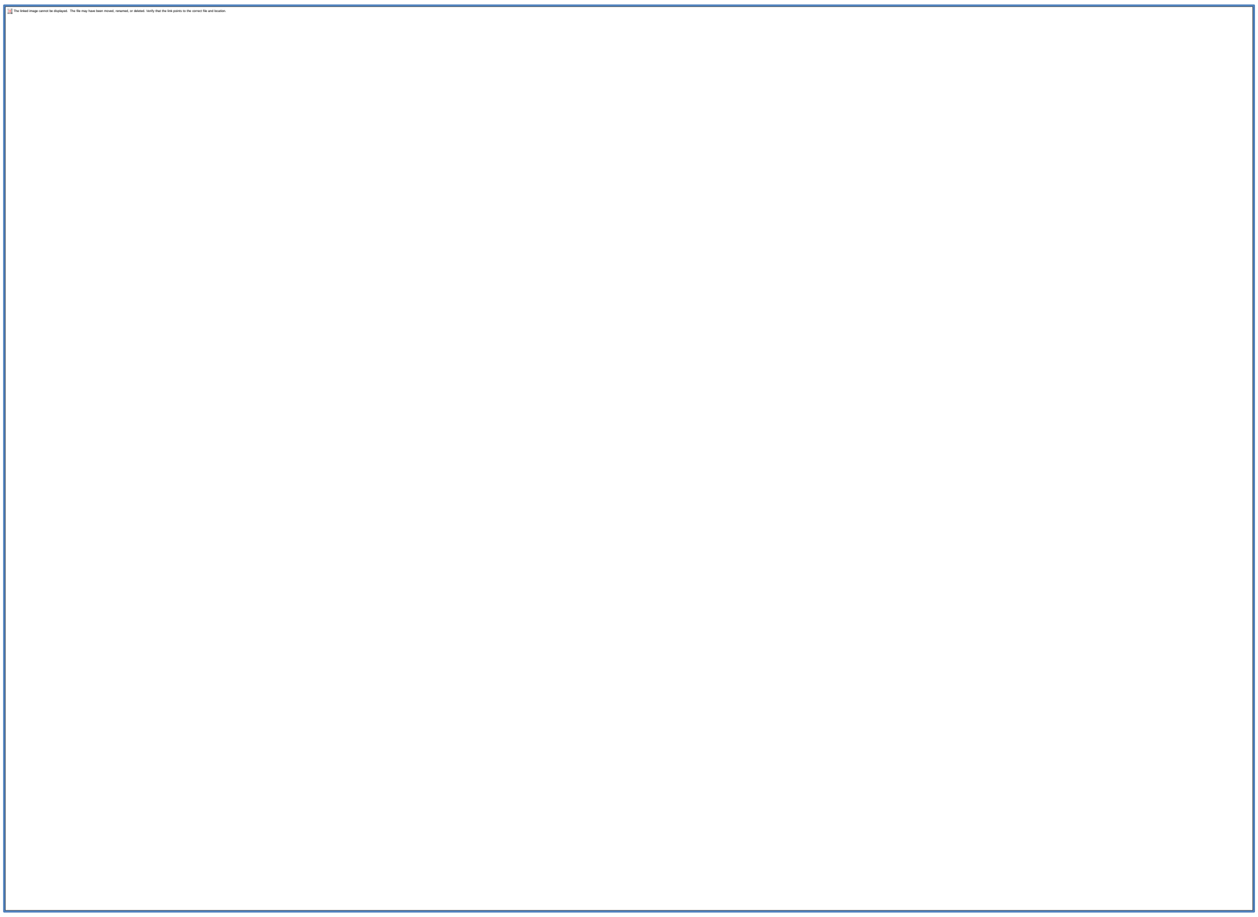


Figure 28 Dialog to add an address

8 Enter the **Postal/Zip Code**.

9 Click the icon next to **Town/City** to display the following screen.

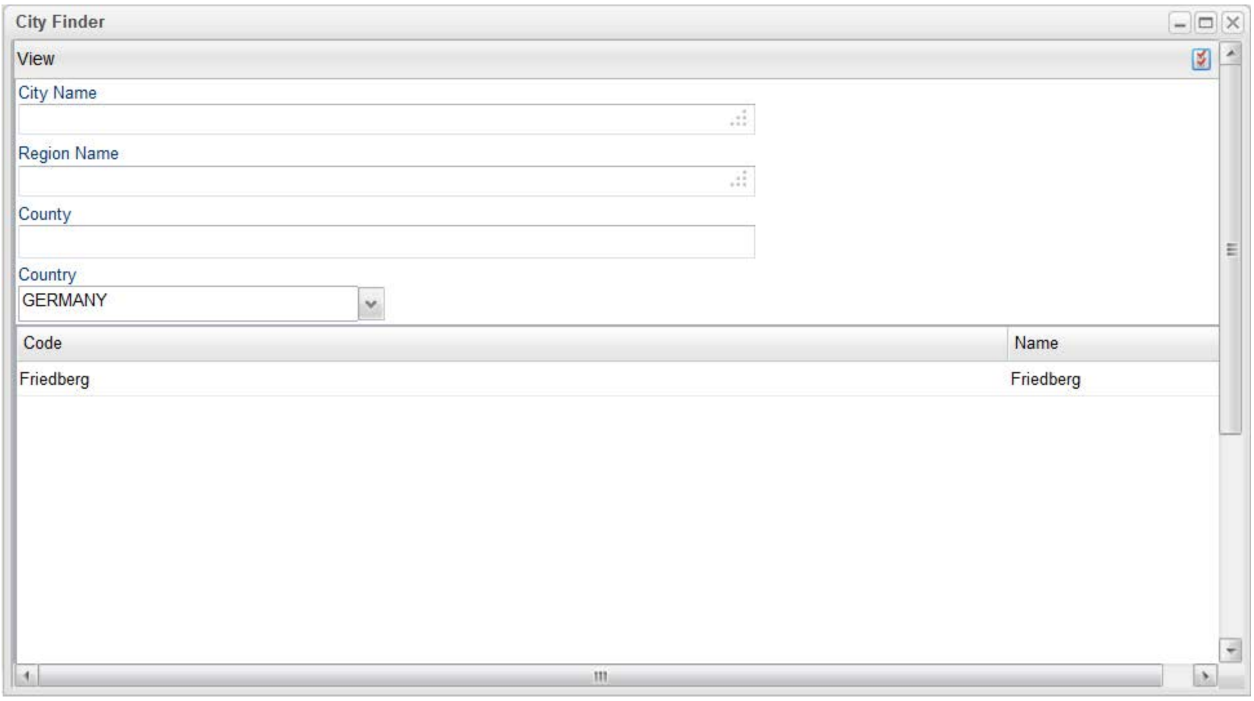


Figure 29 City Finder dialog

10 If the city that you want is already in the system and displayed, select it and click the **Select** button. If the city is not in the system, click the **Add** button to add a city. Then, select that city on this screen and click the **Select** button. The previous dialog appears, with the **Town/City** field filled in.

11 Enter the remaining information for the address.

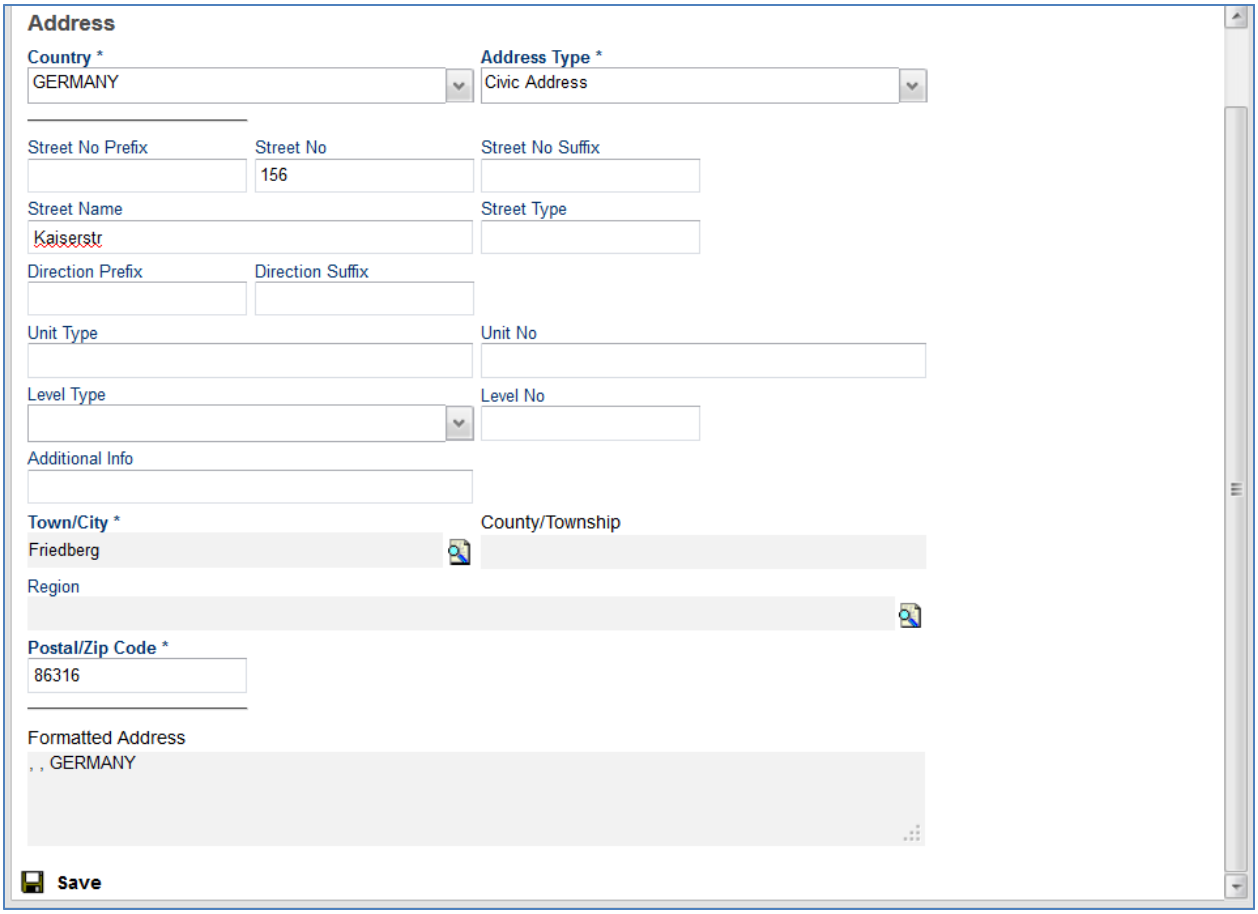


Figure 30 Address Details filled in

12 Click the **Save** button.

4.2.6.2 Edit a Contact Medium

To edit an existing contact medium, do the following:

1. Expand the Contact Mediums section and double-click the contact medium that you want to edit.
2. From the Contact Medium dialog, click the **Edit** button and make your changes.

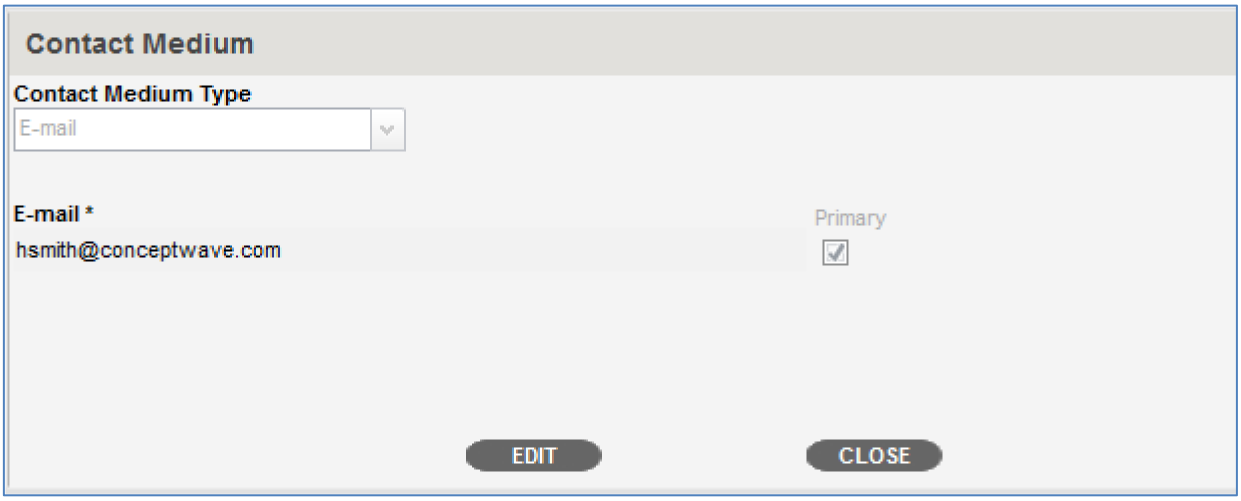


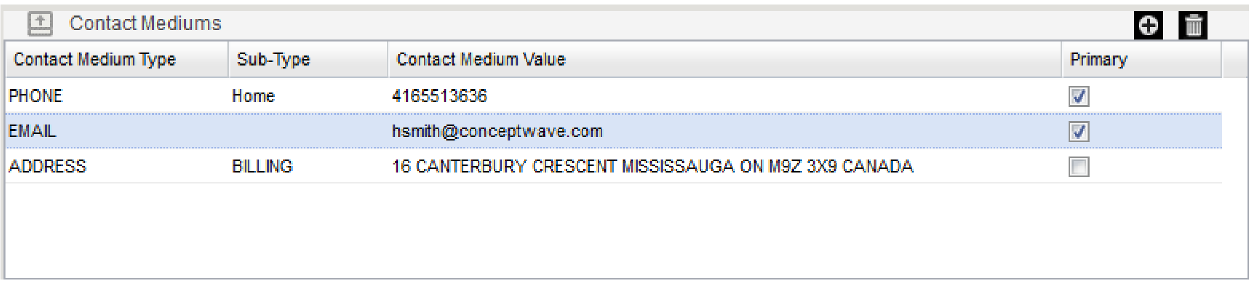
Figure 31 Edit Contact Medium information

3 When you have completed your changes, click the **Save** button.

4.2.6.3 Delete a Contact Medium

To delete a contact medium, complete these steps:

1 Expand the Contact Mediums section and select the contact medium that you want to delete by clicking and highlighting the row.



Contact Mediums

Contact Medium Type	Sub-Type	Contact Medium Value	Primary
PHONE	Home	4165513636	☑
EMAIL		hsmith@conceptwave.com	☑
ADDRESS	BILLING	16 CANTERBURY CRESCENT MISSISSAUGA ON M9Z 3X9 CANADA	☐

Figure 32 List of contact mediums

2 Click the **Delete** button () to the right of the Contact Mediums heading.

3 A message appears, asking you to confirm whether you want to delete this contact medium. Click the **Yes** button.

4 Your contact medium has been successfully deleted.

4.3 Accounts Info

The Accounts Info section shows the number of top-level accounts at-a-glance.

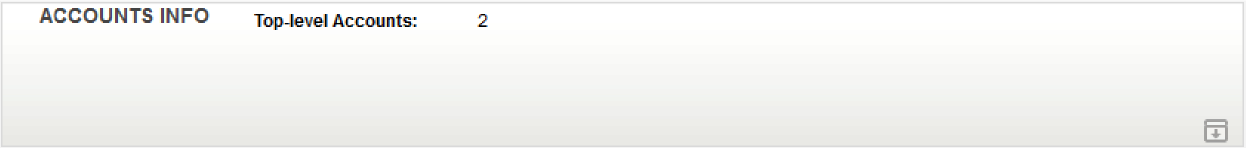


Figure 33 Accounts Info section

Expanding this section shows a list of accounts in the Accounts section.

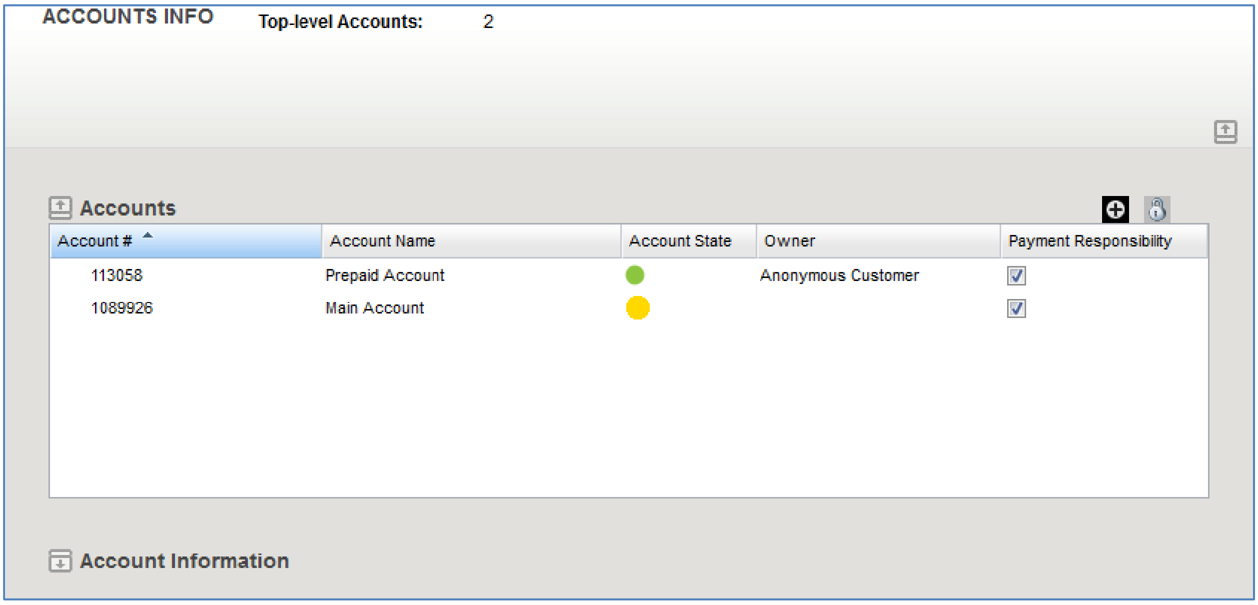


Figure 34 Accounts section

Selecting an account in the Accounts section shows its details in the Account Information section.

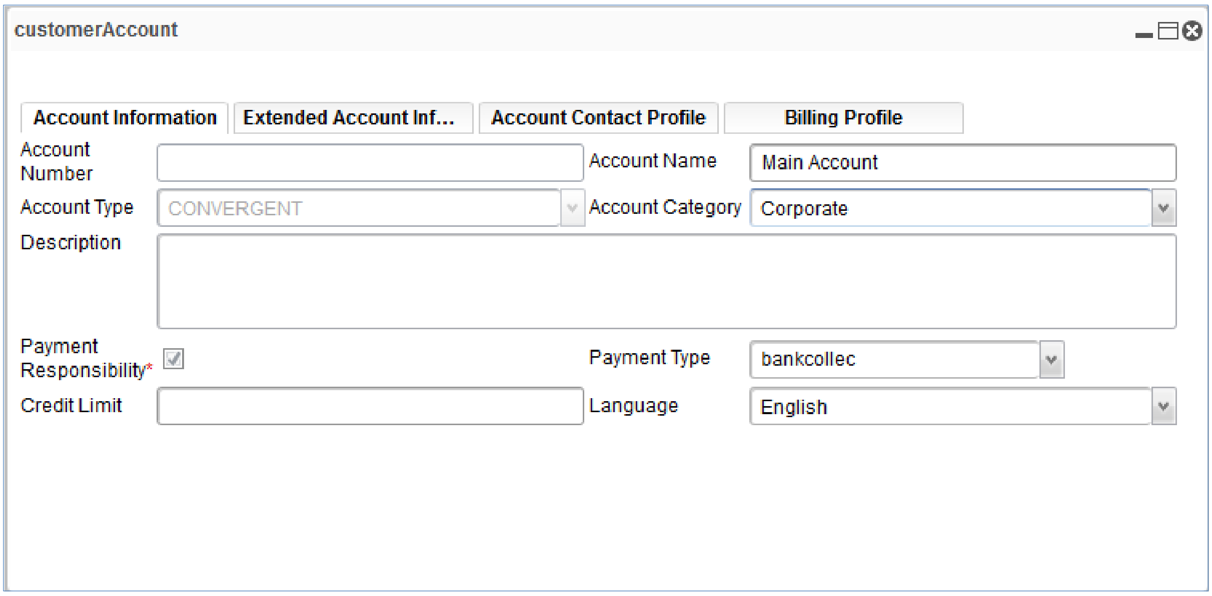


Figure 35 Account Information section

4.3.1 Account State

The Account State for each account is indicated by either the green icon ( ) or the yellow icon ( ).

