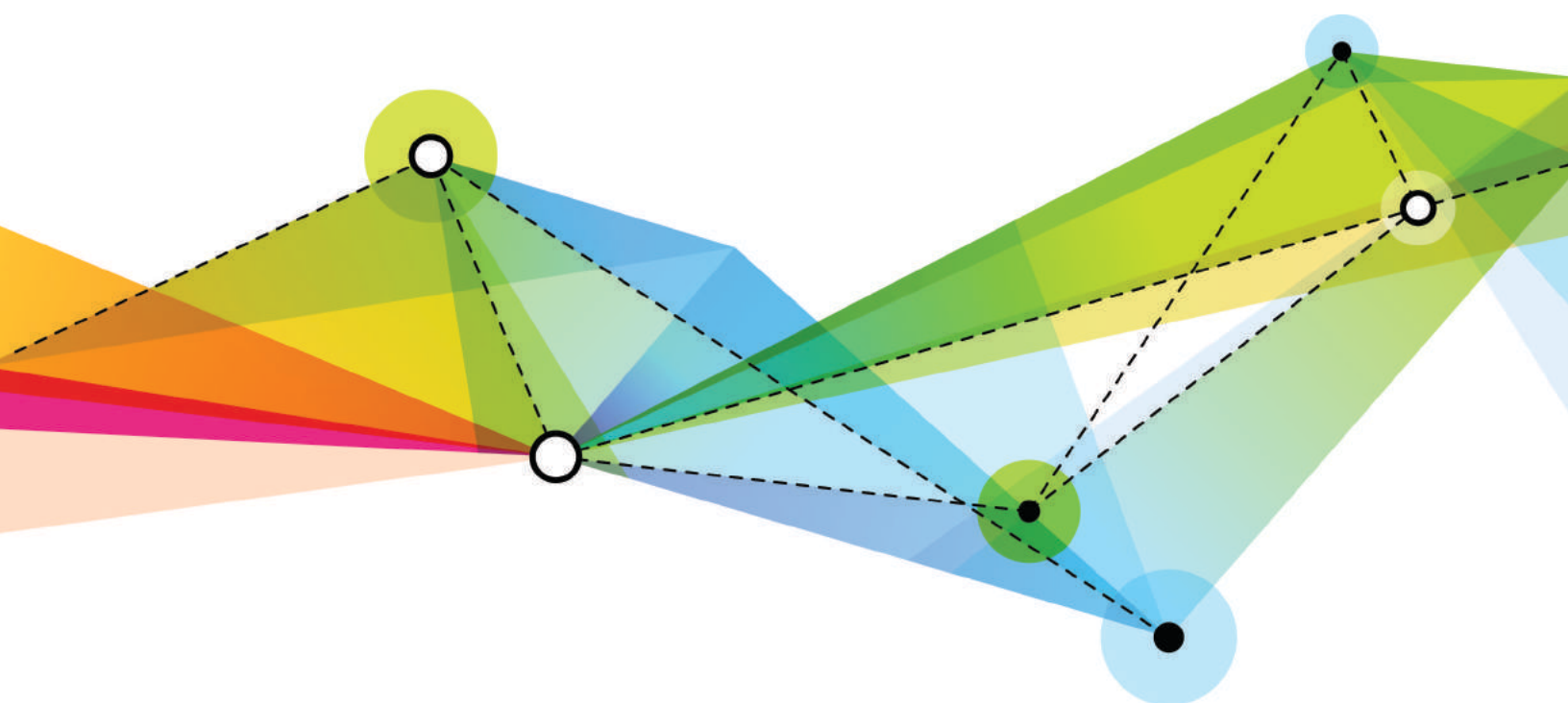


Smile Configuration Guide



inomial

Smile Configuration Guide
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What's changed

This document was last released as the Smile 6.0 Configuration Guide - Edition 1.2 in August 2016.

The information and functionality included in the Smile Configuration Guide - Edition 1.3 is compatible with **Smile Version 6.0**.

New configuration

Smile Configuration Guide - Edition 1.3 adds the following new configuration information:

Chapter	New information
Configuring accounts receivable	<ul style="list-style-type: none">• Credit control - Dispute treatment level

Updated configuration

Smile Configuration Guide - Edition 1.3 updates the following configuration information:

Chapter	Updated information
Configuring accounts receivable	<ul style="list-style-type: none">• Invoice grouping• Credit control• Format configuration
Configuring email, SMS, print and web	<ul style="list-style-type: none">• Stationery and forms

Chapter 1

Introducing Smile

Who this guide is for

This Configuration Guide is for administrators or managers who use Smile to manage customers, services and billing. This guide helps you complete tasks such as:

- configuring accounts receivable and credit control
- configuring communication preferences
- creating and configuring services
- creating and configuring packages and plans
- configure payment processing
- configuring user management and security
- configuring RADIUS
- configuring reports
- configuring help desk
- creating workflows

For information about using Smile, see the *User Guide*. For information about the Smile API and message bus, see the *Developer Guide*.

Introduction to Smile

Smile is a business support system (BSS) for ISPs, telcos and utility providers. You can use Smile with many consumer data services, including xDSL and wireless internet, mobile and fixed-line telephony, web hosting, web application management, fax gateways and IPTV.

As a business support and order-to-cash system, Smile:

- creates and tracks invoices on a cycle that suits your company
- sends the invoices to customers
- accepts payments, including credit card and direct debit payments
- automates debtor control
- supports a variety of plans and packages so you can bundle services to customers

Smile integrates with operational support systems (OSS) via well-defined interfaces. Smile can:

- provision and deprovision customers

- automatically control a customer's access to a service based on the status of their account
- enforce spend limits and other policy actions

Configuration and tools page

The Configuration and Tools page is the main page from which configuration items can be viewed.

On the **Smile** menu, click **Configuration**.

Note: Your permissions determine the shortcuts you see on the Configuration and Tools page.

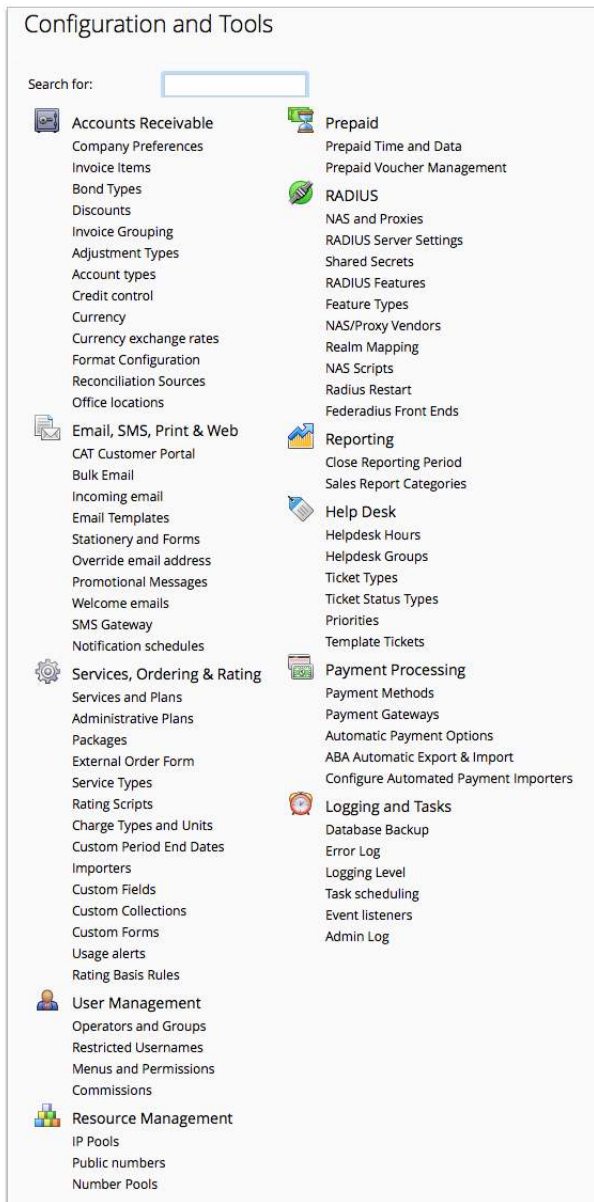


Figure 1: The Configuration and Tools page

Search

The global **Search** field lets you search for accounts, subscriptions, invoices and receipts, and lets you locate customer information in Smile.

The following table lists the terms you can use in the **Search** field.

Table 1: Search terms for each search type

Search type	Search term
Account	<ul style="list-style-type: none"> • Contact name • Phone numbers • Address details • USN (unique subscription number)
Subscription	<ul style="list-style-type: none"> • Username • Past usernames • USN
Invoice	Invoice number
Receipt	Receipt number

A USN, or unique subscription number, uniquely identifies each account and subscription in your company.

This task explains how to search for an account, subscription, invoice or receipt.

1. Do one of the following:


- Click in the **Search** field on the Smile Menu Bar.
- Press **ALT+S** or **CMD+S**.¹
- On the **Smile** menu, click **Find Customer**.

The **Search** window is displayed. The most recent previous search results are displayed by default. Double-click a previous result entry to select it.

2. Type your search term in the **Search** field and press **Enter**.

A list of results that match your search term appears.

3. Do one of the following:

- Double-click the required entry in the search results.
- Select the required entry, then click the  icon.
- Right-mouse click on the required entry and click **View**.

Detail of the search result is displayed.

¹ Your operating system or browser may override these key-combinations.

Terminology

Many BSS applications use the same term in slightly different ways. To avoid confusion, the following list explains what some common terms mean in Smile.

service	A generic kind of product that can be provided to customers, for example, ADSL or mobile telephony.
subscription	A single instance of a service that is provided to a customer, for example, a single mobile number. Subscriptions belong to an account and are often the source of usage and recurring charges.
account	A customer, company or debtor in the accounts receivable system to whom one or more subscriptions are provided. For example, you can provide mobile subscription 0401234567 to the account of Joe Smith. The account defines who bills are sent to, how much the customer owes and their payment terms.
plan	The set of rules that determine how much is charged for a subscription. A plan can include recurring charges, usage charges, minimum charges, included usage and access rules such as modem speed.
package	A bundle of services added as a group to an account. Packages specify default values for bill layout and billing frequencies, and are used to order subscriptions and accounts.

Note: For a full list of Smile terms, see the [Glossary](#) .

Documentation conventions

The following table lists the documentation conventions used in this guide.

Table 2: Documentation conventions

Convention	Meaning
bold	In text, specifies a user interface element.
<i>italic</i>	<ul style="list-style-type: none">• In code and syntax, specifies a variable value that you supply• In text, specifies a reference or link to another resource
<u>underlined</u>	Specifies a default value.
<code>monospaced font</code>	Specifies system input or output, for example: <ul style="list-style-type: none">• method or message names• method signatures• examples
[square brackets]	Specifies an optional parameter.
<code>smile.example.com:port</code>	Specifies the URL of your Smile implementation.

Get support

For information about how to contact Inomial, including how to access 24-hour emergency support, see [Support](#).

Chapter

2

Configuring accounts receivable

Company preferences

Company preferences is where you set Smile defaults for elements such as:

- your company name and address
- your accepted payment options
- how you display tax on your invoices
- your cycles for rating, invoicing and billing
- your credit and debit approval limits
- how you age your invoices
- your company timezone
- how you handle currency rounding

Select **Company Preferences** under **Accounts Receivable** on the Configuration and Tools page to view the Company details page.

Company preferences properties

Company name	Specifies the company name used in Smile.
ABN	Specifies the registered Australian Business Number of the Company name .
BPay biller code	Specifies your BPay biller code. This your registered biller code to which BPay payments are directed.
Address for payments	Specifies a postal address for receipt of customer payments that can be used in stationery.
Payment Instructions (if any)	Specifies additional or alternative payment instructions that can be used in stationery.

GST Item Type

Add a single GST item to any given invoice (default)	Specifies that a single totalled tax entry is displayed on an invoice.
Add several GST items, one for each subscription on an invoice	Specifies that tax entries for multiple subscriptions are displayed individually on invoices.

Always round down to 5c	Specifies that invoice totals are rounded down to the nearest 5 cent value.
Default rating cycle x on the n day of the month	<p>Specifies the day of the month and the period of a rating cycle. For more information, see Monthly and anniversary cycles.</p> <ul style="list-style-type: none"> • Anniversary • Monthly • Custom
Default invoicing cycle x on the n day of the month	<p>Specifies the day of the month and the period of an invoicing cycle. For more information, see Monthly and anniversary cycles.</p> <ul style="list-style-type: none"> • Anniversary • Monthly • Custom
Default billing release n day(s) delay	Specifies the number of days delay for processing of billing after the end of a cycle.
Sales Report Billing x on the n day of the month	<p>Specifies the day of the month and the period of a sales report billing cycle. For more information, see Monthly and anniversary cycles.</p> <ul style="list-style-type: none"> • Anniversary • Monthly • Custom
Align account & subscription billing periods	Specifies that account and subscription billing periods are aligned. Smile may pro-rate initial subscription charges to bring it into alignment with an account.
Approval Limit Debit	Specifies the automatic approval debit amount above which invoices require approval.
Approval Limit Credit	Specifies the automatic approval credit amount above which invoices require approval.
Address style	<p>Specifies the display format of addresses that are used in stationery.</p> <ul style="list-style-type: none"> • Australia Post • French Style • Normal
Show street address on account order forms	Specifies that street address fields are displayed on account order forms as well as billing address fields.
Invoice age basis	
Use the age of the individual transactions	When selected specifies that debtor days are computed based on the date of individual transactions. An account or invoice is current until it reaches the specified Debtor aging days .

Debtor aging days	Specifies the default number of debtor days.
Use the billing cycle of each individual debtor	When selected specifies that debtor days are based on the billing cycle of the debtor.
When aging invoices, use the invoice's due date instead of the transaction date.	When selected specifies that invoices are aged based on the invoice due date.
BCC outgoing mail to	Specifies an email address to which all outgoing messages are blind copied.
Show reversals when printing statements	When selected specifies that reversals are displayed on invoices.
Time Zone	Specifies the local time zone used by Smile.
Automatically allocate credits during billing run	When selected specifies that any available credits are applied during a billing run.
Rounding line item	Specifies the rounding transaction item displayed on invoices. <ul style="list-style-type: none"> • No rounding • Rounding adjustment

Monthly and anniversary cycles

Smile supports three types of cycles:

- **monthly**—all cycles start on the same day of each month.
- **custom**—all cycles use the same pre-determined table of end dates.
- **anniversary**—each cycle starts on the day of the month that the associated account or subscription was created.

By default, each cycle is a month long. You can use different types of cycles throughout your company.

Custom cycles may not follow a monthly pattern. For example, you can configure a custom cycle that is three months long.

If your company uses monthly billing, you process the billing run once a month because every invoicing period finishes on the same date. If your company uses anniversary billing, you should process the billing run several times a month because the invoicing periods end at different times throughout the month.

Consolidated billing

If an account has multiple subscriptions, by default Smile sets all subscriptions to use the same invoicing cycle as the account. This is known as consolidated billing, and lets you issue a single invoice for the account each cycle.

If you use consolidated billing and add a subscription to an account in the middle of an invoicing period, Smile pro-rates the recurring charges and any period limits, such as download limits, if it is configured to do so.

Invoice items

Invoice items are transactions that are manually added to an invoice through the Smile user interface or externally through a custom application using the Smile API.

Invoice items contain the following information:

- item code and description
- sales report category
- rate, unit size and display rate
- discounts
- approval limits
- tax status

Invoice items let you specify how a charge is displayed on an invoice. For example, you can specify that multiple charges for an invoice item are grouped into a single line, or that an invoice item of zero value is not printed on an invoice. To help you track costs, you must assign each invoice item to a sales report category.

View invoice items

You can create, configure and deprecate invoice items.

This task explains how to access invoice items.

1. Select **Invoice Items** under **Accounts Receivable** on the Configuration and Tools page.
The **Active Invoice Items** tab is displayed.
2. (Optional) To view inactive invoice items click the **Inactive Invoice Items** tab.
The **Inactive Invoice Items** tab is displayed.

Add an invoice item

Multiple invoice items can be configured in Smile to calculate usage, recurring charges and to display on an invoice.

This task explains how to add an invoice item.

1. Select **Invoice Items** under **Accounts Receivable** on the Configuration and Tools page.
The **Active Invoice Items** tab is displayed.
2. Click **Add**.
An Invoice line item page is displayed.
3. Type a code in the **Item code** field.
This is a unique alpha-numeric invoice item code. Limit of 8 characters. It cannot be edited once the invoice item has been saved.
4. Complete the required fields.
For more information, see [Invoice item properties](#).

5. Click Save.

The **Active Invoice Items** tab is displayed.

Invoice item properties

Item code	Unique alpha-numeric invoice item code. Limit of 8 characters.
Item description	Specifies the invoice item text.
Sales report category	Specifies the sales report category the invoice item is allocated to. <ul style="list-style-type: none"> • Select category from drop-down. • Create new... For more information, see Sales report categories .
Rate	Specifies the ex-tax value of the item charge.
Unit size	Specifies the size of an invoice item unit. For example, an invoice item may be made up of 12 units. An invoice for a quantity of 3 will be for 36 units in total.
Quantity Format	Specifies a string format to define how an amount is displayed. For more information, see Quantity format .
Display Rate	Specifies the text value to display on the invoice, which may include tax.
Display Order	Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Charge GST on this item	When selected specifies that tax is be added to the charge.
For billing plans, summarise multiple charges into a single invoice line item?	When selected only a total is displayed if the invoice item would appear more than once.
Do not add this item if the value is zero	When selected specifies that the invoice item is not visible in Smile when the item has a \$0 value.
Do not print this item if it is zero-value	When selected specifies that the invoice item is not included on an invoice or statement when the item has a \$0 value. The item is still visible in Smile.
Valid from	Specifies the date from which the charge is available to be added to invoices. If only a start date is specified Smile will view the charge as active and raise the charge from this date onwards.

Valid to	<p>Specifies the date up to which the charge is active.</p> <p>If only an end date is specified Smile will raise the charge up to this period only.</p> <p>Note: An item with a Valid to date specified in the past will be inactive or deprecated.</p>
Discount category	<p>Specifies a discount or commission category. For more information, see Charge types and units.</p>
Approval Limit	<p>Specifies a dollar value that if exceeded will require approval before being invoiced.</p>

Edit an invoice item

You can edit the configuration and value of an invoice item.

This task explains how to edit an invoice item.

1. Select **Invoice Items** under **Accounts Receivable** on the Configuration and Tools page.
The **Active Invoice Items** tab is displayed.
2. Click **View** to the right of the invoice item line entry.
The Invoice line item page is displayed.
3. Edit the required fields.
For more information, see [Invoice item properties](#).
4. Click **Save**.
The **Active Invoice Items** tab is displayed.

Delete or deprecate an invoice item

Deleting an invoice item removes the item from the invoice item list. It will no longer be available or visible in Smile.

Deprecating an invoice item sets the item to inactive. A deprecated invoice item is added to the **Inactive Invoice Items** tab.

Note: Deprecating an invoice item does not affect existing invoices. The deprecated option will not be available for new invoices.

This task explains how to delete or deprecate an invoice item.

1. Select **Invoice Items** under **Accounts Receivable** on the Configuration and Tools page.
The **Active Invoice Items** tab is displayed.
2. Click **View** to the right of the required invoice item.
The invoice line item page is displayed.

3. Do one of the following:

- Click **Delete**. Click **Continue** to confirm.
- Click **Deprecate**.

The Invoice items page is displayed.

Invoice grouping

Invoice grouping configuration is a global configuration for invoice groupings. Invoice grouping allows for a subset of an accounts subscriptions charges to be represented as a single item on an invoice. For example, invoice grouping can be used to display bundle charges on an invoice without itemising the individual charges that apply to the bundle.

An account invoice grouping can have one invoice grouping configuration. The configuration of an invoice grouping can:

- override the roll-up invoice item description
- specify multiple charge types
- specify the charge date range to roll-up
- specify charge types to exclude from grouping behaviour

Charge type grouping behaviours

Charge items can be displayed grouped together or rolled up into one line item.

- **Group**—Charges are still displayed individually on an invoice, but charges of the same charge type are displayed grouped together on the page.
- **Roll Up**—Multiple charges are rolled up and displayed as one line item on an invoice with an item description, the quantity of charges that have been rolled up and a total charge for all the line items that are part of the rolled up group.
- **Exclude**—Specified charges are excluded from grouping behaviour.

Multiple charge types can be specified for a grouping, and a behaviour can be set separately for each charge type.

View invoice groupings

You can create, configure and edit invoice groupings.

This task explains how to access the invoice grouping configurations page.

1. Select **Invoice Grouping** under **Accounts Receivable** on the Configuration and Tools page.
The Invoice Grouping Configurations page is displayed.
2. (Optional) To view inactive invoice groupings select the **Show inactive configurations** checkbox.
Inactive configurations are groupings with a **Valid to** date before the current date.
Inactive configurations are added to the **Invoice grouping configurations** list.

Add an invoice grouping

You can create multiple invoice groupings. An invoice group specifies the charge types that are included in the grouping and the behaviour for each type.

This task explains how to add an invoice grouping.

1. Select **Invoice Grouping** under **Accounts Receivable** on the Configuration and Tools page.

The Invoice Grouping Configurations page is displayed.

2. Click **Add**.

An Invoice Grouping properties page is displayed.

The screenshot shows the 'Invoice Grouping properties' form. It contains the following fields and sections:

- Name:** A text input field.
- Invoice display order:** A text input field with the value '0'.
- Invoice description:** A text input field with the value 'Invoice item description'.
- Valid from:** A date picker field.
- Valid to:** A date picker field.
- Default charge type behaviour:** A dropdown menu with 'Roll Up' selected.
- Applicable charge types:** A section with a table header:

Name	Behaviour
No charge types for this group	
- Charge type:** A dropdown menu with 'Not Set' selected, followed by an 'Add' button.
- Save:** A button at the bottom left.

Figure 2: Invoice grouping properties

3. Type a name for the grouping in the **Name** field.
4. Complete additional fields as required.
For more information, see [Invoice grouping properties](#).
5. Click **Save**.

The Invoice Grouping Configurations page is displayed.

Invoice grouping properties

Name	Specifies the name of the invoice grouping.
Invoice display order	Specifies the display order of the grouped charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Invoice Description	Specifies the item description that will be used for the roll-up item on an invoice.
Valid from	Specifies the date, inclusive, from which new invoice groupings can be created.
Valid to	Specifies the date, inclusive, to which new invoice groupings can be created.
Default charge type behaviour	<p>Specifies the grouping behaviour applied to Applicable charge types.</p> <ul style="list-style-type: none"> • Exclude • Group • Roll Up <p>For more information, see Charge type grouping behaviours.</p>
Applicable charge types	Specifies the charge types charge that are affected by the specified Default charge type behaviour .
Charge type	<p>Select charge types from the drop-down to add to the Applicable charge types table, click Add.</p> <p>Multiple types can be added. This list is populated from Charge Types and Units.</p>

Discounts

Discount configuration defines types of discounts and how discounts are applied. Discounts can be applied to all invoices or only to invoice items associated with specific charge types.

Discount modes

A discount mode specifies the type of discount that Smile applies.

Percentage

Percentage mode specifies the rate of discount as a percentage value of a charge. For example, 10%.

Capped

Capped discount is applied per account to the specified cap value per invoice. If the invoice total is larger than capped value then the discount is spread uniformly across all subscriptions that have the discount. The capped discount is calculated per invoice. As a result it is possible to have discounts of greater than capped value if an account has more than one invoice in a month.

Scripted

Scripted discount mode provides the ability to apply custom discounts via a script.

Discount scripts are advanced configuration. For more information, [contact Inomial](#).

Add a discount

Multiple discounts can be configured in Smile.

This task explains how to add a discount.

1. Select **Discounts** under **Accounts Receivable** on the Configuration and Tools page.
The Discounts page is displayed.
2. Click **Add**.
A blank Discount page is displayed.
3. Enter a name for the discount in the **Name** field.
4. Complete other discount fields as required.
For more information, see [Discount properties](#).
5. Click **Save**.
The Discounts page is displayed.

Discount properties

Name	Specifies the name of the discount. This is the name displayed in the discount drop-down on an account or subscription.
Currency	Specifies the currency that applies to the discount. This selection is applicable when multiple currencies are configured in Smile. For more information, see Currency .
Discount mode	Specifies the mode of discount applied. For more information, see Discount modes . <ul style="list-style-type: none"> • Percentage • Capped • Scripted
Discount Percentage	Specifies the discount amount applied, when Percentage discount mode selected.
Cap Value	Specifies the discount cap value, when Capped discount mode selected.
Discount Script	Contains the script, when Scripted discount mode selected.
Calculate discounts	Specifies how the discount is applied. <ul style="list-style-type: none"> • on a per service basis—specifies that the discount is calculated and displayed as a separate line item for each subscription on an invoice. • over the entire invoice—specifies that the discount is calculated and displayed as a single line item on an invoice.
Invoice display order	Specifies the display order of the discount on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Invoice description	Specifies the invoice item text.
Sales report category	Specifies the sales report category the invoice item is allocated to. For more information, see Sales report categories . <ul style="list-style-type: none"> • Select category from drop-down.
Discount/commission category	Specifies a discount or commission category. For more information, see Charge types and units .
Valid from	Specifies the date from which the discount is applied. If only a start date is specified Smile will view the discount as active and apply the discount from this date onwards.

Valid to

Specifies the date up to which the discount is applied.

If only an end date is specified Smile will apply the discount up to this date only.

Note: An item with a **Valid to** date specified in the past will be deprecated.

Charge Item Overrides

Specifies discount overrides on individual charges types. If no overrides are specified all charge types are discounted by the same discount mode.

Add an Override

Select a charge type from the **For Charge** drop-down, enter an amount for **Discount Percent**, then click **Add Override** to add the type to the **Charge Type Overrides** list.

Bond types

Bonds are a sum that are held as security and will generally be reimbursed at a future date. For example, a bond can be held as a deposit for supplied hardware that will be refunded upon return or as a security deposit to mitigate a potential risk of default when providing credit to a customer.

A bond is not revenue. A bond is a debit transaction that does not put a customer account in credit. An active bond is a liability. A bond type allows the transaction to be managed and reported on. Generally bonds do not include or attract a tax component.

Bonds are added to an account through either the bonds tab on an account or when configured as a workflow ticket action.

Add a bond type

You can add multiple bond types for different purposes and values. Active bond types are available for selection on an account or a configured ticket action.

This task explains how to add a bond type.

1. Select **Bond Types** under **Accounts Receivable** on the Configuration and Tools page.

The Bond Types List page is displayed.

2. Click **Add**.

A New Bond Type page is displayed.



The screenshot shows a form titled 'New Bond Type'. It has four input fields: 'Name', 'Description', 'Rate', and 'Currency'. The 'Currency' field is a dropdown menu currently showing 'AUD - Australian Dollars'. Below the fields is a 'Create' button.

Figure 3: New Bond Type properties

3. Enter the following information:

- **Name**—Unique alpha-numeric bond type name.
- **Description**—Longer descriptive text field of the bond type.
- **Rate**—The ex-tax value of the bond type item charge.

4. Click **Create**.

The Bond Types List page is displayed.

Edit or delete a bond type

Editing or deleting a bond type does not affect current or historical bond allocations.

Note: An error is displayed if an attempt is made to delete a bond type that is assigned as a current ticket action.

This task explains how to edit or delete a bond type.

1. Select **Bond Types** under **Accounts Receivable** on the Configuration and Tools page.

The Bond Types List page is displayed.

2. Click **View** to right of the required bond type entry.

The Bond Type page is displayed.

3. Do one of the following:

Options	Description
Edit a bond type	<ol style="list-style-type: none">1. Complete the required changes.2. Click Save.
Delete a bond type	<ol style="list-style-type: none">1. Click Delete.2. Click Continue to confirm.

The Bond Types List is displayed.

Adjustment types

Adjustments are a type of transaction that change the balance of an account. Adjustments are used to correct an error in a closed invoice or to add a credit to a customer's account.

Adjustment types specify the rules and restrictions of how operators can allocate credits and debits to customers. For example, you may place a \$100 limit on adjustments, or specify that an operator cannot change the automatically-calculated tax value of an adjustment.

Add an adjustment type

Smile is configured with a credit and debit note adjustment type by default. Additional variations of credit and debit notes can be added as required.

This task explains how to add an adjustment type.

1. Select **Adjustment Types** under **Accounts Receivable** on the Configuration and Tools page.

The Adjustment Types page is displayed.

2. Click **Add**.

A blank Adjustment Type page is displayed.

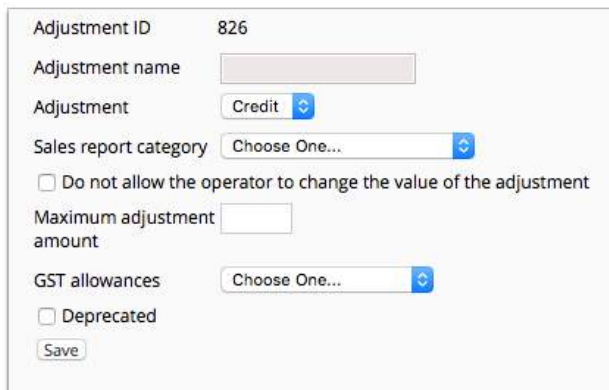


Figure 4: Adjustment type properties

3. Type a name in the **Adjustment name** field.
4. Select a type from the **Adjustment** drop-down.
Additional adjustment type fields are displayed.
5. Do the following:
 - Select a category from the **Sales report category** drop-down.
 - Select an option from the **GST allowances** drop-down.
6. Complete other adjustment type fields as required.
For more information, see [Adjustment type properties](#).
7. Click **Save**.

The Adjustment Types page is displayed.

Adjustment type properties

Adjustment ID	System allocated adjustment ID.
Adjustment name	A descriptive name of the adjustment type.
Adjustment	Specifies the type of adjustment. <ul style="list-style-type: none"> • Credit—adds a credit to an account. • Debit—adds a charge to an account.
Sales report category	Specifies the sales report category the transaction is allocated to.
Do not allow the operator to change the value of the adjustment	When selected an operator is not able to edit the value of the adjustment.
Maximum adjustment amount	Specifies a maximum value of a single adjustment transaction.
GST allowances	Specifies how tax is calculated on the credit or debit amount. <ul style="list-style-type: none"> • GST is calculated—specifies that Smile calculates the tax component of an adjustment amount. • Operator adjusts GST—specifies that an operator manually calculates and applies the tax component of the adjustment amount. • GST is set to zero—specifies that the tax component of an adjustment amount is zero.
Deprecated	When selected marks the adjustment type as deprecated. The type will no longer be visible to an operator when raising an adjustment.

Account types

Account types primary purpose is to separate your accounts for financial reporting and billing.

Multiple packages can be created with different account types specified. Packages can be used to separate users for ordering purposes, which in turn can specify different dispatch rules, stationery and credit control terms.

View account types

You can view, add, edit and delete account types.

This task explains how to view account types.

1. Select **Account types** under **Accounts Receivable** on the Configuration and Tools page.

The Account types page is displayed.

2. (Optional) To view an account type click **Edit** to the right of an account type entry.

The Account type page is displayed.

Add an account type

Smile is configured with a standard account type by default. Multiple account types can be added for different reporting and billing purposes in multiple currencies.

This task explains how to add an account type.

1. Select **Account types** under **Accounts Receivable** on the Configuration and Tools page.

The Account types page is displayed.

2. Click **Add Account Type**.

A blank Account type page is displayed.

3. Enter a name for the account type in the **Name** field.

4. Complete other account type fields as required.

For more information, see [Account type properties](#).

5. Click **Save**.

The Account types page is displayed.

Account types properties

Name	Specifies a short descriptive name of the account type.
Currency	Specifies the currency that applies to the account type. Selection is applicable when multiple currencies are configured in Smile. For more information, see Currency .

Accounts receivable

Prefix for transaction numbers	Specifies a prefix added to the beginning of a transaction number. For example, invoices created for Example Internet Pty Ltd may include the prefix EX, EX0123456.
Suffix for transaction numbers	Specifies a suffix added to the end of a transaction number. For example, invoices created for Example Internet Pty Ltd may include the suffix EX, 0123456EX.

