



Product Requirement Document (PRD)

The goal of this PRD is to provide 8x8 customers with a comprehensive and actionable account summary view that consolidates invoice data, payment history, and credit adjustments into a single, intuitive interface within the Gaviti external dashboard. This summary page is designed to enhance billing transparency, self-service capabilities, and customer satisfaction by enabling users to quickly assess their financial standing and take key actions.

Key capabilities include:

- Displaying total account balance with drill-down access to open, past due, and closed invoices.
- Highlighting account status (e.g., Active, CC Suspended, Suspended) to give immediate visibility into billing risk or restrictions.
- Enabling one-time payments via credit card based on currency and payment method eligibility.
- Providing a dispute option directly from the summary view.
- Linking to knowledge articles to support self-resolution and reduce support ticket volume.

This account summary experience is tightly integrated with 8x8's Billing Manager and Gaviti platforms. All invoice and customer data will be provided in the agreed format already shared with Gaviti, and updates (e.g., invoice status changes post-payment) will be reflected with a known data sync lag (up to 24 hours). Additional validations and payment eligibility rules will be enforced based on customer billing configuration (e.g., currency type, primary payment method).

This functionality not only empowers customers to manage their financial relationship with 8x8 more efficiently but also supports internal goals around collections automation, payment accuracy, and customer experience optimization.

Driving Product Adoption & Engagement

This release will serve as a **key driver for product adoption** of the Gaviti-powered self-service collections platform by:

- **Empowering customers** to resolve billing issues independently, reducing reliance on support teams
- **Streamlining the payment experience**, particularly for eligible credit card users across supported currencies (USD, CAD, GBP, EUR)
- **Encouraging repeat usage** through convenient, in-context access to billing actions

- **Reducing friction** for customers with mixed payment configurations by handling eligibility logic and UX cues within the platform

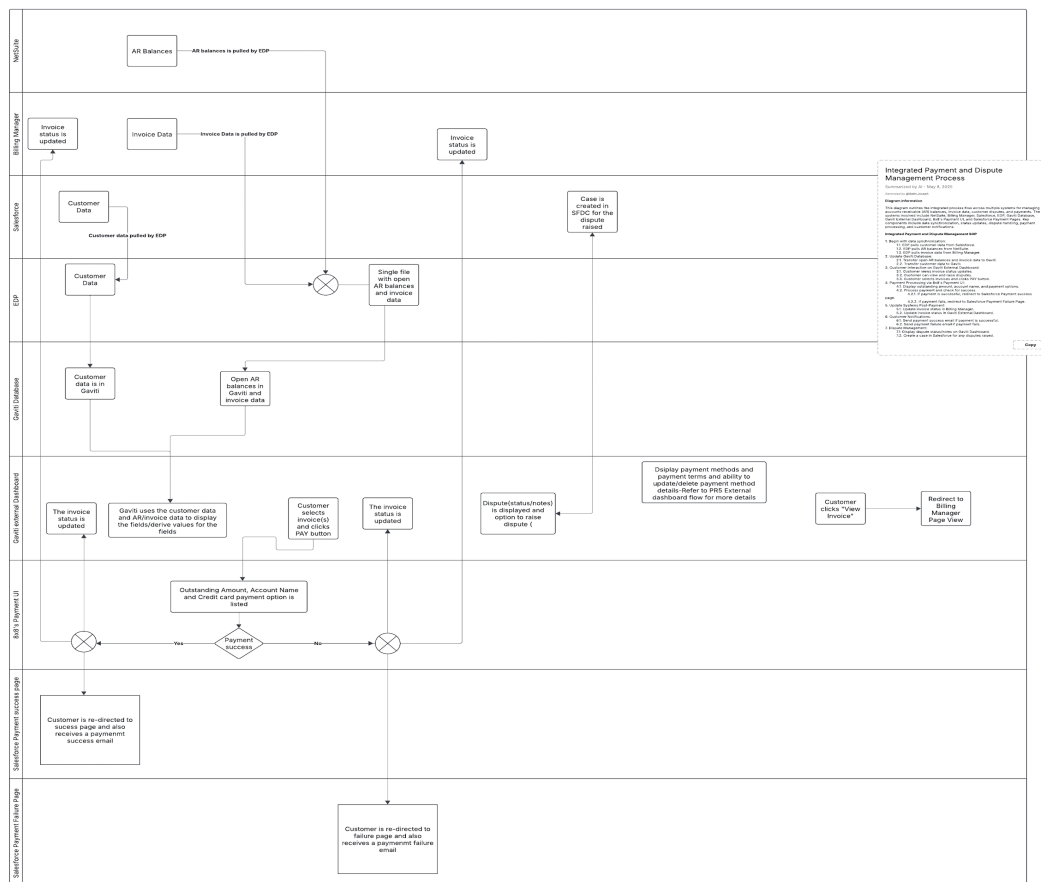
Adoption success will be tracked via:

- **Engagement metrics** (e.g., usage rates of Pay Now, drill-down interactions)
- **Conversion rates** for one-time payments
- **Reduction in billing-related support tickets**
- **Increase in dispute submissions** via self-service pathways

PR1: Product Requirements Mapping with BR1 for the external dashboard([EPIC: 88630](#))

This section outlines all the business requirements and corresponding product requirements for BR1, from the business requirements document.

PR1: Process Flow for the external dashboard (*click the process flow to navigate to the flow in Lucid Chart*)



Business Requirement: Display Customer Portfolio Account Summary Level

As a customer, I want to see a holistic overview summary of invoices/payments/credit adjustments, manage my payment methods, make a one-time payment via Credit card, and dispute.

Acceptance Criteria

- Open Invoices widget: Total Account Balance with drill down to all open invoices (current and past due)
- Account Status widget: CC Suspended and Suspended
- Link to knowledge articles

Product Requirement: Display Customer Portfolio Account Summary Level

As a Customer, I want to see a **holistic summary** of my invoices, payments, and credit adjustments. and have the ability to:

- Make a one-time payment via Credit Card,
- Dispute charges, directly from the account summary page.

So that I can have **full visibility and control** over my account status, open balances, and quickly address any billing issues or payments.

Note: 8x8 will make the invoice data and customer data available in the format specified in this document (this file is already shared with Gaviti for data mapping). The acceptance criteria below will be derived by Gaviti based on the data 8x8 provides. 8x8 will work with Gaviti to test the "redirection to Billing manager page to view the invoice as part of the external dashboard. Invoice status update(acceptance criteria 4): If the customer makes payment via PAY NOW, for the invoice status update, there will be a lag of 24 hours, as we will be relying on the invoice data push for the status update.

Acceptance Criteria 1: Open Invoices Widget ([BIZ:89389](#))

- Display a **Total Account Balance** at the summary level.
- Provide a **drill-down link** that opens a detailed view showing:
 - a) All **open invoices**.
 - b) Status whether they are **current** or **past due**.
 - c) Closed invoices
- Amounts must be **accurately summed** and updated in the Gaviti external dashboard

Acceptance Criteria 2: Widget([BIZ:89389](#))

- Display current **Account Status** with the following possible states:
 - a) **Active**
 - b) **CC Suspended** (Credit Card Suspended)
 - c) **Suspended** (general account suspension)

Acceptance Criteria 4: Make One-Time Payment([BIZ:89391](#))