- The green icon means that the account is ACTIVE.
- The yellow icon means that the account is DEPLOYED.

Normally, the state for each account is determined by the billing system. The default state for each account is DEPLOYED, represented by the yellow icon ( ).

4.3.2 Edit Account Information

Note: You need the appropriate privileges to be able to edit account information. For example, you will need the following privileges:

- Care – Edit Customer Accounts
- Care – Edit Customer Information

To edit the Account Information section, do the following:

1. Display the customer's information on the Dashboard.
2. Expand the Accounts Info section.
3. Highlight the account number that you want to edit from the Accounts section, and then click the **Edit Account Information** button ( ) in the Account Information section to make the Account Information section editable.

4 Make the pertinent changes and then click the **Save** button ( ).

4.3.3 Add a New Account

To add a new customer account, do the following:

1 Click the **Add** button ( ) to the right of the Accounts heading.

2 On the Add Account page, complete the pertinent fields. Fields marked with an asterisk (*) indicate that you must enter information in them.

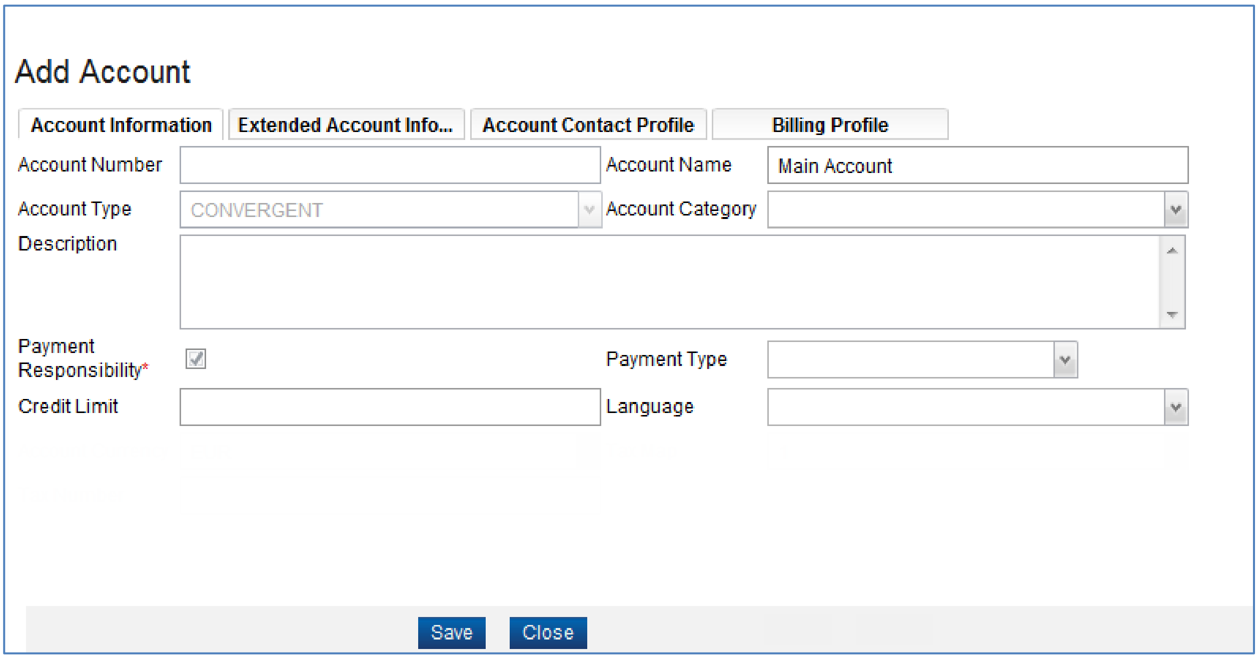


Figure 36 Add Account page

3 When you have completed entering your information on the Add Account page, click one of the following buttons:

- **Save** button, to save your changes and close the Add Account page.
- **Order** button, to save your changes, and to add a new order or change an existing one.
- **Cancel** button, to cancel your changes and return to the Dashboard.

4.3.4 Extended Account Information

The Extended Account Information section contains additional information about the account, such as the segment, channel, market, etc.

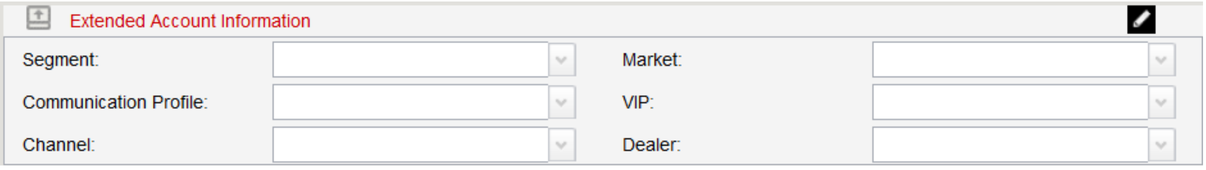


Figure 37 Extended Account Information section

To edit the information in this section, click the **Edit** button (). When you have completed making your changes, click the **Save** button (). Otherwise, to cancel any changes that you have made, click the **Cancel** button ().

4.3.5 Owner Profile

The Owner Profile section displays information about the main owner profile, such as the customer's job title, mother's maiden name, nationality, and more.

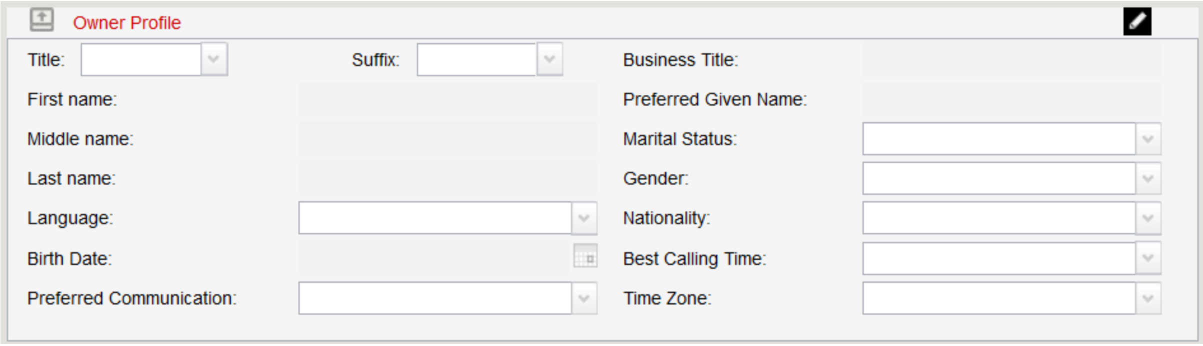


Figure 38 Owner Profile section

To edit the information in this section, click the **Edit** button (). When you have completed making your changes, click the **Save** button (). Otherwise, to cancel any changes that you have made, click the **Cancel** button ().

4.3.6 Balances

For postpaid subscriptions, the Balances section shows outstanding account balances that require payment. You can click the **Refresh Balance** button () to view the current balance on the selected account. For prepaid subscriptions, the Balances section shows the remaining monetary balance. The Balances section also usage balances such as residual voice minutes or SMS.

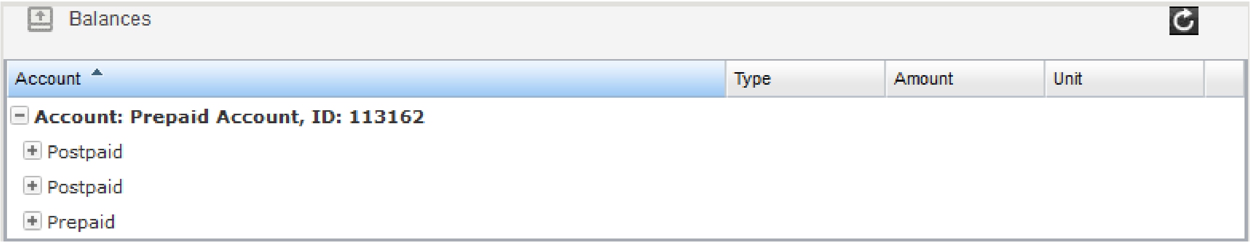


Figure 39 Balances section

4.3.7 Top Up

The Top Up section allows you to top-up the customer's account, using cash, a credit card payment, or a bank payment. You can also choose whether to perform a recurring top-up or a one-time top-up. Note that, at the present time, if multiple subscriptions exist under a single account, it is not possible to top-up a single subscription only.

Note: Only CSRs with the correct top-up account permissions will have access to perform top-ups on customer accounts.

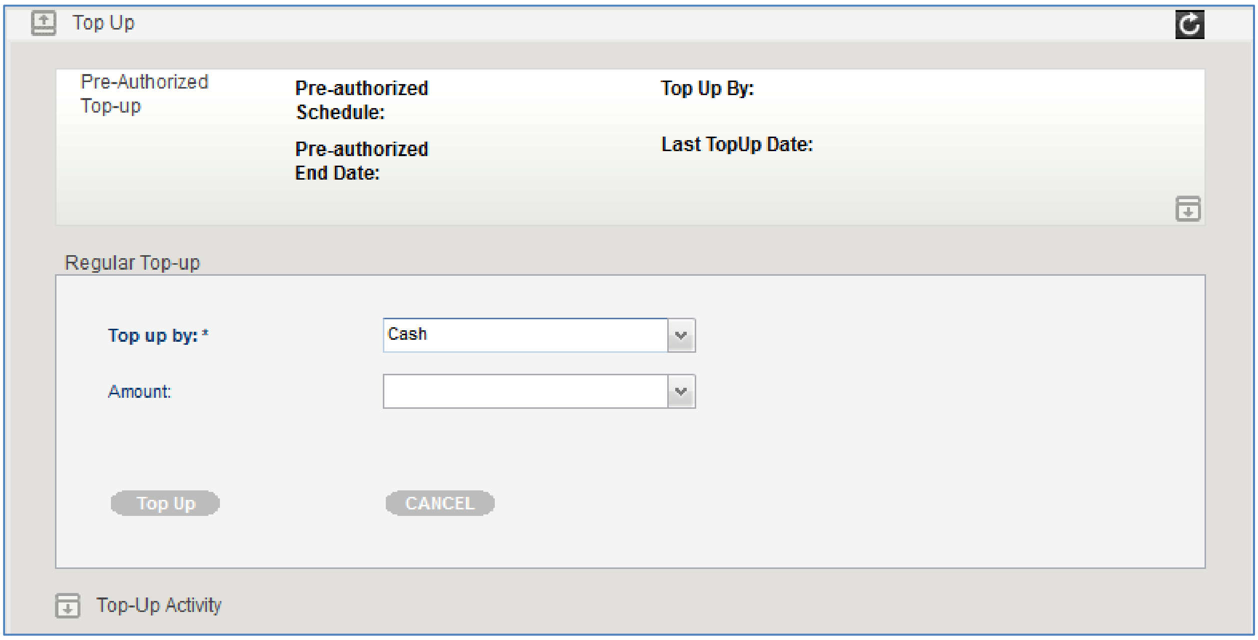


Figure 40 Top Up section

4.3.7.1 Pre-Authorized Top-up

You can make recurring pre-authorized top-ups using credit card payment.

To make a pre-authorized top-up, do the following:

1 Click the **Expand** button ( ) at the bottom of the Pre-Authorized Top-up section. Doing so displays the area in which the information for a recurring top-up can be entered.

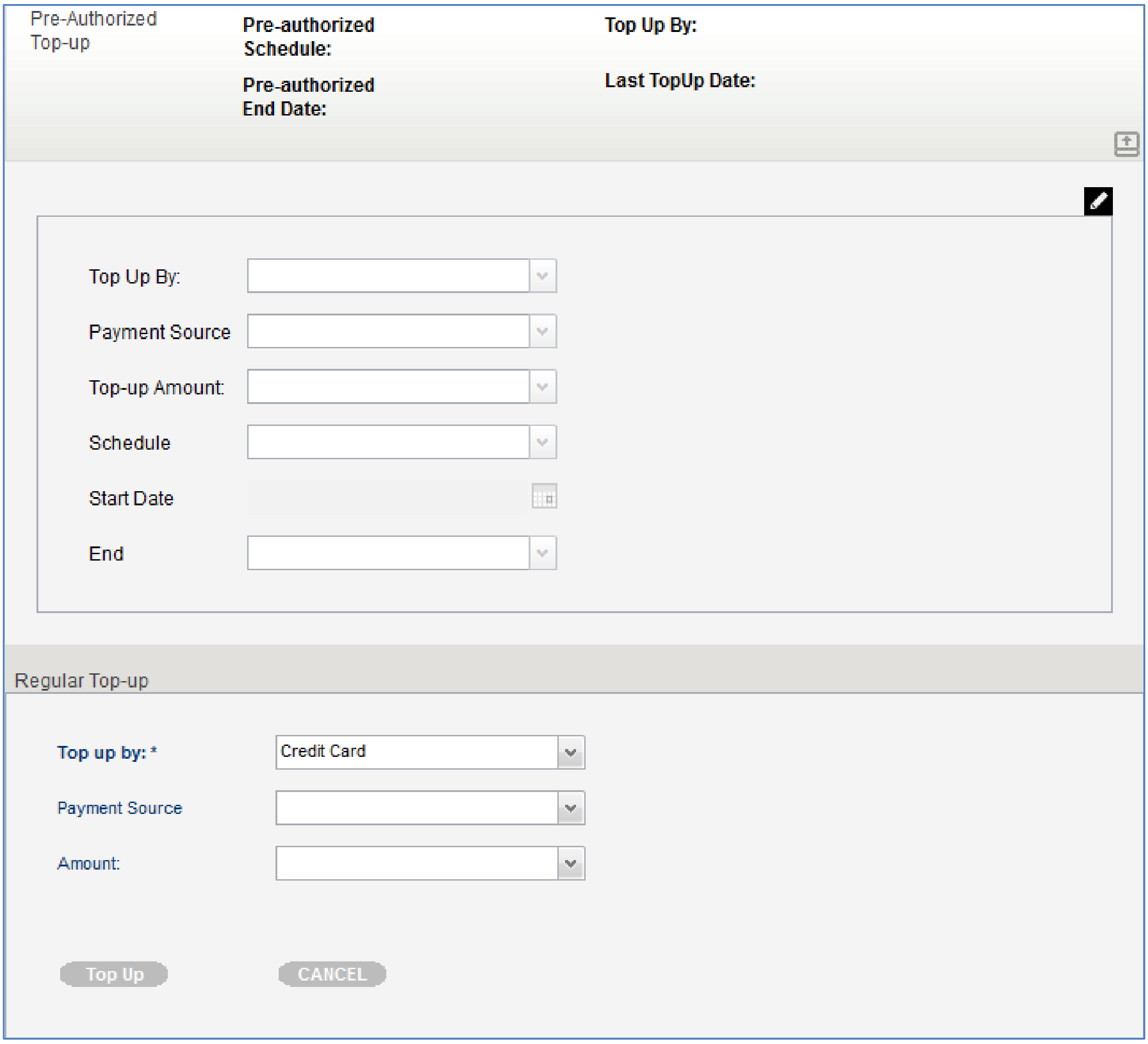


Figure 41 Pre-Authorized Top-up

2 Click the **Edit** button ( ) and enter the appropriate information in the fields. The payment method specifies the payment source as credit card information listed from the Payment Profile section. The top-up amount is the amount of the recurring top-up. A recurring top-up schedule is selected as daily, bi-weekly or monthly, as well as the start date for the recurring top-up and the ending condition. The ending condition is chosen as an end date, after a certain number of top-ups, or until the customer decides to cancel the recurring top-up.

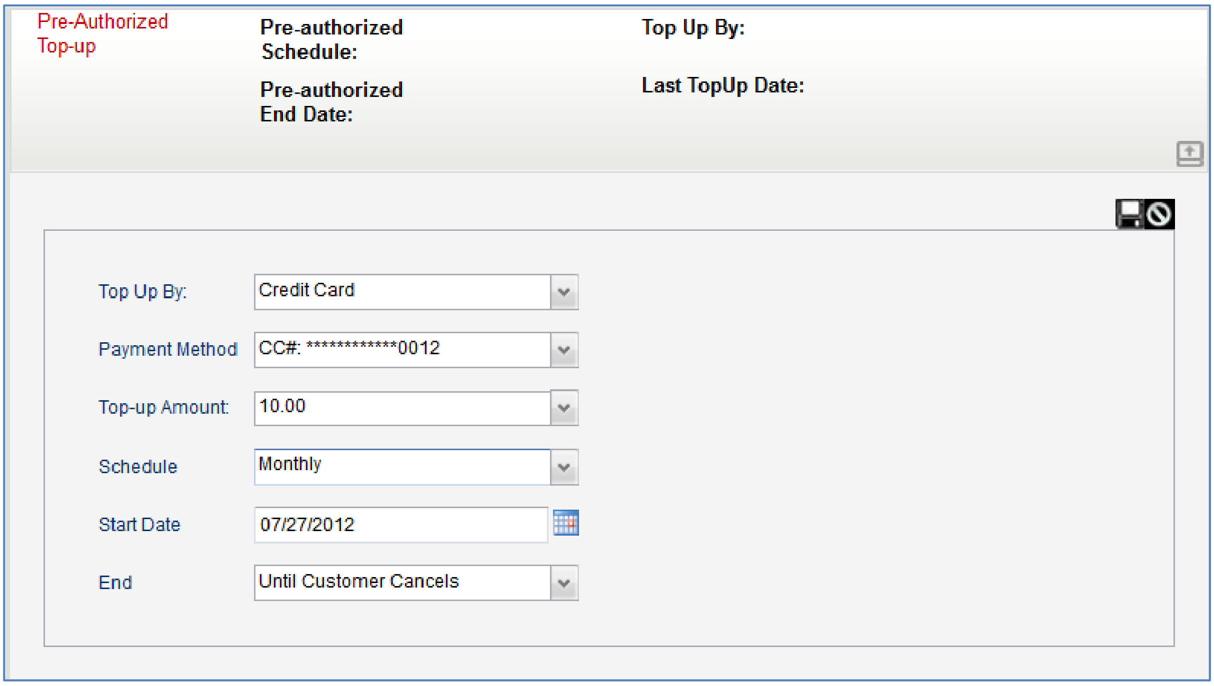


Figure 42 Pre-Authorized Top-up – credit card

3 Click the **Save** button ( ). The information entered appears at the top of the Pre-Authorized Top-up section. The customer will see the top-up in their account based on the schedule provided.

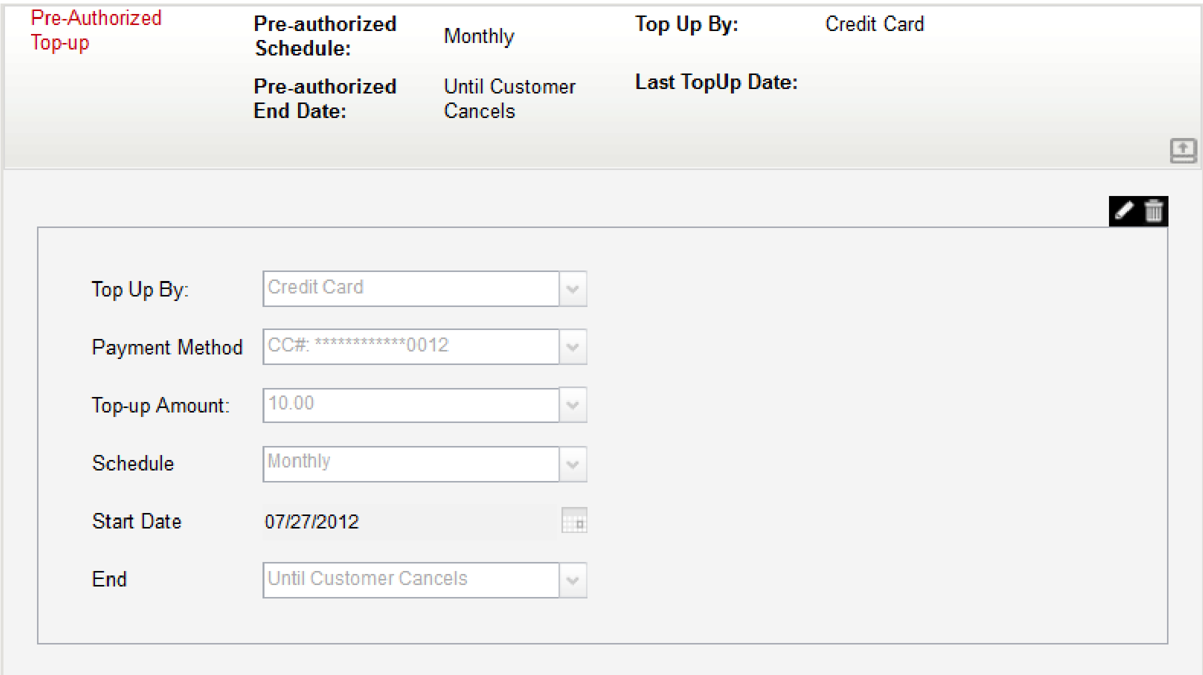


Figure 43 Pre-Authorized Top-up information entered

4.3.7.2 One-time Top-up

You can make a one-time top-up using cash or credit card payment.