Credit control

Credit control is the process of methodically communicating with customers to ensure the collection of accounts receivable. Communications progress from gentle reminders to more purposeful letters and other allowable collection options as accounts become further past due. Credit control configuration also controls the actions for dispute treatment level, which will pause automatic dispatches while an account issue is being resolved.

Credit control in Smile specifies one or more sets of accounting terms, treatment levels and actions triggered as the account's unpaid debts age. Account terms can be used to:

- send reminder and warning emails and letters
- charge late fees
- create helpdesk tickets
- apply policy

Defining a credit control process can involve other configuration elements in Smile. Automatic payments require payment details and payment gateways. Elements such as stationery and email templates are required for creating and sending documents.

For example, the following diagram shows the elements required for an emailed first reminder for an overdue invoice, owing over \$100, for an account set with Residential Customer account terms.

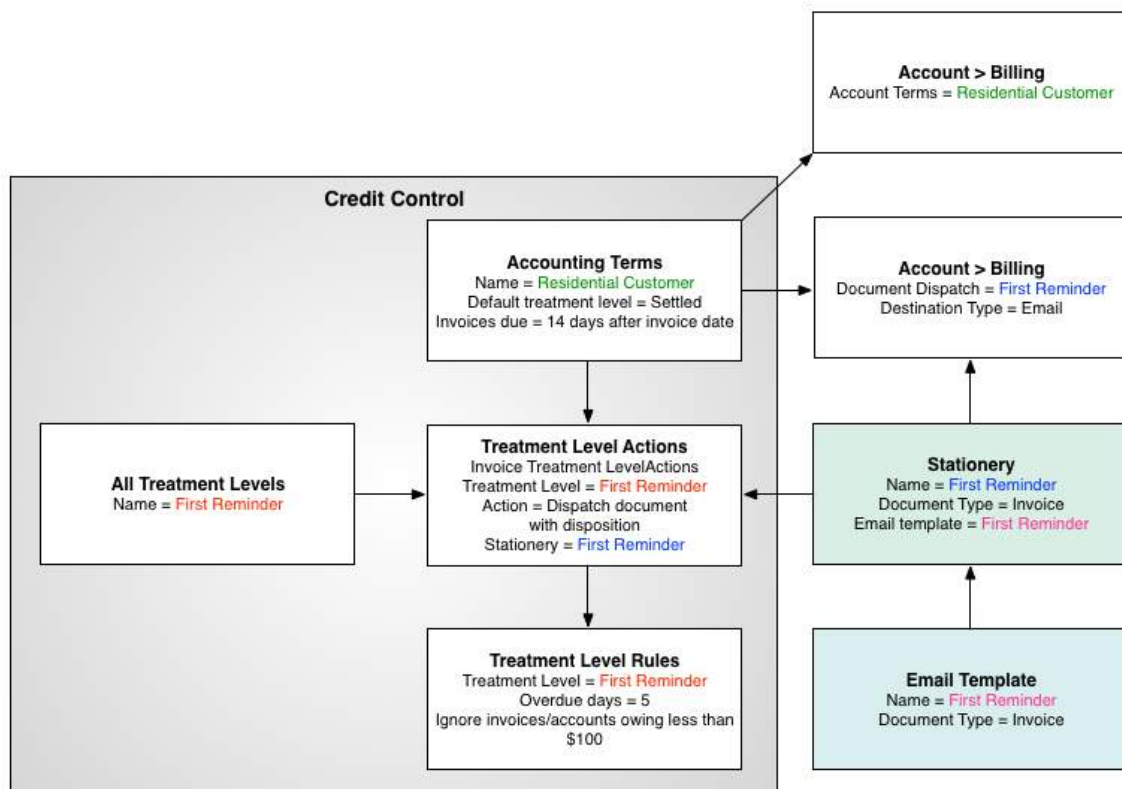


Figure 5: Credit control elements in an emailed warning for an overdue invoice.

Account terms and document dispatch, initially set by the package, can be changed on the **Account** summary and **Branding** pages of an account. For more information, see the *User Guide*.

The Credit control configuration page has four configuration tabs:

- **Accounting terms**—specifies the rules that determine when an account is considered overdue or delinquent and the actions taken.
- **Responsive terms**—specifies account term rule sets that can alter an account's accounting terms based on past payment behaviour.
- **All Treatment Levels**—displays a summary list of global treatment level status or level labels.
- **Advanced**—lists actions that may be taken on an account when a specified level has been reached.

Accounting terms

Accounting terms specify the rules that determine when an account is considered overdue or delinquent and the actions taken. Different terms can be applied to different accounts.

The **Accounting terms** tab provides a summary of account terms available for use. If multiple currencies have been configured in Smile, a currency drop-down is displayed. For more information, see [Currency](#).

Add an accounting term

You can configure multiple terms that can be applied to different accounts.

This task explains how to add an accounting term.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Click **Add**.

A blank **Account Terms** tab is displayed.

3. Complete all fields on the **Account Terms** tab.

For more information, see [Account term properties](#).

4. (Optional) Configure or edit the account terms tabs as required.

For more information, see [Tabs on the Account Terms page](#).

5. Click **Save**.

The Update dispositions page is displayed.

6. Click one of the following:

- **Update dispositions** to immediately update the dispositions of all accounts.
- **Leave them for the nightly run** to update all account dispositions at the next nightly run.

The **Accounting terms** tab is displayed.

Tabs on the Account Terms page

When you view or add an accounting term, the Account Terms page is displayed. The Account Terms page contains several tabs that display the rules and actions that apply to a term.

All fields on the **Account Terms** tab are mandatory. Other tabs and fields are completed as required.

The following table summarises the tabs available to an account term.

Table 3: Tabs on Account Terms page

Tab	Purpose
Account Terms	Specifies the name of the accounting term along with the default treatment level, dispute treatment level, invoice date and when invoices are due.
Treatment Level Rules	Specifies when a treatment level is applied to an account or invoice.
Treatment Level Actions	Specifies the actions taken when the treatment level of an account or invoice changes.
Notifications	Specifies how and when notifications are produced for invoices, receipts and recipient created tax invoices.
Payments	Specifies scheduled automatic payments.

Account terms

The Account Terms tab specifies the name of the accounting term along with the default treatment level, dispute treatment level, invoice date and when invoices are due.

Account terms properties

Name	Specifies a descriptive name of the accounting term.
Default treatment level	Specifies the default disposition of the account. This is the disposition at which Smile considers the account to be settled. This list is populated by the levels specified in All treatment levels .
Dispute treatment level	Specifies the treatment level applied when an account is in dispute. This list is populated by the levels specified in All treatment levels . For more information, See Dispute treatment level .
Set the invoice date of bulk invoices to the	<p>Specifies the invoice date based on the selected option. Bulk invoices are invoices created by an automated billing process.</p> <ul style="list-style-type: none"> • last day of the invoicing period • first day of the next period • date the invoice is approved • date the invoice is raised—when the billing is processed. • last day of the month of the invoicing period—last day of the calendar month.
Invoices are due <i>n</i> days after	<p>Specifies the number of days the invoice is due after the selected date option.</p> <ul style="list-style-type: none"> • Issue date—the approval date of automated processing or the close date of manual processing. • Invoice date—creation date for manual invoices or the above setting for bulk invoices. • Dispatch date—date of the first dispatch.

Treatment level rules

The Treatment Level Rules tab specifies when a treatment level is applied to an account or invoice. Rules are displayed in a summary list.

Add a treatment level rule

Multiple treatment level rules can be configured for an account or invoice.

This task explains how to add a treatment level rule.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Click **Edit** to the right of the required account term name.

The **Account Terms** tab is displayed.

3. Click the **Treatment Level Rules** tab.

The **Treatment Level Rules** tab is displayed.

4. Click **Add treatment level rule**.

A blank Treatment Level page is displayed.


5. Complete the treatment level rules fields.

For more information, see [Treatment level rules properties](#).

6. Click **Save**.

The **Treatment Level Rules** tab is displayed.

Treatment level rules properties

Treatment Level	Specifies the disposition which will apply if this rule is the best match. This list is populated from the levels specified in All treatment levels .
Apply this rule to	Specifies what this rule is applied to. <ul style="list-style-type: none"> • Invoices • Payments on payment plans
Overdue days	Specifies the number of days past due at which the treatment level rule is enacted. <div>  Tip: Specify a negative value to set an action before the invoice due date. For example, to send a reminder 2 days before the due date enter a value of -2. </div>
Ignore invoices owing less than	Specifies that a rule will not apply when an invoice value is less than the defined amount.
Ignore accounts owing less than	Specifies that a rule will not apply when an outstanding account value is less than the defined amount. Smile only considers the value of aged debt on an account when applying this rule.
Actions	Displays the actions applied to the treatment level. Any actions defined for a treatment level on the Treatment Level Actions tab are displayed by default.
Tickets	Specifies a template ticket to be used at a specified treatment level. For more information, see Template Ticket .

Treatment level actions

The Treatment Level Actions tab specifies the actions taken when the treatment level of an account or invoice changes. Actions are displayed in summary lists for account and invoice actions.

Add a treatment level action

Multiple actions can be configured for an account or invoices.

This task explains how to add a treatment level action.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Click **Edit** to the right of the required account term name.

The **Account Terms** tab is displayed.

3. Click the **Treatment Level Actions** tab.

The **Treatment Level Actions** tab is displayed.

4. Do one of the following:

Option	Description
Click Add treatment level action for accounts .	<p>Select an account treatment level action form the list displayed:</p> <ul style="list-style-type: none"> • Send Notification • Disable feature • Disable login access and continue billing • Enable feature • Enable login access and continue billing • Send Document • Send Email • Sent Statement • Suspend Account • Unsuspend Account
Click Add treatment level action for invoices .	<p>Select an invoice treatment level action form the list displayed:</p> <ul style="list-style-type: none"> • Send Notification • Dispatch document • Dispatch document with disposition • Raise surcharge • Raise charge in next invoice

A blank configuration page for the action selected is displayed.

5. Complete the treatment level action fields.

For more information, see [Treatment level actions properties](#).

6. Click **Save**.

The **Treatment Level Actions** tab is displayed.

Treatment level actions properties

Account Treatment Level Actions

Specifies actions taken when an account reaches a specified treatment level. An accounts treatment level will be the greatest of all invoice payment plans. Multiple actions can be configured for a treatment level.

Note: Not all properties apply to all actions.

Treatment Level	Specifies the treatment level label. This list is populated from the levels specified in All treatment levels .
Action	<p>Specifies the action to be taken. Additional properties are displayed dependant on the action selected.</p> <ul style="list-style-type: none"> • Disable feature • Disable login access and continue billing • Enable feature • Enable login access and continue billing • Send Document • Send Email • Send Statement • Suspend Account • Unsuspend Account <p>For more information, see Advanced.</p>
When to execute	<p>Specifies when an action occurs:</p> <ul style="list-style-type: none"> • Enter—action is taken when the account is first assigned the specified treatment level. • Exit—action is taken when the account ceases to be assigned the specified treatment level.
Service Feature	Specifies the name of the feature to be disabled or enabled.
Batch Dispatch	When selected specifies that the dispatched document is queued for review and approval before it is sent.
Check disposition has not changed before dispatching	When selected specifies that the current disposition of the account is checked before the action taken.
Stationery	Specifies the stationery used for the dispatch document. For more information, see Stationery and forms .
Continue charging until the end of the period	When selected specifies that charges are still applied to an account if it is suspended before the end of the period. If not selected then refunds may be issued.
Position	Specifies the display order of the action in the Invoice Treatment Level Actions list. Actions are sorted by treatment level. The position number is used to sort multiple actions with the same treatment level. A lower number will be displayed higher in the list.

Send Notification

Notifications can be sent by email, SMS and print. A notification can be sent via multiple methods that can specify individual format and schedules.

For more information, see [Notification method configuration](#).

Invoice Treatment Level Actions

Specifies actions taken to an invoice when a specified treatment level is reached. Multiple actions can be configured for a treatment level.

Note: Not all properties apply to all actions.

Treatment Level

Specifies the treatment level label. This list is populated from the levels specified in [All treatment levels](#).

Action

Specifies the action to be taken. Additional properties are displayed dependant on the action selected.

- **Dispatch document**
- **Dispatch document with disposition**
- **Raise surcharge**
- **Raise charge on next invoice**

When to execute

Specifies when an action occurs:

- **Enter**—action is taken when the account is first assigned the specified treatment level.
- **Exit**—action is taken when the account ceases to be assigned the specified treatment level.

Batch Dispatch

When selected specifies that the dispatched document is queued for review and approval before it is sent.

Stationery

Specifies the stationery used for the dispatch document. For more information, see [Stationery and forms](#).

Surcharge Treatment Level

The ID of the treatment level that the account will remain at until the charge is paid.

Sales Report Category

Specifies the sales report category the surcharge is allocated to.

Item Code

Specifies a code used as the invoice item text.

Fixed Amount

Specifies a flat fixed surcharge or charge amount added to an invoice.

Percentage

Specifies the percentage of an outstanding invoice charged.

Calculate percentage from unallocated portion of invoice only

When selected specifies that a percentage fee is only calculated on unallocated amounts of an outstanding invoice.

Charge GST

When selected, specifies that tax is calculates on the surcharge amount.

Surcharge Comment	Specifies a free text field.
Position	Specifies the display order of the action in the Invoice Treatment Level Actions list. The first action added will be assigned a position of 0. By default a new action will be assigned the next available number. A lower number will be displayed higher in the list.
Send Notification	<p>Notifications can be sent by email, SMS and print. A notification can be sent via multiple methods that can specify individual format and schedules.</p> <p>For more information, see Notification method configuration.</p>

Notifications

Notifications in credit control specify how and when notifications are produced for invoices, receipts and recipient created tax invoices.

Notifications properties

Invoices

Automatically send notifications for new bulk invoices	When selected specifies that a notification is sent, using the methods configured below, when a new bulk invoice is generated.
Automatically send notifications for new manual invoices	When selected specifies that a notification is sent, using the methods configured below, when a new manual invoice is generated.
Email, SMS, Print	For more information, see Notification method configuration .

Receipts

Configures notifications to be sent to the account holder when receipts are created.

Email, SMS, Print	For more information, see Notification method configuration .
--------------------------	---

Recipient Created Tax Invoices

Configures notifications to be sent to the commission earner's account when a commission is raised.

Email, SMS, Print	For more information, see Notification method configuration .
--------------------------	---

Payments

The Payments tab specifies:

- if automatic payments are enabled and, if so, when they are scheduled to be taken
- any actions to take in the event of an expiring credit card
- when and how a notification is sent in the event of a declined payment

Note: The following Smile elements need to be defined to use automatic payments:

- Payment details—For more information on configuring account payment details, see the *User Guide*.
- Payment gateway—For more information, see [Payment gateways](#).

Payments properties

Automatic Payment Scheduling default

When a payment is scheduled specifies which amount will be charged.

- **No Auto Payment**
- **Schedule Payment of Account Balance**
- **Schedule Payment of Invoice Amount**
- **Schedule Payment of Strict Invoice Amount**

Schedule payment n days after the

Specifies how many days after the selected date the payment is scheduled.

- **Invoice date**
- **Invoice close date**
- **Invoice due date**

Expiry Handling

Only take action on accounts with an invoice in the last n days

Specifies that an expiry action is only taken on recent accounts with an invoice issued in the set number of days.

Expiry Actions

Specifies actions that are taken before expiry of stored credit card information. Multiple actions can be defined.

n days before expiry

Specifies the number of days before expiry the **Run** action is taken.

Run

Specifies the action that will be applied.

- **Disable dispatch of invoices, reminders and statements**
- **Disable feature**
- **Disable login access and continue billing**
- **Enable dispatch of invoices, reminders and statements**
- **Enable feature**
- **Enable login access and continue billing**
- **Send Document**
- **Send Email**
- **Send Statement**
- **Suspend Account**
- **Unsuspend Account**

For more information, see [Advanced](#).

Notifications**Send a notification when:**

Specifies when a notification is sent.

- **A payment attempt is declined the first time**
- **A payment declined for the last time and won't be retried**
- **Any payment attempt is declined**

Email, SMS, Print

Declined payment notifications can be sent by email, SMS and print. A notification can be sent via multiple methods that can specify individual format and schedules.

For more information, see [Notification method configuration](#).

Note: Payment email templates use the payment [document type](#).

Responsive terms

Responsive credit control terms automatically move customers between accounting terms based on an accounts' past payment history. Before computing an account's treatment level an account on responsive terms first evaluates a set of rules to determine which accounting terms apply to the account. These rules count the number of overdue invoices over the account's recent past to determine the terms of the account. For example, if an account has sufficient overdue invoices in the past the account may move to more vigilant terms.

Before configuring responsive credit control you must first configure credit control terms. You can then configure responsive term rules which use those terms. For more information, see [Accounting terms](#).

Responsive term rules are in the form of:

At least X invoices owing $\$Y$ or more Z days after the due date in the last Q months results in a particular set of terms to apply to the account.

Rules are evaluated in the order they are presented in the Rules list. The first rule satisfied determines the terms to use. An account will move to less strict terms or return to default terms in time if the payment behaviour improves. If no rules apply, then the default terms will be used.

The **Responsive terms** tab provides a summary of the configured responsive rules sets.

Credit control configuration

Configuration and Tools

Accounting terms **Responsive terms** All Treatment Levels Advanced

Smile can automatically change accounts between credit control terms in response to good (or bad) payer behavior.

☐ Show deprecated

Name

Exception (Responsive) Terms [Edit](#)

Payment History [Edit](#)

[Add](#)

Figure 6: Responsive terms tab

Add a responsive term rule set

A responsive term rule set contains the rule(s) that Smile applies to an account to determine what account terms should apply.

This task explains how to add a responsive term rule set.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Select the **Responsive terms** tab.

The **Responsive terms** tab is displayed.

3. Click **Add**.

A blank responsive term set configuration page is displayed.



The screenshot shows a configuration form for a responsive term rule set. It contains the following elements:

- Currency:** A dropdown menu currently showing "AUD - Australian Dollars".
- Name:** An empty text input field.
- Default terms:** A dropdown menu currently showing "Choose One...".
- Buttons:** "New rule", "Save", and a checkbox labeled "These terms are no longer in use".

Figure 7: Responsive terms rule set configuration page

4. Type a name for the rule set in the **Name** field.

5. Select a term from the **Default terms** drop-down.

This is the default terms of an account with good payment behaviour. This list is populated with terms specified in [Accounting terms](#).

6. Click **Save**.

The **Responsive terms** tab is displayed. The rule set is added to the rule set list.

7. (Optional) Click **Edit** to the right of a rule set entry to edit or add a rule to a rule set.

For more information, see [Add a responsive rule](#).

Add a responsive term rule

A responsive term rule set can have multiple rules. Rules are evaluated in the order they are presented in the Rules list. The first rule satisfied determines the terms to use.

A rule is expressed in the form of:

At least X invoices owing $\$Y$ or more Z days after the due date in the last Q months results in a particular set of terms to apply to the account.

This task explains how to add a responsive term rule.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Select the **Responsive terms** tab.

The **Responsive terms** tab is displayed.

3. Click **Edit** to the right of a rule set entry in the responsive term list.

The configuration page for the responsive term set is displayed.

4. Click **New rule**.

A blank responsive term rule properties page is displayed.

Figure 8: Responsive term rule properties page

5. Complete the rule property fields.

Overdue invoice count	(X) The minimum number of overdue invoices
Months	(Q) The number of months into the past overdue invoices are counted
Overdue by Z days	(Z) The minimum number of days an invoice is overdue
Overdue amount	($\$Y$) The minimum value of the overdue invoice amount
Results in credit control terms	The account terms applied if the account meets the rule. Select from list. This list is populated with terms specified in Accounting terms .

6. Click **Save.**

The configuration page for the responsive term set is displayed. The new rule is added to the **Rules** list.

7. (Optional) Click **New rule to add another rule.**

A blank responsive term rule properties page is displayed. Repeat the above steps to add a new rule.

8. (Optional) Click **Down or **Up** to the right of a rule entry to reorder rules.**

Rules are evaluated in the order they are presented in the Rules list. The first rule satisfied determines the terms to use. If no rules apply, then the default terms will be used.

9. Click **Save.**

The **Responsive terms** tab is displayed.

All treatment levels

The **All Treatment Levels** tab displays a summary list of global treatment level status or level labels. The rules and actions that apply to a treatment level are specified in **Accounting Terms**. Not all treatment levels need to be used in an account term.

Typically treatment levels are sequenced. For example, first warning, second warning, final warning and suspended.

Add treatment level

Multiple treatment levels can be created for the different states of an invoice or account.

This task explains how to create a treatment level.

1. Select **Credit control** under **Accounts Receivable** on the Configuration and Tools page.

The **Accounting terms** tab is displayed.

2. Select the **All Treatment Levels** tab.

The **All Treatment Levels** tab is displayed.

3. Type a name in the **Create treatment level** field. Click **Add**.

The new treatment level is added to the **All Treatment Levels** summary list.

4. Click **Edit** to the right of the treatment level.

The Account disposition page is displayed.

5. (Optional) You can do the following:

- Edit the **Name** of the treatment level.
- Change the position of the treatment level by changing the number in the **Position** field. The first treatment level added will be assigned a position of 0. By default a new treatment level will be given the next available number. A lower number will be displayed higher in the list.
- Type a description in the **Stationery text** field.

6. Click **Save**.

The **All Treatment Levels** tab is displayed.

Advanced

The **Advanced** tab lists actions that may be taken on an account when a specified level has been reached. For example, an account can be suspended, features disabled, login disabled, an email or document sent or dispatch paused and re-enabled.

Account actions are advanced configuration. For more information, [contact Inomial](#).

Dispute treatment level

The dispute treatment level is an additional function within credit control that defers the automatic dispatch of invoices and statements and suspends credit control actions until an account or billing dispute has been resolved.

When an account is set as in dispute:

- automatic dispatch of invoices and other notifications are deferred
- if applicable, credit control actions such as payment reminders are deferred
- the account is clearly marked as in dispute in the account's **Account Balance** panel
- an account's Document Dispatch page will display which dispatches have been disabled

Dispatches can still be sent manually while an account is in dispute.

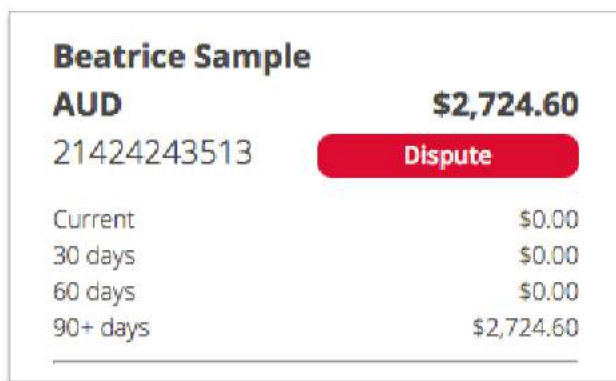


Figure 9: An account flagged as in dispute.

Dispute configuration properties

The dispute treatment level is set on the **Account Terms** tab of an individual accounting term. For more information, see [Accounting terms](#).

Account terms

Dispute treatment level	Specifies the treatment level applied when an account is in dispute. This list is populated by the levels specified in All treatment levels .
Actions	Specifies the actions to be taken when an account is set as in dispute, when the account is no longer in dispute and the template used if a help desk ticket is created for the dispute.
Tickets	Specifies the template ticket to use if a help desk ticket is raised when a dispute triggered. For more information, see Template Ticket .
Action	Specifies the action: <ul style="list-style-type: none"> • Disable dispatch of invoices, reminders and statements • Enable dispatch of invoices, reminders and statements For more information, see Advanced .

When to execute

Specifies when an action occurs:

- **Enter**—action is taken when the account is first set as in dispute.
- **Exit**—action is taken when the account ceases to be in dispute.

Position

Specifies the display order of the action in the Dispute Configuration Actions list. The position number is used to sort multiple actions in the list. A lower number will be displayed higher in the list.

Currency

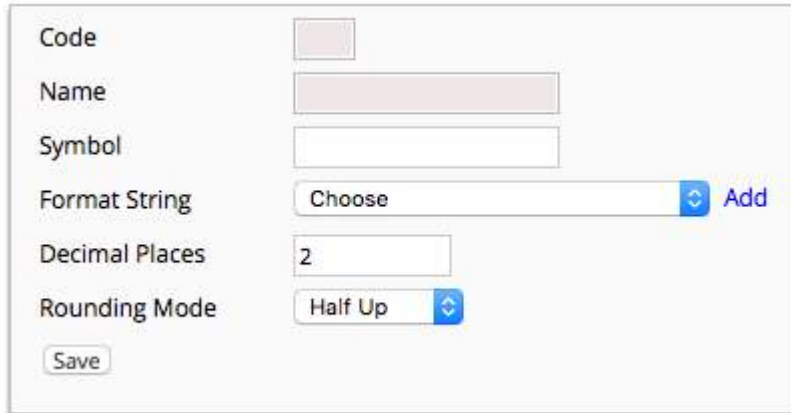
Currency manages international currencies in Smile. You can configure multiple currencies and set their display formats. Currencies can be assigned individually to services in Smile.

Add a currency

You can configure Smile with multiple currencies, specifying the appropriate display format and rounding rules.

This task explains how to add a currency.

1. Select **Currency** under **Accounts Receivable** on the Configuration and Tools page.
The International Currencies page is displayed.
2. Click **Add...**
A blank Currency page is displayed.



The screenshot shows a form for adding a new currency. It contains the following fields and controls:

- Code:** A small text input field.
- Name:** A larger text input field.
- Symbol:** A text input field.
- Format String:** A dropdown menu currently showing "Choose", with a blue "Add" button to its right.
- Decimal Places:** A text input field containing the number "2".
- Rounding Mode:** A dropdown menu currently showing "Half Up", with a blue "Add" button to its right.
- Save:** A button at the bottom left of the form.

Figure 10: Currency properties page

3. Complete the following fields:
 - **Code**
 - **Name**
 - **Format String**
4. Complete other currency fields as required.
For more information, see [Currency properties](#).
5. Click **Save**.
The International Currencies page is displayed.

Currency properties

Code	Specifies a maximum 3 digit code for the currency, usually the currency abbreviation. For example, AUD for Australian dollars. The code cannot be edited once the currency has been saved.
Name	Specifies a longer descriptive name for the currency.
Symbol	Specifies a symbol used to denote the currency. For example, \$ for dollars.
Format String	Specifies the format configuration of the currency field. For more information, see Format configuration .
Decimal Places	Specifies the number of decimal places used in the currency format. Decimal places cannot be edited once the currency has been saved.
Rounding Mode	<p>Specifies how Smile will round currency amounts. Rounding mode cannot be edited once the currency has been saved. For more information, see Rounding modes.</p> <ul style="list-style-type: none">• Ceiling• Down• Floor• Half Down• Half Even• Half Up (Default)• Up

Rounding modes

Rounding modes specify how numerical currency values are handled by Smile. Rounding a numerical value means replacing it by another value that is approximately equal but, has a shorter, simpler or more explicit representation. For example, the value \$23.4476 is rounded up to two decimal places, resulting in the value \$23.45.

Half Up (default)

Rounds towards the “nearest neighbour” unless both neighbours are equidistant, in which case, this mode rounds up to the next larger absolute value, away from zero. This rounding method behaves the same as the **Up** rounding method if the discarded fraction (decimal point) is ≥ 0.5 . Otherwise this rounding method behaves the same as the **Down** rounding method.

Examples—

5.7 rounds up to 6

5.5 rounds up to 6

5.1 rounds down to 5

-1.1 rounds up to -1

-1.5 rounds up to -1

-1.7 rounds down to -2

Half Down

Rounds towards the “nearest neighbour” unless both neighbours are equidistant, in which case this mode rounds down to the next smaller absolute value, towards zero. This rounding mode behaves the same as the **Up** rounding mode if the discarded fraction (decimal point) is > 0.5 . Otherwise it behaves the same as **Down** rounding mode.

Examples—

5.7 rounds up to 6

5.5 rounds down to 5

5.1 rounds down to 5

-1.1 rounds up to -1

-1.5 rounds down to -2

-1.7 rounds down to -2

Half Even

Rounds towards the “nearest neighbour” unless both neighbours are equidistant, in which case, this mode rounds towards the even neighbor. This rounding mode behaves the same as the **Half Up** rounding mode if the digit to the left of the discarded fraction (decimal point) is odd. It behaves the same as the **Half Down** rounding method if it is even.

Examples—

5.7 rounds up to 6

5.5 rounds up to 6

5.1 rounds down to 5

-1.1 rounds up to -1

-1.5 rounds down to -2

-1.7 rounds down to -2

Up

Rounds away from zero to the next greater absolute value. This rounding mode never decreases the magnitude of the calculated value.

Examples—

5.7 rounds up to 6

5.5 rounds up to 6

5.1 rounds up to 6

-1.1 rounds down to -2

-1.5 rounds down to -2

-1.7 rounds down to -2

Down

Rounds towards zero to the next smaller absolute value. This rounding mode never increases the magnitude of the calculated value.

Examples—

5.7 rounds down to 5

5.5 rounds down to 5

5.1 rounds down to 5

-1.1 rounds up to -1

-1.5 rounds up to -1

-1.7 rounds up to -1

Ceiling

Rounds towards positive infinity. If the result is positive, this mode behaves the same as the **Up** rounding mode. If the result is negative, it behaves the same as the **Down** rounding mode. This rounding mode never decreases the calculated value.

Examples—

5.7 rounds up to 6

5.5 rounds up to 6

5.1 rounds up to 6

-1.1 rounds up to -1

-1.5 rounds up to -1

-1.7 rounds up to -1

Floor

Rounds towards negative infinity. If the result is positive, this mode behaves the same as the **Down** rounding mode. If negative, this mode behaves the same as the **Up** rounding mode. This rounding mode never increases the calculated value.

Examples—

5.7 rounds down to 5

5.5 rounds down to 5

5.1 rounds down to 5

-1.1 rounds down to -2

-1.5 rounds down to -2

-1.7 rounds down to -2

Format configuration

Format configuration specifies the format strings for numeric and date display. Smile is configured with common formats. Additional numeric and date formats can be specified.

The format string list page displays a summary list of formats and their type.

Format configuration is used in [stationery and forms](#) to specify display formats. Numeric type format is also used to specify the appearance of [currency](#) in reports and within Smile itself.

Date type format

Date type format specifies the alphanumeric formats that date, month and years can be displayed in Smile.

Table 4: Date type format

Format	Description	Example
d	Specifies short numeric day format	5
dd	Specifies long numeric day format	05
M	Specifies short number month format	8
MM	Specifies long numeric month format	08
MMM	Specifies short text month format	Sep
MMMM	Specifies long text month format	September
yy	Specifies short numeric year format	14
yyyy	Specifies long numeric year format	2014

Table 5: Date type format examples

Format	Result
d MMM yy	3 Jul 14
dd MMMM yyyy	03 July 2014
d/M/yy	3/7/14
dd/MM/yyyy	03/07/2014

Numeric type format

Numeric type format specifies the alphanumeric formats in which numbers can be displayed in Smile. These formats specify display configurations for presenting currency, including debit and credit, decimal places and the use of other notations such as commas, brackets and other characters.



Attention: The numeric type format is specified in Java's notation so the decimal place is always a period and the thousands separator is always a comma in the format string. If your localisation uses other characters for these notations then you need to have the correct localisation set in Smile. When viewing individual format string configuration in Smile the examples displayed will use your localisation. For more information, [contact Inomial](#).

Table 6: Numeric type format

Format	Description	Example
#	Specifies a single numeric placeholder at the start or end of a number. Will only display if a value exists. Enter multiple characters to specify longer numbers or decimal places.	###0.00
0	Specifies a single numeric placeholder. Will display the relevant value, otherwise will display 0. Enter multiple characters to specify longer numbers or decimal places.	0.00
.	Specifies a decimal point. Only one decimal point character can be specified in a numeric value.	
,	Specifies a comma break in numbers of four or more digits.	1,000,000
Letters, symbols, special characters	Specifies characters that are displayed before or after a numeric value.	-(0.00) CR
decimal place length	Decimal place length is specified in the Positive Format field. This length will be used regardless of the length specified in the Negative Format or Zero Format fields.	