- Make a one-time payment via Credit card:
 - a) The PAY button is displayed on the Gavitis' external dashboard so customers can select an invoice(s) to make the payment
 - The **PAY NOW** button will **only be visible** to end customers whose billing currency is one of the following:
 - **USD** (U.S. Dollar)
 - **CAD** (Canadian Dollar)
 - **GBP , EUR**(British Pound)
 - b) If the customer has mixed currencies, let's say, USD and CAD, if the customer selects both USD and CAD, a pop-up is displayed to the customer asking them to select just one currency for the payment. The customer should be able to close the pop-up manually. Every time, a customer tries to perform this kind of selecting pop-up to be displayed.
 - c) If the end customer's primary payment method is ACH or Invoice, the PAY button is to be hidden for that customer in the external dashboard. The customer should still be having access to the Gaviti APPA portal
 - d) The customer clicks the PAY button after selecting the invoice(s) in the Gavitis dashboard
 - e) Gaviti to call the payment adapter to get the PAY UI redirect URL for the payment adapter (pass the cloud8 authentication token to this URL, the payment adapter will accept the body. The payment adapter URL is :
<https://cloud8-cf.8x8.com/paymentadapter/api/payment-adapter/v2/payment/batch>
Gaviti will receive the auth2.0 token and pass that token as part of the header parameter of the below API
 - f) Sample Request that Gaviti needs to initiate to the payment adapter:

```
{
  "id": "1748549361052",
  "customerId": "0012J00002b2gTGQAY", //aka platformId
  "companyName": "lis-qa3",
  "billingSystem": "BILLING_MANAGER", //internally defined by 8x8
  "source": "BM_COMMUNITIES", // Will be Gaviti

  "currencyCode": "USD",
  "isCustomer": "true",
```

```

"invoices": [
{
"totalAmount": "2993.6",
"openAmount": "2993.6",
"dueDate": "2023-08-01",
"costCenterId": null,
"billingStartDate": "2023-07-01",
"billingEndDate": "2023-07-31"
}
]
}

```

g) Sample RESPONSE that Gaviti will get:

```

{
"id": "1748549361052",
"customerId": "0012J00002b2gTGQAY", // aka platformId
"billingSystemId": null,
"companyName": "lis-qa3",
"country": "USA",
"billingSystem": "BILLING_MANAGER",
"source": "BM_COMMUNITIES", // will be Gaviti

```

```

"currencyCode": "USD",

```

```

"redirectUrl": " https://pay.8x8.com/paynow?transactionId=3ac4b8e149d847099030ef3878416375"

```

```

,

```

```

"txnId": "3ac4b8e149d847099030ef3878416375",

```

```

"status": "ACCEPTED",

```

```

"isCustomer": null,

```

```

"invoices": [

```

```

{

```

```

"invoiceId": null,

```

```

"invoiceNumber": null,

```

```

"totalAmount": "2993.6",

```

```

"openAmount": "2993.6",

```

```

"billingStartDate": "2023-07-01",

```

```

"billingEndDate": "2023-07-31",

```

```

"invoiceDate": null,

```

```

"dueDate": "2023-08-01",

```

```

"costCenterId": null

```

```

}

```

```

]

```

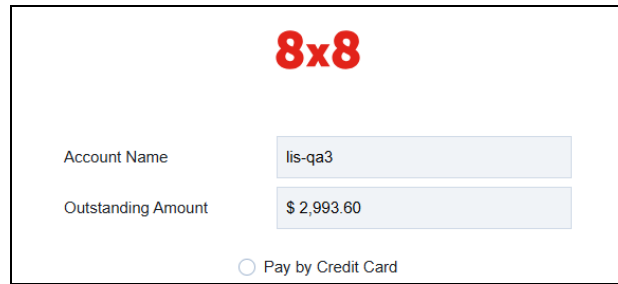
```

}

```

h) Gaviti to use the URL received from the above step to redirect to 8x8's Payment UI
Here, the Payment UI will be displayed with "Account Name" and "Outstanding Amount"

will be **prepopulated** on the payment UI screen. Example below:



8x8

Account Name lis-qa3

Outstanding Amount \$ 2,993.60

☐ Pay by Credit Card

- i) Customers enter their card details and submit them details
- j) If payment is successful, redirect to the payment success page of Gaviti, where verbiage is displayed indicating payment was successful.
- k) If payment fails, redirect to the payment failure page in Gaviti, where verbiage is displayed indicating payment has failed.
- l) The invoice status is updated in the Gavitis' external dashboard if the payment was successful.
- m) The invoice status is updated in Billing Manager as well

Acceptance Criteria 5: Initiate Dispute (detailed as part of BR12, and the JIRA ID will be placed there)

Customers must be able to:

- a) View the Dispute button at the account level and Invoice as part of the Gaviti external dashboard. Detailed requirement for disputes is elaborated as part of BR12 External
- b) The customer can raise a dispute (detailed as part of BR12)

Acceptance Criteria 6: Link To Knowledge Article([BIZ: 89392](#))

The link to the knowledge article is provided as part of the external dashboard to the end Customer.