To make a one-time top-up, do the following:

1. Enter the appropriate information in the Regular Top-up section. Certain top-up amounts contain bonuses such as the $25.00 amount with 25 bonus SMS.

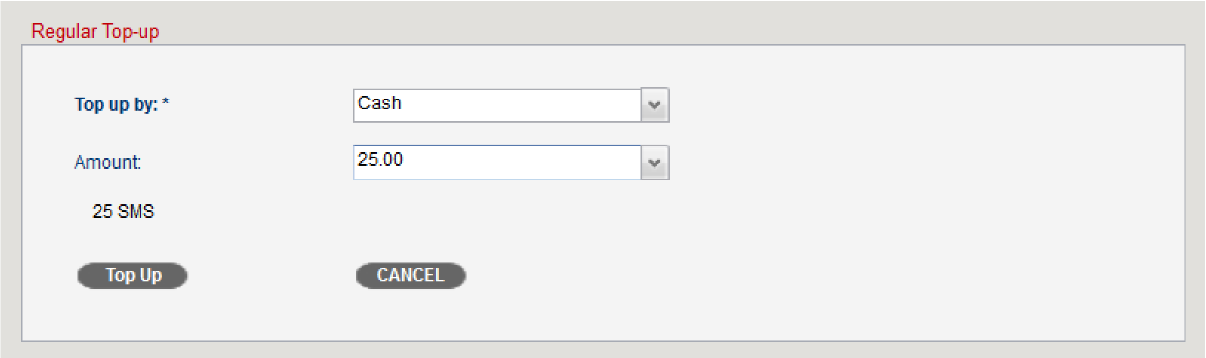


Figure 44 Regular Top-up

2. Click the **Top Up** button. A dialog appears asking you to confirm the top-up.

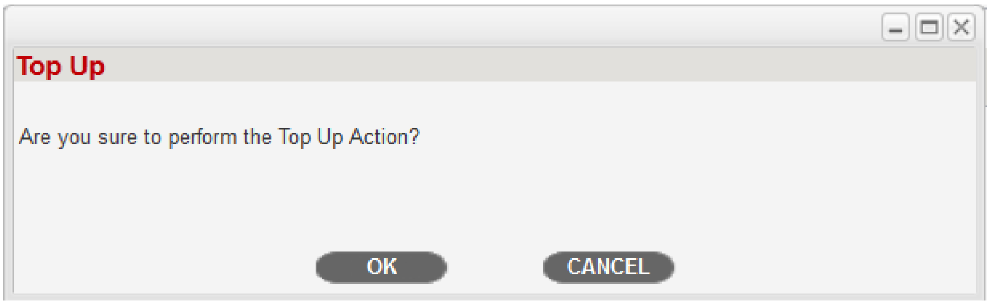


Figure 45 Regular Top-up confirmation dialog

3. Click the **OK** button.

4. If the top-up was made successfully, a dialog is displays stating this.

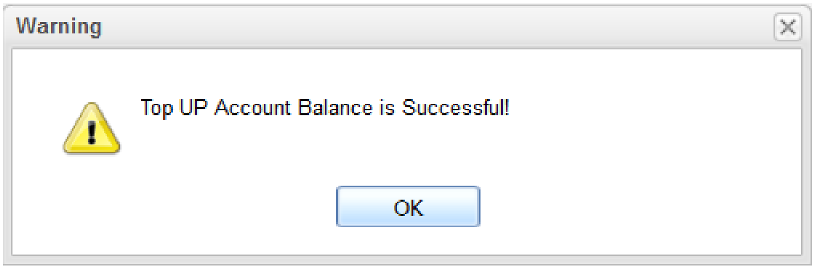
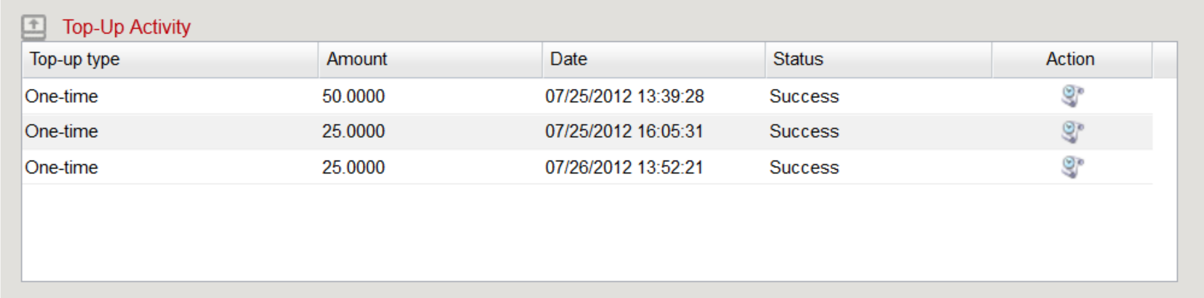


Figure 46 Top-up made successfully

4.3.7.3 Top-Up Activity

The Top-Up Activity section shows the history of top-ups which have been made to this account. Click the **Expand** button ( ) next to Top-Up Activity to expand this area and view the top-up details.

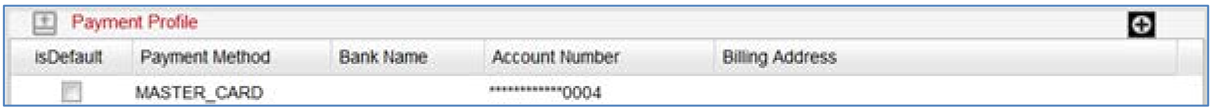

Top-Up Activity

Top-up type	Amount	Date	Status	Action
One-time	50.0000	07/25/2012 13:39:28	Success	
One-time	25.0000	07/25/2012 16:05:31	Success	
One-time	25.0000	07/26/2012 13:52:21	Success	

Figure 47 Top-Up Activity

4.3.8 Payment Profiles

The Payment Profile section allows you to specify the customer account's payment type. UWS is able to support multiple credit card payment methods that can be used to pay bills for postpaid accounts. For prepaid accounts, these payment methods can be selected as payment sources for regular top-ups or pre-authorized top-ups.


Payment Profile

isDefault	Payment Method	Bank Name	Account Number	Billing Address
	MASTER_CARD		************0004	

Figure 48 Payment Profile section

Add Payment Profile Information

You can add payment profile information for credit card information. To add payment profile information, do the following:

1 Click the **Add** button ( ) to the right of the Payment Profile heading.

2 The Payment Profile dialog appears. Enter your customer's information in the fields provided. Newly entered payment methods are assumed to be preferred and, as such, are automatically selected as the new default payment method. If multiple payment methods exist, one may double-click the payment method in the payment profile table and select edit to mark it as default. This will assign the payment method of interest as the default payment method. Also, note that the default payment method is that of the top level account; only one default payment method may be assigned per account regardless of the number of subscriptions associated with the account.

3 In the **Payment Method** field, select Credit Card.

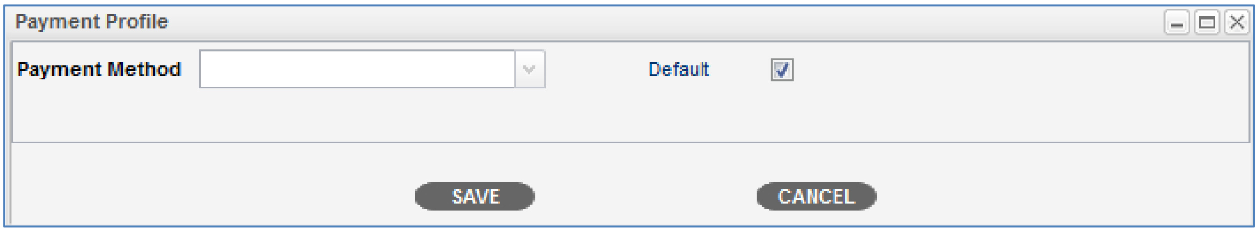


Figure 49 Payment Profile dialog

4 Based on **what** you select in the Payment Method field, additional fields will appear where you can enter the appropriate information.

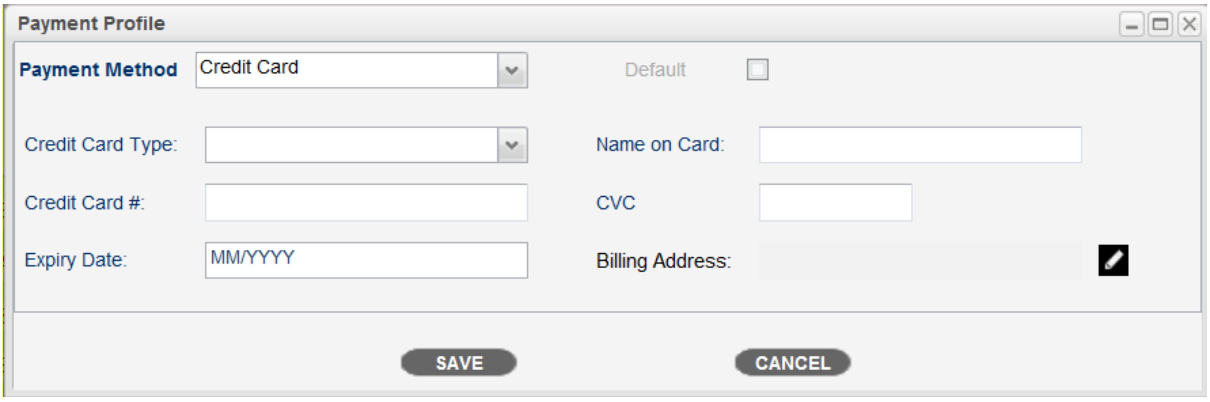


Figure 50 Payment Method – Credit Card

5 When you have completed entering your information, click the **Save** button.

Edit Payment Profile Information

To edit an entry in the Payment Profile section, follow these steps:

1 Double-click the entry from the Payment Profile section. The Payment Profile dialog with the information that is already entered appears.

2 Click the **Edit** button. The dialog changes so that all the entries can be edited.

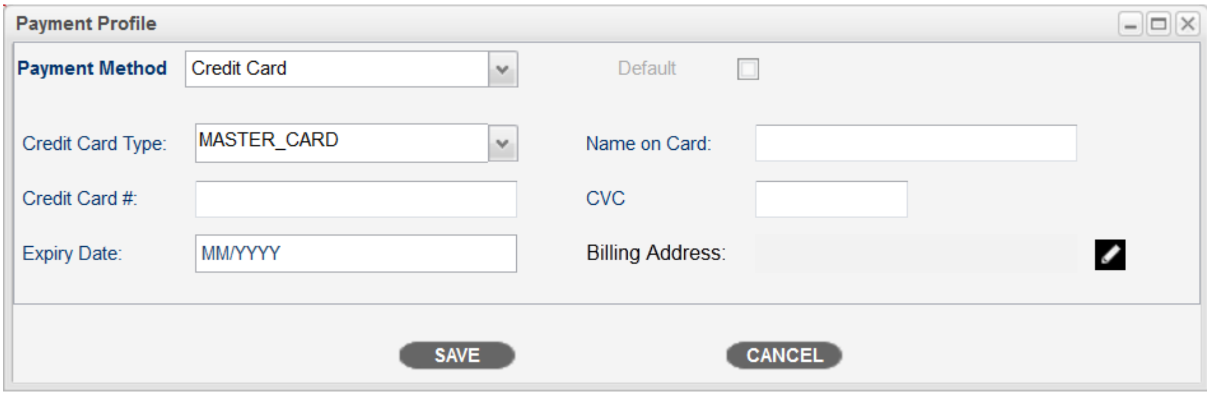


Figure 51 Editing a credit card Payment Profile

3 Edit the information as appropriate. Then, click the **Save** button (SAVE).

Note: Editing credit card information requires re-entry of the credit card information for security purposes.

4.3.9 Billing Profile

The Billing Profile section allows you to specify a number of billing settings, including the billing cycle or period, the currency of the customer's invoice, the billing format, and more.

To edit the information in this section, click the **Edit** button ( ) to the right of the Billing Profile heading and make your pertinent changes.

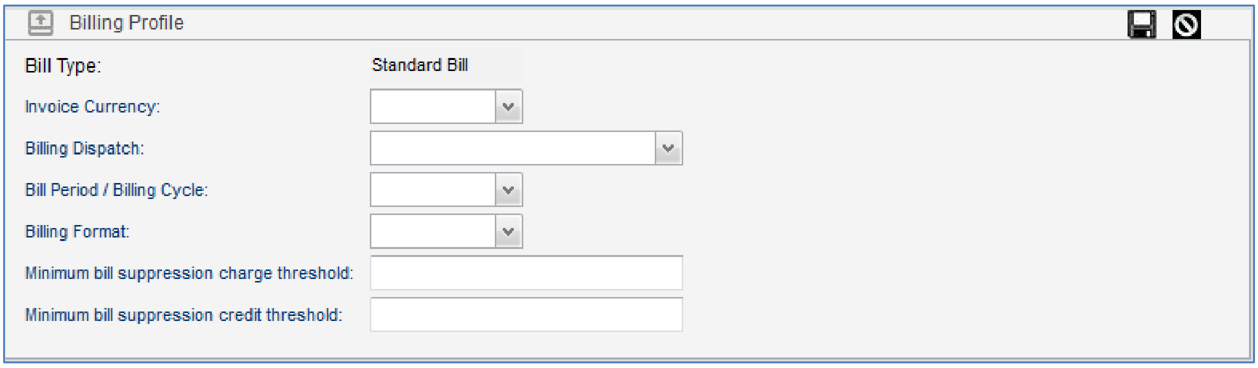


Figure 52 Billing Profile – Edit and save changes

When you have finished making your changes, click the **Save** button ( ).

4.3.10 Services

The Services section shows the services linked to the selected account.

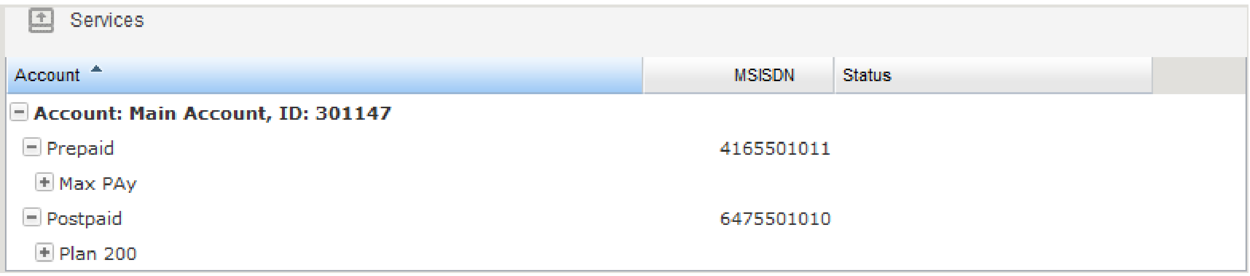


Figure 53 Services section

4.3.11 Bills History

The Bills History section allows you to perform a search for a specific bill, or a number of bills within a given period.

To perform a search, do the following:

1. Expand the Bills History section to view the search criteria.
2. Specify your search criteria in the fields provided, and then click the **Search** button.

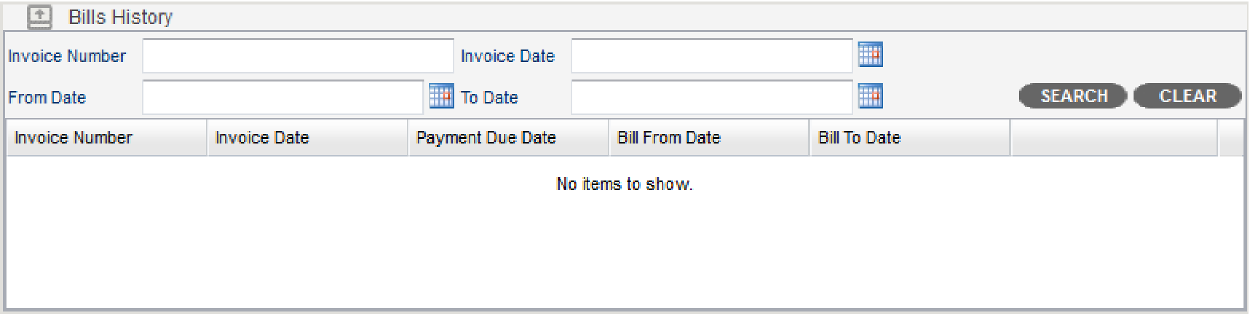


Figure 54 Bills History section

3. In the search results area, double-click any row to view the billing information.

4.3.12 Events

The Events section allows you to search for events associated with this account. Event types include:

- Adjustments
- Manual Payment
- Miscellaneous Credit
- Non-Recurring Charge
- Payment
- Pre-Payment
- Recharge
- Recurring Charge
- Refund
- Usage

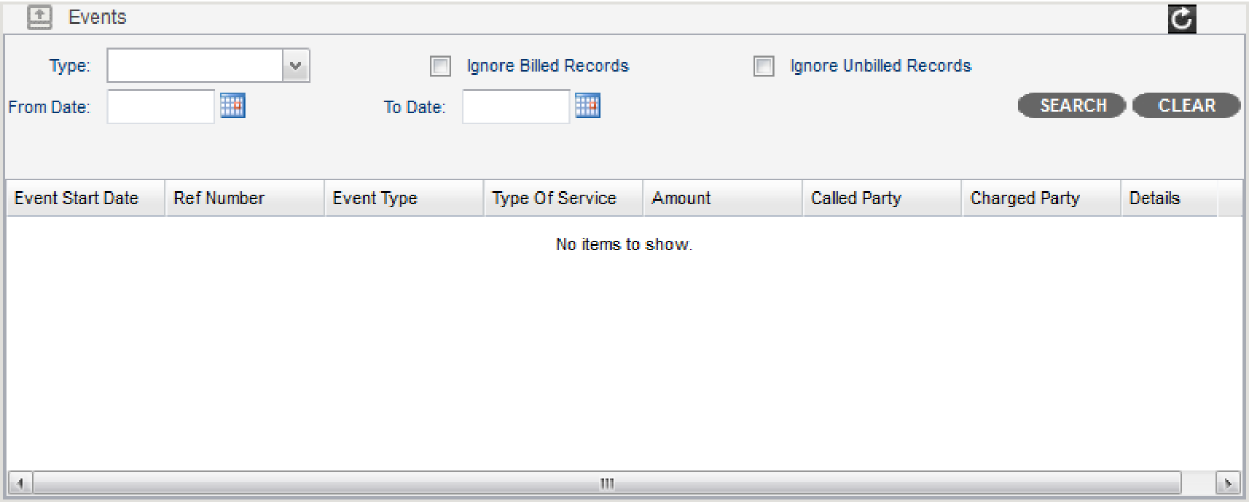


Figure 55 Events section

4.4 Services

The Services section displays the number of subscriptions that a customer has.

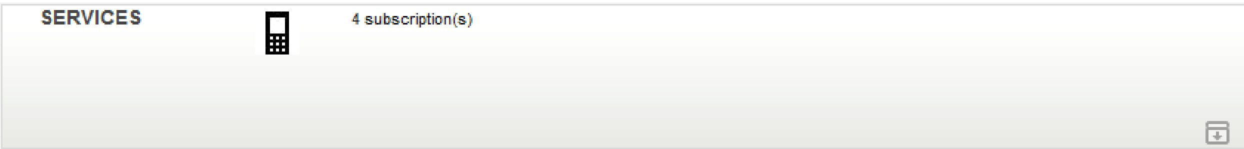


Figure 56 Services section

Click the **Expand** button on the right to view more information on the customer’s subscriptions, including the Account ID, MSISDN, and the status of each subscription.