Table 7: Numeric type format examples

Format	Result
0.00	1.23
###0.0000	1234.5600
\$\$,##0.00 CR	\$1,234.56 CR
\$(\$,##0.00)	\$(1,234.56)
-\$,##0.00	-1,234.56

Add a format configuration

Smile is configured with common date and numeric formats. You can add additional formats as needed.

This task explains how to add a format configuration.

1. Select **Format Configuration** under **Accounts Receivable** on the Configuration and Tools page.

The Format String List page is displayed.

2. Click **Add**.

A blank Format String page is displayed.

3. Enter a name for the format in the **Name** field.

4. Select a format type from the **Type** drop-down.

Option	Description
Date	Enter a format in the Date Format field. For more information, see Date type format .
Numeric	Enter formats in the following fields: <ul style="list-style-type: none"> • Positive Format • Negative Format • Zero Format For more information, see Numeric type format .

5. Click **Save**.

The Format String List page is displayed.

6. (Optional) To see examples of how the format is displayed, click **View** next to the format string entry.

When viewing individual format string configuration in Smile the examples displayed will use your localisation.

The Format String configuration page is displayed.

Figure 11: Numeric and date format configuration properties

Office locations

Office locations are a list of physical locations. These locations identify the location of a Smile operator or a sale location of an invoice line item.

Note: If no office locations are configured in Smile then no location options will be displayed for an operator or invoice line item.

Smile operator location

A Smile operator's location is set in their operator account profile. The selected location will be used as the default when the operator creates invoice line items.

Capabilities determine if an operator can change their default location or the location of other operators. Smile will retain an operators last set location between logons.

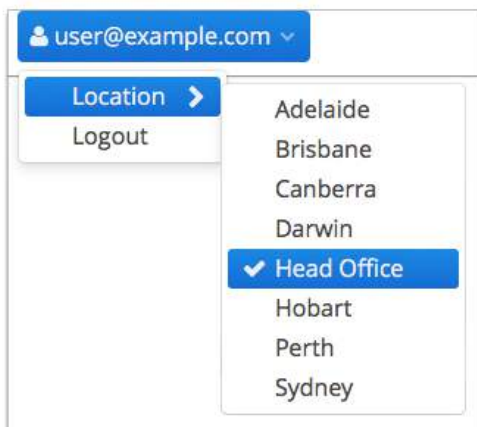


Figure 12: Example of locations available to a logged in Smile operator in the Smile Menu Bar

Transaction item location

When an operator creates an invoice line item the location is automatically populated from the operator's default. The operator may optionally change a location if there is more than one location to choose from and the operator has the capability to do so. For example, the operator is not working from their usual office.

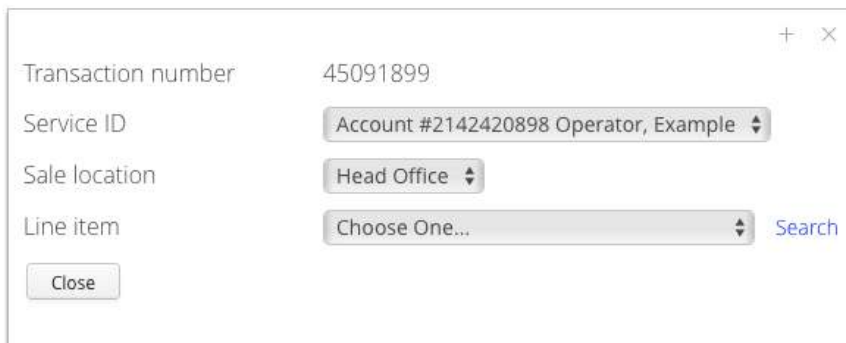
A screenshot of a software window titled 'Add Item'. The window has a light gray background and a standard title bar with a close button (X) in the top right corner. Inside the window, there are several input fields and buttons. The 'Transaction number' field contains the text '45091899'. The 'Service ID' field is a dropdown menu showing 'Account #2142420898 Operator, Example'. The 'Sale location' field is a dropdown menu showing 'Head Office'. The 'Line item' field is a dropdown menu showing 'Choose One...'. To the right of the 'Line item' field is a blue 'Search' button. At the bottom left of the window is a 'Close' button.

Figure 13: The Add Item window displaying the sale location field

Add office location

Smile can be configured with multiple office locations.

This task explains how to add an office location.

1. Select **Office locations** under **Accounts Receivable** on the Configuration and Tools page.
The Office locations page is displayed.
2. Click **Add**.
A blank **New office location** window is displayed.
3. Enter a name for the location in the **Name** field.
4. (Optional) Enter additional location address details as required.
5. Click **Save**.
The Office Locations page is displayed. The new location is added to the locations list.

Change Smile operator default office location

If an operator has the capability they can change their default office location under their username settings on the Smile Menu Bar, otherwise a Smile administrator can change an operators office location in Configuration and Tools.

This task explains how to change a Smile operator's default office location.

1. Select **Operators and Groups** under **User Management** on the Configuration and Tools page.

The Operators and Groups page is displayed.

2. Click **View** to the right of the operator to edit.

The Smile Access page for the selected operator is displayed.

3. Select the new location from the **Office location** drop-down.

4. Click **Save**.

The location is saved and the operator's Subscriptions page is displayed.

Chapter

3

Configuring email, SMS, print and web

Document types

Document types are Smile system groupings that provide access to relevant [substitution codes](#) to personalise customer communications. For example, the type of **Ticket** includes codes for ticket number and priority. The document type of **Account** includes codes for account number and overdue balance.

The following document types are available in email templates:

<ul style="list-style-type: none">• None (No substitution)• Account• Bond• Invoice• Itemized credit• Itemized debit• Journal• Payment• Prepaid expiry warning• Quote• Receipt	<ul style="list-style-type: none">• Recipient created tax invoice• Reimbursement• Renewal• Spend limit alert• Statement• Subscription• Surcharge• Ticket• Usage alert• Value pool alert
---	--

None (No substitution) is the default document type.

When a type is selected from the **Document type** drop-down the **Substitution codes** button appears below the **Body** text box of the template. Click **Substitution codes** to display all the codes for the selected document type.

For more information on the use and format, see [Substitution codes](#).

Substitution codes are used in [Bulk email](#), [Email templates](#) and [Stationery and forms](#).

Bulk email

Bulk email provides you the ability to send an email to multiple customers at once. The content of a bulk email can be a custom one-off message or it can be created from a saved template.

Send a bulk email

When you create a bulk email you specify the audience, format and message of the email. Custom bulk emails are single use. You cannot save the format and message for re-use.

This task explains how to send a bulk email.

1. Select **Bulk Email** under **Email, SMS, Print & Web** on the Configuration and Tools page.
The Bulk Email page is displayed.
2. Select a state from the **Send email to** drop-down.
3. Select a service from the **with the service of** drop-down.
4. Select an option from the **Email template** drop-down:
 - **Custom email**—Specifies that you will configure the remaining bulk email properties and message. For more information, see [Bulk email properties](#).
 - **Select template from drop-down**—Specifies that the selected email template will be sent as the bulk email. You cannot customise the bulk email properties. The remaining bulk email properties will be removed from display. For more information, see [Email templates](#).
5. Click **Send Bulk Email**.
A Confirmed page is displayed.
6. Click **Ok**.
The Configuration and Tools page is displayed.

Send email to: Open (not Locked or Closed) with the service of: Choose One...

Email template: Custom email

From: user@example.com

Subject:

Text / HTML: Not Set

Message:

To use substitution, enclose the substitution code in curly braces. Click the button below for a list of substitution codes.

Substitution codes Send Bulk Email

Figure 14: Bulk email template page

Bulk email properties

The properties of a bulk email specify the recipients, format of the email and the email message.

Send email to

Specifies the state of the user's account. The email will be sent to all account holders in the selected state of the selected service.

- **All States**
- **Open (not Locked or Closed)**—Specifies the recipient is currently not on a locked or closed plan.
- **Locked**—Specifies the recipient is currently on a locked plan.
- **Closed**—Specifies the recipient is currently on a closed plan.

with the service of

Displays current published services. The email will be sent to all accounts holders of the selected state of this service.

Email template

Specifies a standard message and format of the email.

- **Custom email**—Specifies that the remaining bulk email properties will be used to configure the email.
- **Select template from drop-down**—Specifies that the selected email template will be used as the bulk email. The remaining bulk email properties are removed from display.

For more information, see [Email templates](#).

From

By default displays the current Smile operators email address. You can edit this field.

Subject

Specifies a subject for the email.

Text/HTML

Specifies the email message body content format.

- **Not set**—A specific content type is not selected.
- **HTML**—Allows the use of HTML tags in the Message to format the content.
- **Text**—Text is the default body content type. Type your content into the Message field as plain text.

Message

Text field of the email message.

[Subscription](#) document type substitution codes can be used in the message body. For more information, see [Substitution codes](#).

Incoming email

Incoming email allows you to configure email servers, usernames and passwords from which to retrieve support email requests from customers.

Add a support email address

The Support email address page displays a summary of configured email addresses and their assigned ticket template.

This task explains how to add a support email address.

1. Select **Incoming email** under **Email, SMS, Print & Web** on the Configuration and Tools page.
The Support email address page is displayed.
2. Click **New**.
The **Mail account** property page is displayed.

Mail account

Email address

Username

Password

Host name

Port

Protocol

Send an email in reply [New](#)

Subject regular expression

Recipient regular expression

Ticket raising

When an email is received, the following properties will apply to the raised ticket.

Template ticket [Create](#)

[Save](#)

Figure 15: Incoming email support email address properties

3. Complete the mail account property fields.
For more information, see [Support email address properties](#).
4. Click **Save**.
The Support email address page is displayed. The email address is displayed in the **Support addresses** table.

Support email address properties

The properties of a support email address specify the email account details and the format of any response and ticket.

Email address	Specifies the support email address.
Username	Specifies the username for the mail account. This is usually the same as the email address.
Password	Specifies the password to connect to the mail server.
Host name	Specifies the name of the host mail server.
Port	Specifies the port number of the host mail server. Leave blank to use the protocol's default.
Protocol	Specifies the protocol for accessing the mail server. <ul style="list-style-type: none">• IMAP• POP3
Send an email in reply	Specifies the email template used if an email reply is sent. <ul style="list-style-type: none">• Do not send a reply• Select an email template from drop-down. For more information, see Email templates .
Subject regular expression	Identifies the ticket number from the email subject.
Recipient regular expression	Identifies the ticket number from the recipient list.
Ticket raising	Specifies the ticket template used when a ticket is created. For more information, see Template tickets .

Email templates

Email templates can be used for bulk messaging, providing a standard response to defined actions or triggers or manually on demand.

Templates can be used for such things as:

- acknowledgment of a customer ticket request
- closure or resolution of a ticket
- [usage alerts](#)
- invoices
- payment reminders

Email templates			
Name	From address	Subject	
General Usage Alert	test@example.com	Usage Warning {percentUsed}	Edit
New			

Figure 16: Email templates page

Create an email template

Email templates are messages that contain a default set of properties. They can be used for sending bulk emails to a large number of recipients or for single messages that are used repeatedly. They reduce repetition of effort and provide a consistent message and look to your customers.

This task explains how to create an email template.

1. Select **Email Templates** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The Email templates page is displayed.

2. Click **New**.

An empty Email Template page is displayed.

3. Select a type from the **Document type** drop-down.

For more information, see [Document types](#) and [Substitution codes](#).

4. Type a template name in the **Name** field.

Note: This name is not visible to clients.

5. Type an address in the **From** field.

6. Type a message subject in the **Subject** field.

7. (Optional) Type an email address in the **Reply to** field.

Leave blank to use the **From** address.

8. (Optional) Select a **Body content type** from the drop-down. The following options are displayed and require additional information:

- **Text**—Text is the default body content type. Type your content into the **Body** field as plain text.
- **HTML**—Allows the use of HTML tags in the **Body** field to format the content.
- **Not Set**—A specific content type is not selected.

9. Type the text of the message in the **Body** field.

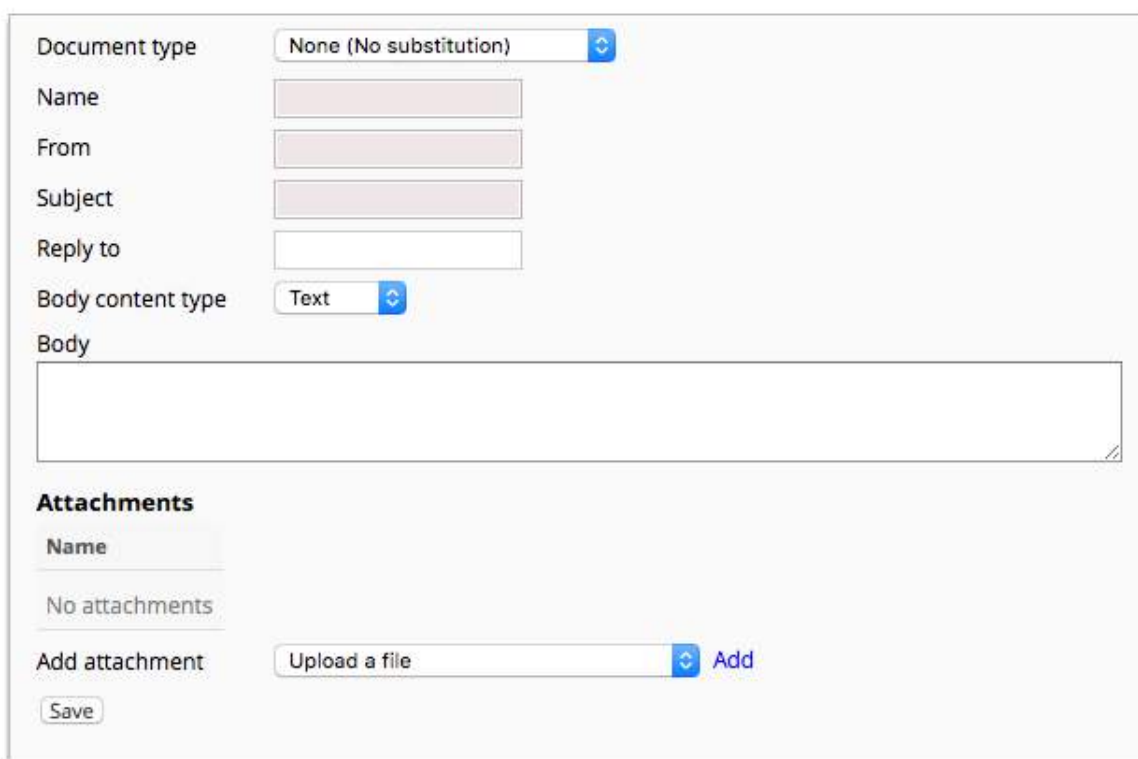
10.(Optional) Click **Add attachment...** to attach any required files.

- Type a name in the **Description of media** field.
- Click **Choose file** and select the file to attach.
- Click **Add attachment**.

The Email Template page with the selected file in the **Attachments** list is displayed.

11. Click **Save**.

The Email templates page is displayed.



The screenshot shows a web form for creating an email template. It includes fields for 'Document type' (set to 'None (No substitution)'), 'Name', 'From', 'Subject', 'Reply to', and 'Body content type' (set to 'Text'). Below these is a large text area for the 'Body'. An 'Attachments' section shows 'No attachments' and an 'Add attachment' button. At the bottom are 'Save' and 'Add' buttons.

Document type	None (No substitution)
Name	
From	
Subject	
Reply to	
Body content type	Text
Body	
Attachments	
Name	
No attachments	
Add attachment	Upload a file Add
Save	

Figure 17: Email template page

Stationery and forms

Stationery defines the format and content of printed documents in Smile. When you select the stationery to use for a document, Smile enters the required information into the document and displays it in the specified format.

Stationery can have different formats and content to suit different situations. Stationery can include graphical elements such as backgrounds and company logos. For example, an organisation that owns several companies may have a different layout for each company's receipts. Alternatively, a company may have different content on an initial invoice and a reminder invoice.

The account package defines the default stationery available to each given account type. You can view or change stationery at an account level or at an individual account level from the account's **Branding** page.

Stationery is used for documents such as:

- invoices
- quotes
- receipts
- statements
- reminders and disconnection notices

The fields available to a stationery document are controlled by the document type assigned to the item. You can only assign one document type to a stationery document. For more information, see [Document types](#).

A stationery document is constructed from information provided by a number of elements. Not all elements are required to create a stationery document. The elements used in stationery include:

- **Page setup**—specifies the document page size and orientation, output format and stationery filename.
- **Page group**—specifies a group that consists of page layouts and tables. A stationery document can have multiples page groups.
- **Page layouts**—specify the overall layout of a page, including the location of static fields, logos and background images. Multiple pages can be configured for one stationery document with different layouts on different pages.
- **Tables**—specify the configuration of data, including field selection, column headings, sorting, summaries and calculations. For example, the table on an invoice can list individual invoice items, tax amounts, subtotals, and a total amount due.
- **Styles**—specify the look of text, including font properties, spacing and borders.



Attention: The following stationery topics are based on configuring stationery documents with a postscript (PS or PDF) output type. When configuring MS Excel documents there are some differences to be aware of. Not all stationery properties apply or are visible when configuring a MS Excel page output type. For more information, see [MS Excel formatted stationery](#).

The screenshot shows the 'Main stationery property page' for a document named 'Invoice'. The page includes fields for 'Stationery Name' (Invoice), 'Description' (A template for invoice documents), 'Document Type' (Invoice), and a 'Page Group' (0). There are buttons for 'Save', 'Setup', 'Publish', 'Delete', and 'Clone'. The 'Page Layouts' section shows a table with columns for layout positions and a message that no layouts are defined. The 'Tables' section shows a table with columns for table title and width, and a message that no tables are printed. Red callout boxes on the right side of the page point to the 'Page Setup' button, the 'Page Group' field, the 'Page Layouts' section, and the 'Tables' section.

Figure 18: Main stationery property page

Add new stationery

Stationery can have different formats and content to suit different situations. You can create different stationery based on the same document types for different customers or needs.



Tip: Click **Clone** in an existing stationery document that you want to edit and does not exist as a template.

This task explains how to add a new stationery document.

1. Select **Stationery and Forms** under **Email, SMS, Print & Web** on the Configuration and Tools page.
The Stationery page is displayed.
2. Click **Add...**
The Stationery Templates page is displayed.
3. Type a name for the new document in the **New Stationery Name** field.
4. Click the template name that the new document will be based on from the **Stationery Template** list.
A **Please confirm** window is displayed.
5. Click **Continue** to confirm the creation of a new stationery document.
The Stationery page is displayed.

6. Click **Edit to the right of the new stationery document list entry.**

The new stationery document is unpublished and unavailable for use by Smile operators until it has been configured and published.

The main stationery configuration page for the new document is displayed.

7. (Optional) Edit the **Description and **Document Type** fields.**

These fields are initially populated from the details in the template that was selected when the new stationery was created.

Note: The document type cannot be edited once the document has been published or if the document contains data fields or table references specific to the document type. For more information, see [Document types](#).

8. Click **Setup.**

The page setup configuration window is displayed.

9. Configure the required page setup elements. Click **Save.**

For more information, see [Page setup properties](#).

The main stationery configuration page for the new document is displayed.

10. Click **Add Page Group.**

A **Page Group** including **Page Layouts** and **Tables** elements are added to the the main stationery configuration page.

11. To add a page layout, click **Add Page.**

The **Fields** tab is displayed.

12. Configure the required page layout elements. Click **Save.**

For more information, see [Page layouts](#).

The main stationery configuration page for the new document is displayed.

13. To add a table, click **Add Table.**

The Stationery Table page is displayed.

14. Configure the required table elements. Click **Save.**

For more information, see [Tables](#).

The main stationery configuration page for the new document is displayed.

15. When the stationery document has been configured, do one of the following:

- Click **Save** to save the stationery configuration.
- Click **Publish** to make the stationery document active.

The Stationery list page is displayed.

Page setup

Page setup defines the basic size, layout, email template and file format of a stationery document.

By default, Smile generates documents in PDF format. You can also configure Smile to produce documents in Excel format (.xls).

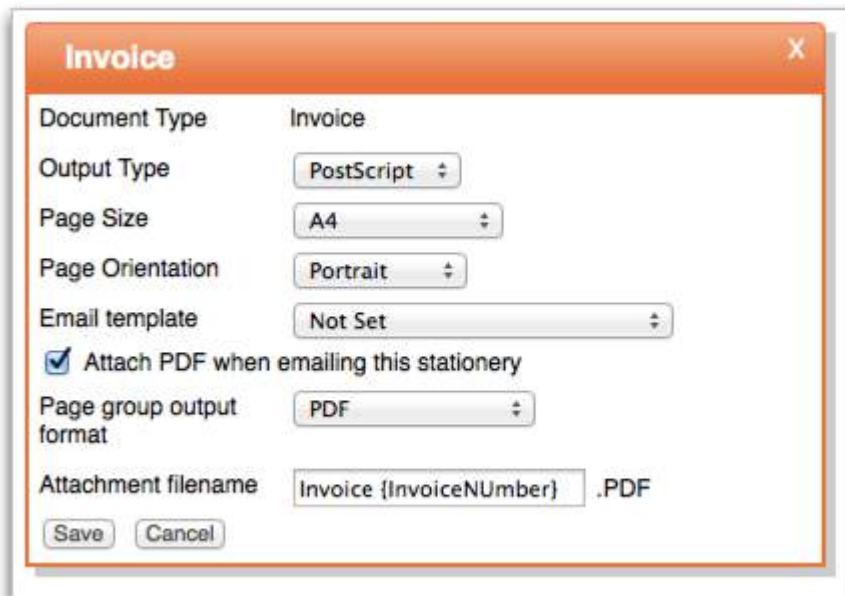
Click **Setup** on the main configuration page of a stationery document to access the page setup detail fields.

Page setup properties

Document type	Specifies the document type that the stationery document has been assigned. The document type cannot be edited once the document has been published or if the document contains data fields or table references specific to the document type.
Output Type	<p>Specifies the file format when exporting the stationery content.</p> <ul style="list-style-type: none"> • PostScript • MS Excel <p>For more information, see MS Excel formatted stationery.</p>
Page Size	<p>Specifies the page size format of the document.</p> <ul style="list-style-type: none"> • A4 • Address label
Page Orientation	<p>Specifies the page orientation of the document.</p> <ul style="list-style-type: none"> • Portrait • Landscape
Email template	<p>Specifies the email template used by default when emailing the stationery document.</p> <ul style="list-style-type: none"> • Not set • Select from list <p>For more information, see Email templates.</p>
Attach PDF when emailing this stationery	When selected specifies that the stationery document will be attached to the email as a PDF.
Page group output format	<p>Specifies the file format of the document when sent as an attachment.</p> <ul style="list-style-type: none"> • PDF—.PDF • Postscript—.PS • MS Excel—.xls • Modern MS Excel—.xlsx

Attachment filename

Specifies the format of the attachment filename. Substitution codes can be used in filenames. For example, an invoice document filename can be defined as Example Internet invoice {invoiceNumber}.PDF For more information, see [Substitution codes](#)



The screenshot shows a dialog box titled "Invoice" with a close button (X) in the top right corner. The dialog contains the following settings:

- Document Type: Invoice
- Output Type: PostScript
- Page Size: A4
- Page Orientation: Portrait
- Email template: Not Set
- ☒ Attach PDF when emailing this stationery
- Page group output format: PDF
- Attachment filename: Invoice {InvoiceNUmber} .PDF

At the bottom of the dialog are "Save" and "Cancel" buttons.

Figure 19: Example of page setup properties for an invoice document type

Page group

A page group specifies the configuration of a page. A page contains page layouts and tables. A page group can have multiple page layouts and tables. A stationery document can have multiple page groups.

For example, an invoice can have a page group that contains the layout of the front page of the invoice displaying the customer account details and a total amount due. A second page group contains the layout of a second page that displays an itemised list of invoice items.

Add page group

A page group contains the page layout and table property elements. You can add multiple page groups to a stationery document.

This task explains how to add a page group.

1. On the main property page, click **Add Page Group**.

A page group section is added to the main property page.

2. Click **Change** to the right of the page group header to rename the property group name.

By default property groups are numbered numerically.

The **Change stationery part name** window is displayed.

3. Type a name in the **New page group name** field. Click **Set**.

The stationery main property page is displayed.

Page layouts

Page layouts specify the overall configuration of a page. This configuration specifies the location and display properties of text, fields and graphics. For example, a page layout can include a customers name and address, account information, invoice number, company logo and payment information.

A page layout can contain multiple pages. If the document content spans more than the number of page layouts configured then Smile will use the last page layout specified for any additional pages. For example, an invoice may have a first page and a second page layout specified. If the content of the invoice is longer than two pages, then Smile will repeat the use of the second page layout until all content is displayed.

Page layout properties are configured in the following tabs:

- **Fields**—specifies the location, size and style of text, fields and graphics on the page.
- **Background**—specifies a background image and its location on the page.
- **Global offsets**—specifies offset measurements. Useful when printing on preprinted stationery.
- **Postscript**—specifies additional information added to the raw postscript of the page layout.

Add a page layout

Page layouts specify the overall configuration of text, fields and graphics on a page. A page layout is added to a page group. For more information, see [Page groups](#).

This task explains how to add a page layout.

1. On the main property page, click **Add Page** in the relevant **Page Group**.
An empty **Fields** tab is displayed.
2. Configure the required [Fields](#), [Background](#), [Global offsets](#) and [Postscript](#) elements.
3. (Optional) Click **Update**.
Any changes are saved. You will remain on the same tab.
4. Click **Save**.
The main property page is displayed.

The Fields tab

The fields tab lists each text entry, data field and graphic element on the page. The fields tab summarises the location and size of each field. The configuration of each field is accessed by clicking **More** to the right of a field entry.

Field types are differentiated by the display format of the field name.

- `text`—specifies plain text.
- `[fieldname]`—specifies a Smile database field name.
- `<Object name>`—specifies an image file.

Text and data field names can be combined in a field. For example, Page [Page Number]

Field	Top	Left	Height	Width	
	1.0	1.0			More

Add a field

Empty field [Add](#)

[Update](#)

[Save](#) [Delete](#)

Figure 20: The Fields tab

Field properties

Text Placement

Text placement specifies the placement of plain text either as text on its on or in relation to a selected data field. Plain text can be situated to the left or right, or above or below the data field. The data field is specified in the drop-down in the middle of the text layout section.

Plain text is typed in one of the four empty fields. **Empty field** is selected in the middle drop-down.

Style Settings

Style Settings

Style settings specifies the look and placement applied to the text in the five text placement fields.

- **Not set**
- **Inherited**
- **Select from list**

For more information, see [Styles](#).

Position

Specifies the distance in millimetres that the field is located from the top and left edges of the stationery document.

Dimensions	Specifies the width and height in millimetres of the visible space the field is displayed within. Width is useful when alignment is set to centre, justify and right.
Overflow behavior	<p>Specifies the action taken if the field contents do not fit within the field dimensions.</p> <ul style="list-style-type: none"> • Inherit • Hidden • Visible
Format of field	Specifies the format configuration of the field. For more information, see Format configuration .
Alignment	<p>Specifies the alignment of the field.</p> <ul style="list-style-type: none"> • Not Set • Centre • Justify • Left • Right
Background image	Specifies the filename of an image file.
Conditionally display this field	<p>When selected specifies that the field is only displayed when the specified condition is met.</p> <p>Show only when:</p> <ul style="list-style-type: none"> • Not Set • Account is not in default disposition • Has auto debit? • Has pending payment? • Invoice is overdue • Invoice is paid <p>is:</p> <ul style="list-style-type: none"> • True • False
Display this field	When selected specifies that the field will be displayed in all situations.

Add a data field

Fields specify the individual text entries, data fields and graphics displayed on a page. The data fields available for selection are dependant on the document type specified in the stationery document. For more information, see [Document types](#).

This task explains how to add a data field.

1. Do one of the following:

- Click **Add Page** on the main stationery property page.
- Click **Edit** to the right of a current **Page Layouts** list entry.

The **Fields** tab is displayed.

2. Select a document field name from the **Add a field** drop-down. Click **Add**.

The field is added to the Field list table.

3. Click **More** to the right of the data field list entry.

The document type field window is displayed.

4. Configure the required field properties. Click **Save**.

For more information, see [Field properties](#).

The **Fields** tab is displayed.

Add a plain text field

Fields specify the individual text entries, data fields and graphics displayed on a page.

This task explains how to add a plain text field.

1. Do one of the following:

- Click **Add Page** on the main stationery property page.
- Click **Edit** to the right of a current **Page Layouts** list entry.

The **Fields** tab is displayed.

2. Select **Empty field** from the **Add a field** drop-down. Click **Add**.

The field is added to the Field list table.

3. Click **More** to the right of the field list entry.

The document type field window is displayed.

4. Configure the required field properties. Click **Save**.

For more information, see [Field properties](#).

The **Fields** tab is displayed.

Add an image field

Fields specify the individual text entries, data fields and graphics displayed on a page.

This task explains how to add an image field.

1. Do one of the following:

- Click **Add Page** on the main stationery property page.
- Click **Edit** to the right of a current **Page Layouts** list entry.

The **Fields** tab is displayed.

2. Select **Empty field** from the **Add a field** drop-down. Click **Add**.

The field is added to the Field list table.

3. Click **More** to the right of the new field list entry.

The document type field property window is displayed.

4. Click **Background image**.

The Add Media page is displayed.

5. Type a name in the **Description of media** field.

6. Click **Choose File**.

A file explorer window is displayed.

7. Navigate to the location of the image file. Select the file, click **Choose**.

The Add Media page is displayed.

8. Click **Save**.

The document type field property page is displayed.

9. Configure the required field properties. Click **Save**.

For more information, see [Field properties](#).

The **Fields** tab is displayed.

The Background tab

A background image can be specified to display under the fields and tables of a stationery document. For example, a background image can contain a company logo, colour blocks and other static images or text. Only one background image can be specified on a stationery document.

The background offset settings specify where on the page the background image is placed. The body measurements specify the space on the document that is reserved for table content. For example, the body of an invoice may contain a table that lists invoice items.

All measurements are specified in millimetres.

Background image	Specifies the background image file.
Background Offset Left	Specifies the distance the background image is located from the left document edge.
Background offset Top	Specifies the distance the background image is located from the top document edge.
Body's Left Margin	Specifies the distance from the left side of the document at which the body block begins.
Body's Right Margin	Specifies the distance from the right side of the document at which the body block begins.
Body's Top Margin	Specifies the distance from the top of the document at which the body block begins.
Body's Bottom Margin	Specifies the distance from the bottom of the document at which the body block begins.

Figure 21: The Background tab

Add background image

A background image underlays the content of a stationery document. A stationery document can only have one background image specified.

A background image can be provided in most popular graphic formats. We recommend EPS file types for better scalability.

This task explains how to add a background image.

1. Click **Background image**.

The Media Object page is displayed.

2. Type a name in the **Object name** field.

3. Click **Choose File**.

A file explorer window is displayed.

4. Navigate to the location of the image file. Select the file, click **Choose**.

The Media Object page is displayed.

5. Click **Save**.

The **Background** tab is displayed.

6. Configure the required offset and margin fields. Click **Update**.

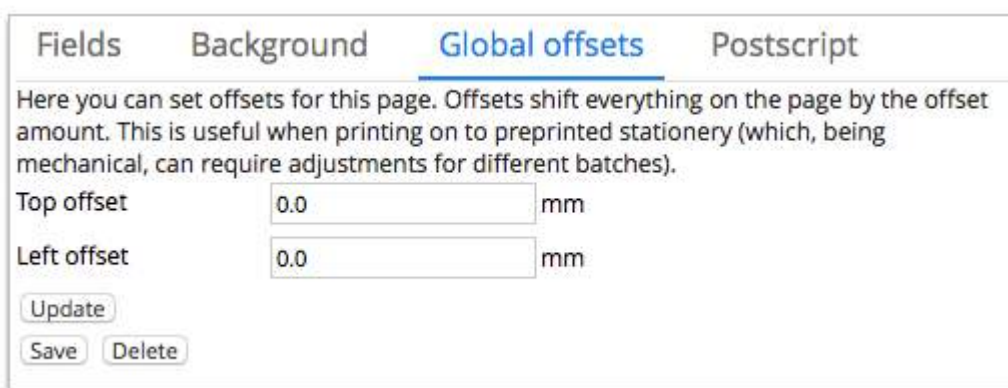
For more information, see [The Background tab](#).