- a) The end customer should be able to see the "Understand your statement" button in their self-serve portal
- b) The end customer is routed to the below page, upon clicking the button
https://support-portal.8x8.com/helpcenter/category.html?hl=en&c=1_40_65_67_7571

Business Requirement: Display Customer Portfolio Account Detail Level

Total open balance transaction date, transaction amount, transaction currency, transaction date, due date, Usage Files - CDR SDR .CSV or .XLS Files, CC refunds

- Invoice to and AP to contacts
- Payment receipt

Product Requirement: Display Customer Portfolio Account Detail Level ([BIZ: 89393](#))

As a Customer, I want to view comprehensive **transaction** and **payment details** related to my account, including downloadable usage files and contact information, so that I can have complete visibility over my **open balances, payments, invoices, refunds, and usage records** for easier reconciliation and record-keeping.

Acceptance Criteria 1: Display Total Open Balance Details ([BIZ: 89393](#))

Show the following fields for each open transaction:

- Only customers with a primary payment method = credit card should have access to the Gavitis external dashboard
- Total Open balance-*Gaviti is expected to calculate this value(open balance and total open balance)*
- Transaction Date
- Transaction Amount
- Transaction Currency
- Due Date
- CC Refund- *8x8 does not have this data, as this resides only on Cybersource. For MVP, 8x8 will be using our own payment UI. We are not proceeding with using Gaviti's Cybersource connection or sharing MIDs with Gaviti for MVP.*

Acceptance Criteria 2: Invoice PDF Display and Re-Routing ([BIZ: 89394](#))

- The Customer is provided with the option to view the Invoice via Gavitis' external dashboard
- When the customer clicks "View Invoice" via Gavitis' external dashboard, they are redirected to the Billing Manager page view.
- The parameters mentioned in the URL will be passed by 8x8(EDP) to Gaviti as part of the Invoice data push, and Gaviti to construct the state parameter (sample provided) and pass that to 8x8.
- For regular customers, the state parameter that needs to be constructed by Gaviti and passed to 8x8 looks like below, based on the parameters 8x8 will pass:
State Parameter: custID=QB2052618010722&beginDate=2023/08/01¤cy=USD
- For cost center customers, the state parameter that needs to be constructed by Gaviti and passed to 8x8 looks like below, based on the parameters 8x8 will pass:
(An additional parameter, cost center, will be included.):
State Parameter:
custID=QB1818546020421&beginDate=2025/04/01¤cy=GBP&costCenterID=890aeceacbc65b91043ac4675f7c880
- The base URL is to remain the same: <https://sso.8x8pilot.com/v2/login/billingService-staging>

Acceptance Criteria 3: Usage Files Display ([BIZ: 89394](#))

- The end customer should be able to access the usage field from their Billing Manager statements for MVP

1. ASSUMPTIONS AND CONSTRAINTS

Assumptions:

- CC Refund value display in GAVITI external dashboard at the customer portfolio account detail level: 8x8 does not currently receive this data from Cybersource. However, if Gaviti provides out-of-the-box capability to retrieve this information, it can be displayed through the Gaviti external dashboard. This would be possible for Gaviti only if 8x8 decides to share the Cybersource MIDs with Gaviti. This was discussed and agreed upon by the business during the meeting on 4/22/25.

Constraints:

- Gaviti cannot update Salesforce when changes to the payment method are made. Hence, 8x8 to figure out a mechanism to keep systems in sync for payment methods-related data.