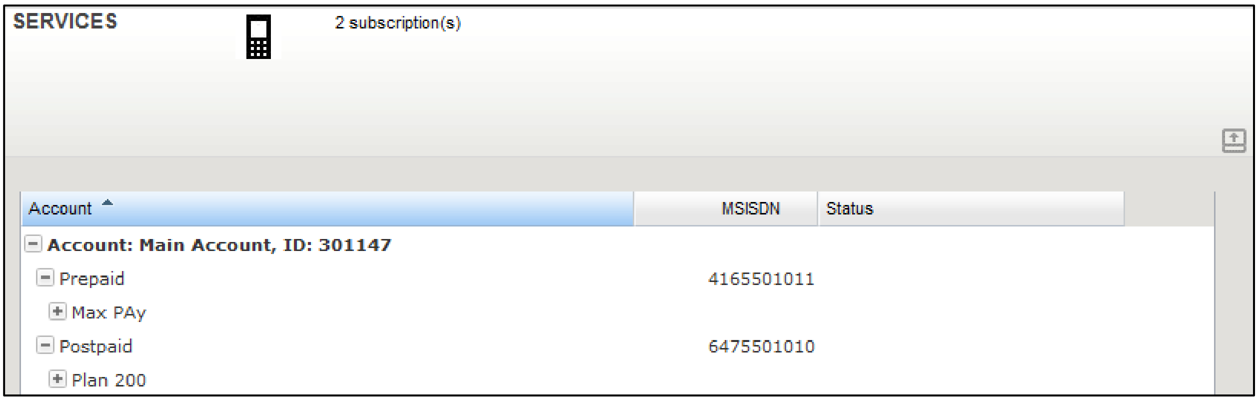


Figure 57 Services section expanded

4.4.1 Block and Unblock Subscriptions

Note: Before the **Block** and **Unblock** buttons can be used, they must be implemented. For more details, see the **Block** and **Unblock** Subscription section of the UWS Configuration Guide. The following instructions are only valid once the **Block** and **Unblock** buttons have been implemented.

The Services section allows you to block and unblock a customer subscription due to a customer request or a decision made by the operator. For example, a customer may wish to have their subscription blocked if they are going to be traveling or have misplaced their phone. An operator may block a customer subscription if they suspect fraud or the customer has a large outstanding balance. Generally, the blocking by operator function is a system-level action; however, with the required permission level, a CSR user such as a manager is able to perform the action. The same goes for the unblocking by operator function.

Note: Only CSRs with the correct block accounts and unblock accounts permissions will have access to perform these functions on customer accounts.

4.4.1.1 Blocking a Subscription

To block a subscription, do the following:

1. Select a subscription, as shown in the previous figure.
2. Click the **Block** button. The Block Subscription dialog opens. In this dialog, specify whether the subscription is being blocked by customer request or by operator, and add a note in the **Notes** field.

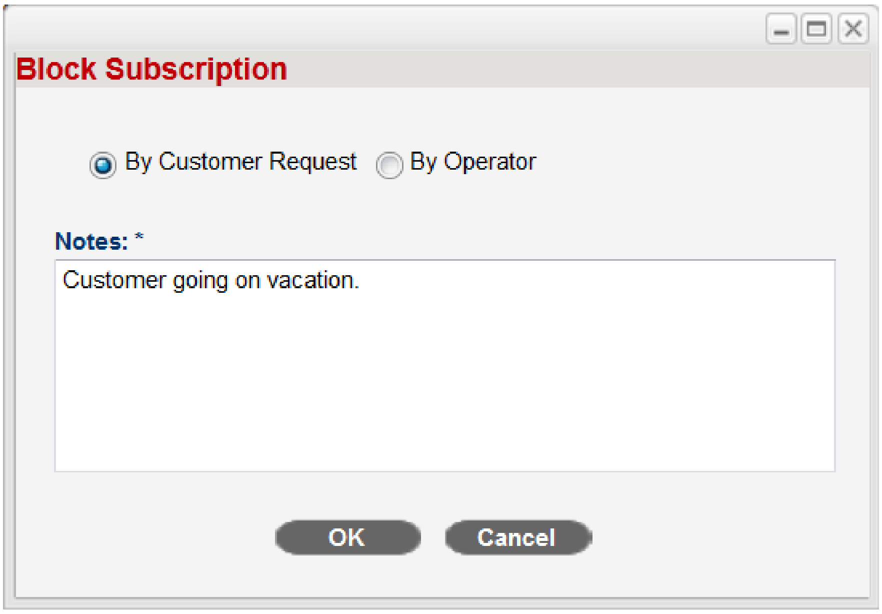


Figure 58 Block Subscription dialog

3 Click the **OK** button. The changes made are reflected in the Services section.

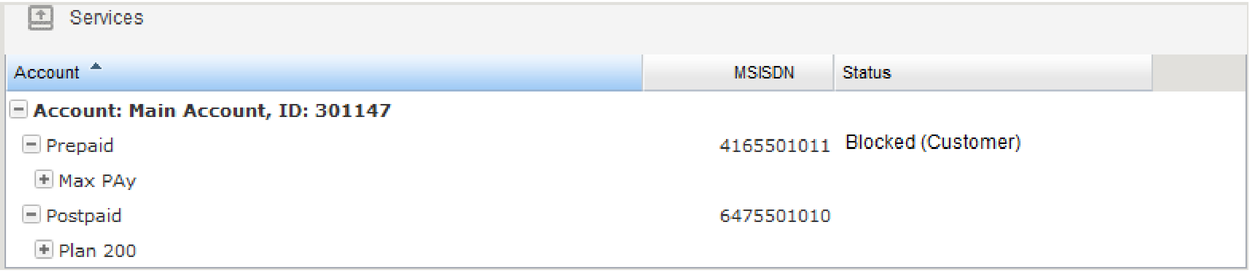


Figure 59 Services section – Subscription blocked

4.4.1.2 Unblocking a Subscription

To unblock a subscription, do the following:

1 Select a blocked subscription.

2 Click the **Unblock** button. The Unblock Subscription dialog appears. Add a note in the **Notes** field.

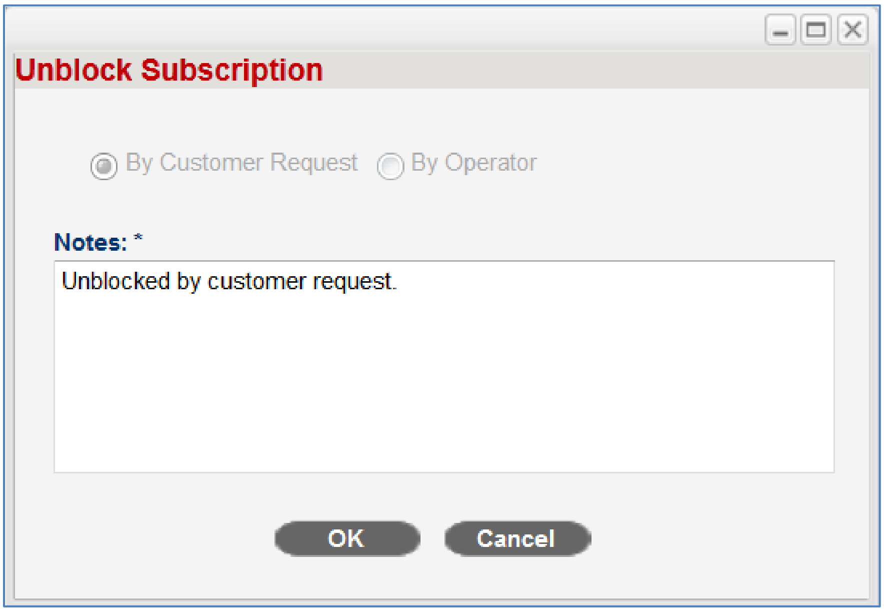


Figure 60 Unblock Subscription

3 Click the **OK** button. The subscription will no longer be shown as blocked in the Services section.

4.5 Order History

The Order History section provides a quick view of the following information:

- Number of open orders
- Number of presented orders
- Number of orders cancelled
- Number of completed orders
- Number of orders that contain errors

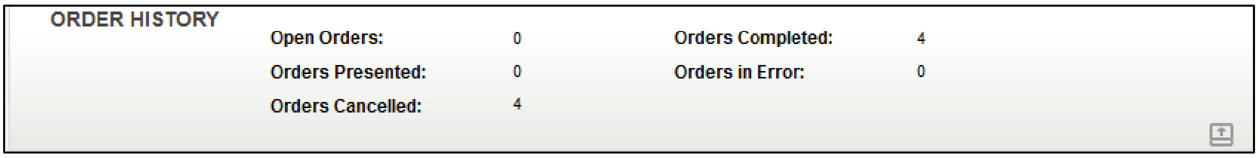


Figure 61 Order History section

Expanding this section shows a list of all orders related to that customer.

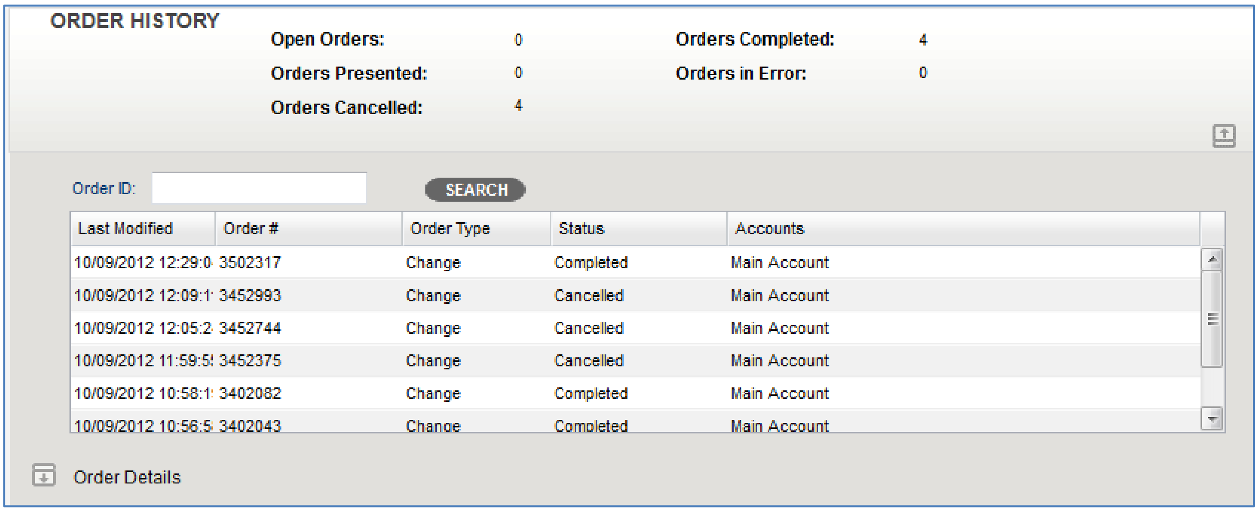


Figure 62 Order History section expanded

You can search for a particular order by entering the order number in the **Order ID** field, and then clicking the **Search** button. To view the complete list of orders, delete the criterion in the **Order ID** field, and then click the **Search** button.

To view additional details about a particular order, double-click on the order entry. This expands the Order Details section.

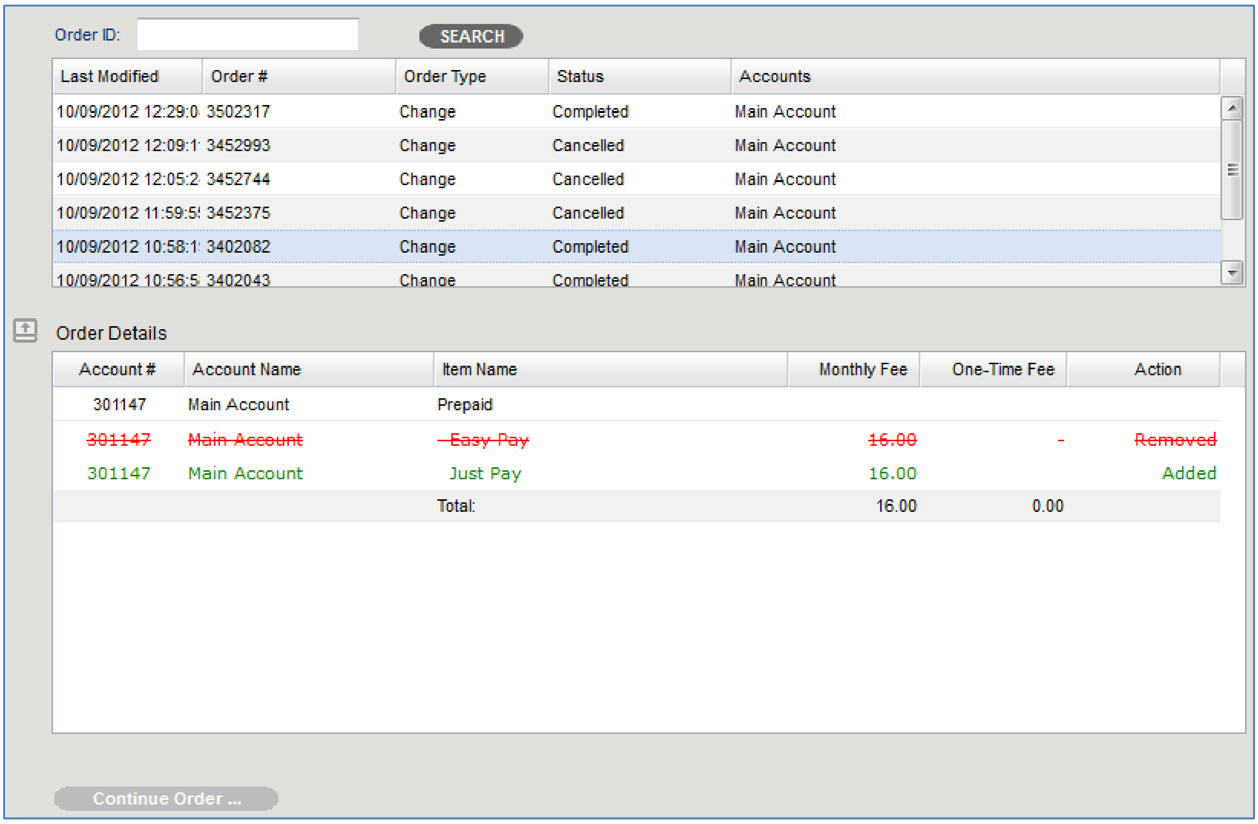


Figure 63 Order Details section

4.6 Addresses

The Addresses section shows the mailing address used to correspond with the customer.

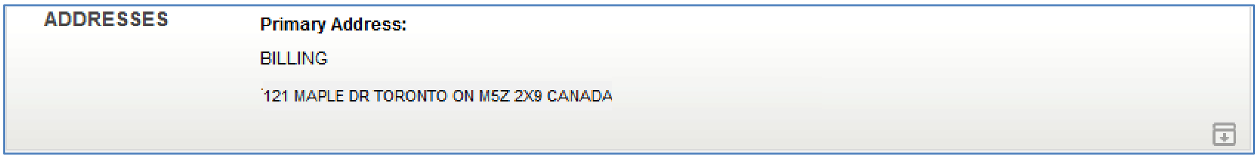


Figure 64 Addresses section

Expanding this section allows you to view all address types associated with this customer, and whether these address are primary.

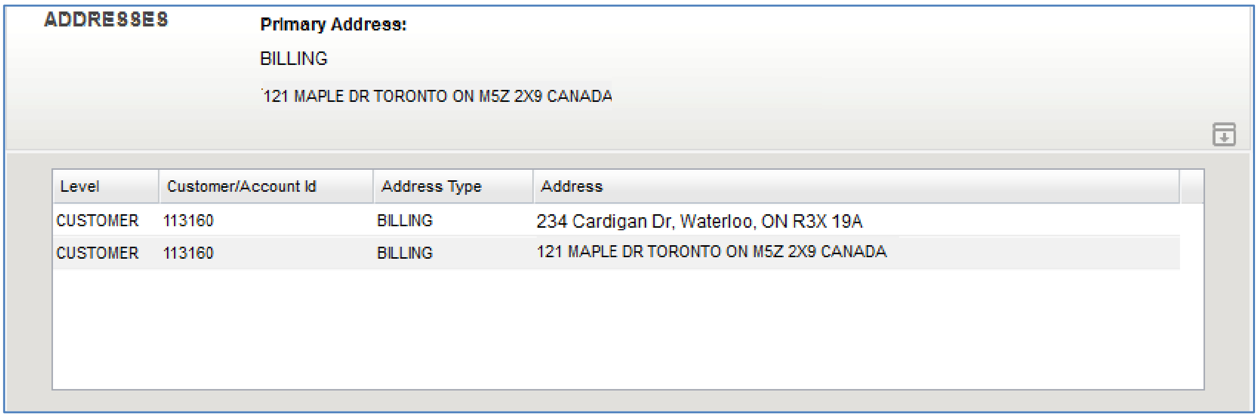


Figure 65 Addresses section expanded

4.6.1 Add Billing Address

To add a billing address, you have to add a **Contact Medium** of the **Type Billing**.

In order to order a service, a billing address must be present at the Account level.

Do the following steps:

1. Navigate to the **Accounts Info** section and select the account for which you want to add the billing address.
2. Expand **Contact Mediums** of the **Account Information** section within the Accounts Info of the Dashboard.
3. Click the **Add** button ( ) to the right of the Contact Mediums heading.
4. For the **Contact Medium Type** field, select **Address.** For the **Address – Role** field, select **Billing.**
5. Click the **Address Lookup** button to display the Address Finder.
6. From the Address Finder, click on the **Add** button.

7 From the Address Master form, add the pertinent information and click the **Save** Button.

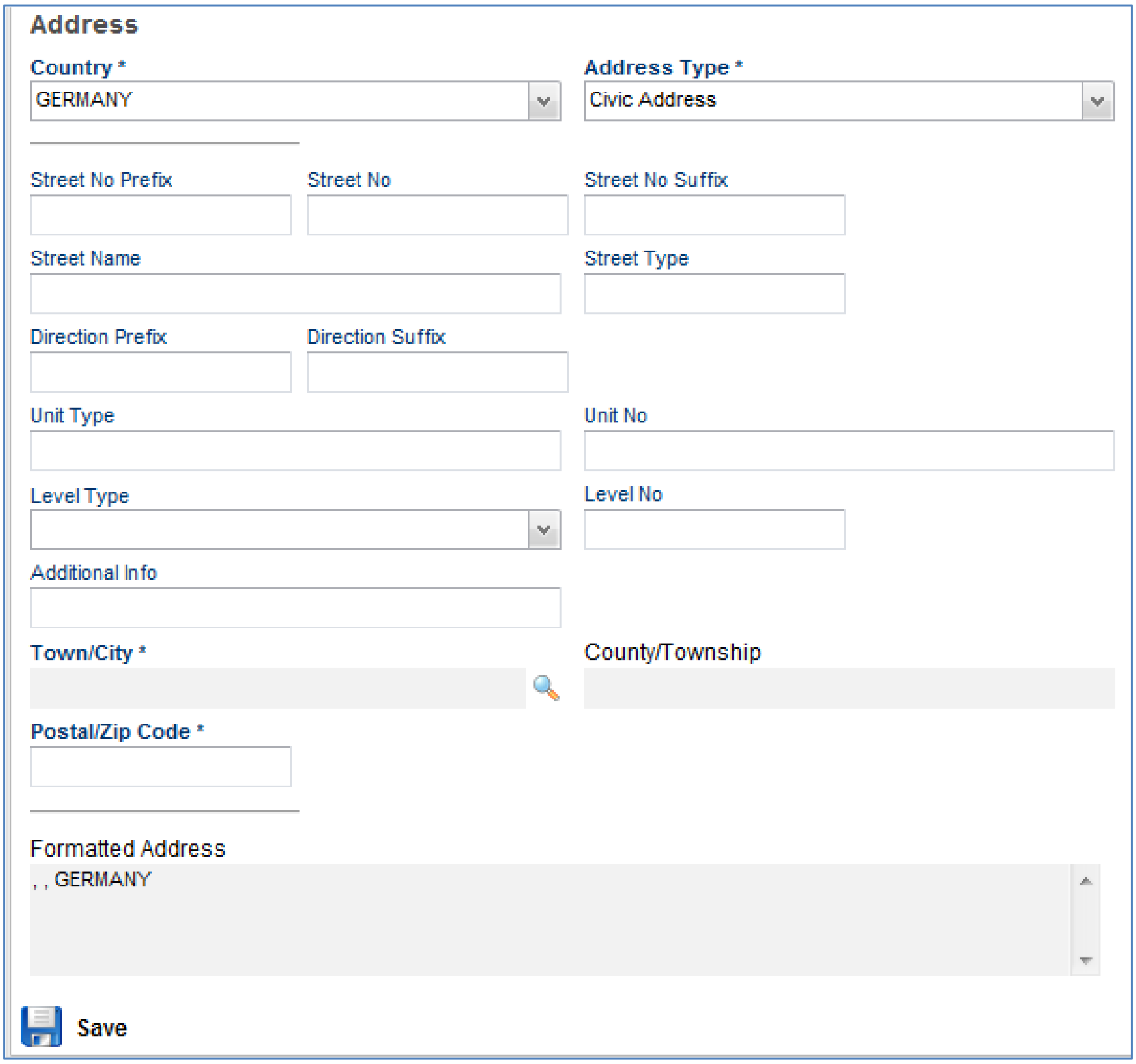


Figure 66 Addresses Master

8 From the **Address Master Finder**, select the address previously created and click the **Select** button. The billing address is added to the **Contact Mediums**.