The Global offsets tab

Global offsets is used to shift everything on a page by the offset amount. This is useful when printing on preprinted stationery, which may require adjustment for different batches.

Top offset	Specifies the distance the stationery is moved up or down the page. Measurements specified in millimetres. Enter a negative value to move the stationery up the page.
Left offset	Specifies the distance the stationery is moved left or right on the page. Measurements specified in millimetres. Enter a negative value to move the stationery left on the page.

To set an offset, enter a value in the offset fields. Click **Update**.



The screenshot shows a web interface with four tabs: 'Fields', 'Background', 'Global offsets' (which is selected and highlighted with a blue underline), and 'Postscript'. Below the tabs, there is a text block explaining that offsets shift everything on the page by the offset amount, useful for preprinted stationery. Below this text are two input fields: 'Top offset' and 'Left offset', both containing the value '0.0' and followed by 'mm'. At the bottom of the form are three buttons: 'Update', 'Save', and 'Delete'.

Figure 22: The Global offsets tab

The Postscript tab

Postscript specifies additional information that is added to the raw postscript of the page layout.

Postscript settings are typically only used with high-end printers, specifying which paper tray is used during printing. For example, the media position is specified when using paper with pre-printed images and backgrounds. Different pre-printed paper is used for different pages of the document.

Media position

Specifies which paper tray is used during printing.

To set a position, type a value in the **Media position** field. Click **Update**.



Fields	Background	Global offsets	Postscript
Media position <input type="text"/>			
<button>Update</button>			
<button>Save</button> <button>Delete</button>			

Figure 23: The Postscript tab

Tables

Tables specify the configuration of data, including field selection, column headings, sorting, summaries and calculations. Tables are generally used for displaying itemised or summarised information. For example, a table on an invoice can list individual invoice items, tax amounts, subtotals, and a total amount due.

Table properties

Parent table	When selected specifies a parent table name. <ul style="list-style-type: none"> • Not set • Select from list
Parent document table ID	When a Parent table is selected specifies the parent table ID number.
Filter source column	When a Parent table is selected specifies the source column. Column fields displayed in the drop-down are dependant on the selected parent table. <ul style="list-style-type: none"> • Not Set • Select from list
Filter target column	Specifies the target column for filtering. <ul style="list-style-type: none"> • Not Set • Select from list
Position within page	Specifies the order of the table if multiple tables are added to the page group. For example, a table set with a position of 1 is displayed above a table with a position of 5.
Table	Specifies the table name that was selected on table entry creation. This table cannot be edited.
Table title	Specifies a descriptive table name.
Table width	Specifies the maximum width in millimetres of the table.
Cell padding	Specifies the whitespace provided around the content of a table cell. All measurements specified in millimetres.
Print titles after headlines instead of at the top of the table	When selected specifies that column titles will be displayed after section headlines.
Header top padding	Specifies the whitespace above the content of the table header row. Specified in millimetres.
Header bottom padding	Specifies the whitespace below the content of the table header row. Specified in millimetres.
Print summaries only	When selected specifies that only column summaries will be displayed when the table is printed.

Table style	<p>Specifies the look and placement applied to the text in the table.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Row Style	<p>Specifies the look and placement applied to the text in a row.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Title row style	<p>Specifies the look and placement applied to the text in the table header row.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Columns	
Columns display a summary list of all columns in the table and a summary of the applied styles. For more information, see Table column properties .	
Sorting	
Sorting displays a summary list of the sorting order of the table columns. For more information, see Table sort column properties .	
Table column properties	
Column number	Specifies the display order of the column if a table has multiple columns. For example, a column with a position of 1 is displayed before a column with a position of 5.
Document Column	Specifies the Smile data field that the column is displaying.
Column Title	Specifies a title for the column. Can be different than the Document Column data field name.
Column Width	Specifies the width in millimetres of the column in the table.
Header Style	<p>Specifies the style applied to the column title.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Cell Style	<p>Specifies the style applied to a column cell.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>

Alignment	Specifies the alignment of content in the column. <ul style="list-style-type: none"> • Inherited • Centre • Justify • Left • Right
Left margin	Specifies the left margin space of the column. Measurements specified in millimetres or percentages.
Right margin	Specifies the right margin space of the column. Measurements specified in millimetres or percentages.
Column format	Specifies the format configuration of the column. For more information, see Format configuration .
Print totals for this column	When selected a total of the columns data will be printed.
Print totals using style	Specifies the style applied to the total when Print totals for this column is selected. <ul style="list-style-type: none"> • Inherited • Select from list For more information, see Styles .
Prefix	Specifies the text displayed before the column value.
Suffix	Specifies the text displayed after the column value.

Table sort column properties

Sorting position	Specifies the sort order of the column if a table has multiple columns. For example, a column with a position of 1 is sorted before a column with a position of 5.
Sort by column	Specifies the data name of the column that is being sorted. Column fields displayed in the drop-down are dependant on the selected page group table.
Sort in ascending order	When selected the column data is sorted in ascending order.
Print headlines and column totals when this value changes	When selected specifies that a header and total is displayed for the headline value.
Headline Prefix	Specifies the text displayed before the headline value.
Headline value	Specifies the data name of the column that is being sorted. Column fields displayed in the drop-down are dependant on the selected page group table.
Headline suffix	Specifies the text displayed after the headline value.

Headline style	<p>Specifies the style applied to the headline.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Only print the headline when the value is not null	When selected specifies that the headline will not be printed if the column value is null.
Print summary text in column	Specifies in which table column the summary text is located.
Summary text prefix	Specifies the text displayed before the summary value.
Summary text value	Specifies the summary text value of the column that is being sorted. Column fields displayed in the drop-down are dependant on the selected page group table.
Only print a summary when the summary text value is not null	When selected specifies that the summary will not be printed if the column value is null.
Summary text suffix	Specifies the text displayed after the summary value.
Summary row style	<p>Specifies the style applied to the summary row.</p> <ul style="list-style-type: none"> • Inherited • Select from list <p>For more information, see Styles.</p>
Summary top margin	Specifies the distance to the margin above the summary row.
Summary bottom margin	Specifies the distance to the margin below the summary row.
Summary left margin	Specifies the distance to the margin to the left of the summary row.
Summary right margin	<p>Specifies the distance to the margin to the right of the summary row.</p> <p>All summary margin measurements specified in millimetres or percentages.</p>
Apply these margins to the entire summary row	When selected specifies that the summary margins will apply to the entire summary row.
Summary alignment	<p>Specifies the alignment of the summary text.</p> <ul style="list-style-type: none"> • Inherited • Centre • Justify • Left • Right

Add table

Tables specify configuration of data, including field selection, column headings, sorting, summaries and calculations. Tables are generally used for displaying itemised or summarised information. A table is added to a page group. For more information, see [Page groups](#).

This task explains how to add a table.

1. On the main property page, click **Add Table** in the relevant **Page Group**.
A Stationery Table page is displayed.
2. Configure the required table elements. For more information, see [Table detail fields](#).
To add columns, see [Add column](#).
To configure column sorting, see [Add sort column](#).
3. Click **Save**.
The main property page is displayed.

Add a table column

Multiple columns can be added to a table to display information.

This task explains how to add a table column.

1. Select a column type from the **Add column** drop-down. Click **Add**.
A Table Column page is displayed.
2. Configure the required table column elements.
For more information, see [Table column properties](#).
3. Click **Save**.
The Stationery Table page is displayed.

Add a sort column

Columns in a table can be sorted by their values. Sorting in a table can be configured by multiple columns.

This task explains how to add a table sort column.

1. Select a column type from the **Add sort column** drop-down. Click **Add**.
The selected column is added to the **Sorting** column list.
2. Click **Edit** to the right of the sorting column list entry.
The Sort Column page is displayed.
3. Configure the required sort column elements.
For more information, see [Table sort column properties](#).
4. Click **Save**.
The Stationery Table page is displayed.

Styles

Styles specify the look and spacing of text within a stationery document. The styles page provides a summary table of configured styles and the font characteristics.

Styles are accessed from the main stationery and forms list page or a stationery document page layout field property page.

Style properties

Style name	Specifies a descriptive name for the style.
Background color	Specifies the background color displayed behind the text.
Font name	Specifies the name of the font. Smile recognises the following fonts: <ul style="list-style-type: none"> • Courier • Helvetica • Times (default when unspecified)
Font size	Specifies the font character size in points (pt).
Font style	Specifies the slope style applied to the font characters. <ul style="list-style-type: none"> • Not Set • Backslant • Italic • Normal • Oblique
Font Weight	Specifies the thickness of the font character outline relative to its height. <ul style="list-style-type: none"> • Not Set • Bold • Light • Normal
Decoration	Specifies additional font display properties. <ul style="list-style-type: none"> • Not Set • Strike-Through • None • Underline
Colour	Specifies the font colour. Colour is specified in colour names or HEX values.

Whitespace treatment

Linefeed treatment

Specifies how a new line of text is treated, particularly if a text field includes paragraphs or line breaks.

- **Inherit**
- **Ignore**
- **Preserve**
- **Treat as space**
- **Treat as zero width space**

Collapse whitespace

Specifies the action taken if a field includes multiple contiguous spaces.

- **Inherit**
- **No**
- **Yes**

Whitespace treatment

Specifies the action taken if a field contains whitespace after a line break.

- **Inherit**
- **Ignore**
- **Ignore if after linefeed**
- **Ignore if before linefeed**
- **Ignore if surrounding linefeed**
- **Preserve**

Wrap option

Specifies the action taken if field content is does not fit the field dimensions.

- **Inherit**
- **No wrapping (overflow)**
- **Wrap**

Borders, padding and margins

Border model

Specifies the action taken if two borders are next to each other.

- **Inherit**
- **Collapsing borders**
- **Collapsing borders with precedence**
- **Separate borders**

Border separation

Specifies the separation of a border. Specified in millimetres.

Left - Right - Top - Bottom

Padding	Specifies the whitespace provided around a font.
Margin	Specifies the whitespace provided around a border.
Border color	Specifies the colour of the border.
Border width	Specifies the width of the border. Specified in millimetres.
Border style	Specifies the line style of the border. <ul style="list-style-type: none"> • Not set • Dashed • Dotted • Double • Groove • Inherit • None • Ridge • Solid

Add a style

Styles are used to specify the characteristics and appearance of text in Smile. Multiple styles can be configured for use in multiple stationery documents.

This task explains how to add a style.

1. Click **Add** on the Styles list page.
A blank Stationery Style page is displayed.
2. Type a name for the style in the **Style name** field.
3. Complete the following fields:
 - **Font style**
 - **Font Weight**
 - **Decoration**
4. Configure any additional required style elements. Click **Save**.
For more information, see [Style properties](#).
The Styles page is displayed.

MS Excel formatted stationery

Smile provides stationery output types postscript (PS or PDF) and MS Excel in a stationery documents [Page setup](#). While format selection is as simple as selecting the appropriate options from the page setup drop-downs there are some fundamental differences to be aware of when designing stationery in the different formats.

In the previous stationery topics the *Configuration Guide* assumes that the majority of stationery will be configured in PDF format. This topic outlines the differences when designing MS Excel stationery.

What you cannot do in MS Excel stationery

The following design elements are not available or will be ignored in MS Excel formatted stationery:

- field width or height
- font styling such as font size or colour
- graphics, both background and in fields

Page setup

Page setup defines the basic size, layout, email template and file format of a stationery document. To define an Excel document select the following:

Output type	MS Excel
Page group output format	MS Excel (.xls) Modern MS Excel (.xlsx)

Page group

A page group is presented as a worksheet in the resulting MS Excel workbook. If a stationery document contains multiple page groups each will be presented as a separate worksheet in the one workbook. Worksheets are labelled the name set for the page group in Smile.

Page layout

If a page group has multiple page layouts, they are all presented on the same worksheet. Additional care is necessary to ensure data and text fields do not overlap.

When configuring an MS Excel stationery document only the **Fields** tab is available in a page configuration. The Fields tab summarises the location of each text or data field using the **Top** and **Left** settings. These fields specify the cell number from the top or left of a spreadsheet, not a measurement.

The following example shows the field configuration in Smile and the resulting output in MS Excel format. The field **TAX INVOICE** has a **Top** setting of 1.0 and a **Left** setting of 10.0. In the Excel worksheet that means it is located in the 1st row from the top of the page and in the 10th cell from the left, J1.

Fields

Field	Top	Left	
[Company Name]	1.0	1.0	More
TAX INVOICE	1.0	10.0	More
ABN [Company ABN]	2.0	1.0	More
[Company Payment Address]	3.0	1.0	More
Phone: 1300 975 111	5.0	1.0	More
Fax: 1300 975 722			

	A	B	C	D	E	F	G	H	I	J
1	Example Telecom								TAX INVOICE	
2	ABN: 00 000 000 000									
3	27 Example Boulevard Technology Business Park Melbourne Victoria 3000									
4										
5	Phone: 1300 975 111				Fax: 1300 975 722		Invoice Number		21429469	
6	sales@example.com				www.example.com		Issue Date		12 Feb 2016	
7										
8										
9										
10	Sample, Alfred									
11	1 Flinders LANE Melbourne, 3000									
12										

[Due date]	7.0	10.0	More
Account Number	8.0	8.0	More
[Account number]	8.0	10.0	More
[Account Name]	10.0	2.0	More
[Billing Address]	11.0	2.0	More

Figure 24: Example stationery field configuration and the MS Excel output

Tables

Tables are placed under any fields that have been specified on a page layout. You cannot place a table in the middle of a page in the same way you can with postscript stationery. As you can not specify a length limit on an Excel table it is recommend that you place a table in a new page group.

Override email address

In override email address you can set an email address that all emails that you send whilst logged in to Smile will be sent to. This is useful when you are testing dispatches or performing a task that usually emails your users.



Warning: The override email address will only apply to the current login session. If you log out then the override is cleared. Take care when sending emails if you use multiple browser windows and tabs. Different browser windows and tabs may actually be logged in to a different session.

Add an override email address

You can only set one override email address at a time. The override address will remain in use by Smile until you log out of your current session or you clear the override.

This task explains how to add an override email address.

1. Select **Override email address** under **Email, SMS, Print & Web** on the Configuration and Tools page.
The Override email address page is displayed.
2. Type an address in the **Override email address** field.
3. Click **Override**.
A warning advising that all email sent from the current session to the set address is displayed.
4. (Optional) To clear the override before the end of your current Smile session click **Clear override**.

Promotional messages

Promotional messages are messages that you can select to appear on invoices, receipts and statements.

For more information, see [Stationery and forms](#).

Add a promotional message

Multiple promotional messages can be specified in Smile.


This task explains how to add a promotional message.


1. Select **Promotional messages** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The Promotional Message page is displayed.

2. Click **Add**.

A blank Promotional Message page is displayed.

3. Click the  to the right of **Start Date** to select a date from which the message is valid.

4. Click the  to the right of **End Date** to select a date after which the message is no longer valid.

5. Type the promotional message in the **Message** field.

6. Click **Save**.

The Promotional Message page is displayed. The message is added to the promotional message table.



The screenshot shows a web form for adding a promotional message. It contains three input fields: 'Start Date', 'End Date', and 'Message'. Each date field has a small calendar icon to its right. The 'Message' field is a large text area. At the bottom left of the form, there are two buttons: 'Save' and 'Deprecate'.

Figure 25: Promotional message properties

Welcome emails

Welcome emails are messages that you can configure to be sent when a customer begins a new service or plan.

Add a welcome email

Multiple welcome emails can be configured for different services and plans.

This task explains how to add a welcome email.

1. Select **Welcome emails** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The Service email page is displayed.

2. Click **New welcome email**.

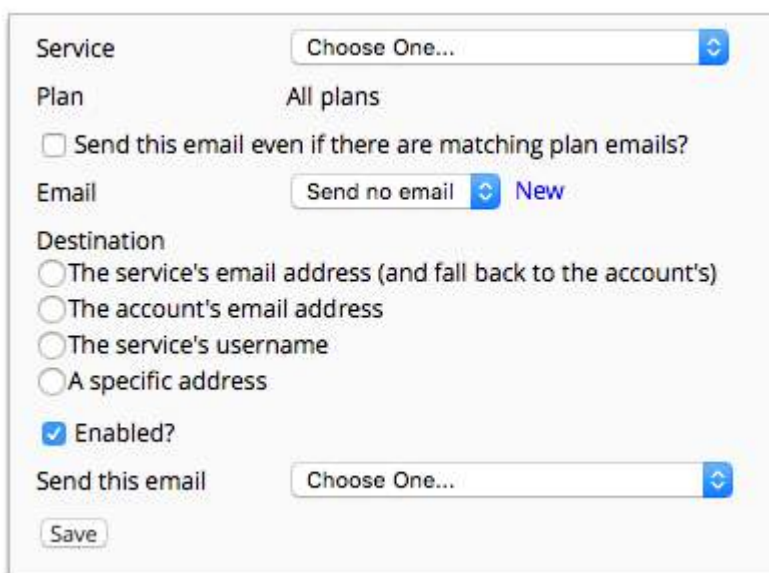
The Service email property page is displayed.

3. Complete the service email property fields.

For more information, see [Welcome email properties](#).

4. Click **Save**.

The **Welcome emails** tab is displayed. The welcome email is displayed in the **Welcome emails** table.



The screenshot shows a configuration form for a welcome email. It includes the following fields and options:

- Service:** A dropdown menu with the text "Choose One..." and a blue arrow icon.
- Plan:** A text field with the value "All plans".
- ☐ **Send this email even if there are matching plan emails?**
- Email:** A dropdown menu with the text "Send no email" and a blue arrow icon, followed by a blue link labeled "New".
- Destination:** Four radio button options:
 - ☐ The service's email address (and fall back to the account's)
 - ☐ The account's email address
 - ☐ The service's username
 - ☐ A specific address
- ☒ **Enabled?**
- Send this email:** A dropdown menu with the text "Choose One..." and a blue arrow icon.
- Save:** A button at the bottom left.

Figure 26: Welcome email properties

Welcome email properties

The properties of a welcome email specify the service and plan the message applies to, the format of the email, the recipients address and when the email is sent.

Service	Specifies the service the welcome email applies to.
Plan	Specifies the service's plan that the welcome email applies to. You can select a specific plan or all plans on the service.
Send this email even there are matching plan emails?	<p>When selected specifies that the welcome email is sent even if there is a welcome email specifically for one of the service's plan.</p> <p>This option is only applicable when All plans is selected for Plan.</p>
Email	Specifies the email template that contains the welcome email message. For more information, see Email templates .
Destination	<p>Specifies what information Smile will use for the recipient of the welcome message.</p> <ul style="list-style-type: none"> • A specific address • The service's username • The account's email address • The service's email address (and fall back to the account's)
Enabled	When selected specifies that the welcome email is active.
Send this email	<p>Specifies when the welcome email is sent.</p> <ul style="list-style-type: none"> • Upon activation • When the service is ordered • When the service is provisioned • When the service is ordered via CAT

SMS gateway

Smile has support for simple email based SMS gateways. Configure a gateway to tell Smile how to email your SMS vendor and send SMSs.

Add an SMS gateway

You can configure Smile with a single SMS gateway instance. The following substitutions can be used in any of the SMS gateway fields:

- `%destination%`—will be substituted for the phone number to send the SMS to.
- `%message%`—will be substituted for the message to be sent.

This task explains how to add an SMS gateway.

1. Select **SMS Gateway** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The SMS Gateway Configuration page is displayed.

2. Type a name for the gateway in the **Name** field.
3. Type an entry in the **From format** field.
4. Type an entry in the **To format** field.
5. Type an entry in the **Subject format** field.
6. Type your message in the **Body format** field.
7. Click **Save**.

The Configuration and Tools page is displayed.

Notification schedules

Notification schedules allow you to configure when notifications from Smile are sent. A schedule defines the rules for which days of the week and during which hours notifications can be sent. For example, a schedule could determine that notifications are sent any day or the week, but during the hours of 8am to 9pm, to ensure that SMSes are not sent and received in middle of the night. A schedule can also specify exclusions that override the regular scheduled days and times.

Notifications not assigned a schedule are sent immediately.

Add a notification schedule

A notification schedule consists of entries that specify the days of the week and time periods during with notifications can be sent.

This task explains how to add and configure a notification schedule.

1. Select **Notification schedules** under **Email, SMS, Print & Web** on the Configuration and Tools page.
The Notification schedules page is displayed.
2. Click **Add**.
A Create notification schedule configuration page is displayed.
3. Type a name for the schedule in the **Name** field. Click **Create**.
Additional configuration properties are displayed.
4. Click **Add hours** in the **Recurring hours** section.
A **Recurring hours entry** window is displayed.
5. Complete the following fields:

Option	Description
Every	Select a day of the week from the Every drop-down.
Start	Specifies the time from which notification can be sent on the selected day. The field format is HH:MM:SS. For example, 7:00am is entered as 07:00:00.
End	Specifies the end time at which a notification can be sent on the selected day. The field format is HH:MM:SS. For example, 10:30pm is entered as 22:30:00.
Label	(Optional) Specifies a descriptive text label for the recurring hours entry.

6. Click **Save**.
The Schedule notification schedule configuration page is displayed. The entry is added to the **Recurring hours** list.
7. (Optional) Click **Add hours** to add additional days and time ranges.

8. Click **Save** when complete.

The Notification schedules page is displayed. The schedule is added to the **Schedule configurations** list.

Add an exclusion to a schedule

Exclusions are one-off dates and time periods where notifications must not be sent. For example, a public holiday.

This task explains how to add an exclusion.

1. Select **Notification schedules** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The Notification schedules page is displayed.

2. Click **Configure** next to the schedule to update.

The Schedule notification schedule configuration page is displayed.

3. Click **Add exclusion**.

An **Exclusion hours entry** window is displayed.

4. Complete the following fields:

Option	Description
Exclusion date	Select a date from the calendar.
Start	Specifies the start time from which notifications will not be sent on the selected date. The field format is HH:MM:SS. For example, 7:00am is entered as 07:00:00.
End	Specifies the end time of the time period during which notifications will not be sent on the selected date. The field format is HH:MM:SS. For example, 10:30pm is entered as 22:30:00.
Label	(Optional) Specifies a descriptive text label for the recurring hours entry.

5. Click **Save**.

The Schedule notification schedule configuration page is displayed. The exclusion entry is added to the **Exclusion** list.

6. (Optional) Click **Add exclusion** to add additional dates and time ranges.

7. Click **Save** when complete.

The Notification schedules page is displayed.

Notification method configuration

Notifications are used in Smile to communicate with Smile users. Notifications may include advice on time and data usage, invoices and account updates and communication of credit control actions. A notification can be sent via multiple methods that can specify individual format and schedules.

The screenshot displays a configuration window with three sections: Email, SMS, and Print. Each section has a Template dropdown menu, a Schedule dropdown menu, and a list of notification types with checkboxes and associated fields.

- Email Section:**
 - Template: Don't send email (dropdown with a 'New' button)
 - Schedule: Immediately (dropdown)
 - ☐ Account Email address
 - ☐ Subscription Email address
- SMS Section:**
 - Template: Don't send SMS (dropdown with a 'New' button)
 - Schedule: Immediately (dropdown)
 - ☐ Account Mobile phone
 - ☐ Subscription Mobile phone
 - ☐ Subscription Username
- Print Section:**
 - Template: Don't print (dropdown)
 - Schedule: Immediately (dropdown)

Figure 27: Notification method properties

The following lists the configuration options for notifications sent by email, SMS and print. A notification can be sent by multiple methods.

Email

Specifies configuration for notifications sent by email.

Template

Specifies the template used for email notifications.

- **Don't send email**
- **Select template from drop-down**

Click **New** to create a new template. Payment email templates use the payment [document type](#). For more information, see [Email templates](#).

Schedule	Specifies when a triggered notification is sent. <ul style="list-style-type: none">• Immediately• Select schedule from drop-down. For more information, see Notification schedules .
Account - Email address	Specifies the source of the alert recipients email address. Recipient email address taken from account details.
Subscription - Email address	Specifies the source of the alert recipients email address. Recipient email address taken from subscription details.

For more information on managing accounts and subscriptions, see the *User Guide*.

SMS

Specifies configuration for notifications sent by SMS.

Template	Specifies the template used for SMS notifications. <ul style="list-style-type: none">• Don't send SMS• Select template from drop-down Click New to create a new template.
Schedule	Specifies when a triggered notification is sent. <ul style="list-style-type: none">• Immediately• Select schedule from drop-down. For more information, see Notification schedules .
Account - Mobile phone	Specifies that notifications are sent to the mobile phone number recorded in the account.
Subscription- Mobile phone	Specifies that notifications are sent to the mobile phone number recorded in the subscription.
Subscription - Username	Specifies that notifications are sent to the username recorded in the subscription.

Print

Specifies the configuration for printed notifications.

Template	Specifies the stationery template used for printed notifications. <ul style="list-style-type: none">• Don't print• Select template from drop-down For more information, see Stationery and forms .
-----------------	---

Schedule

Specifies when a triggered notification is printed.

- **Immediately**
- **Select schedule from drop-down.**

For more information, see [Notification schedules](#).

Chapter

4

Configuring services

Services

A service is a generic type of product that you provide to customers. For example, if your company is a cable TV provider, you may offer telephone, TV, cable internet and wireless internet services.

Each service contains the following information:

- plan and contract configurations
- rating and tariff configurations
- provisioning data
- any other details about how the service should be provided

You can associate multiple plans with each service. For example, you may offer plans with 50GB, 100GB or 200GB monthly download limits for the same cable internet service.

A service is static. Once you set up a service, its service definition does not change until you change the configuration. You can create new services or rename the existing services for your specific requirements.

Services and plans page

The Service and Plans page displays the available services configured in Smile. To view the Services and Plans page, select **Services and Plans** under **Services, Ordering & Rating** on the Configuration and Tools page.

Each service specifies its own unique set of plans. Select a service to see the plans it offers.

The Services and Plans page filters services in Smile, by currency if multiple currencies are configured, in the following views:

Available Services	Available published and unpublished services and plans. This is the default view of the Services and Plans page.
Deprecated Services	Services and plans that are no longer active or valid.
Service Templates	System templates for services and plans.
System Services	System service functions such as Smile access and server tasks.

To select the required view, select it from the **Show** drop-down.

You can then do one of the following:

- Click **View** to the right of the service entry to view or edit the service details.
- Click **Create new service** below the service list to create a new service entry.

Note: Create new service is not available for **Deprecated Services**.

Service tabs

A Smile service has a number of configuration tabs. Some tabs are service dependant and will only be displayed when applicable.

Table 8: Service tabs

Tab	Sub-tab	Service	Purpose
Billing		All	Specifies plans, plan change groups and recurring service charges.
Settings		All	Specifies configuration information for service identifier, service description, charge pools, subservice identification, billing mode, service activation and display settings.
Tickets		All	Specifies ticket actions within ordering workflows.
Rating		All	Advanced configuration. For more information, contact Inomial .
Defaults	Component	All	Specifies how a service obtains a service username.
	Plan Schedule	All	Specifies actions operators can take on the service and its plans.
Ordering		All	Specifies the format of custom order form fields.
Contracts		All	Specifies minimum service connection terms and associated connection and termination charges and payment methods.
CAT		Data, Telephony, Customer Portal/ CAT Access	Specifies functions that a user can see or perform in CAT
CAT Portal Configuration		Customer Portal/ CAT Access	Specifies CAT page look, contact details, online payments, domains and remote CAT authentication.
Tariffs	Destinations	Telephony	Specifies a destination label against which calls are aggregated for the purpose of charging.

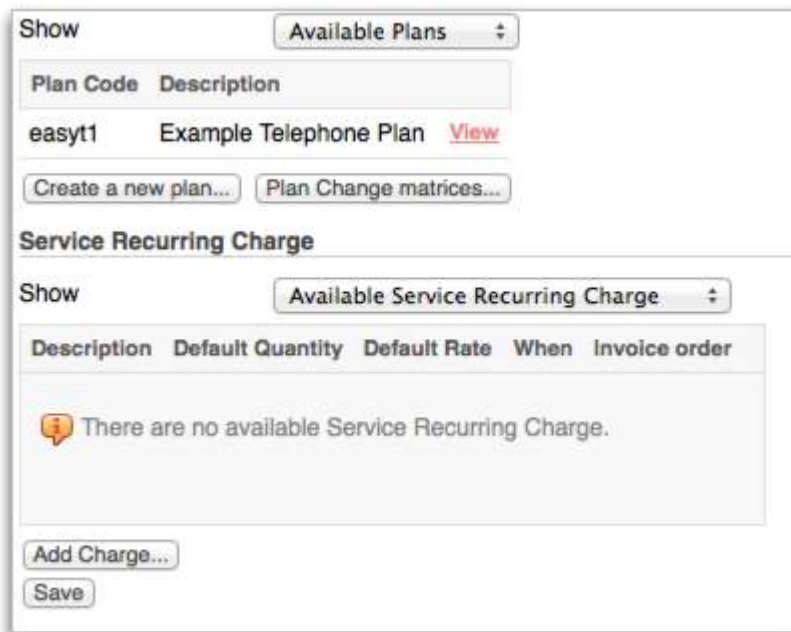
Tab	Sub-tab	Service	Purpose
	Tariff Types	Telephony	Specifies a set of types that define what charge type is applied to individual charge components of a tariff.
	Spend Limits	Telephony	Specifies the spend amount of a particular type of usage in a rating period and any features applied to a subscription as a result.
	Settings	Telephony	
Authentication		Smile Access	Specifies Smile's authentication method
Flow Control Configuration		Data	Specifies flow control settings and configuration.
Importers		Data, Telephony	Add and view importers used by the service

Billing

The Billing tab summarises the plans and recurring charges applied to a service.

The Billing tab has two sections:

- **Plans**—displays line item summary of all plans applied to a service. The plans list has filter options for Available Plans, Deprecated Plans, Plan Templates and Private Plans. Managed plans are specified in this section.
- **Service Recurring Charge**—displays line item summary of all recurring charges applied to a service. The Service Recurring Charge list has filter options of Available Service Recurring Charge and Deprecated Service Recurring Charge.



The screenshot shows the Billing tab interface. It is divided into two main sections: 'Plans' and 'Service Recurring Charge'.

Plans Section:

- At the top, there is a 'Show' button and a dropdown menu set to 'Available Plans'.
- Below this is a table with two columns: 'Plan Code' and 'Description'.
- The table contains one row: 'easyt1' and 'Example Telephone Plan'. To the right of the description is a red 'View' link.
- Below the table are two buttons: 'Create a new plan...' and 'Plan Change matrices...'.

Service Recurring Charge Section:

- At the top, there is a 'Show' button and a dropdown menu set to 'Available Service Recurring Charge'.
- Below this is a table with five columns: 'Description', 'Default Quantity', 'Default Rate', 'When', and 'Invoice order'.
- The table is empty, and a message box with an information icon states: 'There are no available Service Recurring Charge.'
- Below the table are two buttons: 'Add Charge...' and 'Save'.

Figure 28: Billing tab

Create a new plan

Plans can be added to a service based on a template, existing plans or private plans.

For more information, see [Configuring plans](#).

This task explains how to create a new plan.

1. Click **Create a new plan....**

The Plan Templates page is displayed.

2. Click a template from the **Plan Template list.**

A Create Plan page is displayed.

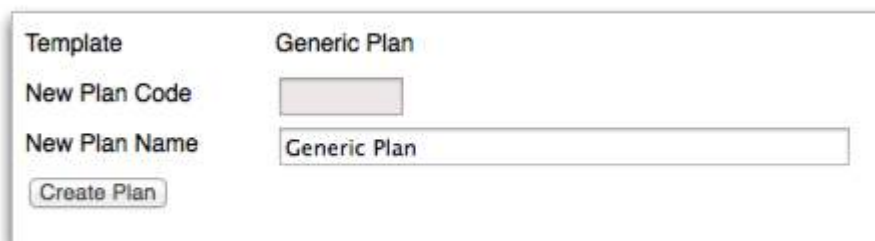
A screenshot of a web form titled 'Create Plan'. The form has a 'Template' dropdown menu with 'Generic Plan' selected. Below it is a 'New Plan Code' text input field. Underneath that is a 'New Plan Name' text input field containing the text 'Generic Plan'. At the bottom left of the form is a 'Create Plan' button.

Figure 29: Create Plan page

3. Enter the following information:

- **New Plan Code**—Unique alpha-numeric plan code. Limit of 8 characters.
- **New Plan Name**—Descriptive plan name. This field is populated with the selected template plan name by default.

4. Click **Create Plan.**

The plan **Usage Charges** tab is displayed. The plan is created with all settings contained in the selected template. Complete any other required configuration. For more information, see [Configuring plans](#).

Managed plans

Managed plans add a layer that regulates how plan changes can occur within a service.

A managed plan consists of:

- **plan change groups**—the group contains plan change choices and defines the available plans and any charges associated with a change.

Each plan change group is an independent set of configuration. A subscription can subscribe to a plan change group, which will allow it to change plans according to the configuration of the plan change group.

- **plan change choices**—plan change choices can be different plans within the service and separate plan options of a plan.

Note: Smile allows a subscription only one plan change per period when using managed plans.

Plan change types

- **Upgrade**—specifies a change to a plan change choice set with a higher position number in a plan change group.
- **Crossgrade**—specifies a change to a plan change choice set with the same position number in a plan change group.
- **Downgrade**—specifies a change to a plan change choice set with a lower position number in a plan change group.

Plan change timing

- **Back date to start of current period**—specifies that the change will be applied from the start of the current period. The new plan charges and any quotas will be applied to the entire period.
- **At time of change**—specifies that the plan change takes effect immediately. Plan charges and usage, for the old and new plans, will be pro-rated for the period.
- **Start of next period**—specifies that the plan change will be applied from the start of the next period.

Note: To prevent plan change fraud, Inomial recommends that downgrades take effect at the start of the next period if there is a possibility of 'shaped' style plans.

View plan change groups

Plan change groups are managed from the service Billing tab. A service can have multiple plan change groups.

Configured plan change groups are summarised in the **Managed Plan Matrices** table on the Plan Change Groups page.

This task explains how to view plan change groups configured for a service.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Services and Plans page is displayed.

2. Click **View** to the right of a service.

The **Billing** tab for the selected service is displayed.

3. Click **Plan Change matrices...**

The Plan Change Groups page is displayed.

Plan change properties

Plan change group

Name	Descriptive name for the plan change group.
Valid from	<p>Specifies the start date validity of the plan change group.</p> <p>If only a start date is specified Smile will view the group as valid from this date onwards.</p>
Valid until	<p>Specifies the end date validity of the plan change group.</p> <p>If only an end date is specified Smile will view the group as valid up to this date only.</p>
Upgrade charge	<p>Specifies a charge that is applied for a plan upgrade.</p> <ul style="list-style-type: none"> • Change <p>For more information, see Add a plan change charge.</p>
Upgrade timing	<p>Specifies from when the plan change and any applicable charges will be applied.</p> <ul style="list-style-type: none"> • Back date to start of current period • At time of change • Start of next period
Crossgrade charge	<p>Specifies a charge that is applied for a crossgrade plan change.</p> <ul style="list-style-type: none"> • Change <p>For more information, see Add a plan change charge.</p>

Crossgrade timing	<p>Specifies from when the plan change and any applicable charges will be applied.</p> <ul style="list-style-type: none"> • Back date to start of current period • At time of change • Start of next period
Downgrade charge	<p>Specifies a charge that is applied for a plan downgrade.</p> <ul style="list-style-type: none"> • Change <p>For more information, see Add a plan change charge.</p>
Downgrade timing	<p>Specifies from when the plan change and any applicable charges will be applied.</p> <ul style="list-style-type: none"> • Back date to start of current period • At time of change • Start of next period
Require pre-payment for	<p>Specifies if a CAT user has to pay any plan change charges before the change is processed by Smile.</p> <ul style="list-style-type: none"> • End users • Not required
Plan Change Choices	<p>Summary listing of plans available to the plan change group. In position order, highest plan to lowest.</p>
Plan change group choice	
Managed Plan	<p>Specifies the name of a plan change group choice.</p> <ul style="list-style-type: none"> • Choose One... • New • Edit
Valid from	<p>Specifies the start date validity of the plan change group.</p> <p>If only a start date is specified Smile will view the group as valid from this date onwards.</p>
Valid to	<p>Specifies the end date validity of the plan change group.</p> <p>If only an end date is specified Smile will view the group as valid up to this date only.</p>
Position	<p>Specifies the position of the plan in the change group. Smaller numbers are downgrades, larger numbers are upgrades. Plans with the same position number are crossgrades. Mandatory field.</p>

Available to

Specifies who may initiate a plan change, Smile operators and/or CAT users.

- **Operators and end users**
- **Operators**

Managed plan creation process overview

This task outlines the process to create a managed plan on a service.

1. [Create a plan change group.](#)

This step explains how to create a plan change group that will create plan options and rules for switching between plans.

a. **[Add a plan change charge.](#)**

This step explains how to add upgrade, crossgrade or downgrade charges.

2. [Add a plan change choice.](#)

This step explains how add a plan choice to the plan change group.

a. **[Create a new plan change choice.](#)**

This step explains how to create a new plan choice that can be added to the plan change group.

Add a plan change group

A plan change group contains the plan options and rules for switching between plans.

This task explains how to add a plan change group.

1. On the **Billing** tab, click **Plan Change matrices...**

The Plan Change Groups page is displayed.

2. Click **Add**.

A blank Plan Change Group page is displayed.

The screenshot shows a configuration form for a Plan Change Group. It contains the following fields and options:

- Name:** A text input field.
- Valid from:** A date picker.
- Valid until:** A date picker.
- Upgrade charge:** A dropdown menu currently set to "No charge" with a "Change" link.
- Upgrade timing:** A dropdown menu currently set to "Back date to start of current period" with a "Change" link.
- Crossgrade charge:** A dropdown menu currently set to "No charge" with a "Change" link.
- Crossgrade timing:** A dropdown menu currently set to "Back date to start of current period" with a "Change" link.
- Downgrade charge:** A dropdown menu currently set to "No charge" with a "Change" link.
- Downgrade timing:** A dropdown menu currently set to "Start of next period" with a "Change" link.
- Require pre-payment for:** A dropdown menu currently set to "Not required" with a "Change" link.

Below the form fields is a section titled **Plan Change Choices** containing a table with the following headers: **Name**, **Plan Name/Options**, **Valid from**, **Valid until**, and **Access**. The table is currently empty, and a message below it states "There are no plan change choices configured". At the bottom of the form are two buttons: **Add** and **Save**.

Figure 30: Plan Change Group page

3. Type a name of the plan change group in the **Name** field.

4. Complete the required fields.

For more information, see [Plan change properties](#).

5. Do one of the following:

- Click **Add**—Adds a plan change choice. For more information, see [Add a plan change choice](#).
- Click **Save**—Saves the plan change group. The Plan Change Groups page will be displayed.

Add a plan change charge

A one-off charge can be applied to perform a plan change. Separate charges can be configured for an upgrade, crossgrade and downgrade.

This task explains how to add a plan change charge.

1. On the **Billing** tab, click **Plan Change matrices...**

The Plan Change Groups page is displayed.

2. Click **Edit** to the right of the required plan change group line entry.

The Plan Change Group properties page is displayed.

3. Click **Change** to the right of the required plan change type charge line.

A **Plan change charge** window is displayed.

Figure 31: Plan change charge window

4. Select **Charge a plan change fee**.

Plan charge fee fields are displayed.

5. Type the charge fee in the **Rate** field. The following fields are displayed, populated with default values, and require additional explanation:

- **Description**—Descriptive name for the plan change group that you are currently editing.
- **Invoice display order**—Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
- **Sales report category**—Specifies the sales report category the charge is allocated to. For more information, see [Sales report categories](#).
- **Discount category**—Specifies a discount or commission category. For more information, see [Charge types and units](#).

6. Click **Save**.

The Plan Change Group page is displayed.

Add a plan change choice

Plan change choices list the plans and plan options available to switch between in the change group.

This task explains how to add a plan change choice.

1. On the **Billing** tab, click **Plan Change matrices...**

The Plan Change Groups page is displayed.

2. Click **Edit** to the right of the required plan change group line entry.

The Plan Change Group properties page is displayed.

3. Click **Add**.

A blank Plan Change Group Choice page is displayed.



The screenshot shows a web form for adding a plan change choice. It includes the following fields and controls:

- Managed Plan:** A drop-down menu with the text "Choose One..." and a "New" button next to it.
- Valid from:** A text input field with a calendar icon to its right.
- Valid until:** A text input field with a calendar icon to its right.
- Position:** A small, empty rectangular input field.
- Available to:** A drop-down menu with the text "Operators and end users".
- Save:** A button at the bottom left of the form.

Figure 32: Plan Change Group Choice page

4. Select a plan option from the **Managed Plan** drop-down.

You will need to create a choice if the drop-down is empty. For more information, see [Create a new plan change choice](#).

5. Complete the required fields. For more information, see the [Plan change properties](#).

6. Click **Save**.

The Plan Change Group page is displayed.

7. (Optional) Click **Add** to create additional plan change choices.

8. Click **Save**. The Plan Change Groups page is displayed.

Create new plan change choice

Plan change choices list the plans and plan options available to switch between in the change group.

This task explains how to create a new plan change choice.

1. On the **Billing** tab, click **Plan Change matrices...**

The Plan Change Groups page is displayed.

2. Click **Edit** to the right of the required plan change group line entry.

The Plan Change Group properties page is displayed.

3. Click **Add**.

The Plan Change Group Choice page is displayed.

4. Click **New** to the right of the **Managed Plan** line.

A blank Managed plan page is displayed.



Figure 33: New Plan Change choice

5. Type a name in the **Name** field.

6. Type a summary of the plan change option in the **Description** field.

Both the **Name** and **Description** fields are visible to end users.

7. Select an option from the **Plan** drop-down.

The **Plan** drop-down is populated by the available plans listed for the service on the **Billing** tab.

Note: If charging options have been configured for the plan these options will be displayed. For more information, see [Charging options](#).

8. Do one of the following:

Option	Action
If no plan charging options are displayed	<ol style="list-style-type: none"> 1. Click Save. 2. Select the new plan from the Managed Plan drop-down.
If plan charging options are displayed	<ol style="list-style-type: none"> 1. Select or complete the required charging option. 2. Click Save. 3. Select the new plan from the Managed Plan drop-down. 4. Click Edit to the right of the Managed Plan line. 5. Select an option from the Override allowed for drop-down. <ul style="list-style-type: none"> • CAT/SOAP and Smile—Specifies that the option can be overridden by CAT users and Smile operators. • None—Specifies that the option cannot be overridden. • Smile only—Specifies that the option can only be overridden by a Smile operator. 6. Click Save.

9. Complete the required fields. For more information, see the [Plan change properties](#).**10.** Click **Save**.

The Plan Change Group page is displayed.

11. (Optional) Click **Add** to create additional plan change choices.**12.** Click **Save**. The Plan Change Groups page is displayed.

Settings

The Settings tab contains configuration information of the service. Settings includes information defining areas such as:

- Service identifier
- Service description
- Charge pools
- Subservice identification
- Billing mode
- Service activation
- Display settings

Included charge pools

An included charge pool specifies the [alert thresholds](#) and [email template](#) for customer notification when thresholds are exceeded.

An included charge pool is used by an included value pool. A value pool tracks the monetary amount of included usage that a subscription spends in a rating period.

For more information, see [Usage and spend management](#).

Add new included charge pool

Adding a charge pool specifies usage alert threshold levels and the email template Smile uses for notifications when the levels are exceeded for a service.

This task explains how to add a new included charge pool.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click the **Settings** tab.
The **Settings** tab is displayed.
4. Click **New pool**.
An **Included Usage Charge Pool** window is displayed.
5. Type a descriptive name of the new pool in the **Pool Name** field.

6. Select **Raise notifications**. Click **Save**.

Notifications and **Alert Thresholds** options are displayed. For more information, see [Notification method configuration](#).

Pool Name

☒ Raise notifications

Notifications

Email

Template [New](#)

Schedule

☐ Account Email address

☐ Subscription Email address

SMS

Template [New](#)

Schedule

☐ Account Mobile phone

☐ Subscription Mobile phone

☐ Subscription Username

Print

Template

Schedule

Alert Thresholds

%

There are no alerting thresholds configured

New Threshold [Add](#)

[Save](#) [Delete](#)

Figure 34: New Included Usage Charge Pool window

7. Select an email template from the **Email** drop-down.

If the **Email** drop-down only displays **no email** you must create a value pool alert email template. For more information, see [Create an email template](#).

Source options for the alert recipients email address are displayed.

8. Select the source of the alert recipients email address. One or all options may be selected:
 - **Email - Account - Email address**—Recipient email address taken from account details.
 - **Email - Subscription - Email address**—Recipient email address taken from subscription details.For more information on managing accounts and subscriptions, see the *User Guide*.
9. Type a value in the **New Threshold** field. Click **Add**.

The value is added to the **Alert Thresholds** list.
- 10.(Optional) Repeat the previous step to add additional **Alert Thresholds** values.
11. Click **Save**.

The service **Settings** tab is displayed.

Tickets

The Tickets tab displays options that can be enabled to trigger ticket actions. Ticket actions or workflow steps are controlled by the selected template ticket.

The Tickets tab displays the following options:

Raise a helpdesk ticket when services are ordered

When selected specifies that a helpdesk ticket is created for ordered services. A ticket can be used to initiate a manual provisioning process.

Select a ticket template from the **Order ticket template** drop-down. For more information, see [Template tickets](#).

Raise a helpdesk ticket upon activation of new services

When selected specifies that a helpdesk ticket is created upon activation of new services. For example, a ticket may trigger a follow up process to ensure satisfaction with the customer or as part of an approval or QA process.

Select a ticket template from the **Activate ticket template** drop-down. For more information, see [Template tickets](#).

Rating

The Rating tab displays a summary list of service rating scripts and charge types applied to the service. A service can have multiple rating scripts applied. For more information, see [Rating scripts](#).

Rating scripts are advanced configuration. For more information, [contact Inomial](#).

Add a rating script

Multiple rating scripts can be added to a service.

This task explains how to add a rating script to a service.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Services and Plans page is displayed.

2. Click **View** to the right of a service.

The **Billing** tab for the selected service is displayed.

3. Click the **Rating** tab.

The **Rating** tab is displayed.

4. Click **Add...**

The Rating Script Item page is displayed.

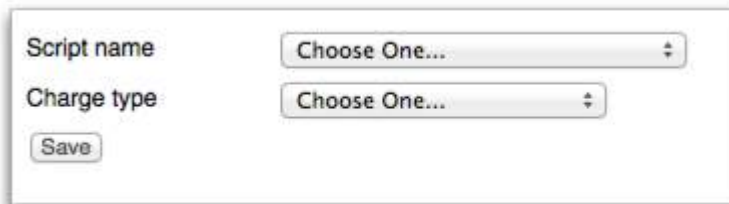
The image shows a web form for adding a rating script. It contains two dropdown menus. The first dropdown is labeled 'Script name' and has 'Choose One...' as its placeholder text. The second dropdown is labeled 'Charge type' and also has 'Choose One...' as its placeholder text. Below these two dropdowns is a 'Save' button.

Figure 35: Rating Script item page

5. Select a script from the **Script name** drop-down.

The **Script name** drop-down is populated with configured service scripts. For more information, see [Rating scripts](#).

6. Select a type from the **Charge type** drop-down.

The **Charge type** drop-down is populated by configured charge types. For more information, see [Charge types and units](#).

7. Click **Save**.

The **Rating** tab is displayed.

Defaults

The Defaults tab contains configuration information for obtaining service username and actions operators can take on a service and plan. The Default tab has two areas of configuration:

Component

The Component tab specifies how a service obtains a service username. An option is selected from the **Service ID Type** drop-down. A username can be specified through the following methods:

- Entered by operator** (Default) The service username is manually entered by an operator when ordering a service.
- Account ID** The service username is taken from the Account ID.
- From other package component** The service username is taken from another package service.

Plan schedule

The Plan schedule tab specifies if an operator can select a plan for a service manually, if they can manually set start and end dates of a service and if the service order form is visible.

- Operators select a plan for this service** Specifies that an operator can select a plan for the service from available plans.
- Operators may select start and end dates for this service** Specifies that an operator can set validity dates for the service.
- Hide the service order form** Specifies that the default service order form is not used during ordering.

The screenshot shows a web interface with two tabs: 'Component' (active) and 'Plan schedule'. Under the 'Component' tab, there are three fields: 'Service' with the value 'ADSL', 'Service ID Type' with a dropdown menu showing 'Account ID', and 'Credit limit' with an empty text box. At the bottom of the 'Component' section are 'Save' and 'Delete' buttons.

Figure 36: Defaults tab, displaying Component and Plan schedule tabs

Ordering

The Ordering tab displays a summary list of custom order form fields. These fields are used to map values to and from objects in Smile. For more information, see [Orders and order forms](#).

Form fields are advanced configuration. For more information, [contact Inomial](#).

Ordering document field properties

Field name	Specifies the form field name.
Document form name	Specifies the document form that the Smile object information is retrieved from.
Property selector	Specifies the Smile service field.
Default format	Specifies the field format in java.text format code.
Default field height mm	Specifies the default height of the field.
Default field width mm	Specifies the default width of the field.
Is a flag field	When selected specifies that the field is flagged.
Custom item	When selected specifies that the field item has been customised. Smile updates will not be applied to the field.
Code name	Specifies a substitution code that is used in stationery documents and templates. For more information, see Substitution codes .
Read only	When selected specifies that the field is read only.

Service contracts

A contract specifies the length of time that a customer must remain on a plan, for example, 12 or 24 months.

A contract may include setup charges, termination charges and payment method restrictions. For example, your company may offer some contracts only to customers who pay with a credit card. You can configure the termination charge as a flat fee or as a pro-rated proportion of the remaining contract value.

Unless otherwise defined, the total contract value is the sum of all the [recurring charges](#) for the duration of the contract, plus any setup charges. It does not include usage charges.

By default the Contracts tab displays a summary of contracts and their validity for a service. To view expired contracts clear the selection of **Only show contracts which are still available for sale**.

Contracts specified on a service are available to be allocated to its plans. For more information, see [Plan contracts](#).

View contracts tab

The Contracts tab provides access to the contract configuration for a service. You can view or edit current contracts, view expired contracts and create new contracts.

This task explains how to access the Contracts tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click the **Contracts** tab.
The **Contracts** tab is displayed.

Contracts properties

Setup charges

Contract name	Specifies a descriptive name for the contract.
Base contract value	Specifies the ex-tax base contract value. The contract value is pro-rated if the contract is terminated early.
Add plan recurring charges to the contract value	When selected Smile multiplies plan recurring charges for the duration of the contract to calculate contract value.
Percentage of recurring charges	When Add plan recurring charges to the contract value is selected specifies the percentage of recurring charges that are applied when calculating contract value on termination.
Contract duration <i>n</i> months	Specifies the length of the contract in months.
Grace period <i>n</i> days	Specifies the number of days past due without payment of contract charges before the contract is suspended or cancelled.
Valid from	Specifies the start date validity of the contract. If only a start date is specified Smile will view the contract as valid from this date onwards.
Valid to	Specifies the end date validity of the contract. If only an end date is specified Smile will view the contract as valid up to this date only.
Allow the alteration of contract values when assigning to a customer	When selected allows the editing of contract values by a Smile operator.
Fixed set up charges	Specifies fixed setup charges that are applied at the commencement of a contract subscription. • Add For more information, see Add a fixed setup charge .

Termination Charges

Invoice display order	Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Invoice description	Specifies the invoice item text.
Sales report category	Specifies the sales report category the charge is allocated to. • Select category from drop-down. For more information, see Sales report categories .
Discount/commission category	Specifies a discount or commission category. For more information, see Charge types and units .

Rate	Specifies the ex-tax value of the early termination charge. This is a flat, fixed charge.
Minimum termination charge	Specifies the minimum early termination charge applied regardless of the pro-rated amount.
Maximum termination charge	Specifies the maximum charge applied upon early contract termination.
Comments	Free text field.

Payment methods

Add payment type	Specifies payment types accepted by plans under the contract. If no payment types are listed, then all types are accepted. <ul style="list-style-type: none"> • Add For more information, see Payment methods .
-------------------------	---

Managed plans

Allowed plan changes	Specifies the plan change actions allowed if managed plans are configured on a service. <ul style="list-style-type: none"> • Up/Cross/Down/Custom • None • Up/Cross • Up only For more information, see Managed plans .
-----------------------------	---

Add a new service contract

Adding a contract specifies the duration, any setup and termination charges and payment methods that apply to a service.

This task explains how to add a new contract.

1. On the **Contracts** tab, click **New contract**.
The Contract: New Contract page is displayed.
2. Type a name in the **Contract name** field.
3. Complete the required fields.
For more information, see [Contracts properties](#).
4. Click **Save**.
The **Contracts** tab is displayed.

Add a fixed setup charge

A fixed setup charge may be applied at the commencement of a contract subscription. This is a one-off charge.

This task explains how to add a fixed setup charge.

1. On the **Contracts** tab, click **Edit** to the right of the required contract line entry.

The contract properties page is displayed.

2. Click **Add**, under the **Fixed setup charges** section.

The Find Invoice Item page is displayed.

3. (Optional) Do one of the following:

Option	Description
Add a new invoice item	<ul style="list-style-type: none"> • Click Edit Item... • Click Add <p>For more information, see Add an invoice item.</p>
Add a custom invoice item	<ul style="list-style-type: none"> • Click Add Custom Item... • Click Continue to confirm <p>For more information, see Add an invoice item.</p> <p>Note: A custom item may only be used in the specific application in which it was created. It cannot be shared with other configurations. If you wish to add an item that can be used more than once, click Edit Item...</p>

4. Click **Select** to the right of the item line entry to add.

The contract properties page is displayed.

Tariffs

The Tariffs tab holds telephony tariff configuration information for a service. Tariffs specify configuration that Smile uses to identify calls based on call types, geographic location, number prefixes and the rates that are applied to identified calls. Tariff configuration is used for billing if relevant rating information is not specified in plan rules. For more information, see [Usage charges](#).

The Tariffs tab has four areas of configuration:

- **Destinations**—specifies destination labels against which calls are grouped by destination class.
- **Tariff Types**—specifies the individual classes of calls for a service.
- **Spend Limits**—specifies any spend limit values assigned to tariff types on a service.
- **Settings**—specifies the format used by Smile for CDR and destination numbers.

View tariffs tab

The Tariffs tab provides access to the tariff configuration areas of destinations, tariff types, spend limits and settings.

This task explains how to access the service Tariffs tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a telephony-based service.
The **Billing** tab for the selected service is displayed.
3. Click the **Tariffs** tab.
The **Tariffs** tab is displayed.

Billing

Settings

Tickets

Contracts

Rating

CAT

Tariffs

Defaults

Ordering

Importers

Destinations

Tariff Types

Spend Limits

Settings

Search

Destination type

Domestic

Name	Tariff Types	
13XX	13XX	View
18XX	Free call	View
Calls between customers	Calls between customers	View
Emergency	Free call	View
Local	Local	View
Mobile	Mobile	View
National	National	View
Orapan's destination	International	View

Add

Upload tariff CSV...

Download tariff CSV...

Upload prefix CSV...

Download prefix CSV

Upload destination CSV

Download destination CSV

Figure 37: Tariffs tab, displaying the Destinations sub-tab

Destinations

A destination is a label against which calls are aggregated for the purpose of charging.

Destinations are grouped by destination type/class. The following destination classes are internally defined in Smile:

- Domestic
- International
- Data
- Premium Rate
- Service

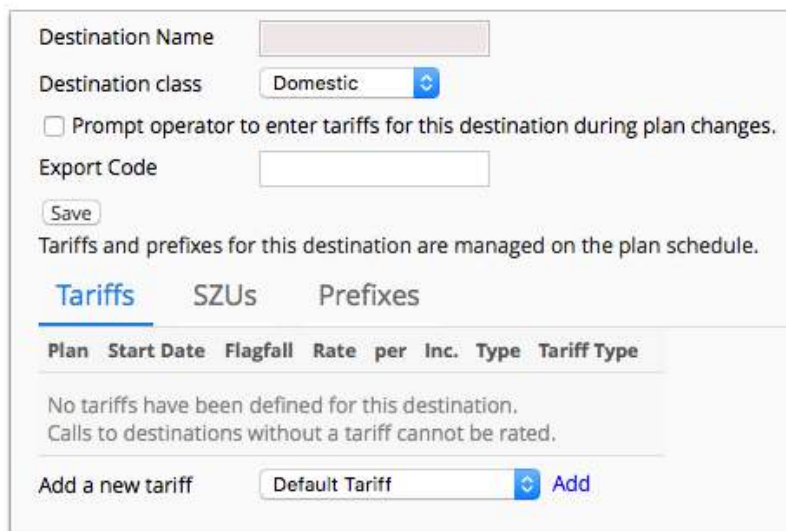
Add a destination

Smile is configured with standard destination definitions. Additional destinations may be required by an upstream provider.

This task explains how to add a destination.

1. Click **Add** on the **Destinations** tab.

A blank Call Destination: page is displayed.



The screenshot shows the 'Destination properties' page with the 'Tariffs' sub-tab selected. The form includes fields for 'Destination Name', 'Destination class' (set to 'Domestic'), a checkbox for 'Prompt operator to enter tariffs for this destination during plan changes.', and an 'Export Code' field. Below these is a 'Save' button. A message states: 'Tariffs and prefixes for this destination are managed on the plan schedule.' There are three tabs: 'Tariffs' (active), 'SZUs', and 'Prefixes'. Under the 'Tariffs' tab, there is a table with columns: Plan, Start Date, Flagfall, Rate, per, Inc., Type, and Tariff Type. The table is currently empty, with a message below it: 'No tariffs have been defined for this destination. Calls to destinations without a tariff cannot be rated.' At the bottom, there is an 'Add a new tariff' section with a 'Default Tariff' dropdown and an 'Add' button.

Figure 38: Destination properties page, displaying the Tariffs sub-tab

2. Type a name for the destination in the **Destination Name** field.
3. Select a class from the **Destination class** drop-down.
4. Complete destination options, including the **Tariff**, **SZUs** and **Prefixes** tabs, as required.
For more information, see [Call destination properties](#).
5. Click **Save**.

The **Destinations** tab is displayed. The destination is added to the destinations summary list.

Call destination properties

Destination Name	Specifies a descriptive name for the destination.
Destination class	Specifies the class of the destination. <ul style="list-style-type: none"> • Domestic • International • Data • Premium Service • Service
Prompt operator to enter tariffs for this destination during plan changes.	When selected specifies that an operator will be prompted to enter tariffs when completing a plan change.
Export Code	Specifies a code identifying the type of destination. Internal Smile use only.

Tariffs

The Tariffs tab displays a summary list of the tariff rates that apply to a destination.

Add a new tariff	Select a plan name from the drop-down. Click Add .
Tariff Type	Specifies the tariff type. For more information, see Tariff types . <ul style="list-style-type: none"> • Select from list
Call Type	Specifies the call type of the tariff. Call types are an internally defined list of Smile values. Call types are used to distinguish call types for a given prefix. <ul style="list-style-type: none"> • Event count • Data • Video Call • Forwarded Voice • Imported Charge • MMS • SMS • Unknown • Voice • WAP • Fax
Tariff Start Date	Specifies the date, beginning at 00:00:00, from which the tariff will apply.
Flagfall	Specifies the fixed charge for a CDR.
Rate	Specifies the charge per unit. A unit is defined in Charging units below.

Minimum Charge	Specifies a minimum charge for a CDR.
Maximum Charge	Specifies a maximum charge for a CDR.
Decimal places	Specifies the number of decimal places used when calculating charges.
Rounding type	Specifies the rounding type applied to the final charge. For more information, see Rounding modes . <ul style="list-style-type: none"> • None • Up • Down • Half up • Half even
Charging units	Specifies the number of seconds in a single charging unit. A unit is charged at the Rate specified above.
Charging increments	Specifies the smallest unit size in seconds that is charged.

The screenshot shows a configuration window for a tariff. The fields are as follows:

- Tariff Type:** International (dropdown menu)
- Call Type:** SMS (dropdown menu)
- Tariff Start Date:** 1/01/14 (calendar icon)
- Flagfall:** \$ 1 (text input)
- Rate:** \$ 0 per unit (text input)
- Minimum Charge:** \$ [] per session (text input)
- Maximum Charge:** \$ [] per session (text input)
- Decimal places:** 2 (dropdown menu)
- Rounding type:** None (dropdown menu)
- Charging units:** 60 seconds (text input)
- Charging increment:** 1 seconds (text input)

At the bottom, there are 'Save' and 'Delete' buttons.

Figure 39: Tariff properties page

SZUs

The SZUs tab displays a summary list of standard zone units that have been defined for the destination. An SZU is a geographic area of a charging zone specified by ACMA. Australia is divided into almost 2100 SZUs.

Note: Take note of the following:

- SZUs are not commonly used and can be misused. For more information, [contact Inomial](#).
- Destinations with no SZUs and no prefixes may only be used for local, paired or on-net calls.
- SZUs are not valid for destinations with a **Destination Type** of **Data**.

Add...

Click **Add**. Type a standard zone unit name in the **Search for** field. Click **Select** to the right of the required SZU to add it to the **SZUs** summary list. Repeat to add additional SZUs.

Prefixes

The Prefixes tab displays a summary list of prefixes that have been defined for the destination. Prefixes are used for determining call charges when Smile can not match a tariff code to the CDR.

Note: Destinations with no SZUs and no prefixes may only be used for local, paired or on-net calls.

Add...

Click **Add**. Complete the prefix fields defined below. Click **Save**.

Prefix Name

Specifies a descriptive name of the prefix

Destination

Specifies the destination that the prefix is assigned to. Defaults to the current **Destination Name**.

Called number prefix

Specifies the called number prefix.

Note: Either a number prefix or a tariff code must be entered.

Tariff Code

Specifies a CDR tariff code ID.

Note: Either a number prefix or a tariff code must be entered.

Effective from

Specifies the date from which the prefix is valid.

Effective through

Specifies the date up to which the prefix is valid.

Prefix Name

Local

Destination

Local [Change](#)

Called number prefix

Tariff Code

Effective from

Effective through

Save

Figure 40: Prefix properties page

Upload destination CSV

You can use this process to upload a CSV with your destinations, instead of entering them manually.

Note: When uploading information to Smile via CSV, files must be uploaded in the following order:

1. Destination
2. Prefix
3. Tariff

The CSV file must contain the following fields:

- Destination Name
- Destination Class
- Export Code
- Psi Override



Warning: If a destination name already exists, its details will be overwritten by the details in the CSV.

Destination Class

The destination class must be one of the following:

- **1**—Domestic
- **2**—International
- **3**—Data
- **4**—Premium Rate
- **5**—Service

Psi Override

- **true**—will prompt an operator to enter tariffs for this destination during plan changes.
- **false**—will NOT prompt an operator to enter tariffs for this destination during plan changes.

This task explains how to upload a destination CSV file.

1. On the **Destinations** tab, click **Upload destination CSV...**

The Destination Upload page is displayed.

2. Click **Choose File**.

A file explorer window is displayed.

3. Navigate to and select the file to upload. Click **Choose**.

The Destination Upload page is displayed.

4. Click **Upload**.

The **Destinations** tab is displayed.

Download destination CSV

You can download a CSV file that contains the current destination entries and their configuration for a service.

This task explains how to download a destination CSV file.

Click **Download prefix CSV** on the **Destinations** tab.

A destination CSV file is downloaded to your default download directory.

Upload prefix CSV

You can use this form to upload a CSV with your prefixes, instead of entering them manually.