4.7 Interactions

The Interactions section shows notes that a Customer Service Representative has made when communicating with the customer.

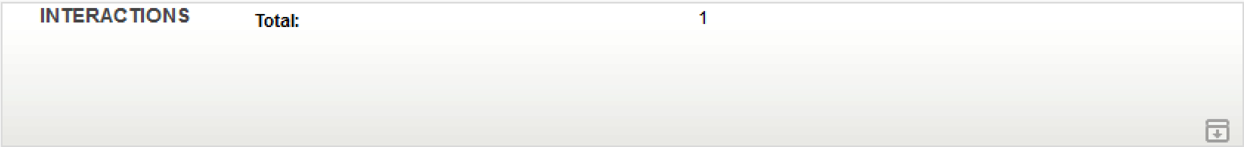


Figure 67   Interactions section

As an example, if the customer has called about a billing inquiry, the Customer Service Representative would log details of the call in this section. The Interactions section would then show the note. Expanding this section allows you to select the note and view its contents.

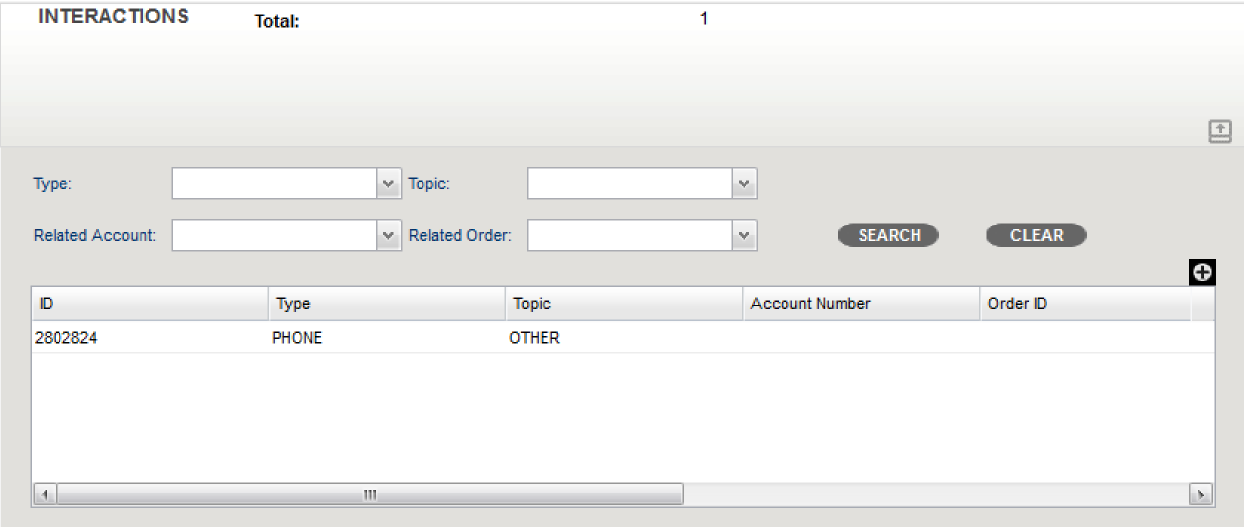


Figure 68   Interactions section expanded

5 Ordering Page

The Ordering page is enabled when a customer has been selected. Customer orders can be viewed, created, changed, submitted or disconnected.

Note: To order a service or subscription for an account, an account billing address must be set up. Follow the steps in the Add Billing Address section before proceeding to ordering.

5.1 Find Offers Page

1. Double-click a customer from the search results on the Search page to launch the Dashboard page.

2. Click the **Ordering** option from the menu bar. The Ordering page appears, which shows the following information:

    - Accounts section, which shows the different accounts.

- Order section, which shows the order number, the account ID, and the subscriptions.

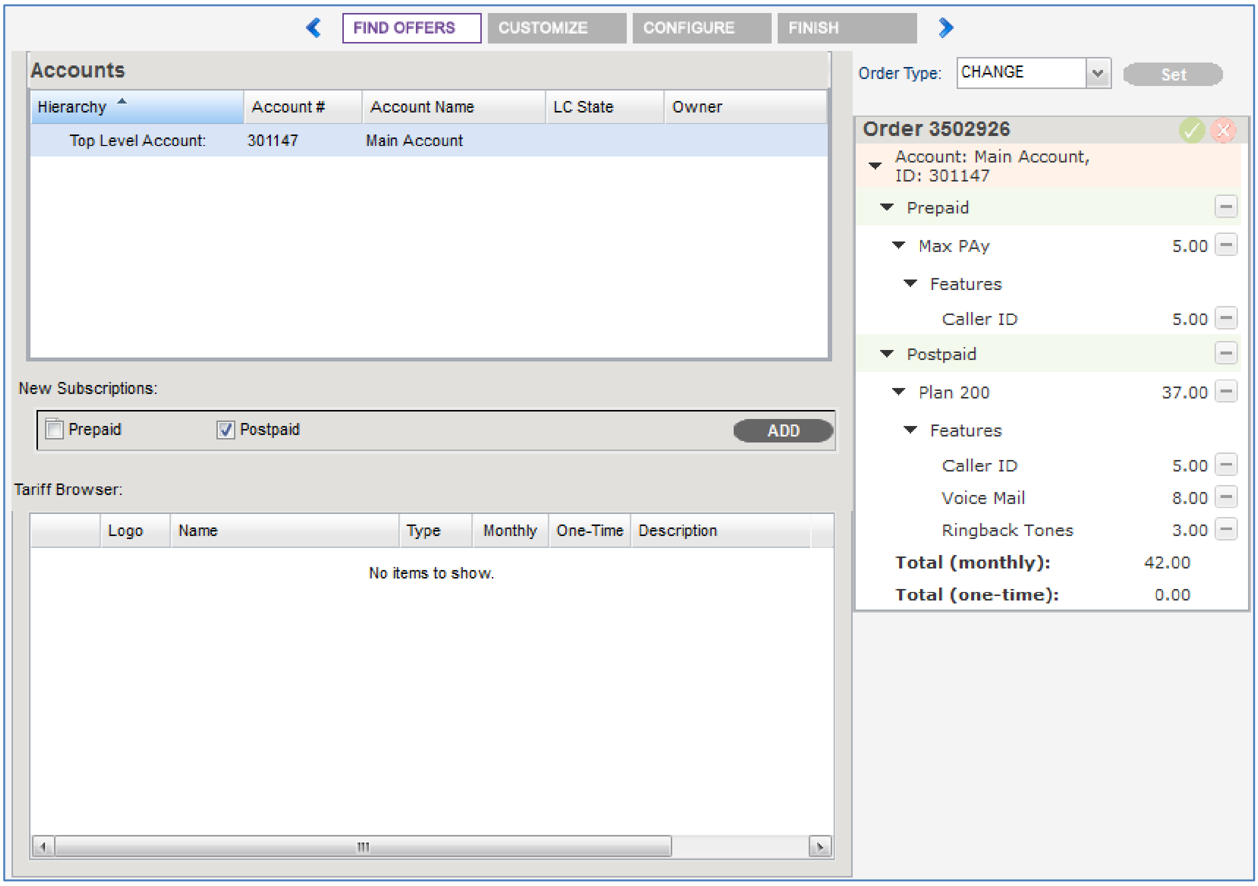


Figure 69 Ordering page

5.1.1 Add a New Postpaid Offer to the Order

To add a new postpaid offer to the order, do the following:

1. Select the appropriate account from the Accounts section.
2. In the New Subscriptions section, select the **Postpaid** checkbox.
3. Click the **Add** button in the New Subscriptions section.

   Postpaid appears in green in the Order section on the right and a list of available plans that can be added to the order appear in the Tariff Browser section.

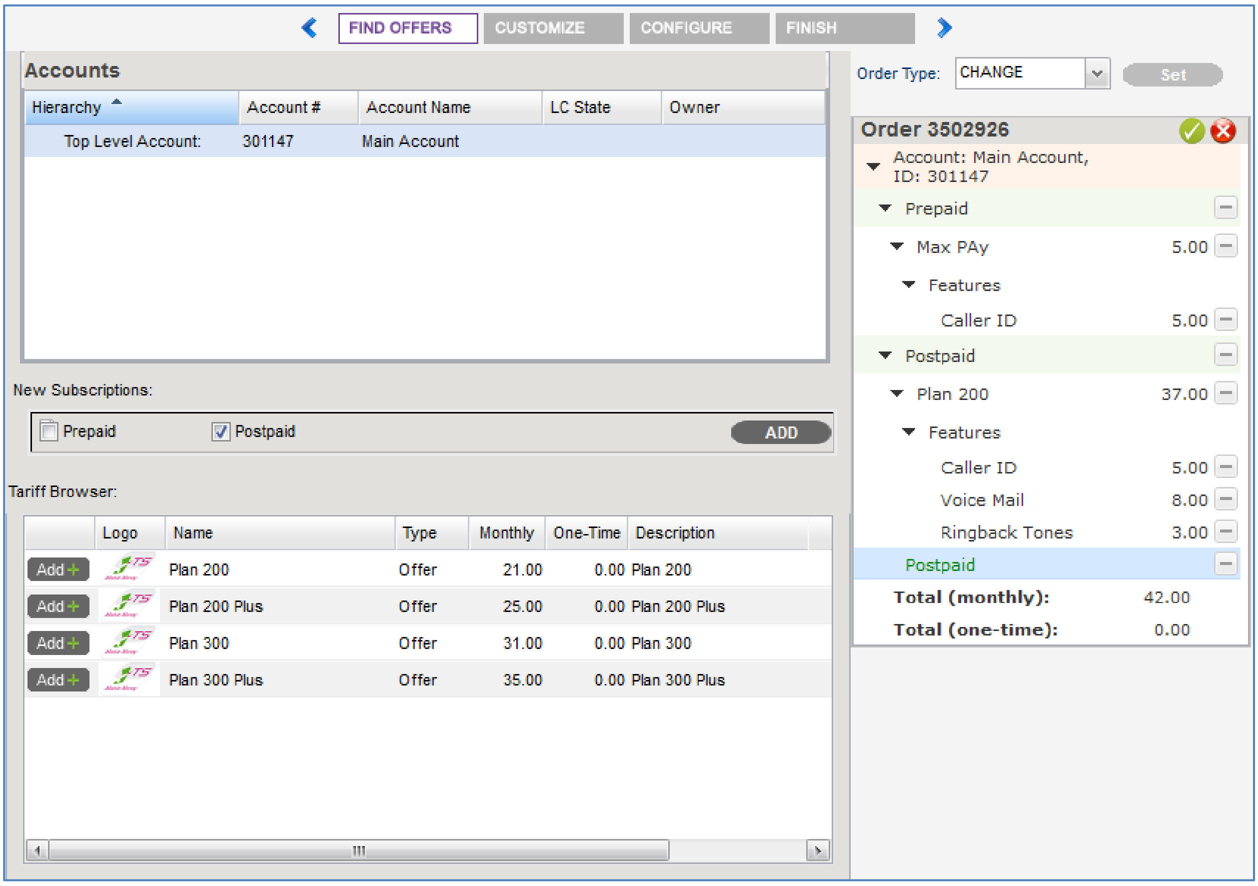


Figure 70 Postpaid offers displayed

4 Click the **Add** button next to the desired offer in the Tariff Browser. The offer appears in green in the Order section.

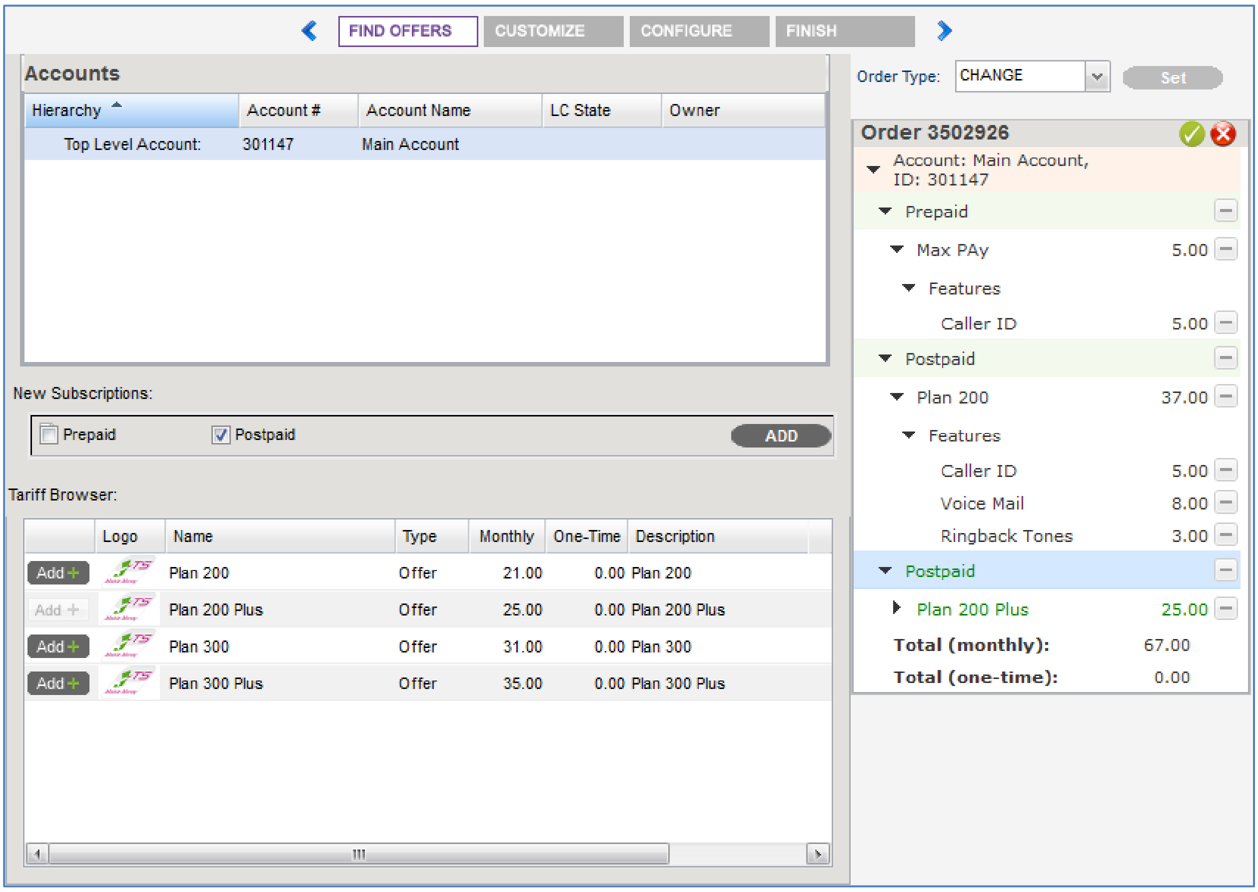


Figure 71 Adding a postpaid offer to the order

5.1.2 Add a New Prepaid Offer to the Order

To add a new prepaid offer to the order, do the following:

1. Select the appropriate account from the Accounts section.
2. In the New Subscriptions section, select the **Prepaid** checkbox.
3. Click the **Add** button in the New Subscriptions section.

   Prepaid appears in green in the Order section on the right and a list of available offers that can be added to the order appear in the Tariff Browser section.

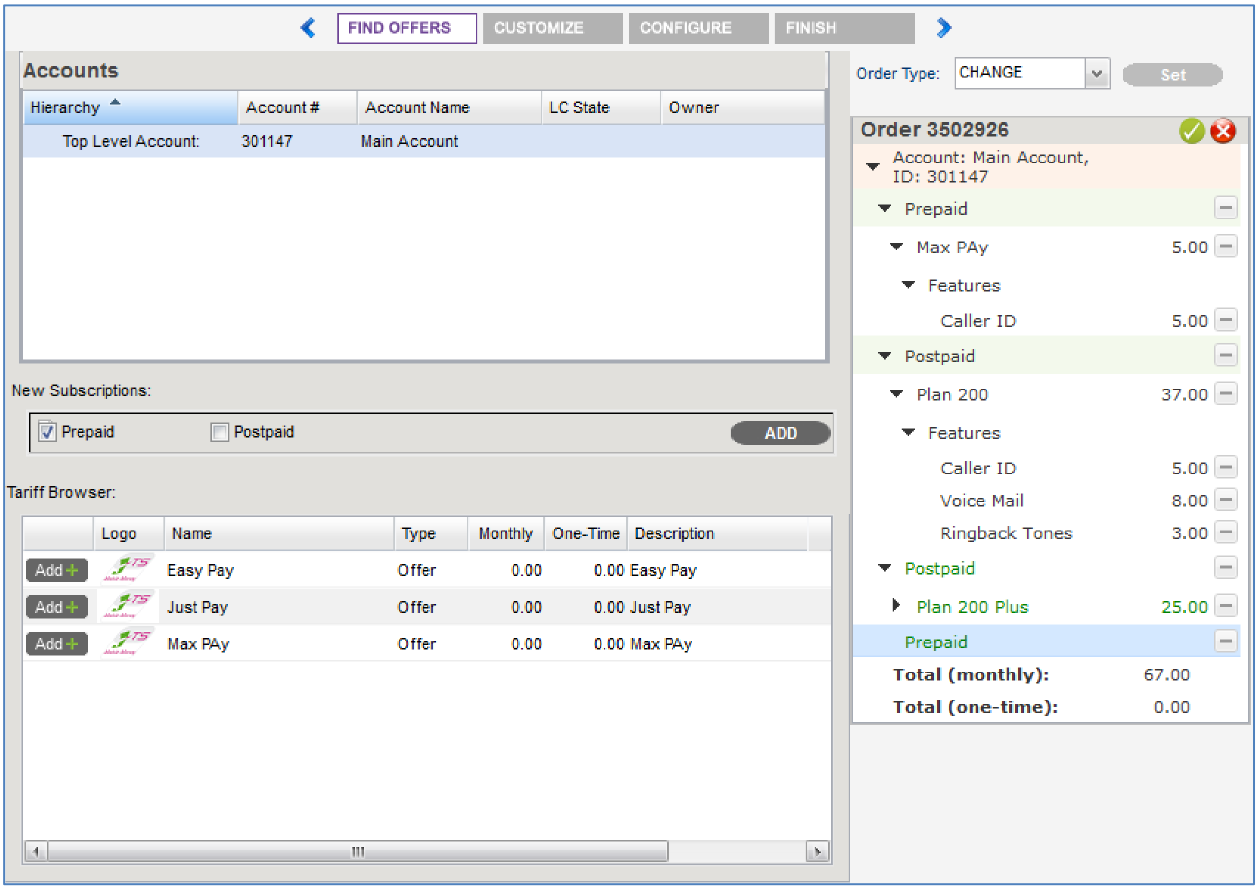


Figure 72 Prepaid offer displayed

1. Click the **Add** button next to the desired offer in the Tariff Browser. The offer appears in green in the Order section.

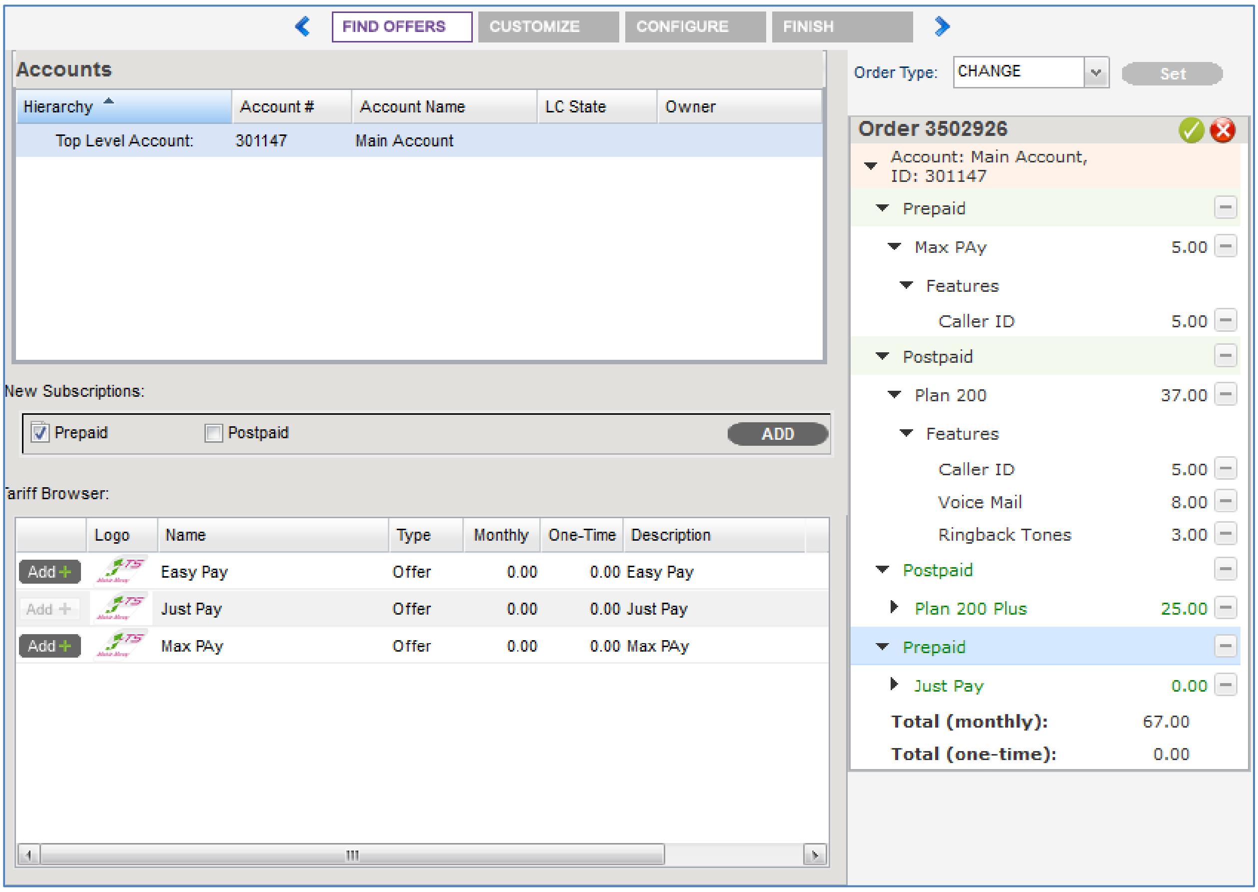


Figure 73 Adding a prepaid offer to the order

5.1.3 Remove an Offer or Subscription

You can remove an offer or a subscription from the Order by clicking the **Minus** button ( ) next to the subscription or offer. If the order has already been submitted and processed than the line will appear in red and the order must be presented, finished and submitted to complete the removal. If the order has not yet been submitted or presented than the line item will be removed from the order.

You can remove offers or subscriptions by clicking the **Minus** button ( ) next to each line item in the Order section.

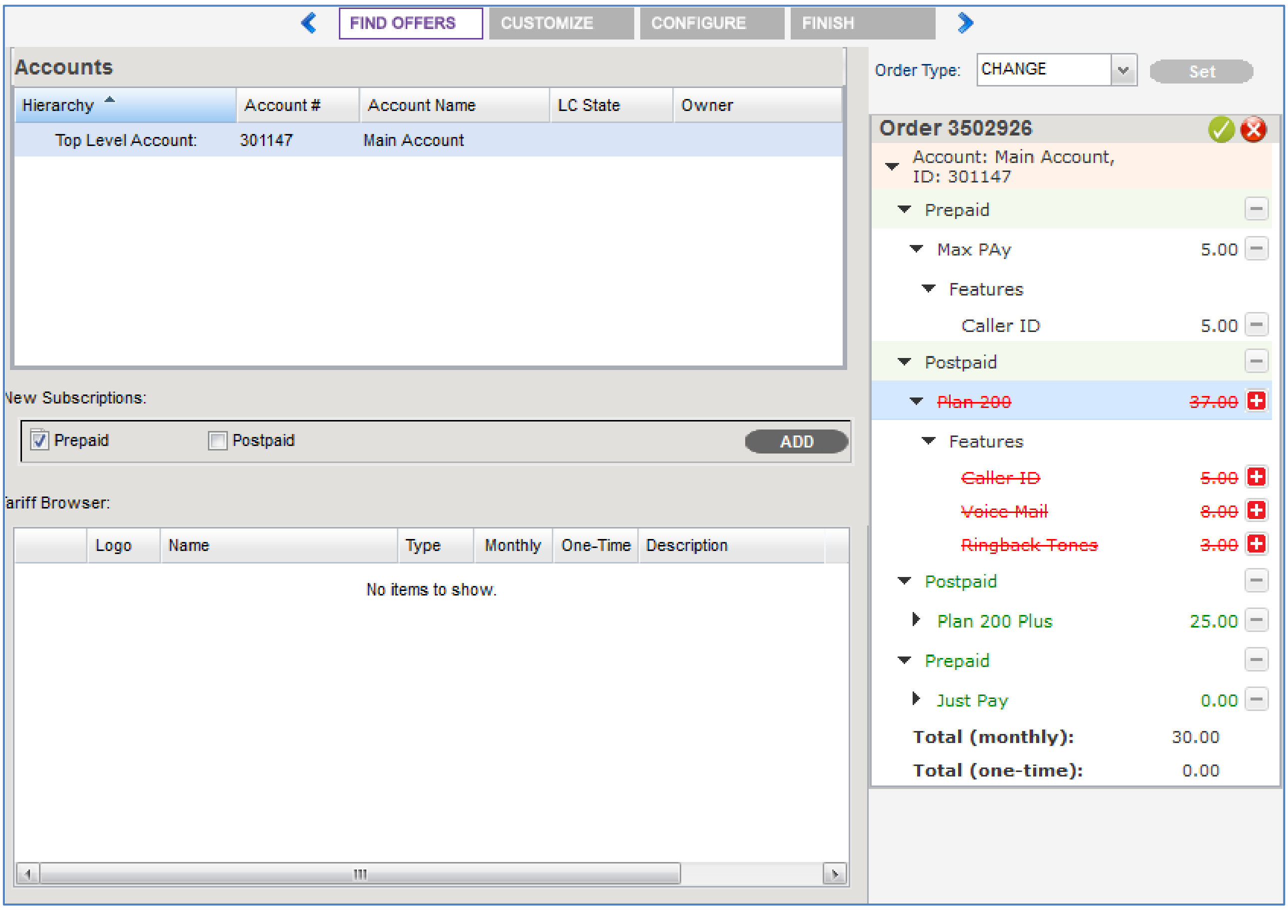


Figure 74 Offer removed from the Order section

Note: When you remove an offer from an unconfirmed Order, the list of available offers will disappear from the Tariff Browser section. To make the appropriate list reappear, click Prepaid or Postpaid in the Order section.

5.1.4 Add an Offer Back In

To add an offer back to the subscription:

1. Add the desired offer back using the steps outlined previously.

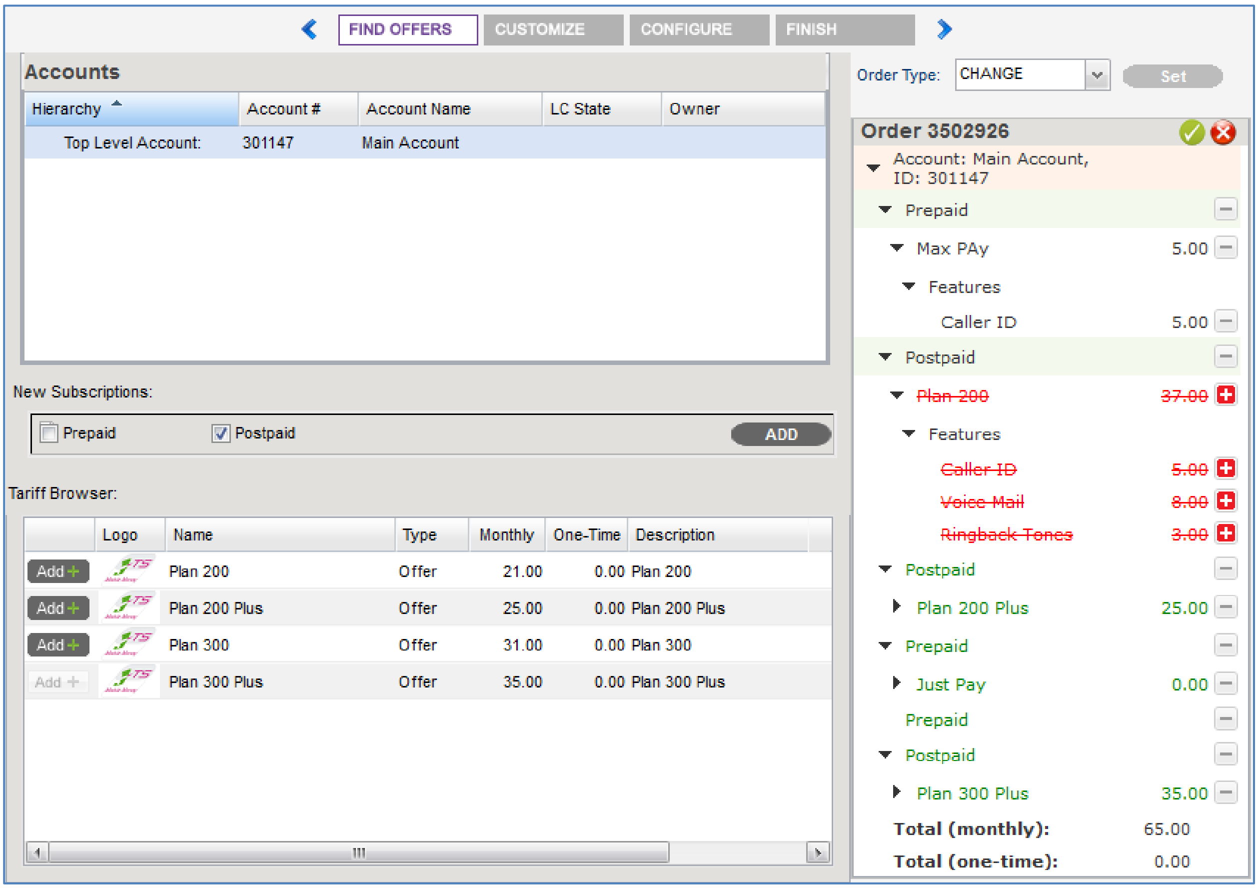


Figure 75 Offer added again

2. When you have finished adding or editing your offers, click the button to continue.

5.2 Customize Page

The Customize page may be available to you. For example, if your order contains a mobile device with a texting option, and you require adding the texting option selections, the Customize section would allow you to make these additions.

1. Clicking on Prepaid or Postpaid in the Order section will show the associated customization components in the Components section.

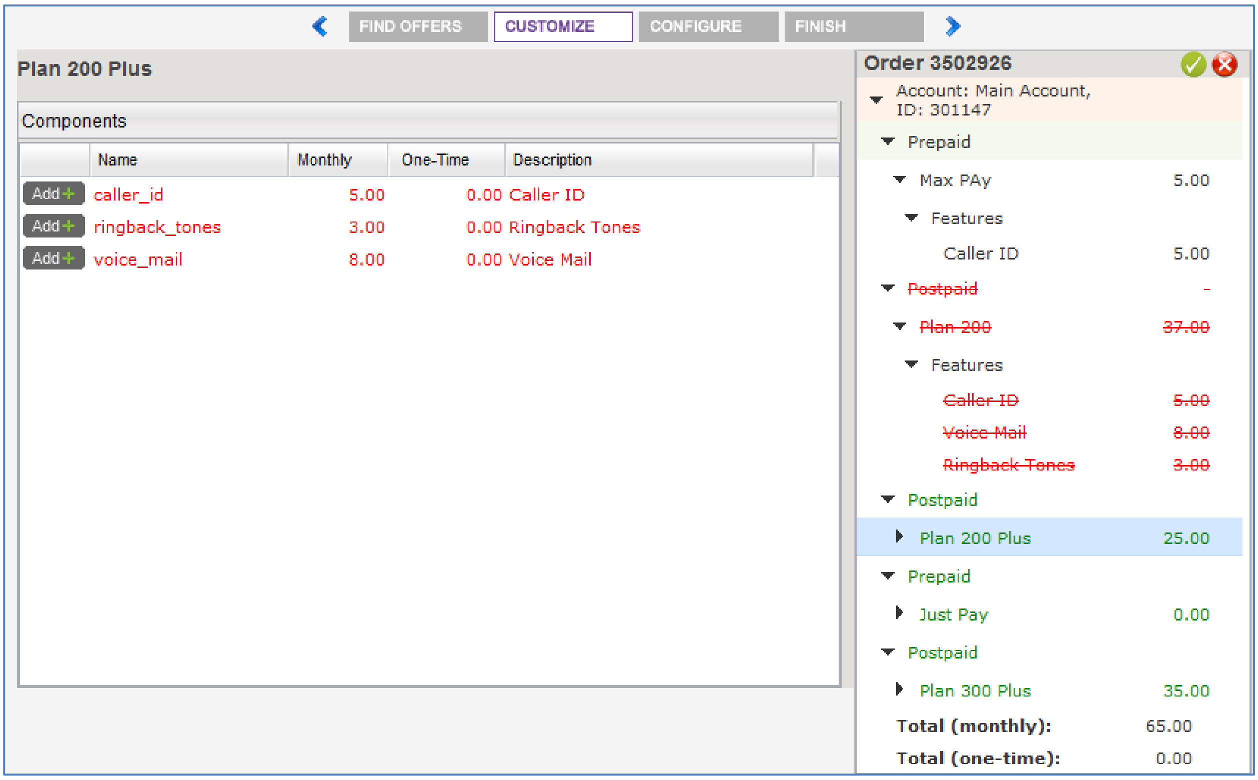


Figure 76 Customize page – Postpaid Components

2. To see the customization components associated with an offer, click the offer in the Order section. The customization components for the offer appear in the Components section.
3. Click the **Add** button next to the desired component.

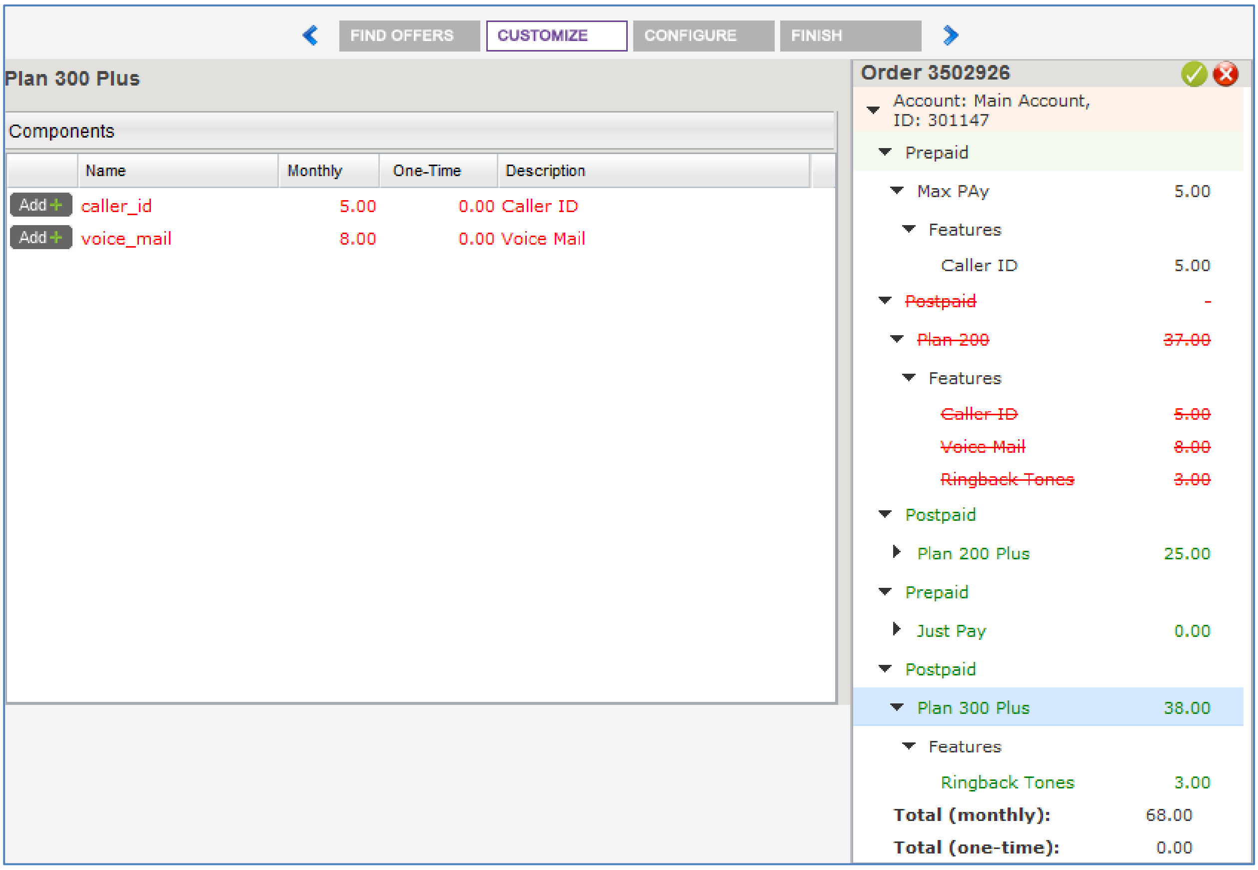
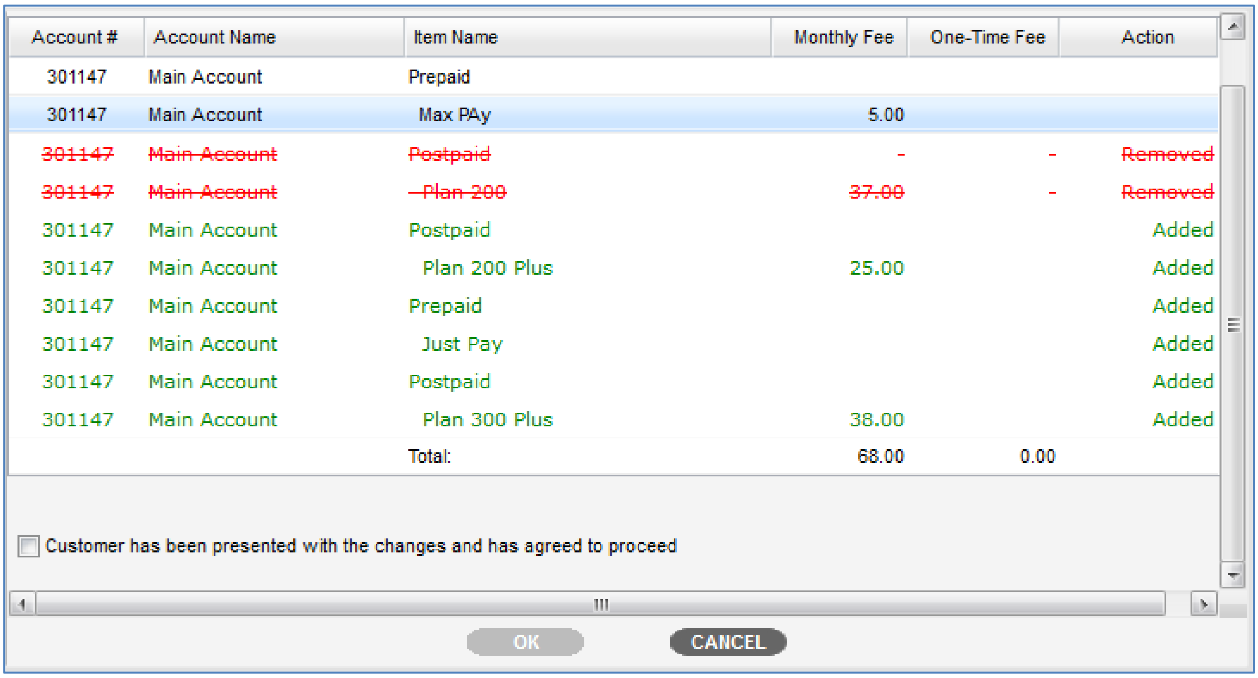


Figure 77 Customization option added

5.3 Present the Order to the Customer

Before the order can be Configured and Finished, the order must be presented to the customer. When you are ready to present the order to the customer, do the following:

1. Click the **Present order** button (). Doing this displays the following dialog.



Account #	Account Name	Item Name	Monthly Fee	One-Time Fee	Action
301147	Main Account	Prepaid			
301147	Main Account	Max PAy	5.00		
~~301147~~	~~Main Account~~	~~Postpaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Plan 200~~	~~37.00~~	-	~~Removed~~
301147	Main Account	Postpaid			Added
301147	Main Account	Plan 200 Plus	25.00		Added
301147	Main Account	Prepaid			Added
301147	Main Account	Just Pay			Added
301147	Main Account	Postpaid			Added
301147	Main Account	Plan 300 Plus	38.00		Added
		Total:	68.00	0.00	

Figure 78   Customer presentation dialog showing additions and removals

2. Select the checkbox **Customer has been presented with the changes and has agreed to proceed**.
3. Click the **OK** button. The dialog closes and you are taken back to the Customize page. Notice that **(Presented)** appears next to the Order number on the right and that the Present Order button **(****)** is dimmed.