Note: When uploading information to Smile via CSV, files must be uploaded in the following order:

1. Destination
2. Prefix
3. Tariff

The CSV file must contain the following fields:

- Destination Name
- Called Number Prefix
- Tariff Code

The following conditions apply to a prefix CSV file:


- When a CSV is uploaded, all current prefixes will be ended or deleted for the service.
- The Destination Name is required.
- The destination must be configured for this service.
- Either Called Number Prefix or Tariff Code must be completed for each Destination Name, but not both.

This task explains how to upload a prefix CSV file.

1. On the **Destinations** tab, click **Upload prefix CSV...**

The Prefix Upload page is displayed.

2. Do one of the following:

- Select **Replace all prefixes**.
- 1. Click the  to set an **Effective Date**.
- 2. Type a time in the **Effective Time** field.

3. Click **Choose File**.

A file explorer window is displayed.

4. Navigate to and select the file to upload. Click **Choose**.

The Prefix Import page is displayed.

5. Click **Continue** to confirm upload.

A confirmation message is displayed.

6. Click Back.

The **Destinations** tab is displayed.

Download prefix CSV

You can download a CSV file that contains the current prefix entries and their configuration for a service.

This task explains how to download a prefix CSV file.

Click **Download prefix CSV** on the **Destinations** tab.

A prefix CSV file is downloaded to your default download directory.

Upload tariff CSV

You can use a tariff upload form to upload your call rates, instead of entering them manually. You can also use an upload form to update existing tariff entries.

Note: When uploading information to Smile via CSV, files must be uploaded in the following order:

1. Destination
2. Prefix
3. Tariff

The CSV file must contain the following fields:

- Destination Name
- Call Type
- Flagfall Rate
- Per Unit Rate
- Minimum Charge
- Maximum Charge
- Start Date
- Decimal Places
- Rounding Type
- Charging Units
- Charging Increment
- Tariff Type Id
- Plan

Destination

If there are no tariffs for a destination, then all fields must be filled. If there are tariffs for a existing destination and a field is empty, the value for that field will not be updated or overwritten.

The destination must be configured against the service of the plan schedule item, plan or service you are uploading for. For more information, see [Destinations](#).

Call Type	<p>The call type must be the same as the default tariff that you are trying to override:</p> <ul style="list-style-type: none"> • D—Data • S—SMS • M—MMS • X—Fax • W—WAP • F—Forward Voice • V—Voice • E—Video Call • C—Event Count • I—Imported Charge • U—Unknown
Flagfall Rate	Excluding tax.
Per Unit Rate	Excluding tax.
Minimum and maximum charge	To set a minimum or maximum charge to null, the field must be filled with <code>null</code> .
Start date	Start date format is <code>dd/MM/yyyy</code> .
Decimal Places	The decimal place length entered must match the format of the values entered for Per Unit Rate , Minimum Charge and Maximum Charge .
Rounding type	<p>The rounding type must be one of the following:</p> <ul style="list-style-type: none"> • 0—none • 1—up • 2—down • 3—half up • 4—half even <p>For more information, see Rounding modes.</p>
Tariff type id	The tariff type Id is the identification code for a tariff type. The Id must be a tariff type applicable to the service and company that you are uploading for. The tariff type ID is displayed in the type summary list on the service Tariff types tab.
Plan	The plan code may be excluded. If it is included and null, the tariff will be configured. The plan code is located on the plan Settings tab.



Tip: To update the rates for existing tariffs, [Download tariff CSV](#), update the required rates, then [Upload tariff CSV](#). Only the updated fields will be changed in Smile.

This task explains how to upload a tariff CSV file.

1. On the **Destinations** tab, click **Upload tariff CSV...**
The Tariff Upload page is displayed.
2. Click **Choose File**.
A file explorer window is displayed.
3. Navigate to and select the file to upload. Click **Choose**.
The Tariff Upload page is displayed.
4. Click **Upload**.
The **Destinations** tab is displayed.

Download tariff CSV

You can download a CSV file that contains the current tariff entries and their configuration for a service.



Tip: To update the rates for existing tariffs, [Download tariff CSV](#), update the required rates, then [Upload tariff CSV](#). Only the updated fields are changed in Smile.

This task explains how to download a tariff CSV file.

Click **Download tariff CSV...** on the **Plan-specific Tariffs** tab.

A tariff CSV file is downloaded to your default download directory.

Tariff types

The Tariff Types tab displays a summary list of tariff types defined in a service. Smile is configured with a default set of tariff types, which can be edited or added to as required. Each tariff type specifies what charge type is applied to individual charge components of a tariff. For more information, see [Charge types and units](#).

Billing

Settings

Tickets

Contracts

Rating

CAT

Tariffs

Defaults

Ordering

Importers

Destinations

Tariff Types

Spend Limits

Settings

Name	Flagfall Type	Timed Type	Invoice Description	Tariff Type Id	
13XX	13XX Flagfall	13XX Timed	1300 Calls	470	View
Calls between customers	On-Net Flagfall	On-Net Timed	Calls Between Customers	474	View
Free call	Free call Flagfall	Free call Timed	Free Calls	471	View
Internal	Internal Flagfall	Internal Timed	Internal calls	465	View
International	International Flagfall	International Timed	International calls	466	View
Local	Local Flagfall	Local Timed	Local calls	467	View
Mobile	Mobile Flagfall	Mobile Timed	Mobile calls	468	View
National	National Flagfall	National Timed	National calls	469	View
Premium Rate Calls	Premium Rate Flagfall	Premium Rate Timed	Premium Rate Calls	473	View
Service Calls	Service Calls Flagfall	Service Calls Timed	Service Calls	472	View

Add

Figure 41: Tariff Types tab

Add a tariff type

Smile is configured with default tariff types. You can create additional tariff types as required.

This task explains how to add a tariff type.

1. Click **Add** on the **Tariff Types** tab.

A New Tariff Type page is displayed.

2. Type a name in the **Tariff Type Name** field.

3. Complete the required tariff type fields.

For more information, see [Tariff type properties](#).

4. Click **Save**.

The **Tariff Types** tab is displayed. The new tariff type is added to the tariff type summary list.

Tariff type properties

Tariff Type Name	Specifies a descriptive name for the tariff type.
Charge type for flagfalls	Specifies the charge type unit for flagfall. For more information, see Charge types and units .
Charge type for session/call time	Specifies the charge type unit for session/call time. For more information, see Charge types and units .
Charge type for pages	Specifies the charge type unit for pages. For more information, see Charge types and units .
Data received from customer	Specifies the charge type unit for uploaded data. For more information, see Charge types and units .
Data sent to customer	Specifies the charge type unit for downloaded data. For more information, see Charge types and units .
Rate Charge Type	Specifies the charge type unit for rate charges. For more information, see Charge types and units .
Data Sent Rate Charge Type	Specifies the charge type unit for downloaded rate charges. For more information, see Charge types and units .
Data Received Rate Charge Type	Specifies the charge type unit for uploaded rate charges. For more information, see Charge types and units .
Invoice Description	Specifies the invoice item text that is printed on the invoice when a call of this type is rated. Invoice description supplied on a tariff type will override invoice description supplied on a plan rule. For more information, see Usage charges .
Item Description	Specifies the invoice item text of the tariff.
Sales report category	Specifies the sales report category the tariff item is allocated to.
Display order	Specifies the display order of the tariff charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Charge GST on this item	When selected specifies that tax is applied to the tariff charge.
Discount/commission category	Specifies a discount or commission category. For more information, see Charge types and units .
Call time format	Specifies the format of call times. Default time format is entered as %h:%m:%s.
Do not print this item if the charge is zero	When selected specifies that the invoice item is not displayed on invoice stationery if the charge has \$0 value.

Do not add this item if the charge is zero

When this is selected, when the resulting charge for tariffs of this type yield \$0 the invoice line item is not added to the invoice at all.

Write call details on printed documents

When selected specifies that itemised call details are displayed on printed documents.

Invoice group name

Specifies the group name that calls of this tariff type are grouped under.

Tariff Type Name	Local
Charge type for flagfalls	Local Flagfall Create...
Charge type for session/call time	Local Timed Create...
Charge type for pages	Fax Pages Create...
Data received from customer	Uploaded Data Create...
Data sent to customer	Downloaded Data Create...
Rate Charge Type	Not Charged Create...
Data Sent Rate Charge Type	Not Charged Create...
Data Received Rate Charge Type	Not Charged Create...

The invoice description is the text printed on the invoice when a call of this type is rated.

Invoice Description	Local calls
Item Description	Local calls
Sales report category	Local Calls Create...
Display order	1
<input checked="" type="checkbox"/> Charge GST on this item	
Discount/commission category	Online time Create...
Call time format	%h:%m:%s
<input type="checkbox"/> Do not print this item if the charge is zero	
<input type="checkbox"/> Do not add this item if the charge is zero	
<input type="checkbox"/> Write call details on printed documents	
Invoice group name	

[Save](#) [Delete](#) [Remove Description](#) [Setup default configuration...](#)

Figure 42: Tariff Type properties page

Spend limits tab

A spend limit restricts the amount a subscription can spend on a particular type of usage in a rating period. For example, you can apply a \$100 spend limit for international calls to a mobile subscription.

A configured spend limit specifies the monetary spend limit and [alert threshold](#) values, along with the applicable tariff types, feature and notification email template.

For more information, see [Usage and spend management](#).

Add new spend limit

Adding a spend limit sets a restriction on the amount a subscription can spend on a particular type of usage, specifies usage levels when Smile sends notifications to the customer and the action that Smile will apply when that limit is exceeded.

This task explains how to add a new spend limit.

1. Click the **Spend Limits** sub-tab under **Tariffs**.

The **Spend Limits** tab is displayed.

2. Click **New spend limit**.

A blank Spend limit page is displayed.

3. Type a descriptive name for the new limit in the **Name** field.

4. Type a value in the **Limit \$** field.

5. Select a start and end date for **Only apply to rating periods ending between**.

If the date fields are left blank the limit will be applied for the life of the service.

6. Select a tariff type from the **Add a tariff type** drop-down.

This list is populated from the types specified in the service [Tariff types](#).

The selected tariff type is added to the **Applies to Tariff Type** list.

7. (Optional) Repeat the previous step to add additional tariff types.

8. Select a feature from the **Apply feature as treatment** drop-down.

Available features are specified by [RADIUS features](#).

9. Select **Raise notifications**.

Notifications fields are displayed.

10. Select an email template from the **Email** drop-down.

If the **Email** drop-down only displays **no email** you must create a spend limit alert email template. For more information, see [Create an email template](#).

Source options for the alert recipients email address are displayed.

11. Select the source of the alert recipients email address. One or all options may be selected:

- **Email - Account - Email address**—Recipient email address taken from account details.
- **Email - Subscription - Email address**—Recipient email address taken from subscription details.

For more information on managing accounts and subscriptions, see the *User Guide*.

12. Type a value in the % field. Click **Add**.

The value is added to the **Alerting Thresholds** list.

13.(Optional) Repeat the previous step to add additional **Alerting Threshold Percent** values.

14.Click **Save**.

The **Spend Limits** tab is displayed.

Settings

The Settings tab provides configuration options for the following numbers:

CDR Number format	Specifies the telephone number format for Call Detail Records.
Destination Number format	Specifies the telephone number format used for Destination Numbers.

To apply a number format select one of the following options from the drop-down and click **Save**:

Australian FNN	<p>Australian Full National Number.</p> <p>Specifies the standard telephone number format of 10 digit fixed or mobile numbers, starting with 0. For example, a fixed land line number is formatted as 02 1234 5678. Mobile number format is 0400 123 456.</p>
ITU-T E.164	<p>International Telecommunications Union - Telecommunication Standardization Sector, recommendation E.164 The international public telecommunication numbering plan.</p> <p>The plan defines a general format for international telephone numbers on the world-wide public switched telephone network (PSTN). Plan-conforming numbers are limited to a maximum of 15 digits, following the format + country code (1-3 digits) subscriber number (12-14 digits).</p>

The screenshot shows a web interface with four tabs: 'Destinations', 'Tariff Types', 'Spend Limits', and 'Settings'. The 'Settings' tab is selected and highlighted with a blue underline. Below the tabs, there are two rows of configuration options. The first row is 'CDR Number format' with a dropdown menu showing 'Australian FNN' and a blue arrow icon. The second row is 'Destination Number format' with a similar dropdown menu showing 'Australian FNN'. At the bottom left of the configuration area, there is a 'Save' button.

Figure 43: Tariff Settings tab

Service types

Service types define the software and parameters used to create a physical service in Smile. Service type configuration includes user interface, provisioning, rating, CAT and Smile display form definitions.

To view service types, select **Service Types** under **Services, Ordering & Rating** on the Configuration and Tools page.

Changing the definitions of a service type can seriously affect your company's billing. Service types are advanced configuration. For more information, [contact Inomial](#).

The Service Types page displays a summary of configured types. A service type has two areas of configuration:

- **Smile Configuration**—specifies forms and settings used for the appearance and provisioning actions of a service.
- **CAT Configuration**—specifies the forms used for the appearance and configuration of CAT for a service.

A service type is defined at the **Service Types** drop-down on the [Settings](#) tab of a service.

Service type properties

Smile Configuration

Name	Specifies a descriptive name of the service type.
Username	Specifies if and how a username is provided to the service. <ul style="list-style-type: none"> • No username • Username is provided by the service • Prompt for a username on the service order form
Services of this type have passwords	When selected specifies that services of this type require a password.
Service usernames of this service type must be unique across this service	When selected specifies that all usernames used across this service are different.
Configuration Form	Specifies the document form from which Smile retrieves configuration object information.
Account Configuration Form	Specifies the document form from which Smile retrieves configuration object information for the account tab.
Plan Form	Specifies the document form from which Smile retrieves object information for plan tabs.
Lifecycle form	Specifies the document form from which Smile retrieves lifecycle object information for the creation, definition and update of subscriptions.

Creation Form	Specifies the document form from which Smile retrieves creation object information when creating services.
Rating Source	Specifies the name of the Java class that defines how CDRs are brought into the rating engine.
Call Detail Writer	Specifies the name of the Java class that defines how call detail is written for a service.
Provisioning retry delay	Specifies the time in milliseconds that Smile waits before retrying a provisioning request.
Retry count	Specifies how many times Smile retries a provisioning request before failing.
Provisioning 'in progress' timeout	Specifies the time in seconds Smile waits for a response from an external service provisioning request before the request times out.
Supports master/child services	When selected specifies that the service supports master and child service configurations. When selected a Master/Child Services button is added to the Settings tab of a service.
Comments	Specifies a free text field for service type comments and information.

CAT Configuration

CAT Form	Specifies the name of the form that is displayed to users logging into CAT.
CAT Config Form	Specifies the name of the form that is used to configure various options for the service and CAT. CAT features are defined in the configuration of the service itself.

Importers

Importers are used for importing usage data into Smile to complete rating and invoice generation.

A configured importer specifies the importer type, location or method of retrieving usage data files, configuration options applied during import, error actions, relevant services and the task schedule of the import action.

To view Smile Importers, select **Importers** under **Services, Ordering & Rating** on the Configuration and Tools page.

Importer types are internally defined in Smile. Importer types are advanced configuration. For more information, [contact Inomial](#).

The Smile Importers main page displays a summary list of configured importers and import results. The following actions can be taken on configured importers:

- **View**—displays current import results for an importer, including the number of successful and failed file and item events.
- **Configure**—displays the configuration of the importer. The configuration of an importer can be edited.
- **View Errors**—displays import errors by importer, failure type and missing subscriptions. For more information about how to check for failed import items, see the *User Guide*.

Import Results						
Importer	Last Completed	Items Processed	Files Failed	Items Failed	Recent Files	Recent Items
Voice Standard Smile	Never	236	0	1353	0	0 View Configure
<input type="button" value="View Errors"/> <input type="button" value="Add"/>						

Figure 44: Smile Importers

Add an importer

Smile importers define how Smile gets and handles usage data. An appropriate **Importer Type** is required to add an importer.

This task explains how to add an importer.

1. Select **Importers** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Smile Importers page is displayed.
2. Click **Add**.
A **New Importer** window is displayed.



Figure 45: New Importer window

3. Type a name for the importer in the **Name** field.
4. Select **Flexible CSV CDR Importer** from the **Importer Type** drop-down.
Importer Types are internally defined. For more information, [contact Inomial](#).
5. Click **Create**.
The Configure Importer page is displayed.
6. Complete the required importer configuration fields.
7. Click **Manage Scheduled Task** to define when and how often the importer runs.
For more information, see the *Configuration Guide*.
8. Click **Save**.
The Smile Importers page is displayed. The importer is added to the **Import Results** summary list.

Importer properties

The configuration properties of an importer are determined by the Importer Type selected during creation. Smile provides proprietary importers for a number of upstream provider formats and field properties vary between importer type.

The following properties are the configuration fields provided in Smiles standard CDR CSV Importers for FTP and SFTP.

Smile CDR CSV Importer (FTP)

Name	Specifies a descriptive name of the importer.
FTP Hostname	Specifies the FTP hostname from which Smile retrieves the CDR CSV.
FTP Username	Specifies the username that Smile provides to the FTP host.
FTP Password	Specifies the password that Smile provides to the FTP host.
Starting directory	Specifies the starting directory. Leave blank to use the default.
Spool directory	Specifies the Smile directory in which Smile places files to be processed.
Filename regex	Specifies the regular expression defining which files to fetch. The importer will only download files matching this pattern. Leave blank to use the default.
Import CDR files from sub-directories	When selected specifies that CDRs are imported from sub-directories under that Starting directory on the FTP server.
Character encoding (defaults to System's encoding)	Specifies character encoding format.
Ignore CDR entries before	Specifies that CDR entries older than the specified date are not processed.
Lookup usernames in	Specifies where Smile will look to match usernames on CDRs. <ul style="list-style-type: none"> • Subservices and Subscriptions • Subscriptions • Subservices
Convert FNN Caller & Called numbers to E.164 format	When selected specifies that Australian Full National Number Caller and Called numbers are converted to E.164 international public telecommunication numbering format.
Age Threshold to be "recent"	Specifies the time, in hours, within which a file or item is classified as recent on the Smile Importers summary page.

Error Ticket	<p>Specifies if a helpdesk ticket is created by Smile in the event of an import error.</p> <ul style="list-style-type: none"> • Don't raise tickets on errors • <i>template ticket name</i>
---------------------	--

For more information, see [Template tickets](#).

Service	Specifies services that Smile will search to find matching subscriptions.
----------------	---

Manage Scheduled Task	Specifies when and how often the importer runs to automatically import CDRs.
------------------------------	--

For more information, see [Task scheduling](#).

Smile CDR CSV Importer (SFTP)

Name	Specifies a descriptive name of the importer.
Spool subdirectory for fetched files	Specifies the Smile subdirectory in which Smile places files to be processed.
Remote Hostname	Specifies the hostname of the remote server from which Smile retrieves the CDR CSV.
Remote port	Specifies the port number of the remote server from which Smile retrieves the CDR CSV. Default port number is 22.
Remote username	Specifies the username that Smile provides to the remote host.
Filename of local private key (id_dsa)	Specifies the name of the file containing the private key Smile users to authenticate the SFTP session.
Remote directory containing CDRs	Specifies the directory on the remote server from which Smile begins fetching files.
Remote filename regex	Specifies the regular expression defining which files to fetch. Importer will only download files matching this pattern. Leave blank to use the default.
Traverse the remote directory recursively	Specifies that the importer will traverse the remote directory recursively before proceeding.
Character encoding (defaults to System's encoding)	Specifies character encoding format.
Ignore CDR entries before	Specifies that CDR entries older than the specified date are not processed.
Lookup usernames in	<p>Specifies where Smile will look to match usernames on CDRs.</p> <ul style="list-style-type: none"> • Subservices and Subscriptions • Subscriptions • Subservices

Convert FNN Caller & Called numbers to E.164 format

When selected specifies that Australian Full National Number Caller and Called numbers are converted to E.164 international public telecommunication numbering format.

Age Threshold to be "recent"

Specifies the time, in hours, within which a file or item is classified as recent on the Smile Importers summary page.

Error Ticket

Specifies if a helpdesk ticket is created by Smile in the event of an import error.

- **Don't raise tickets on errors**
- ***template ticket name***

For more information, see [Template tickets](#).

Service

Specifies services that Smile will search to find matching subscriptions.

Manage Scheduled Task

Specifies when and how often the importer runs to automatically import CDRs.

For more information, see [Task scheduling](#).

Custom fields

Custom fields let you define specialisations within Smile's existing schema. For example, you can define custom fields that let you map fields in different databases, construct workflows or specify display properties.

Using custom fields, you can define additional:

- **fields**—for example, add a custom client ID field to a subscription form
- **metadata**—for example, specify display properties for a field in a web sign-up form

Configuration and settings in pre-defined fields cannot be altered. Pre-defined fields cannot be deleted. Additional custom fields specific to your configuration can be edited and deleted.

In Smile's schema, custom field information is contained in the `<Object/>` element. To view custom field information, select **Custom Fields** under **Services, Ordering & Rating** on the Configuration and Tools page.

Existing field names

The following table lists the field names that are predefined in Smile. To avoid unexpected behaviour, do not give a custom field the same name as an existing field.

<ul style="list-style-type: none"> • abn • billAddress • billBuildingName • billCountry • billFloorNumber • billLotNumber • billName • billNumber • billPostalDeliveryType • billPostCode • billPrintName • billState • billSubUnit • billSuburb • billType • billTypeSuffix • comments • companyPosition 	<ul style="list-style-type: none"> • contactFamily • contactGiven • contactTitle • dob • emailAddress • fax • framedIpAddress • framedIpNetmask • homePhone • jabberAddress • mobilePhone • name • preferredHomeContactTime • preferredMobileContactTime • preferredWorkContactTime • secretAnswer • secretQuestion • sex 	<ul style="list-style-type: none"> • streetAddress • streetBuildingName • streetCountry • streetFloorNumber • streetLotNumber • streetName • streetNumber • streetPostalDeliveryType • streetPostcode • streetPrintName • streetState • streetSubUnit • streetSuburb • streetType • streetTypeSuffix • tradingName • username • workPhone
---	---	---

Create a custom field

Custom fields created for your Smile configuration are added to the **Custom Field** list, under the **Pre-Defined fields** list on the Custom Fields page.

This task explains how to create a custom field.

1. Select **Custom Fields** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Custom Fields page is displayed.
2. Click **Create new....**
The Create New Field page is displayed.



Figure 46: Create new field page

3. Type a **Field name**.
4. (Optional) Type a **Field ID**.
5. Select a **Field type** from the drop-down.
For more information, see [Field type / Attribute type](#).
6. Select an option from the **Only allow this field to be added to:** drop-down.
For more information, see [Field object action](#).
7. Click **Create Field**.
The Custom Fields page is displayed.

Field type / Attribute type

The field or attribute type specifies the format of a field.

Note: Once a custom field has been created the type cannot be changed.

Table 9: Field type / Attribute type options:

Field type	Additional option	Additional option choices
Text		
Date		
Phone Number		
Email Address		
True or False		
Number		
Select from collection	Collection	Not Set
		New Database
Service Feature		
Link to Smile Object	Object Type	Not Set
		Account
		Subscription
Reservation from pool	Pool	Not Set
Compound (with sub-fields)	Existing Object Type	Create a new type for this field
		General
	Add a Sub-Field	Not Set
		(All entries from Custom Fields page)

The following field types require additional explanation:

Select from collection

Define a collection of choices that are presented as a drop-down list. For more information on defining collections, see [Custom collections](#).

Link to Smile Object

Create a link to related Account or Subscription.

Reservation from pool

Provides a list of pre-defined available numbers. For more information on defining number and address pools, see [Configuring resource management](#).

Compound (with sub-fields)

Define a new custom field made up of multiple individual custom fields. For more information, see [Creating a compound custom field](#).

Create a compound custom field

This task continues from step 5 of [Creating a custom field](#).

This task explains how to create a compound custom field.

1. Select **Compound (with sub-fields)** from the **Field type** drop-down.
A sub-field list is added to the Create New Field page.
2. Select a sub-field from the **Add a sub-field** drop-down. Click **Add Sub-Field**.
The selected field is added the sub-fields list.
3. Repeat the previous step to add additional sub-fields.
4. Click **Create Field**.
The Custom Fields page is displayed.

Field object action

Custom fields can be made available to **all** objects or views in Smile or limited to only one. It is not possible to select multiple objects or views.



Tip: The field object action can be changed after a custom field has been created by clicking **View** to the right of the custom field on the Custom Fields page.

Objects listed in the **Only allow this field to be added to:** drop-down:

- Any object (default)
- Account
- Database entry
- Dispatched Email
- Document Action
- IP Pool
- Package
- Plan
- Search
- Service
- Service Feature
- Service Qualification Custom Configuration
- Subscription
- Subservice
- Ticket
- UO Attribute Type Properties
- UO Form Attribute Properties
- UO Form properties
- User defined

Custom collections

Custom collections are an enumeration of values available to a custom field. You can use a custom collection to specify a value for a custom field.

For example, you can define a custom collection of equipment that may be included with a new subscription, or define a custom collection of plans to assign to a workflow.

One or more entries from a collection can be attached to accounts, subscriptions, plans, service definitions and other custom databases and fields.

A defined collection of choices is presented as a drop-down list.

To view custom collection information, click **Custom Collections** under **Services, Ordering & Rating** on the Configuration and Tools page.

Add a custom collection

Custom collections can be created as an individual task or during the task of [Creating a custom field](#).

This task explains how to create a custom collection.

1. Select **Custom Collections** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Custom Collections page is displayed.
2. Click **New collection**.
The New custom collection page is displayed.
3. Type a name in the **Collection name** field.
4. Click **Select** to the right of the **Database Entry** object type.
The Custom Collections page for the new collection is displayed.
5. Click **Add**.
A **Database entry:** window is displayed.
6. Type an entry in the **Name** field. Click **Save**.
The Custom Collections page for the new collection is displayed.
7. Repeat the previous step to add additional entries.
8. Click **Save**.
The Custom Collections page is displayed.

Usage and spend management

Smile offers multiple methods to help you manage customer usage and spend. One or more of the following methods can be configured:

- **spend limits**—a limit on the amount a subscription can spend on a particular usage type in a rating period.
- **value pools**—the monetary amount of included usage in a plan.
- **usage alert groups**—the physical amount of included usage in a plan.

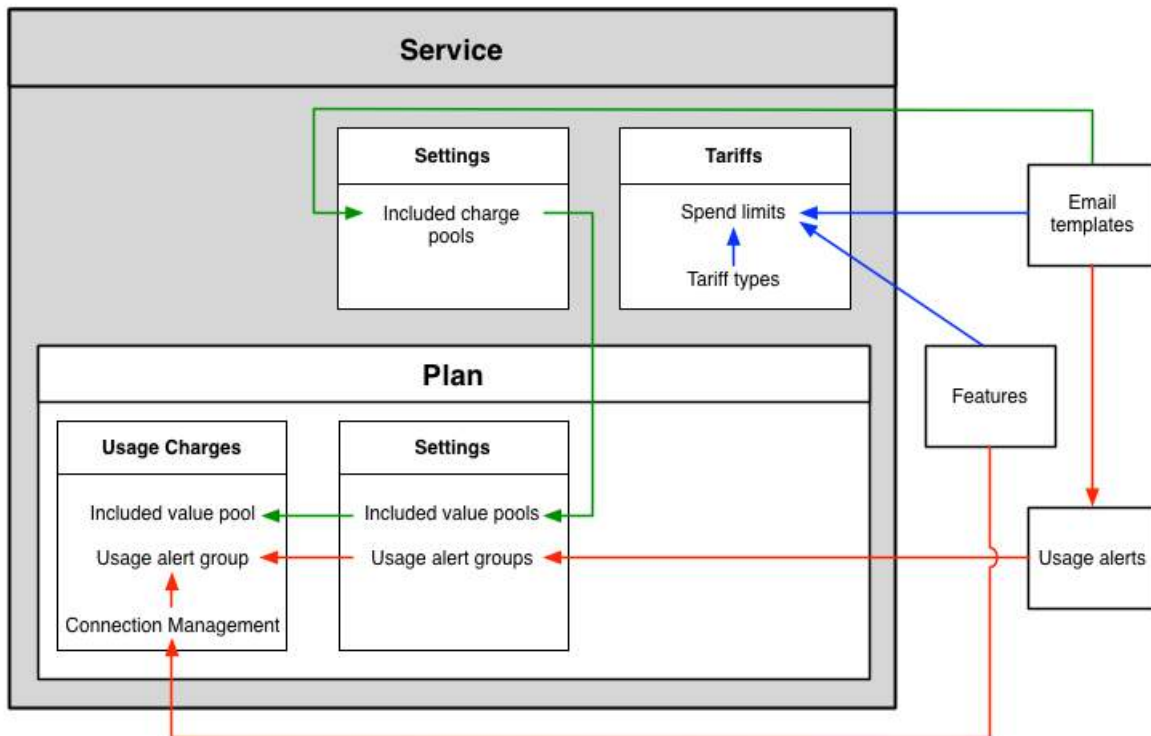


Figure 47: Usage and spend management configuration in Smile

Spend limits

A spend limit restricts the amount a subscription can spend on a particular type of usage in a rating period. For example, you can apply a \$100 spend limit for international calls to a mobile subscription.

Smile resets the value of each spend limit to \$0 at the start of each rating period and when a subscription changes plan.

If a customer exceeds a spend limit, Smile applies a feature to the subscription. A feature is an item that modifies a subscription and that can be switched on and off, for example, shaping or call barring.

A subscription's default spend limits are defined on the corresponding service.

Configuration of the following components combine to create a spend limit:

- **Features**—specifies a feature that is applied when the spend limit is exceeded.
- **Email template**—specifies a standard message and format of the notification to the customer when a specified alert threshold has been exceeded.
- **Tariff type**—specifies the types of usage the spend limit applies to.
- **Spend limit**—specifies the monetary spend limit and [alert threshold](#) values.

Value pools

A value pool tracks the monetary amount of included usage that a subscription spends in a rating period. A subscription can have multiple value pools, for example, a mobile subscription may have a \$100 value pool for local calls and a \$50 value pool for mobile data downloads.

Smile resets each value pool to \$0 at the start of each rating period and when a subscription changes plan. The value pool limit is pro-rated for incomplete rating periods, for example, if a subscription changes plan halfway through a month.

Configuration of the following components combine to create value pool spend management:

- **Email template**—specifies a standard message and format of the notification to the customer when a specified alert threshold has been exceeded.
- **Included charge pools**—specifies the [alert thresholds](#) and [email template](#) for customer notification when thresholds are exceeded.
- **Included value pools**—specifies the monetary limit of usage for the included charge pool. Included value pools are specified on the plan [settings](#).
- **Include value pool**—specifies the pool that will be applied to a [usage charge](#) rule.

Usage alert groups

A usage alert group tracks the physical amount of included usage that a subscription consumes in a rating period. A subscription can have multiple usage alert groups for different types of usage.

Smile resets the value of each usage alert group to 0 at the start of each rating period and when a subscription changes plan. The usage alert group limit may be pro-rated for incomplete rating periods, depending on your Smile configuration. You use plan rules to define pro-rating for usage alert groups.

You can configure a plan rule to perform an action when a subscription exceeds the value of a usage alert group, for example, suspend or shape the subscription.

Configuration of the following components combine to create usage alerts:

- **Features**—specifies a feature that is applied when the spend limit is exceeded.
- **Email template**—specifies a standard message and format of the notification to the customer when a specified alert threshold has been exceeded.
- **Usage alerts**—specifies the [alert thresholds](#) and [email template](#) for customer notification when thresholds are exceeded.
- **Usage alert groups**—specifies the alert groups that are available for use on a plan. Usage alert groups are specified on the plan [settings](#).
- **Connection management**—specifies the feature on the [usage charge](#) rule that will be applied.
- **Usage alert group**—specifies the alert group that will manage alert settings for the [usage charge](#) rule.

Alert thresholds

An alert threshold is a percentage of value that, when consumed, triggers a notification. Alert thresholds apply to spend limits, value pools and usage alert groups.

Alert thresholds help you manage customer spend and prevent bill shock. If configured to do so, Smile notifies customers when they exceed an alert threshold and consume a certain percentage of their included value. Default alert thresholds are defined on a service or plan, but you can customise the alert thresholds for a subscription's spend limits or usage alert groups.