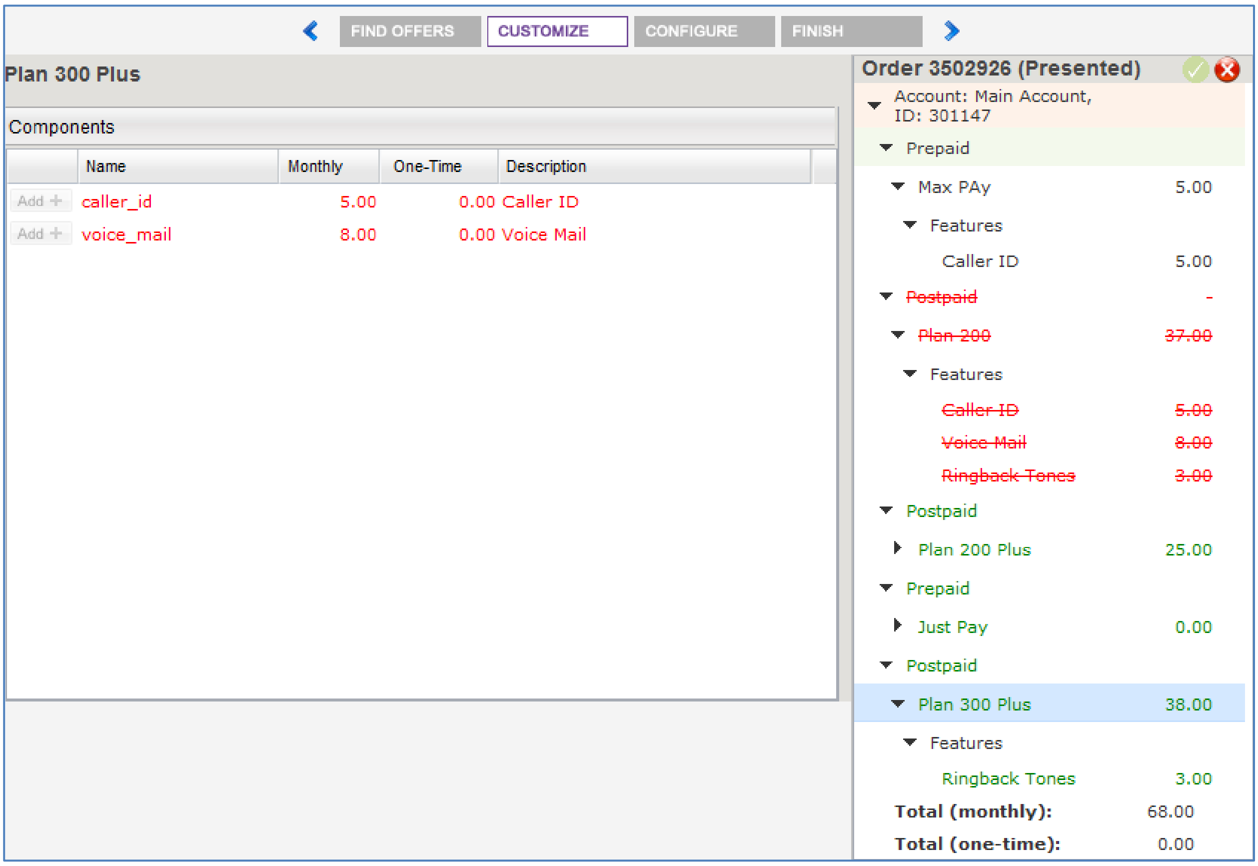


Figure 79 Customize page after customer has been presented with the order

4. From the Customize page, click the button to continue.

5.3.1 Cancel Changes

Click the **Cancel** button ( ) on the order header to cancel any changes made to an order. The order will be reverted back to its original state. To cancel changes made to an order, do the following:

2 Click the **Cancel** button on the order header. A dialog appears, indicating if you want to proceed to cancel changes.

3 Click the **Yes** button to proceed with the cancellation. The order reverts to its original state. Click the **No** button to continue making the changes or additions to the order.

5.3.2 Configure Page

The Configure page allows you to make any configurations to your services within your order. For example, you may have to enter the MSISDN and SIM Serial # (ICCID) for a subscription.

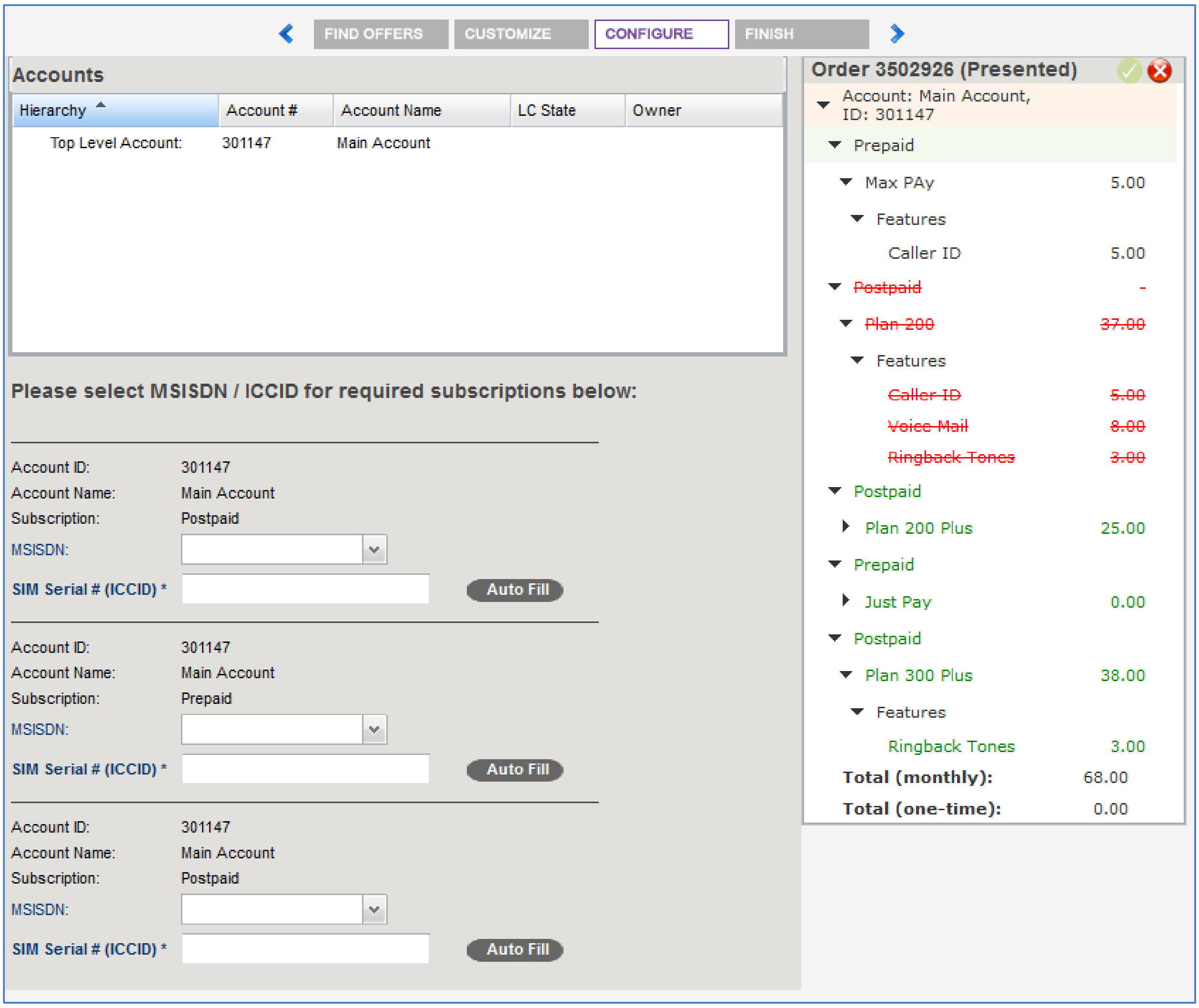


Figure 80 Configure page

- Choose the appropriate MSISDN from the drop-down list at the bottom of the page.

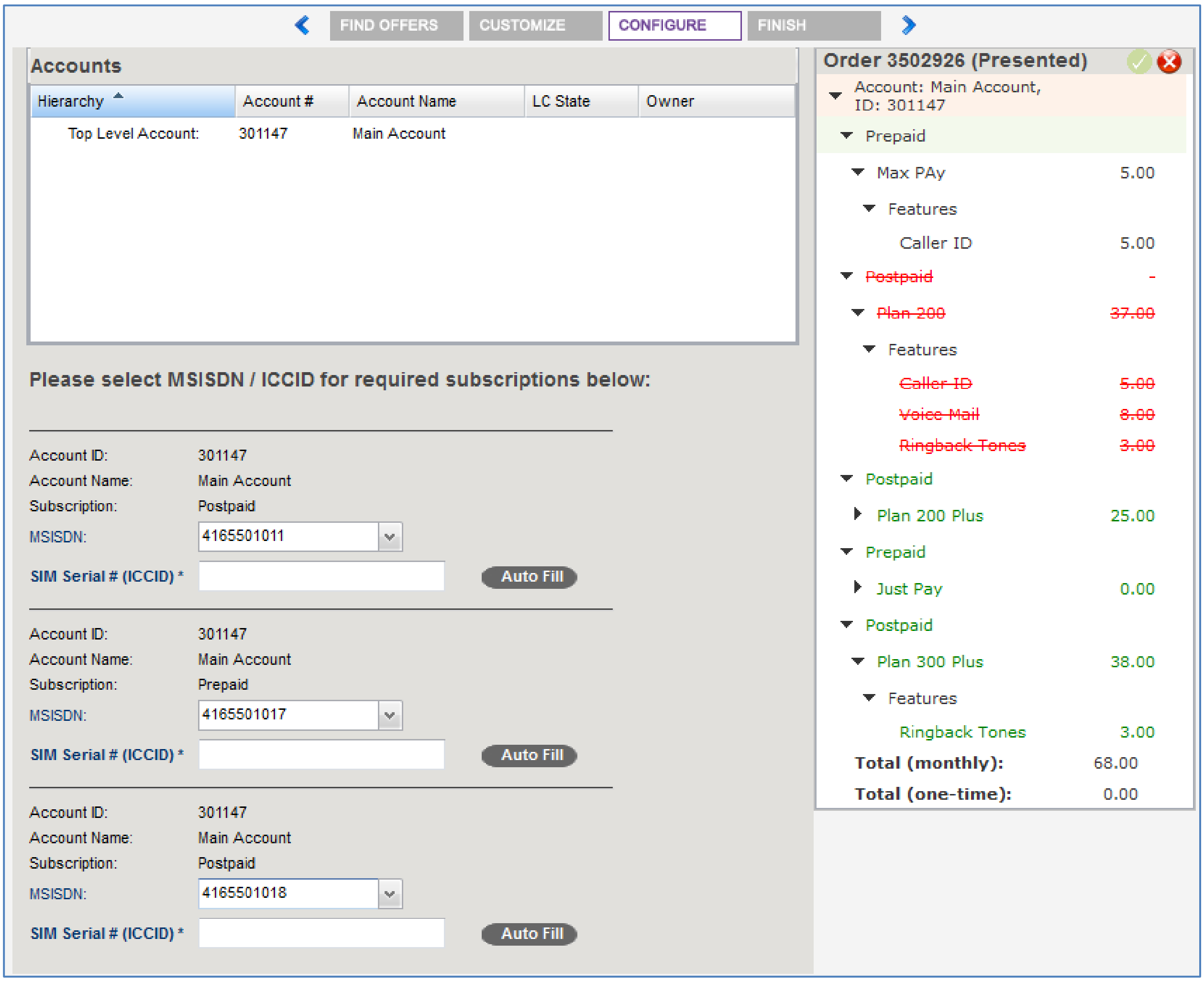


Figure 81 Configuration page – MSISDN selected

- Once you have selected the MSISDN, click the **Auto Fill** button and the appropriate number will appear in the SIM Serial # (ICCID) field.

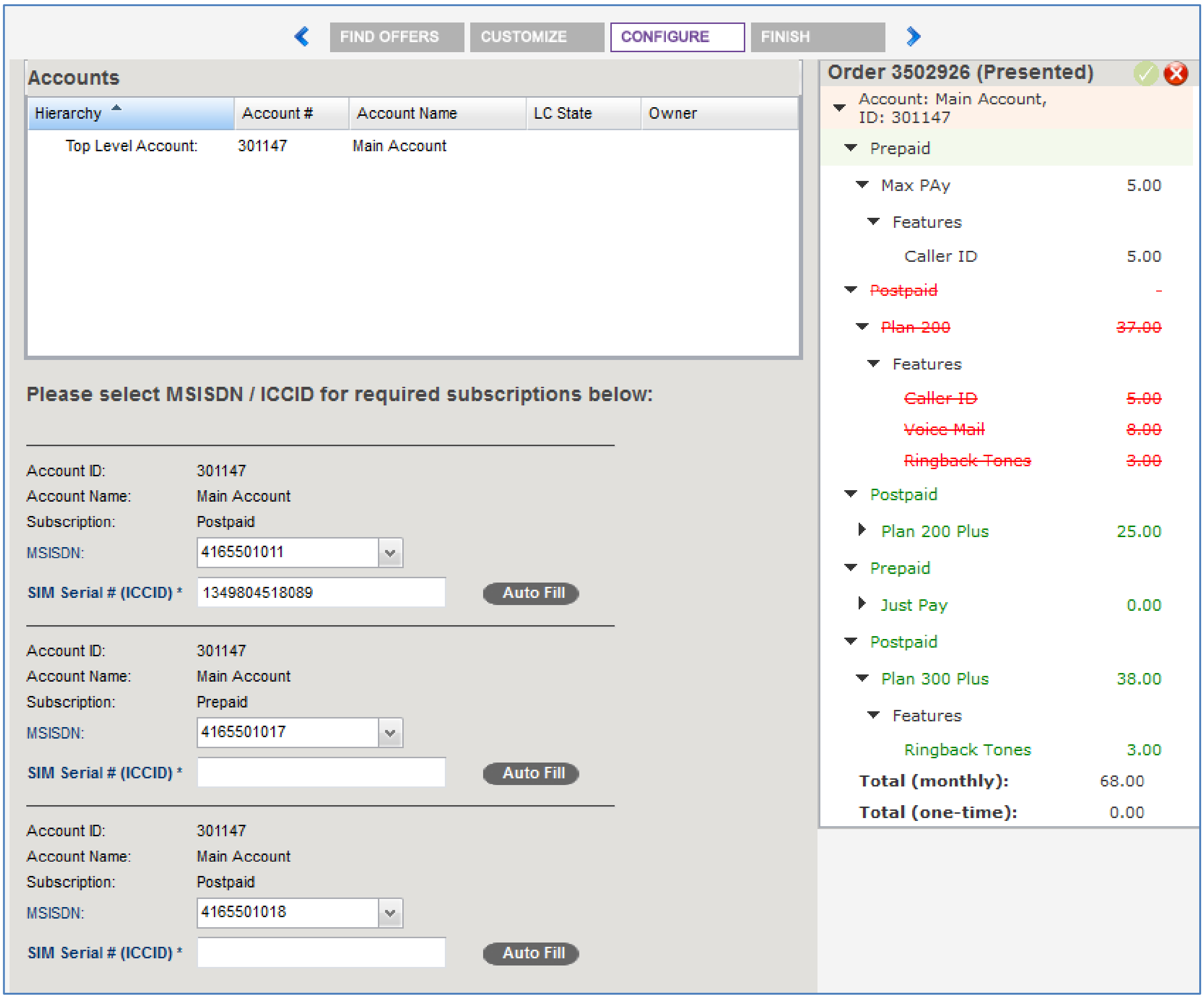


Figure 82 Configuration page – MSISDN and SIM Serial # (ICCID) fields filled-in

- From the Configure page, click the > button to continue.

5.4 Finish Page

The Finish page is the final page before you submit the order, which allows you to review all offers before you submit the order.

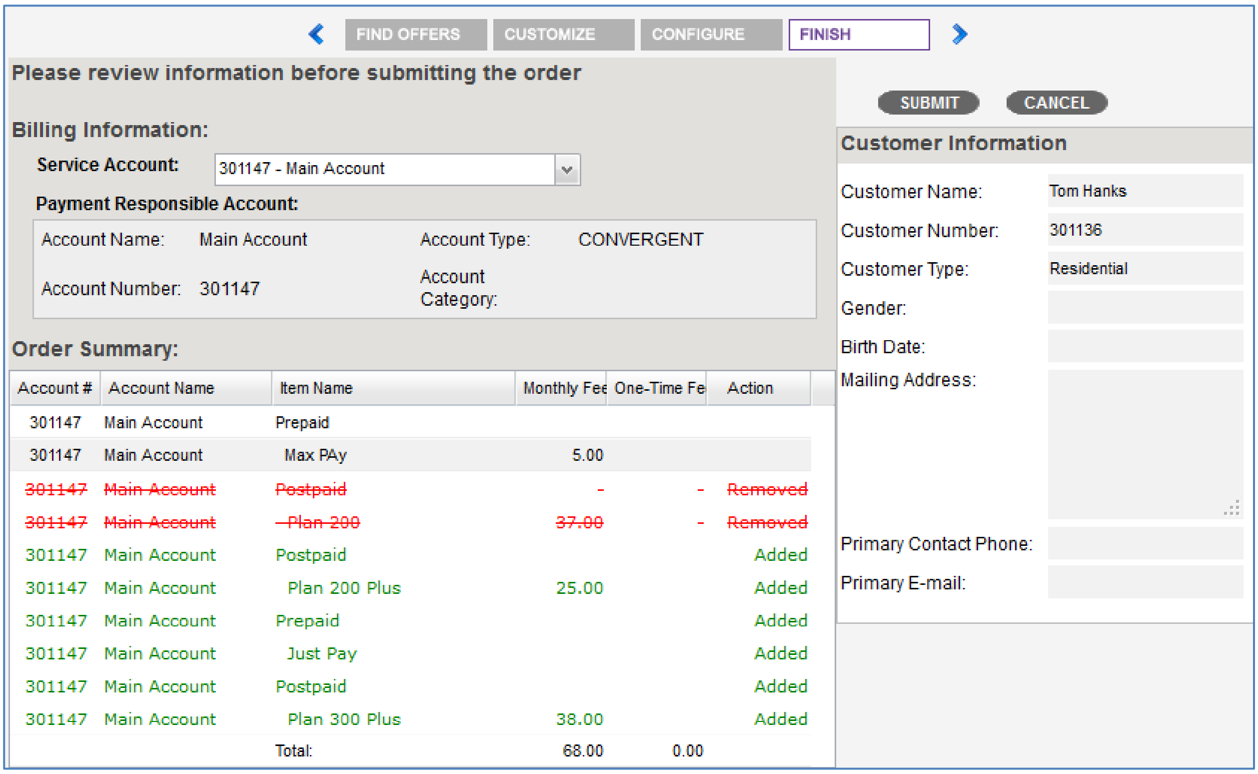


Figure 83 Finish page

- If the order is correct, click the **Submit** button (SUBMIT). Otherwise, click the **Cancel** button (CANCEL) to cancel the order. If the **Submit** button is clicked, the following dialog appears.

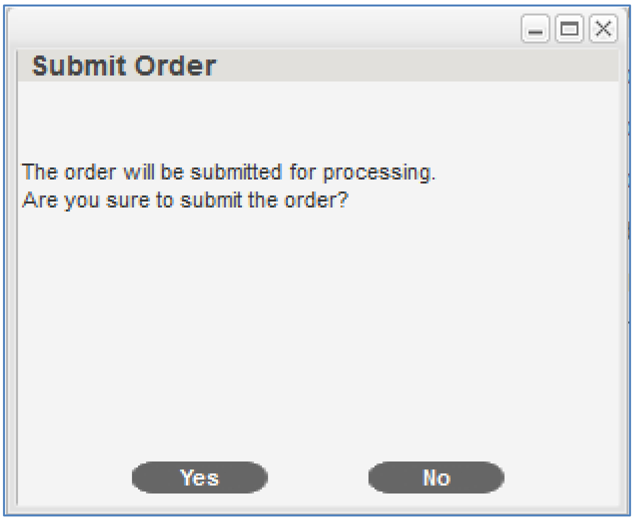


Figure 84 Submit Order dialog

- If you click the **Yes** button, the order is processed, and then the Order History section of the Dashboard displays, which shows the

  details of the completed order. If you click the **No** button, you are returned to the Finish page, where you can make any additional changes.

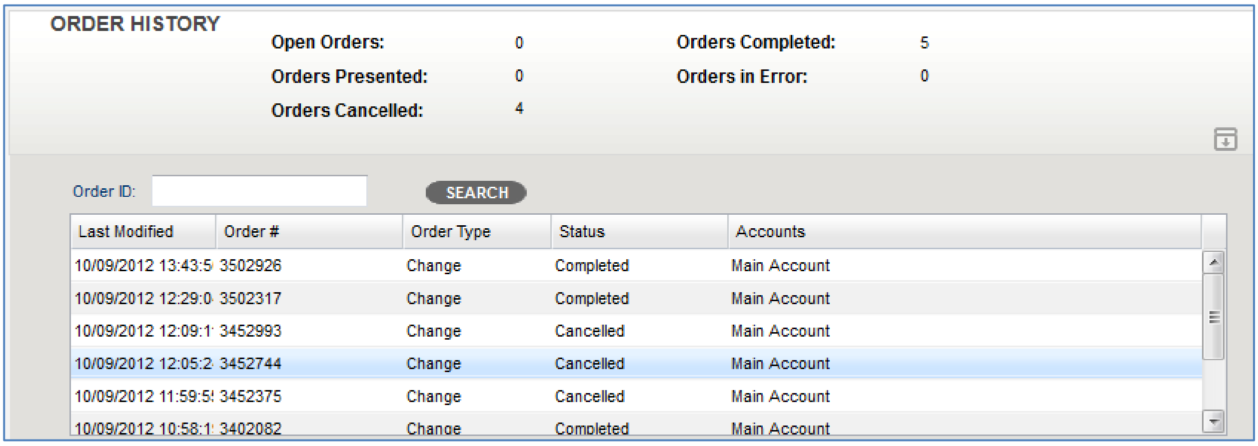


Figure 85 Order History section displayed after processing of order

5.4.1 Deleted Subscriptions or Accounts

When an order is **Finished** and line items have been deleted from an account, all the services under the subscription are terminated. If an entire account is deleted, than all subscriptions and services associated to that account are also terminated.

The state of a subscription account is set to Terminate and the telephone number is disassociated from the subscription through the INMS system.

5.5 Disconnect Order

When you **Disconnect** an order, all customer accounts and their associated subscriptions and services are disconnected. The system will terminate all subscriptions and services, disassociate all phone numbers associated to the subscriptions (through the INMS system) and change the status of the customer to **Inactive**.

To Disconnect an Order, do the following:

1. Click on the **Ordering** tab.
2. Select **Disconnect** from the Order Type and click the **Set** button.

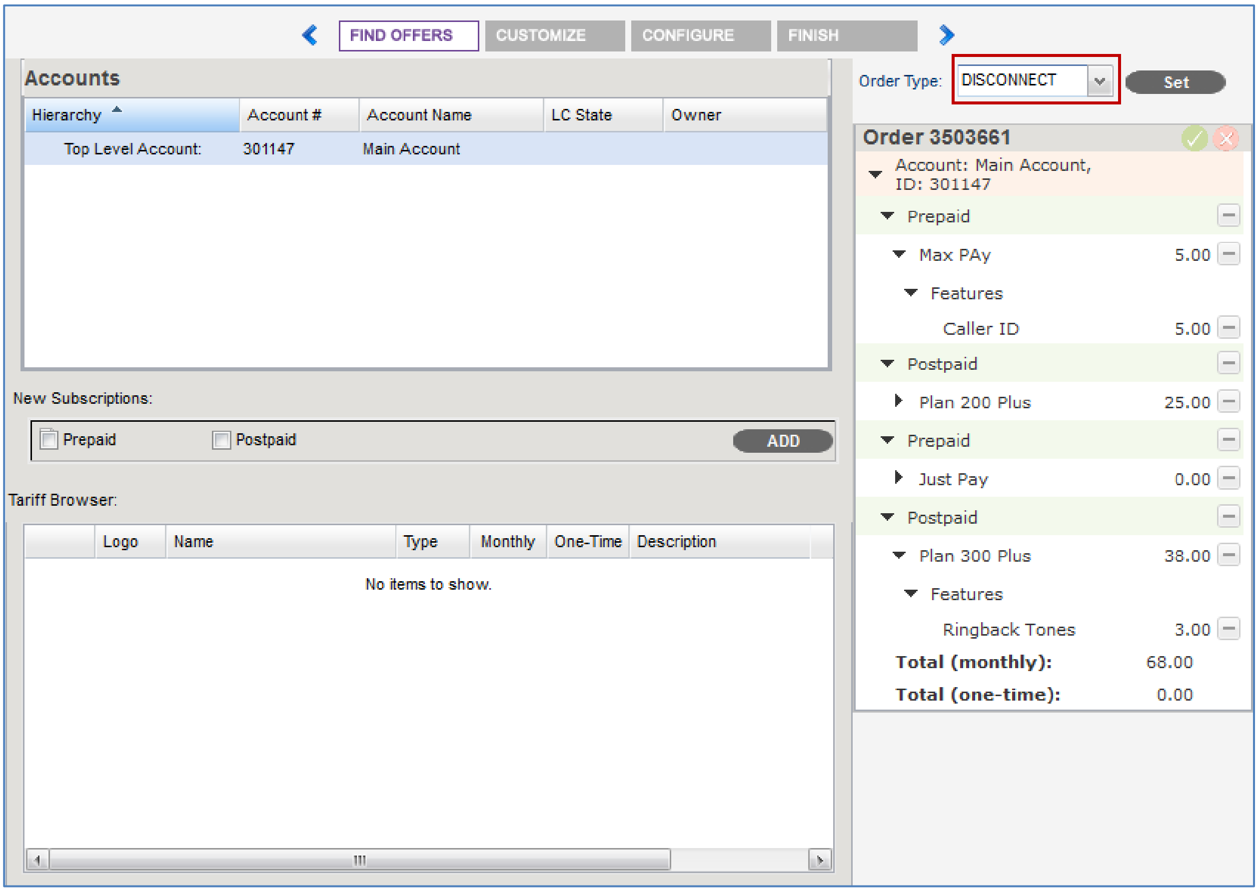


Figure 86 Selecting Disconnect from an order

3. The Change Order Type dialog appears, asking you to confirm the disconnection.

4. If you click the **OK** button, the disconnect order is processed, and all accounts, services, and subscriptions appear deleted.

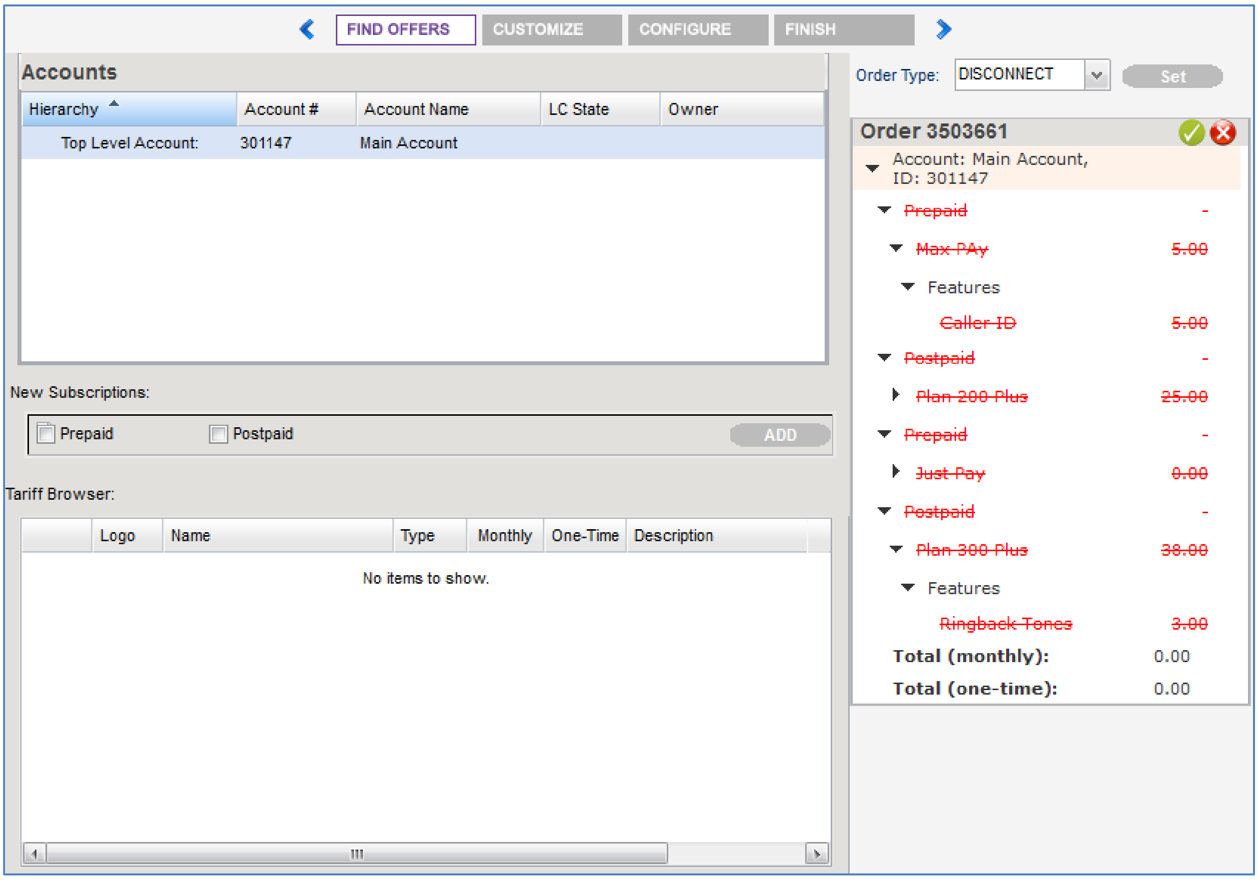
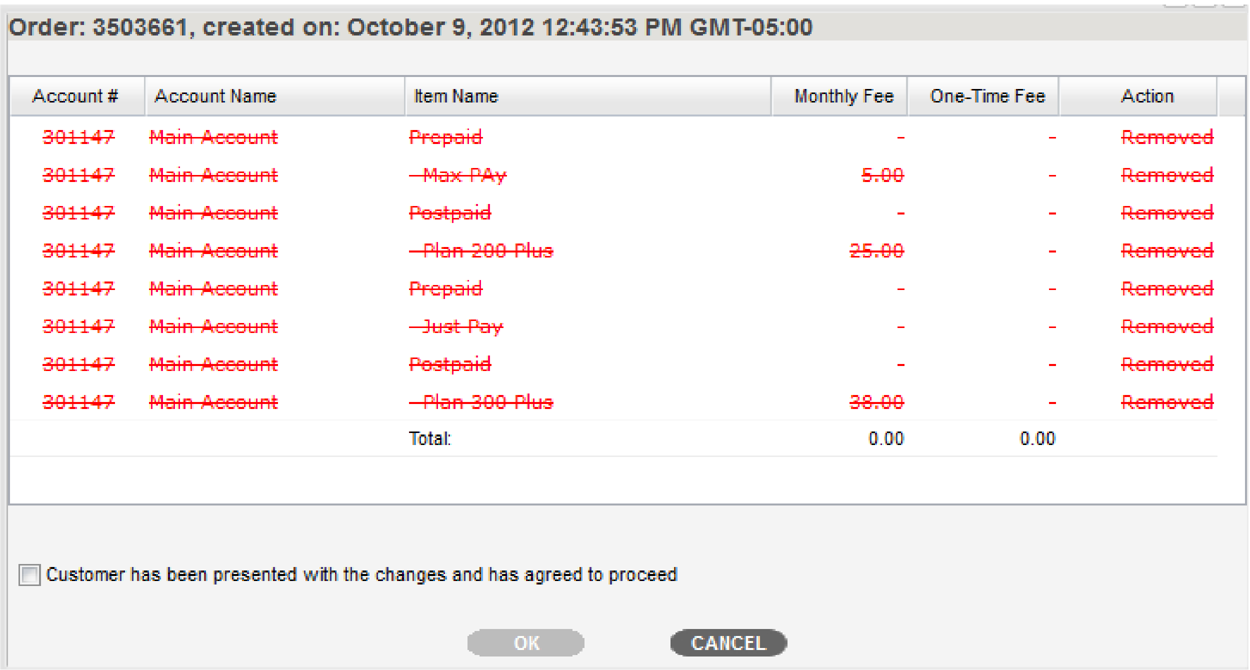


Figure 87 Disconnecting an order: Order is processed

If you click the **Cancel** button, you are returned to the Find Offers page, where you can make any additional changes. The Disconnect order is cancelled and the Order Type is set to **Change**.

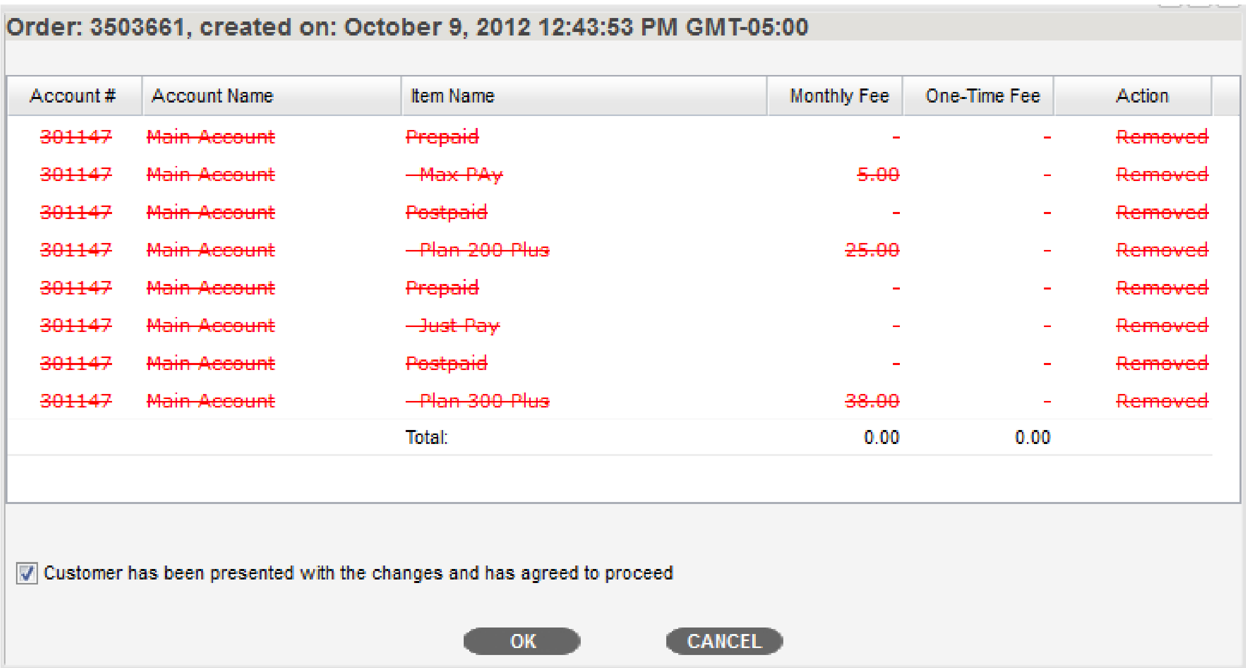
5. Click the **Present order** button () to continue with the disconnection.


Order: 3503661, created on: October 9, 2012 12:43:53 PM GMT-05:00

Account #	Account Name	Item Name	Monthly Fee	One-Time Fee	Action
~~301147~~	~~Main Account~~	~~Prepaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Max PAy~~	~~5.00~~	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Postpaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Plan 200 Plus~~	~~25.00~~	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Prepaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Just Pay~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Postpaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Plan 300 Plus~~	~~38.00~~	-	~~Removed~~
		Total:	0.00	0.00	

Figure 88 Disconnecting an order: Confirming the disconnection

6. Select the **Customer has been presented with the changes and has agreed to proceed** checkbox**.**
7. Click the **OK** button. The dialog closes and the Order status changes to Presented.
8. Click the **Finish** tab and the **Submit** button to complete the order.


Order: 3503661, created on: October 9, 2012 12:43:53 PM GMT-05:00

Account #	Account Name	Item Name	Monthly Fee	One-Time Fee	Action
~~301147~~	~~Main Account~~	~~Prepaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Max PAy~~	~~5.00~~	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Postpaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Plan 200 Plus~~	~~25.00~~	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Prepaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Just Pay~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Postpaid~~	-	-	~~Removed~~
~~301147~~	~~Main Account~~	~~Plan 300 Plus~~	~~38.00~~	-	~~Removed~~
		Total:	0.00	0.00	

Figure 89 Disconnecting an order: Completing the disconnection

9. The dialog button appears confirming the submit process:

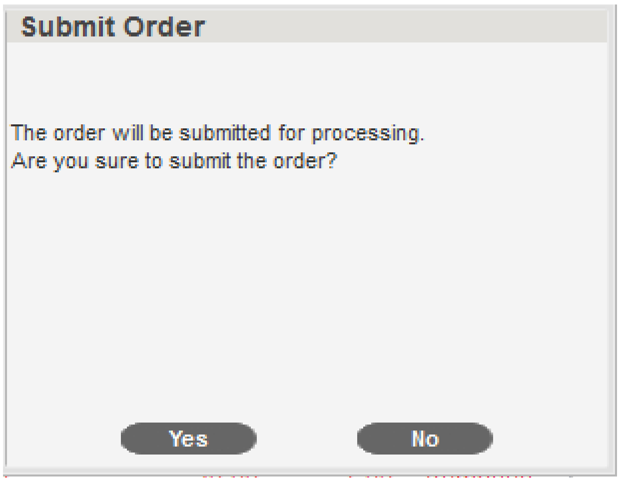


Figure 90 Submit Order dialog

- If you click the **Yes** button, the order is processed, and then the Order History section of the Dashboard displays, which shows the details of the completed order. All services and subscriptions are terminated, any phone numbers are disassociated and the customer is given the Inactive status.
- If you click the **No** button, you are returned to the Finish page, where you can make any additional changes.

6 Acronyms

CSR – Customer Service Representative

UWS – Unified Workstation

7 Reference List

The following is a list of documentation for reference:

- *UWS Configuration Guide*
- *Velocity Studio User Guide*
- *Diagnostic and Support Guide*

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