Usage alerts

A usage alert specifies the [alert thresholds](#), alert method and schedule for customer notifications when thresholds are exceeded. Usage alerts are used as part of spend management to track the physical amount of included usage that a subscription consumes in a rating period.

For more information, see [Usage and spend management](#).

Add a usage alert group

Multiple usage alert groups can be configured for use in usage and spend management.

This task explains how to add a usage alert group.

1. Select **Usage alerts** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Usage alert groups page is displayed.

2. Click **New usage alert group**.

A Usage alert group page is displayed.

Usage alert group

Home > Configuration and Tools > Usage alert groups > Usage alert group

Name:

Unit Format:

Email

Template: [New](#)

Schedule:

☐ Account Email address

☐ Subscription Email address

SMS

Template: [New](#)

Schedule:

☐ Account Mobile phone

☐ Subscription Mobile phone

☐ Subscription Username

Print

Template:

Schedule:

Alert levels

%	Alert level
%	Subscribe new users

There are no alert levels set up yet

Add level: % [Add](#)

[Save](#) [Delete](#)

Figure 48: New Usage alert group page

3. Complete the following fields:

- **Name**—Specifies a name for the group.
- **Unit Format**—Specifies a string format to define how an amount is displayed. For more information, see [Quantity format](#).

4. Complete notification method configuration as required.

Multiple methods can be specified. For more information, see [Notification configuration methods](#).

5. Type an alert level value in the **Add level** field. Click **Add**.

The value is added to the **Alert levels** list.

6. (Optional) Repeat the previous step to add additional levels.

7. Click **Edit** to the right the first entry in the **Alert levels** list.

The **Usage alert level** page is displayed.

8. Select the **Subscribe new users to this level by default** checkbox. Click **Save**.

The **Usage alert group** page is displayed.

9. Repeat the previous step for each **Alert levels** entry.

10. Click **Save**.

The Usage alert groups page is displayed.

Chapter

5

Configuring plans

Plans

A plan is a set of rules that determines how much to charge for a subscription. Plans include the following components:

- **usage charges**—specify how much to charge for different blocks of continuous use, for example, telephone flagfall and timed charges or mobile internet downloads. Usage charges also include plan-specific tariffs and policy configuration rules, for example, a rule that shapes a customer's usage if they exceed a download limit.
- **recurring charges**—specify a regular charge that is not based on usage, for example, an insurance surcharge.
- **setup charges**—specify an initial charge to add a customer to the plan, for example, an ADSL connection fee. Some plans do not have a setup charge.
- **settings**—specify conditions that apply to the plan as a whole, for example, minimum usage charges and the value of included usage.

Plans can also contain special offers, for example, the first month of usage is free.

Plans are static. Once you set up a plan, the plan definition does not change until you change the configuration.

Plan schedules

A plan schedule lists the plan that a subscription uses at a particular point in time.

Each subscription has a plan schedule associated with it. The active plan in the plan schedule tells you how much to charge for the subscription, even if the subscription is free. The plan schedule lets you change the plan that a subscription uses now or in the future.

Plan tabs

A plan has a number of configuration tabs. Some tabs are service dependant and will only be displayed when applicable.

Plan tabs are accessible from the Service and Plans page. On the **Billing** tab of a service do one of the following:

- click **Create a new plan...**
- click **View** next to an existing plan

Table 10: Plan tabs

Tab	Sub-tab	Service	Purpose
Usage Charges		All	Specifies the rules for how much to charge for different blocks of continuous use, for example, telephone flagfall and timed charges or mobile internet downloads.
Settings		All	Specifies base plan configuration settings relating to plan setup, minimum and session charges, plan validity and spend management.
Tariffs	Plan-specific Tariffs	Telephony	Specifies tariffs that override tariffs defined at a service level.
	Destination Setup	Telephony	Specifies plan-specific destination overrides.
Features (Policies)		All	Specifies policies that can modify a subscription and that can be switched on and off, for example, shaping or call barring.
Recurring Charges		All	Specifies regular charges that are billed on a fixed repeating schedule, such as weekly, monthly, quarterly or annually, and not based on usage.
Self Serve Prepaid		All	Specifies prepaid time and data blocks that can be added to a plan and who can add them.
Contracts		All	Specifies which service contracts are applicable to a plan.

Save and Deprecate

Each plan tab displays a **Save** and **Deprecate** button at the bottom of the page. These buttons apply to the plan, not just the tab page currently visible.

Clicking **Save** will save all changes made across all plan tabs.

Clicking **Deprecate** will deprecate the entire plan. To retrieve a plan deprecated in error remove the **Valid to date** on the plan **Settings** tab.

Usage charges

Usage charges specify how much to charge for different blocks of continuous use, for example, telephone flagfall and timed charges or mobile internet downloads. Usage charges also include plan-specific tariffs and policy configuration rules, for example, a rule that applies a shaping policy if a customer exceeds a download limit.

The Usage Charges tab displays a summary of the usage charge rules that apply to a plan. It displays the charge type, the plan option the rule applies to, a charge code, an invoice item description and the charge. The charges are displayed in the order that Smile processes the rule. The set of rules applied to a plan must be complete to handle all usage events. If Smile cannot match a charge against a rule during processing then an error will be generated.

How usage charge rules are processed

When applying usage charges Smile undergoes a process of identification and classification.

1. **Smile identifies the subscription's plan**—Usage data is generated each time a customer uses a subscription. Usage data contains the information Smile needs to rate each subscription's usage. Smile imports usage data from several sources, for example, from RADIUS or NetFlow servers, and activity statements (CDRs) from upstream providers.
2. **Smile determines the CDRs destination**—Smile uses the metadata recorded along with the CDR to determine the destination. Smile comes with a default set of rules that it applies for voice and data destination resolution. You will be using Smile's default resolution rules unless your business has additional rules in place. For more information, see [Charge types and units](#).
3. **Smile splits the usage records into their components**—Smile splits the usage records into their component charge type. Charge types specify separate, identifiable elements of charges that are used in the rating of services provided to customers. For example, charge types include mobile and national flagfall and timed charges; data transmitted and received; and time online. Each charge type specifies the unit or multiple units at which it is charged, for example duration time of a call or internet session; or volume of data uploaded or downloaded.
4. **Smile processes the individual components using the plan's usage charge rules**—Smile processes the individual components using the plan's list of usage charge rules, working in descending order. When Smile has exhausted a rule or the usage does not apply it moves onto the next rule, continuing until all records have been processed through a rule. If Smile cannot process a record through a rule it generates an error.

The output of the plan rules may be a set of invoice line items that are collected together for invoicing.

View usage charges tab

The Usage Charges tab lists the charge rules Smile applies to a plan, in the order in which they are processed.

This task explains how to access the Usage Charges tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.

Add a usage charge rule

Adding a usage charge rule creates a new charge rule line item on the Usage Charges tab. Smile will process usage through the rule. Multiple charge rules can be added.

This task explains how to add a new usage charge rule.

1. On the **Usage Charges** tab, click the drop-down next to **Add rule**.
The **charge type** list is displayed.
2. Click the required charge type.
The selected charge type is displayed.
3. Click **Add**.
A **Usage Charges** properties page is displayed.
4. Complete the required fields.
For more information, see [Usage charges properties](#).
5. Click **Save**.
The **Usages Charges** tab is displayed.

Usage charges properties

Charging

Rate Calculation	<p>Specifies how the charging rate for this rule is to be determined.</p> <ul style="list-style-type: none"> • Use Plan Rule • Use Tariff Rate • Use Tariff Flagfall • Use Wholesale Rate
Retail markup <i>n</i>%	<p>Specifies the charge markup when Use Wholesale Rate is selected as the Rate calculation type. For example, a value of 110% will charge 10% more than the ex tax wholesale rate.</p>
Fixed charge: \$0.000000 per charging unit	<p>Specifies the ex tax charge per charging unit when Use Plan Rule is selected as the Rate Calculation.</p> <p>The charging units displayed are linked to the charge type selected when creating the usage charge rule. Common charge types are data-based, time-based and per-call.</p> <p>For more information, see Charge types and units.</p>
Decimal Places	<p>Specifies the precision required for calculating charges using this rule. Fewer decimal places may result in rounding errors. Charges are calculated per session.</p> <ul style="list-style-type: none"> • 0 to 8
Invoice Item Text	<p>Specifies text that appears on the invoice.</p>
Do not print this item if the charge is zero	<p>When selected specifies that the charge item is not included on an invoice or statement when the item has a \$0 value. The charge is still visible in Smile.</p>
Do not add this item if the charge is zero	<p>When selected specifies that the charge item is not visible in Smile when the item has a \$0 value.</p>
Approval limit	<p>Specifies a dollar value that if exceeded will require approval before being invoiced.</p>
Sales report category	<p>Specifies the category to which the charge is applied for reporting.</p> <ul style="list-style-type: none"> • Select category from drop-down <p>For more information, see Sales report categories.</p>
Quantity Format	<p>Specifies a string format to define how an amount is displayed.</p> <p>For more information, see Quantity format.</p>
Display Rate	<p>Specifies the text value of the charge rate to display on the invoice.</p>

Display Order

Specifies the display order of the charge on an invoice. For example, a value of 0 will list the item at the top of the invoice. A value of 9 will display it lower.

Allow operators to enter a custom rate and limits for this rule in service plan schedules

When selected allows a Smile operator to edit the charging rate and rule limits of the plan within the customer account.

Connection management

Specifies a feature that may be applied to a subscription when a usage alert group is used to manage customer usage and spend.

For more information, see [Usage and spend management](#).

Apply this feature x if this rule is triggered during a connection

Specifies if a feature is applied when a rule limit is met. For example, speed shaping or call barring. Features available on a plan are set on the plan's **Features** tab.

- **Do not apply any feature**
- **Select feature from drop-down**

For more information, see [Features](#).

Date restrictions

Date restrictions specify date, day and time limits for a rule. For example, peak and off-peak usage periods.

Start date

Specifies the start date validity of a rule.

End date

Specifies the end date validity of a rule.

Apply only on these days

Specifies specific day or day ranges to which a rule applies.

- **Sunday**
- **Monday**
- **Tuesday**
- **Wednesday**
- **Thursday**
- **Friday**
- **Monday - Friday**
- **Saturday**
- **Saturday - Sunday**
- **Monday - Sunday**

Start time

Specifies the start time of a rule. Time is applied as per the timezone set in the subscription. Time is entered in 24 hour time format. For example, 3pm = 15:00:00.

End time Specifies the end time of a rule. Time is applied as per the timezone set in the subscription. Time is entered in 24 hour time format. For example, 3pm = 15:00:00.

Prepaid rules

If prepaid usage is available, consume it instead of applying this rule. When selected prepaid usage is exhausted before the rule is applied.

Consume from x prepaid type Specifies the prepaid type that usage is consumed from. Prepaid types must be defined before they are available for selection.

- **any**
- **select type from drop-down**

For more information, see [Prepaid types](#).

Apply this rule only to prepaid usage. When **If prepaid usage is available, consume it instead of applying this rule** is selected, this checkbox **must** be selected as well. Prepaid usage will be consumed first, up to the rule limits, before any later rule is processed.

Automatically add x when prepaid usage expires Specifies the prepaid usage block that is automatically charged when prepaid is exhausted. Prepaid blocks must be defined before they are available for selection.

- **No prepaid usage**
- **Select block from drop-down**

For more information, see [Prepaid blocks](#).

Rule limits

Rule limits specify the unit amounts that apply to the usage charge. Smile will process the component charge type through the rule until the limits have been reached.

The charging units displayed are linked to the charge type selected when creating the usage charge rule. Common charge types are data-based, time-based and per-call.

For more information, see [Charge types and units](#).

Apply to subscribers of Specifies that rule limits only operate on subscriptions who are subscribed to the selected plan option.

- **Any plan option**
- **Select option from drop-down**

For more information, see [Charging options](#).

Units per day n charge unit

Specifies the maximum number of selected charge units per day allowed for this usage charge rule.

When a plan option is selected against **Apply to subscribers of** the following options are displayed:

- **Fixed limit**
- **Based on the plan option** n x the plan option's quantity

Units per session n charge unit

Specifies the maximum number of selected charge units per session allowed for this usage charge rule.

When a plan option is selected against **Apply to subscribers of** the following options are displayed:

- **Fixed limit**
- **Based on the plan option** n x the plan option's quantity

Scripted rule limit

Specifies a rating script that acts as a rule limit. [Contact Inomial](#) for information about the use and creation of rating scripts.

Maximum total units

Specifies that maximum total charging units applied to this rule over a rating period.

When a plan option is selected against **Apply to subscribers of** the following options are displayed:

- **Fixed limit**
- **Based on the plan option** n x the plan option's quantity

The charging units displayed are linked to the charge type selected when creating the usage charge rule. Common charge types are data-based, time-based and per-call.

For more information, see [Charge types and units](#).

Add to the usage alert group's total

Specifies if the value set for **Maximum total units** is added to the alert groups total. The alert group is selected below at the **Usage alert group** drop-down.

Pro-rata if applicable

When selected this option causes the rule's **Maximum total units** to be pro-rated where a plan is only active for part of a rating period.

Included value pool

Specifies an included value pool that will be applied to the usage charge rule. The included value for each value pool is specified on the plan **Settings** tab.

For more information, see **Included Value Pools** on the plan [Settings](#) tab.

Usage alert group

Specifies the usage alert group that will manage alert settings for the usage charge rule. This list is populated from the plan settings.

- **Does not affect usage alerts**
- **Select group from drop-down**

For more information, see **Usage alert groups** on the plan [Settings](#) tab.

View or edit a usage charge rule

Viewing a usage charge rule lets you view all details of the rule. Usage charge rule details can also be edited. Smile will apply changes immediately unless a start or end date is specified.

This task explains how to view or edit a usage charge rule.

1. On the **Usage Charges** tab, click **View** to the right of a usage charge rule line entry.

The usage charge rule properties page is displayed.

2. Edit the required fields.

For more information, see [Usage charges properties](#).

3. Click **Save**.

The **Usage Charges** tab is displayed.

Change usage charge rule order

Smile processes charge rules in the order they are displayed in the usage charges table. When Smile has exhausted a rule or the usage does not apply it moves on to the next rule.

This task explains how to re-order rules in the usage charges table.

1. To move a charge rule do one of the following:

- Click **Up** to the right of the rule to move it up the list.
- Click **Down** to the right of the rule to move it down the list.

The rule line item will move up or down the table by one line.

2. Repeat as necessary until the rule is in the required location.

Delete a usage charge rule

Deleting a usage charge rule removes the rule from the usage charges table. Smile will no longer process usage through the rule.



Tip: To close an active charge rule, without deleting it, specify an **End date** in the Date restrictions section of the usage charge settings. See [View or edit a usage charge rule](#).

This task explains how to delete a usage charge rule.

1. On the **Usage Charges** tab, click **Delete** to the right of the rule in the Usage Charges table.
The **Please confirm** window is displayed.
2. Click **Continue**.
The **Usage Charges** tab is displayed.

Settings

The plan settings tab covers base plan settings not related to usage and recurring charges and features.

Plan settings specify the following information:

- plan name
- setup, minimum and session charges
- plan validity dates
- included usage blocks
- usage alert groups
- included value pools

View settings tab

The Settings tab specifies base plan configuration settings relating to plan setup, minimum and session charges, plan validity and spend management.

This task explains how to access the Settings tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Settings** tab.
The **Settings** tab is displayed.

Settings properties

Plan Code	This is the short plan code specified at creation of the plan. You cannot edit this code.
Plan Name	Specifies a descriptive name for the plan. You can edit this name.
Admin Description	Specifies a longer description of the plan, viewable by Smile operators.
User Description	Specifies a longer description of the plan, viewable by CAT users.
User objects	
Add custom field	Specifies custom fields to add to plan settings.
	<ul style="list-style-type: none"> • Select a custom field to add > Add
	For more information, see Custom fields .

Extra Charges

Setup charge	Specifies a one-off setup charge applied during ordering. <ul style="list-style-type: none"> • Change... For more information, see Add or change a setup charge .
No minimum charge is defined / Minimum charge	Specifies a minimum charge for the rating period. <ul style="list-style-type: none"> • Change For more information, see Add or change a minimum charge .
Minimum session charges are not calculated / Minimum session charge	Specifies a minimum charge applied to every session or call on a plan. <ul style="list-style-type: none"> • Change For more information, see Add or change a minimum session charge .

Rounding

Enable credit limits on services using this plan	When selected a credit limit can be set on the plan.
Credit limit	Specifies a credit limit that is applies to all subscriptions using this plan. Leave blank to apply credit limits on a per user/account basis.
Rate items on this plan independently of other items in the same period	When selected suppresses plan rating errors.
Valid from	Specifies the start date validity of the plan.
Valid to	Specifies the end date validity of the plan.

Prepaid

Defer Usage Block Payment	When selected specifies that a usage block payment is deferred.
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Included usage blocks

Included usage blocks lists prepaid usage blocks that are added to plan subscribers automatically at each billing period. If configured for a usage block, valid from and to dates are displayed. Usage blocks are defined in [Prepaid blocks](#) under [Prepaid time and data](#).

Add included usage block	Adds a usage block to the Included usage blocks list. Select a block from the drop-down, click Add . For more information, see Add included usage blocks .
---------------------------------	---

Usage alert groups

Usage alert groups list all available configured groups. Usage alert groups are defined in [Usage alerts](#).

New alert group

Adds a usage alert group to the **Usage alert groups** list. Multiple groups can be added.

For more information, see [Add an alert group](#).

Included Value Pools

Specifies the monetary limit of usage a subscription can spend in a rating period.

Included Value Pools lists all pools specified in **Included charge pools** under the corresponding service settings.

For more information, see [Included charge pools](#) and [Usage and spend management](#).

Rating Scripts

Rating Scripts list all advanced plan rating scripts applied to the plan. Available rating scripts are defined in [Rating scripts](#).

Add rating script

Adds a plan rating script to the **Rating Scripts** list.

For more information, see [Add a rating script](#).

Publish / Unpublish

Changes the publish state of a plan.

For more information, see [Publish a plan](#) and [Unpublish a plan](#).

RADIUS...

Specifies RADIUS allowances. Allowances only apply to plans using Smile's RADIUS server.

For more information, see [RADIUS allowances properties](#).

Advanced

Specifies advance plan options.

Session time rounding *n* seconds

Specifies the number of seconds that session time is rounded up to.

Start billing in the next minute

When selected specifies that billing is started in the next minute.

Minimum pro-rata days

Specifies a minimum value to calculate limits for a pro-rated period.

The plan causes the account to be locked.

When selected plan settings may override subscription level settings.

Delete Plan

Permanently deletes the current plan and all of its settings.

For more information, see [Delete a plan](#).

Add or change a setup charge

A setup charge is a charge applied when a subscriber first begins a plan.

This task explains how to add or change a setup charge.

1. Under the **Extra Charges** section on the **Settings** tab, click **Change...** to the right of the **Setup charge** line.

A Setup charge page is displayed.

2. Select the **Charge a setup fee** checkbox. Click **Save**.

Setup fee property fields are displayed.



The screenshot shows a configuration form for a setup charge. At the top, there is a checkbox labeled "Charge a setup fee" which is checked. Below this are several input fields: "Rate" with the value "0", "Description" with the value "Setup charge", "Invoice display order" with the value "0", "Sales report category" with a dropdown menu showing "Uncategorised Transaction", and "Discount category" with a dropdown menu showing "Setup charge". At the bottom left of the form is a "Save" button.

Figure 49: Setup charge page

3. Complete the setup fee properties:

- **Rate**—Specifies the numerical ex tax value of the setup fee.
- **Description**—Specifies the invoice item text of the setup fee.
- **Invoice display order**—Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display the charge item lower.
- **Sales report category**—Specifies the sales report category the charge is allocated to. For more information, see [Sales report categories](#).
- **Discount category**—Specifies a discount or commission category for the setup fee. For more information, see [Charge types and units](#).

4. Click **Save**.

The charge option properties page is displayed.

Add or change a minimum charge

A minimum charge is a minimum cost charged for the plan regardless of use.

This task explains how to add or change a minimum charge.

1. Under the **Extra Charges** section on the **Settings** tab, click **Change...** to the right of the **Minimum charge** line.

The Minimum charge page is displayed.

2. Select the **This plan has a minimum charge** checkbox. Click **Save**.

Minimum charge property fields are displayed.

Figure 50: Minimum charge page

3. Complete the minimum charge properties:

- **Don't include recurring charges when calculating the minimum charge**—When selected specifies that recurring charges are not included when calculating the minimum charge.
- **Only charge a minimum charge if the account is actually used**—When selected a charge will only be applied when the account has been used during a period.
- **Rate**—Specifies the numerical ex tax value of the minimum charge.
- **Description**—Specifies the invoice item text of the minimum charge.
- **Invoice display order**—Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display the charge item lower.
- **Sales report category**—Specifies the sale report category the charge is allocated to. For more information, see [Sales report categories](#).
- **Discount category**—Specifies a discount or commission category for the minimum charge. For more information, see [Charge types and units](#).

4. Click **Save**.

The **Settings** tab is displayed.

Add or change a minimum session charge

A minimum session charge is the minimum charge applied to every session or call on a plan.

This task explains how to add or change a minimum session charge.

1. Under the **Extra Charges** section on the **Settings** tab, click **Change...** to the right of the **Minimum session charge** line.

A Minimum session charge page is displayed.

2. Select the **Charge a minimum amount for every session or call** checkbox. Click **Save**.
Minimum session charge property fields are displayed.

☒ Charge a minimum amount for every session or call.

Use a minimum charge of \$0 even if you intend to specify the actual minimum charge on a per-tariff basis.

Note: A minimum charge description must be specified in order for the minimum charge to be calculated automatically, even if the charge is always overridden by the tariff.

Minimum session/call charge

Invoice item description

Invoice item order

Sales report category

Charge type

Figure 51: Minimum session charge page

3. Complete the minimum session charge properties:
 - **Minimum session/call charge**—Specifies the numerical ex tax value of the minimum session charge.
 - **Invoice item description**—Specifies the invoice item text of the minimum session charge. **Minimum session charge** is displayed by default.
 - **Invoice display order**—Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display the charge item lower.
 - **Sales report category**—Specifies the sales report category the charge is allocated to. For more information, see [Sales report categories](#).
 - **Charge type**—Specifies the charge type category. **Minimum charge** is displayed by default. For more information, see [Charge types and units](#).
4. Click **Save**.
The **Settings** tab is displayed.

Add included usage blocks



Adding a prepaid usage block to a plan lists usage blocks that are automatically available to subscribers at each billing period. You can add multiple blocks to a plan.

This task explains how to add a prepaid usage block.

1. Under the **Included usage blocks** section on the **Settings** tab, select a usage type from the **Add included usage block** drop-down. Click **Add**.

For more information see, [Prepaid blocks](#).

A **Plan Included Usage Blocks** window is displayed. The **Prepaid Code** and **Plan Code** fields are populated by the details of the selected prepaid block.

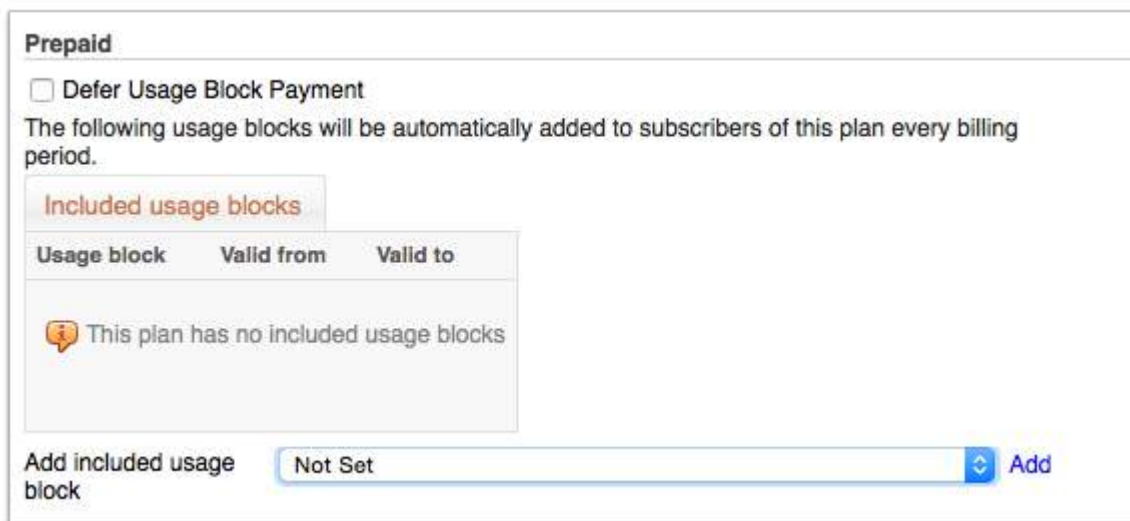
2. (Optional) Click the  to the right of the **Valid From** field to select a date from which the usage block is valid.
3. (Optional) Click the  to the right of the **Valid To** field to select a date to which the usage block is valid.

If the **Valid From** and **Valid To** dates are set, prepaid items with start dates between the valid date period will be added to subscribers.

4. Click **Save**.

The Included Usage Block List page is displayed.

5. (Optional) To add additional usage blocks select a usage type from the **Add included usage block** drop-down. Click **Add**.




Prepaid

☐ Defer Usage Block Payment

The following usage blocks will be automatically added to subscribers of this plan every billing period.

Included usage blocks

Usage block	Valid from	Valid to
 This plan has no included usage blocks		


Add included usage block Not Set  **Add**

Figure 52: Plan settings prepaid included usage blocks

Add an alert group

Adding a group to the Usage alert groups list in plan settings specifies that it is available for use on the plan usage charge rules. Multiple groups can be added to the list.

This task explains how to add an alert group to a plan.

1. Under the **Usage alert groups** section on the **Settings** tab, click **New alert group**.

The Plan usage alerts page is displayed.

A screenshot of a web form titled "Plan usage alerts page". The form contains three input fields: a dropdown menu labeled "Usage alert group" with the text "Choose One..." and a downward arrow; a text input field labeled "Total units for this group"; and another text input field labeled "Display limit for this group". At the bottom left of the form is a "Save" button.

Figure 53: Plan usage alerts page

2. Select a group from the **Usage alert group** drop-down.

For more information, see [Usage alerts](#).

3. Type a value in the **Total units for this group** field.

This is a numerical value of the group. It is recommended that a value of "0" be entered to allow Smile to calculate the total units of the plan from the plan rules. Specifying a total manually may result in inaccurate calculations for usage alerts.

4. Type a value in the **Display limit for this group** field.

This is an alpha-numeric description used when displaying the limit in usage alert messages. For example, the plan name.

5. Click **Save**.

The **Settings** tab is displayed.

Edit or delete an alert group

Deleting a usage alert group only removes the group from the plan settings. It does not delete the usage alert itself.

A error will be displayed if you attempt to delete a usage alert group that has been assigned to a usage charge rule

This task explains how to edit or delete an alert group.

1. Under the **Usage alert groups** section on the **Settings** tab, click **Edit** to the right of the group in the **Usage alert groups** list.

The Plan usage alerts page is displayed.

2. Do one of the following:

- Make the required changes. Click **Save**.
- Click **Delete**. Click **Continue** to confirm.

The **Settings** tab is displayed.

Add a plan rating script

Adding a rating script adds additional customisation for the plan into the rating engine.

This task explains how to add a rating script to a plan.

1. Under the **Rating Scripts** section on the **Settings** tab, select a script from the **Add rating script** drop-down.
2. Click **Add**.

Note: Only a plan rating script can be added to plan settings. An error will be displayed if an attempt is made to add a service rating or invoice filter script to a plan.

The selected rating script will be added to the **Rating Scripts** list.

Publish a plan

When a new plan is created it begins in an unpublished state. It can be configured, but cannot be assigned to a subscription until it has been published. Publishing a plan makes the plan active.

Note: Publishing a plan will also change the state of the service it is assigned to if it was also unpublished.

This task explains how to publish a plan.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Services and Plans page is displayed.

2. Click **View** to the right of a service.

The **Billing** tab for the selected service is displayed.

3. Click **View** to the right of a plan listed on the **Billing** tab.

The **Usage Charges** tab is displayed.

4. Click the **Settings** tab.

5. Click **Publish** at the bottom of the **Settings** tab.

The plan will be set to a published state. The **Publish** control will change to **Unpublish**.

Unpublish a plan

Unpublishing a plan makes a plan inactive. An unpublished plan cannot be assigned to a subscription.

Note: Existing subscribers will remain active on the plan. The plan cannot be changed. If a subscriber changes plans they cannot return to the original plan. New subscribers cannot be added to the plan.

Note: Unpublishing a plan does not unpublish the corresponding service.

This task explains how to unpublish a plan

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Services and Plans page is displayed.

2. Click **View** to the right of a service.

The **Billing** tab for the selected service is displayed.

3. Click **View** to the right of a plan listed on the **Billing** tab.

The **Usage Charges** tab is displayed.

4. Click the **Settings** tab.

5. Click **Unpublish** at the bottom of the **Settings** tab.

The plan will be set to an unpublished state. The **Unpublish** control will change to **Publish**.

RADIUS allowances properties

Specifies RADIUS allowances. Allowances only apply to plans using Smile's RADIUS server.

Allow authentication?	<p>Specifies if the user will be authenticated using RADIUS.</p> <ul style="list-style-type: none"> • Yes • No
Maximum Idle time	<p>Specifies that when the user does not use their internet connection for this amount of time, they will be automatically disconnected.</p>
Cooling off time	<p>Specifies the minimum time that must pass between a user disconnecting and then reconnecting.</p>
Cooling off threshold	<p>Specifies that if a user connects for less than this time, then the Cooling off time is not required before the next login. Typically this option is used to prevent problems when a user is disconnected before their session limit is reached. Setting this option to a value less than the session limit will also prevent customers from manually disconnecting just before the session limit is reached, and then reconnecting without incurring a cooling off penalty.</p>
Concurrent logins	<p>Specifies that no more than this number of people can use this account to connect to the internet at the same time.</p>
Consecutive failures	<p>Specifies that the account will not be accessible after this limit is reached.</p>
Daily session limit	<p>Specifies the maximum amount of time that a user can connect in one day. The time is counted over multiple sessions. The user is automatically disconnected when this limit is reached. The user may be able to connect longer if prepaid time is included in the daily limit.</p>
Single Session Limit	<p>Specifies the maximum amount of time that a user can connect in one session. The user will be disconnected when this limit is reached. The user will be able to reconnect, but only after the Cooling off time has passed.</p>
Period Session Limit	<p>Specifies the maximum amount of time that a user can connect in one billing period. The user may be able to connect for longer if they have prepaid time, and if the prepaid time is included in the period limit. The user will be disconnected when the limit is reached.</p>
Prepaid time only	<p>Specifies if the user will only be allowed to connect if they have purchased prepaid time.</p> <ul style="list-style-type: none"> • Yes • No

Prepaid time warnings

Specifies that if system-wide prepaid warning levels have been set, then a warning will be automatically emailed to the customer, while they are online, indicating that their prepaid time is about to expire.

- **Yes**
- **No**

Add prepaid to period

Specifies if any remaining prepaid time will be added to the customers **Period Session Limit**.

- **Yes**
- **No**

Add prepaid to daily

Specifies if any remaining prepaid time will be added to the customers **Daily session limit**.

- **Yes**
- **No**

RADIUS filter ID

Specifies the filter ID of a predefined filter to be accessed on a RADIUS NAS. This option is not normally used. Most NAS aggregators do not use this function.

Allowances X

Allow authentication? Yes ▾

Maximum Idle time

Cooling off time

Cooling off threshold

Concurrent logins

Consecutive failures

Daily session limit

Single Session Limit

Period Session Limit

Prepaid time only No ▾

Prepaid time warnings No ▾

Add prepaid to period No ▾

Add prepaid to daily No ▾

RADIUS filter ID

Save Close

Figure 54: Allowances window

Delete a plan

Deleting a plan permanently deletes the current plan and all its settings from the Smile database. An error will be displayed if an attempt is made to delete a plan that has been or still is in use.

This task explains how to delete a plan.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Settings** tab.
5. Click **Delete Plan** at the bottom of the Settings page. Click **Continue** to confirm.
The service **Billing** tab is displayed.

Tariffs

Plan tariffs specify tariffs that apply to a specific plan. Plan tariffs take precedence over service level tariffs. If charges are to be defined at a plan level, a service level tariff must still be defined to allow destinations to be linked to a tariff code. In this case set the service level tariff flagfall and rate to null. This will ensure that rating a plan defined without a tariff will fail because the service level tariff will be unusable with null prices. For more information, see service [Tariffs](#).

The Tariffs tab has two areas of configuration:

- [Plan-specific Tariffs](#)—specifies tariffs that override tariffs defined at a service level.
- [Destination Setup](#)—specifies plan-specific destination overrides.

Related tasks

[Upload tariff CSV](#)

[Download tariff CSV](#)

View tariffs tab

The plan Tariffs tab provides access to plan-specific tariff and destination configuration.

This task explains how to view the plan tariffs tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Tariffs** tab.
The **Plan-specific Tariffs** sub-tab of **Tariffs** is displayed.

The screenshot shows the 'Tariffs' tab selected in the top navigation bar. Below it, the 'Plan-specific Tariffs' sub-tab is active. A search bar labeled 'Find Destination' is present. Below the search bar, a table titled 'Plan-specific tariffs' displays the following data:

Destination	Start Date	Flagfall (\$)	Rate (\$)	per	Inc.	Tariff Type	
National	4/02/16	1	1	60	1	National	View Add

Below the table, there are buttons for 'Add', 'Upload tariff CSV...', 'Download tariff CSV...', 'Save', and 'Deprecate'.

Figure 55: Tariffs tab, displaying Plan-specific Tariffs sub-tab

Add plan-specific tariff

Plan-specific tariffs can be defined on a plan and take precedence over service level defined tariffs.

This task explains how to add a plan-specific tariff.

1. Click **Add** on the **Plan-specific Tariffs** tab.

A blank Tariff page is displayed.

2. Complete the tariff properties fields.

For more information, see [Plan-specific tariff properties](#).

3. Click **Save**.

The **Plan-specific Tariffs** tab is displayed. The tariff is added to the **Plan-specific tariffs** list.

Plan-specific tariff properties

Destination	Specifies the destination of the tariff. Click Search to view and Select from available destination types. For more information, see Destinations .
Tariff Type	Specifies the tariff type. For more information, see Tariff types . <ul style="list-style-type: none"> • Select from list
Call Type	Specifies the call type of the tariff. Call types are an internally defined list of Smile values. Call types are used to distinguish call types for a given prefix. <ul style="list-style-type: none"> • Event count • Data • Video Call • Forwarded Voice • Imported Charge • MMS • SMS • Unknown • Voice • WAP • Fax
Tariff Start Date	Specifies the date, beginning at 00:00:00, from which the tariff will apply.
Flagfall	Specifies the fixed charge for a CDR.
Rate	Specifies the charge per unit. A unit is defined in Charging units below.
Minimum Charge	Specifies a minimum charge for a CDR.
Maximum Charge	Specifies a maximum charge for a CDR.

Decimal places

Specifies the number of decimal places used when calculating charges.

Rounding type

Specifies the rounding type applied to the final call charge. For more information, see [Rounding modes](#).

- **None**
- **Up**
- **Down**
- **Half up**
- **Half even**

Charging units

Specifies the number of seconds in a single charging unit. A unit is charged at the **Rate** specified above.

Charging increments

Specifies the smallest unit size in seconds that is charged.


Destination	Not Set Search
Tariff Type	Choose One...
Call Type	Voice
Tariff Start Date	16/03/16 
Flagfall	
Rate	per unit
Minimum Charge	per session
Maximum Charge	per session
Decimal places	2
Rounding type	None
Charging units	60 seconds
Charging increment	1 seconds
Save	

Figure 56: Plan-Specific tariff properties page

Destination Setup

The Destination Setup tab specifies plan-specific destination overrides.

The destination drop-downs are populated by the destinations specified in the service. For more information, see [Destinations](#).

Geographically local destination For calls within the same charging area, but not provided by your company or by this voice service (SZU).

On-Net destination For calls to numbers provided by your company, and using this service.



The screenshot shows a web interface with two tabs: "Plan-specific Tariffs" and "Destination Setup". The "Destination Setup" tab is active and highlighted with a blue underline. Below the tabs, there are two rows of configuration options. The first row is labeled "Geographically local destination" and has a dropdown menu set to "Not Set". The second row is labeled "On-Net destination" and also has a dropdown menu set to "Not Set". At the bottom of the form, there are three buttons: "Save", "Save", and "Deprecate".

Figure 57: Destination Setup tab

Features (Policies)

A feature is an item that modifies a subscription and that can be switched on and off, for example, shaping or call barring. If a customer exceeds a spend limit Smile applies a feature to the subscription. Other examples of a feature are voicemail and call forwarding.

The features applied to a plan are displayed on the Features tab. Features are displayed as a summarised line item.

For more information on creating and configuring features, see [RADIUS features](#).

View features tab

The Features tab displays any features that have been added to a plan as a summarised line item.

This task explains how to access the Features tab, on an existing service and plan.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Features** tab.
The **Features** tab is displayed.

Add a feature

Adding a feature will create a new feature line item in the Feature table. The feature is added to all subscriptions on the plan.

Only pre-configured features can be added to a plan. For more information on adding and configuring features, see [RADIUS features](#).

This task explains how to add a feature.

1. Click **Add Feature**.
The RADIUS plan feature page is displayed.
2. Select an option from the **Feature** drop-down.
3. Click **Save**.
The **Features** tab is displayed.

Recurring charges

A recurring charge is a regular charge that is billed on a fixed repeating schedule, such as weekly, monthly, quarterly or annually, and not based on usage. For example, line rental or an account access fee are recurring charges. A recurring charge includes information about the charge amount, the charge frequency, how the charge is applied, tax and validity period.

Smile uses recurring charges in the following areas:

- base plan charges
- plan options
- service features
- custom recurring charges on subscriptions

How recurring charges work

To compute recurring charges Smile creates time-lines for raising charges taking into consideration any mid-cycle plan starts, changes, terminations or retrospective price adjustments. Smile will debit or credit pro-rata charges as required now, in the future or in the past.

Cycles and periods

A recurring charge cycle is the repeat cycle in which charges are raised. For example, a cycle can be each calendar month.

A recurring charge period is a single instance of the recurring charge cycle. For example, a recurring charge period can be February 2015.

A recurring charge cycle may not match an invoicing cycle. For example, a user may be invoiced monthly at the anniversary date of the month on which their subscription was created, but their usage is calculated on the previous calendar month.

Smile provides the following cycle options for recurring charges:

- **Invoicing periods**—the period of time between invoice generation.
- **Fixed-Days**—a full day from 00:00:00 to 23:59:59
- **Fixed-Months**—a fixed full calendar month beginning the 1st of January. For example, a 12 Fixed-Month period will charge on 1st of January, as the cycle starts on 1st January. If the recurring charge starts in July, then the first charge will be for 6 months to bring the charge into line.
- **Rating periods**—the length of time for which usage charges are calculated.
- **Calendar months**—a calendar month from a specified date. For example, if a plan was applied to an account on the 10th of a month, then the charge cycle for the plan will be from the 10th of the month to the 9th of the following month.
- **Days**—a 24 hour day beginning from the time a plan is activated. For example, if a plan is activated at 10:30am, a day finishes at 10:29am the following day.

Billing frequency

One charge is raised per recurring charge cycle. Each recurring charge cycle is made up of two components:

- the duration of the recurring charge period. For example, days or months.
- the number of recurring charge periods that are charged. For example, if the recurring charge period is monthly and the recurring charge frequency is 2, then 2 monthly charges will be raised at a time. If the recurring charge period is weekly and the recurring charge frequency is 6, a charge will be raised every 6 weeks.

If the charge is raised in advance then the number of periods into the future it is charged is also specified.

The following example shows a charge that is raised every 2 fixed-month periods, billed in advance.

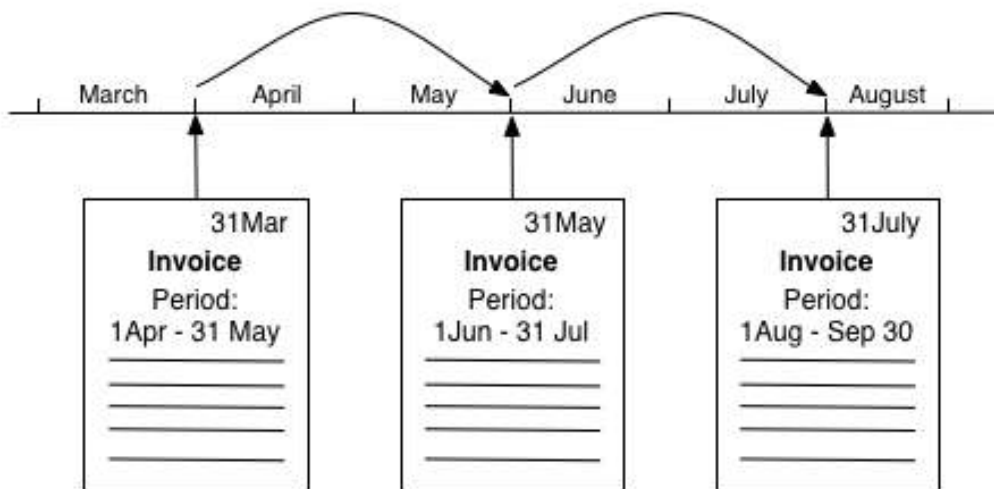


Figure 58: Example of a fixed-month period charge invoiced, in advance, every 2 months in advance

Charging type

In addition to billing frequency Smile provides options for when charges are applied. Smile provides the following charging types:

- **In arrears**—each new invoice reflects the recurring charge applicable since the last invoice to the current invoice period end date. The period being charged has entirely ended before invoicing. Usage-based charges, such as call charges, data blocks or excess fees, are charged in arrears.
- **Partially in arrears**—when the invoicing cycle does not match a recurring charge cycle Smile charges for the period that has already started, but not yet closed.
- **In advance**—each invoice reflects the charge for the next future recurring charge period. New service connections charged in advance can charge for both an amount in arrears for the time period from service connection to the end of the first recurring charge period, and the future period.

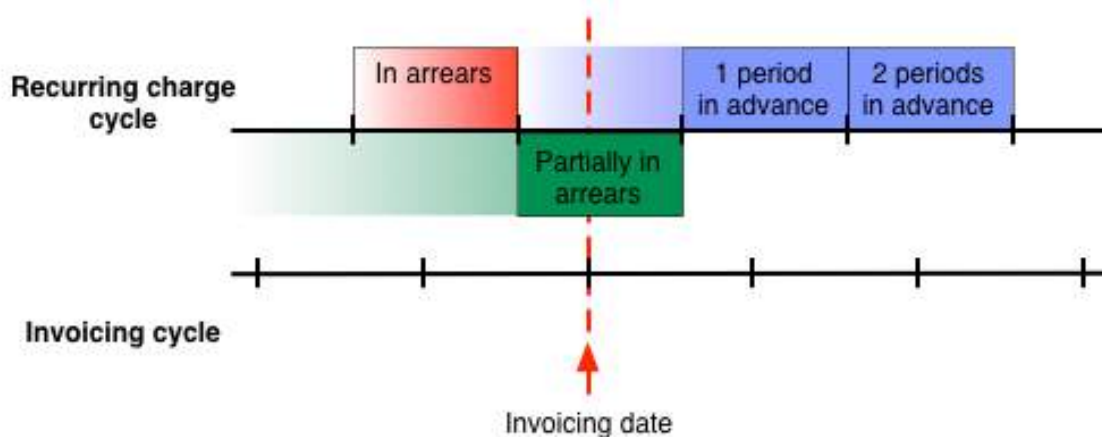


Figure 59: Recurring charge cycle types compared to invoicing cycles

View recurring charges tab

The Recurring Charges tab summarises the regular charges and charge options of a plan.

The Recurring Charges tab has three sections:

- **Charges**—displays a line item summary table of all charges applied to a plan.
- **Charging options**—displays a line item summary table of any additional recurring plan charges.
- **Service feature recurring charge overrides**—displays a line item summary table of any charges overriding recurring feature charges.

The following screenshot shows you the sections of the Recurring Charges tab.

Usage Charges Settings Tariffs **Recurring Charges** Self Serve Prepaid

The following charges are applied for all users of this plan:

Code	Description	Rate	Units	Frequency	Charging mode	Renewal?
000337	Line rental {{0,date}} - {{1,date}}	\$27.27	1	Rating periods	In advance	<input type="checkbox"/> View

[Add Charge](#)

Each of the following options may contain charges that will be raised only if a user has had this option selected:

Charging Options

Code	Name	Plan Option Group	Setup	Available
This plan has no charging options				

☐ Show Depreciated

[Add Option](#)

Service Feature Recurring Charge Overrides

Feature	Description
This plan does not override any service feature recurring charges	

Add new override for: [+](#)

[New Override](#)

[Save](#) [Deprecate](#)

Charges section

Charging Options section

Service Feature Recurring Charge Overrides section

Figure 60: Recurring Charges tab

This task explains how to access the Recurring Charges tab on an existing service and plan.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Recurring Charges** tab.
The **Recurring Charges** tab is displayed.

Charges

The charges section on the Recurring Charges tab displays recurring plan charges as a summarised line item. It displays a charge description, the ex-tax charge and how the charge is applied.

Charge item properties

A recurring charge properties page covers the nature of a charge, what it charges and when.

Raise charges every n

Specifies how often Smile raises the recurring charge, per the selected period.

- **Invoicing periods**
- **Fixed-Days**
- **Fixed-Months**
- **Rating periods**
- **Calendar months**
- **Days**

For more information, see [Cycles and periods](#).

Raise charges

Specifies whether Smile raises the charge in arrears or in advance.

- **In arrears**
- **Partially in arrears**
- **In advance**
 - **Always Charge n periods in advance**

Note: When billing in advance Smile looks for the end date of the next invoicing period. Smile will raise charges for n of the periods set in the **Raise charges every** drop-down.

For more information, see [Charging type](#).

Pro-rata calculation

Specifies how Smile applies the charge to an incomplete period.

- **Not set**
- **Don't charge anything**
- **Prorate the charge**
- **Charge the full amount**

Item code

A Smile generated numeric code for the charge item.

Item description

Specifies the invoice item text. The following substitution codes can be used in the description:

- {0,date}—start date
- {1,date}—end date

Sales report category	<p>Specifies the sales report category the charge is allocated to.</p> <ul style="list-style-type: none"> • Select category from drop-down. • Create new... <p>For more information, see Sales report categories.</p>
Rate	Specifies the ex-tax value of the recurring charge.
Quantity Format	Specifies a string format to define how an amount is displayed. For more information, see Quantity format .
Display Rate	Specifies the text value to display on the invoice, which may include tax.
Display Order	Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display it lower.
Charge GST on the item	When selected specifies if tax should be added to the charge on invoicing.
Do not print this item if it is zero-value	When selected specifies that the charge item is not included on an invoice or statement when the item has a \$0 value.
Discount category	Specifies a discount or commission category. For more information, see Charge types and units .
This charge is valid from <i>start date</i> to <i>end date</i>	<p>Specifies the validity date range of a charge.</p> <p>If no dates are specified Smile views the charge as active and raises the recurring charge indefinitely.</p> <p>If only a start date is specified Smile will view the charge as active and raise the charge from this date onwards.</p> <p>If only an end date is specified Smile will raise the charge up to this period only.</p>
Allow operators to enter a custom rate, quantity & description for this charge	When selected allows a Smile operator to edit the Rate and Item description of the charge within the customer account.

Add a recurring charge

Adding a charge will create a new charge line item on the Recurring Charges tab and will be charged by the plan immediately or from a specified start date. Multiple charges can be added.

This task explains how to add a new recurring plan charge.

1. Under the Charges section on the **Recurring Charges** tab, click **Add Charge**.

A Recurring Charge properties page is displayed.

2. Complete the required fields.

For more information, see [Charge item properties](#).

3. Click **Save**.

The **Recurring Charges** tab is displayed.

View or edit a recurring charge

Viewing a recurring charge lets you view all details of the charge. Charge details can also be edited.



Warning: Take care when changing charge details. Smile recalculates recurring charges and may issue refunds or additional charges in the next billing run.

This task explains how to view or edit a recurring plan charge.

1. Under the Charges section on the **Recurring Charges** tab, click **View** to the right of a plan charge line entry.

The Recurring Charge properties page is displayed.

2. Edit the required fields.

For more information, see [Charge item properties](#).

3. Click **Save**.

The **Recurring Charges** tab is displayed.

Delete a recurring charge

Deleting a recurring charge removes the charge from the charge list. It will no longer be available or visible in Smile.



Warning: Deleting a charge permanently removes the charge from the Smile database. To avoid data loss, we recommend that you only delete new charges that were created in error.

To close an active charge, without deleting it, specify an end date in the charge validity date range. See [View or edit a recurring charge](#).

This task explains how to delete a recurring plan charge.

1. Under the Charges section on the **Recurring Charges** tab, click **View** to the right of a plan charge line entry.

The Recurring Charge properties page is displayed.

2. Click **Delete**.

The **Recurring Charges** tab is displayed.

Charging options

Charging options are additional or optional charges on a plan. For example, charging options include static IP addresses and mailboxes; input into plan rules through excess usage charges; and user-configurable usage quotas.

The Charging Options section on the Recurring Charges tab displays additional charging options as a summarised line item. It displays a charge code, charge name, and any plan options and setup charges.

Charge options can be either a standalone, text or numeric, single or multiple options provided as a drop-down. For example, a drop-down may offer data download quota options, such as 10Gb, 50Gb and 100Gb, available on a plan.

Charging options properties

A charging options properties page covers the nature of a charge, what it charges and when.

Code	Specifies a unique short alpha-numeric code for the charge option.
Option Name	Specifies a descriptive name for the charge option. Visible to Smile operators and users.
Plan option group	<p>Specifies the type of charge option, either standalone or multiple choice.</p> <ul style="list-style-type: none"> • None (numeric/boolean option) • new—adds option entries to the Plan option group drop-down. <ul style="list-style-type: none"> • Name—specify the option name or title.
Display type	<p>Specifies display type when None (numeric/boolean option) selected for Plan option group.</p> <ul style="list-style-type: none"> • Boolean • Numeric <ul style="list-style-type: none"> • Minimum allowed quantity • Maximum allowed quantity
Setup charge	<p>Specifies a one-off setup charge.</p> <ul style="list-style-type: none"> • Change... <p>For more information, see Add or change a setup charge.</p>
Valid from <i>date</i>	<p>Specifies the date from which the charge is active.</p> <p>If only a start date is specified Smile will view the charge as active and raise the charge from this date onwards.</p>
Valid to <i>date</i>	<p>Specifies the date up to which the charge is active.</p> <p>If only an end date is specified Smile will raise the charge up to this period only.</p>

Add a charge option

Adding a charge option will create a new charge line item in the Charging Options table and will be immediately charged by the plan or from a specified start date. Multiple charges can be added.

You first create the charge option entry before adding any charge information.

This task explains how to add a new charging option.

1. Under the **Charging Options** section on the **Recurring Charges** tab, click **Add Option**.

A New Option properties page is displayed.

Figure 61: New Option page

2. Complete the initial charge option properties.

For more information, see [Charging options properties](#).

3. Click **Save**.

The **Recurring Charges** tab is displayed. The option is added to the **Charging Options** table.

4. Click **View** to the right of the new charging option entry.

The charge option properties page, including a recurring charge table, is displayed.

5. Click **Add Charge**.

A Recurring Charge properties page is displayed.

6. Complete the required fields.

For more information, see [Charge item properties](#).

7. Click **Save**.

The charge option properties page is displayed.

8. (Optional) Click **Add Charge** to add additional charges.

9. Click **Save**.

The **Recurring Charges** tab is displayed.

View or edit a charge option

Viewing a charge option lets you view all properties of the charge. Charge option properties can also be edited.



Warning: Take care when changing charge properties. Smile recalculates recurring charges and may issue refunds or additional charges in the next billing run.

This task explains how to view or edit a charge option.

1. Under the **Charging Options** section on the **Recurring Charges** tab, click **View** to the right of a charge option line entry.

The charge option properties page is displayed.

2. Edit the required fields.

For more information, see [Charging options properties](#).

3. Click **Save**.

The **Recurring Charges** tab is displayed.

Add or change a setup charge

A setup charge is a charge applied when a subscriber first begins a plan.

This task explains how to add or change a setup charge.

1. Under the **Charging Options** section on the **Recurring Charges** tab, click **View** to the right of a charge option line entry.

The charge option properties page is displayed.

2. Click **Change...** to the right of the **Setup charge** line.

A Setup charge page is displayed.

3. Select the **Charge a setup fee** checkbox.

Setup fee property fields are displayed.

4. Complete the set up fee fields:

- **Rate**—Specifies the numerical ex tax value of the setup fee.
- **Description**—Specifies the invoice item text of the setup fee.
- **Invoice display order**—Specifies the display order of the charge on an invoice. For example, 0 will list the item at the top of the invoice. 9 will display the charge item lower.
- **Sales report category**—Specifies the sales report category the charge is allocated to. For more information, see [Sales report categories](#).
- **Discount category**—Specifies a discount or commission category for the setup fee. For more information, see [Charge types and units](#).

5. Click **Save**.

The charge option properties page is displayed. The charge is added to the **Setup Charge** line.

6. Click **Save**.

The **Settings** tab is displayed.

Delete/deprecate a charge option

Deleting a charge option removes the charge from the charge list. It will no longer be available or visible in Smile.



Warning: Deleting a charge permanently removes the charge from the Smile database. To avoid data loss, we recommend that you only delete new charges that were created in error.

To close an active charge, without deleting it, we recommend deprecating the charge. Deprecating will set the **Valid to** date on the charge option.

Note: Deprecating a plan option will not affect existing users. The deprecated option will not be available for new users.

This task explains how to delete a recurring plan charge.

1. Under the **Charging Options** section on the **Recurring Charges** tab, click **View** to the right of a plan charge line entry.

The charge option properties page is displayed.

2. Do one of the following:

- Click **Delete**. Click **Continue** to confirm.
- Click **Deprecate**.

The **Recurring Charges** tab is displayed.

Service feature recurring charge overrides

Service feature recurring charge overrides are charge alterations to features available to a plan. For example, a special or discount applied for voicemail access.

A plan can have multiple recurring charge overrides. Recurring charge overrides are permanently applied to a plan until they are deleted.

Add a service feature recurring charge override

A service feature recurring charge override is applied to a plan and charges raised as per the override properties until it is deleted.

This task explains how to add a service feature recurring charge override.

1. Under the **Service Feature Recurring Charge Overrides** section on the **Recurring Charges** tab, select a feature from the **Add new override for** drop-down.

For more information, see [RADIUS features](#).

The **Recurring charge** drop-down appears.

2. Select a charge from the **Recurring charge** drop-down.

The **Recurring charge** drop-down is populated by the recurring charges configured on the feature.

3. Click **New Override**.

A Service feature recurring charge override page is displayed.

4. Complete the service feature recurring charge property fields.

For more information, see [Service feature recurring charge override properties](#).

5. Click **Save**.

The **Recurring Charges** tab is displayed. The override is listed in the **Service Feature Recurring Charge Overrides** table.

Service feature recurring charge override properties

A service feature recurring charge override property page specifies the override rate and charge cycle and charge type.

Description	Specifies a text description of the service feature recurring charge override.
Quantity	Specifies the quantity of the recurring charge being applied.
Default rate	Displays the ex tax charge of the feature. For more information, see RADIUS features .
Override rate	The new ex tax charge rate that will be applied for the feature.
Raise charges every	Specifies the recurring charge cycle and charging type of the recurring charge override.
Charge	If in advance is selected for the Raise charges every charging type, specifies how many periods in advance the recurring charge override is raised.
Invoice comment	Specifies a text comment displayed on an invoice.

Self serve prepaid

Self serve prepaid specifies prepaid blocks that can be added to a plan and who can add them. If no prepaid blocks are specified then users cannot self serve prepaid.

For more information, see [Configuring prepaid](#).

Self serve prepaid can be purchased via the Customer Access Toolkit or via a custom application. You can use the prepaid API to write applications that let customers buy self-serve prepaid.

For more information about the Smile API, see the *Developer Guide*.

Prepaid tiers

Prepaid tiers can be specified in Smile to provide access to different configurations of prepaid blocks. When a prepaid block has been purchased prepaid tiers specify what blocks may be purchased next. For example, when a tier 1 prepaid block has been purchased, then tier 2 blocks become available for purchase, when a tier 2 has been purchased, then a tier 3 becomes available.

Each tier may contain the same prepaid block or each tier may contain different blocks. A prepaid block does not need to be consumed before another block can be purchased.

If multiple tiers are specified the tier level resets at the end of a period back to tier 1.

The screenshot shows the 'Self Serve Prepaid' configuration page. At the top, there are tabs: 'Usage Charges', 'Settings', 'Tariffs', 'Recurring Charges', and 'Self Serve Prepaid' (which is selected). Below the tabs, the page is divided into sections. The first section is 'Allowed Prepaid Blocks', which contains a table with headers 'Block Name', 'CAT?', and 'SOAP API?'. Below the table, a message states: 'Users on this plan cannot self serve prepaid blocks.' The second section is 'Add a new prepaid block', which features a 'Prepaid Block' dropdown menu currently set to 'Not Set' and an 'Add...' button. The third section is 'Prepaid Tiers', which contains a table with headers 'Tier' and 'Block'. Below the table, a message states: 'There are no tiers configured for this plan.' At the bottom of the page, there are two buttons: 'Save' and 'Deprecate'.

Figure 62: Self Serve Prepaid page

Add a prepaid block

Adding a prepaid block to Self Serve Prepaid specifies what type of prepaid a customer can use on their plan. You can add multiple blocks to a plan.

This task explains how to add a prepaid block.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Self Server Prepaid** tab.
The **Self Serve Prepaid** tab is displayed.
5. Select a block from the **Prepaid Block** drop-down.
For more information, see [Prepaid blocks](#).
6. Click **Add**.
The prepaid block plan settings page is displayed.
7. (Optional) Specify a numeric tier in the **Add new tier** field. Click **Add**.
If no tiers are specified a default **Tier 1** is created.
The tier number is added to the **Prepaid Tiers** list.
8. (Optional) Repeat the previous step to specify additional tiers.
9. Specify the user access allowed for self serve.
 - **Soap**—User access via a custom application.
 - **CAT**—User access via Smile's CAT.
10. Click **Save**.
The **Self Serve Prepaid** tab is displayed. The prepaid block is added to the **Allowed Prepaid Blocks** table.

Plan contracts

Plan contracts specify which service contracts are applicable to a plan. A service contract specifies the duration, any setup and termination charges and payment methods that apply to a service. For example a service may have contract options of 12, 24, and 36 months, but a plan under the service may only be offered with the 24 month contract.

For more information, see [Service contracts](#).

View plan contracts tab

The Contracts tab displays a summary of the service contracts that apply to a plan.

This task explains how to access the plan contracts tab.

1. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
2. Click **View** to the right of a service.
The **Billing** tab for the selected service is displayed.
3. Click **View** to the right of a plan listed on the **Billing** tab.
The **Usage Charges** tab is displayed.
4. Click the **Contracts** tab.
The **Contracts** tab is displayed.

Add a plan contract

Adding a contract to a plan specifies which service contracts are applicable to the plan. A plan may not be offered with all contract options specified under the service.

This task explains how to add contract options to a plan.

1. On the **Contracts** tab, select a contract from the **Select a contract** drop-down.
Contracts are specified under the corresponding service. For more information, see [Service contracts](#).
2. Click **Add Contract**.

Note: An error will be displayed if an attempt to save a plan contract with a service contract type that has already been specified for the plan.

The contract is added to the plan contract summary list.

3. Click **Save**.
The **Saved** confirmation window is displayed.
4. Click **Ok**.
The **Contracts** tab is displayed.

Edit a plan contract

The specified service contract, plan contract display name and self service option for a plan contract can be edited.

This task explains how to edit a plan contract.

1. On the **Contracts** tab, click **Edit** to the right of the required plan contract.

The Plan Contracts page is displayed.

2. Edit the required fields.

- **Contract**—Specifies available contracts that have been specified for the service.

Note: An error will be displayed if an attempt to save a plan contract with a service contract type that has already been specified for the plan.

- **Name**—Overrides the **Current display name** of the plan contract.

3. Click **Save**.

The **Contracts** tab is displayed.

Chapter 6

Configuring ordering

Packages

A package contains all the configuration information that Smile needs to create an account or subscription. Packages also bundle together multiple services so you can add them as a group of subscriptions to an account.

A package contains:

- **services**—specify the services in the package, for example, an account or subscription.
- **plans**—specify how much to charge for each account or subscription.
- **configuration information**—specify any other information Smile needs to create the account or subscription, for example, default bill layouts, dispatch settings and billing frequencies.

You use packages to order accounts and subscriptions. An order is a request to create a new account or subscription.

A package can contain multiple services, and each service can be associated with multiple plans. When using Smile service order forms the customer chooses a plan for each service in the package when they buy the package. A custom order form can simplify the plan order process.

The following diagram illustrates the components of a simple package. In this example, the package contains mobile, ADSL and telephone services that each have one plan associated with them.

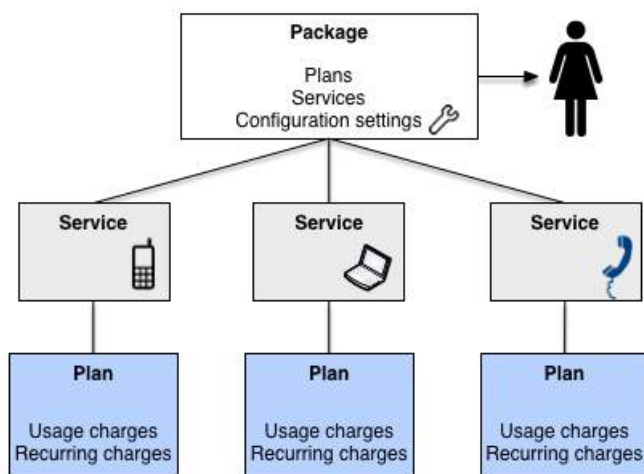


Figure 63: Package components

View packages

The Packages page displays a summary list of package names and descriptions. Unpublished packages are highlighted.

Select a type of package to display from the **Show** drop-down. The following types are available for selection:

New Account Packages	Displays all packages that are configured to create new accounts only. This package list is displayed by default.
Existing Account Packages	Displays all packages that are configured to add services to existing accounts.
Package Templates	Displays package configurations that are used to create new packages.
Deprecated Packages	Displays packages that are no longer available for selection.

If more than one currency has been configured in your Smile a currency drop-down is also displayed. Packages can be created for different currencies. For more information, see [Currency](#).

This task explains how to view packages.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Packages page is displayed.
2. Select a package type from the **Show** drop-down.
The package summary list is refreshed and displays all packages of the selected package type.

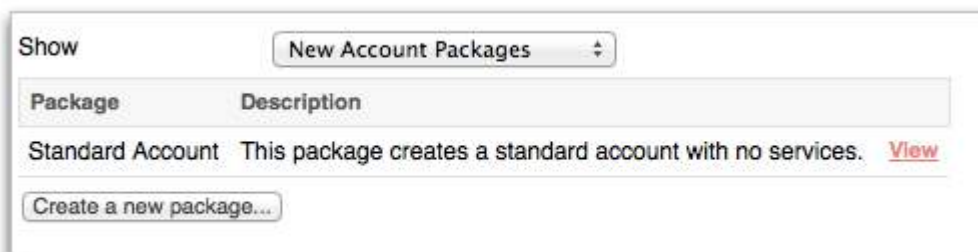


Figure 64: The Packages page

Package tabs

When you view or add a package, the package name page is displayed. A package contains several tabs that display the configuration and components of the package.

The following table summarises the tabs available to a package.

Table 11: Tabs in a package

Tab	Purpose
Package	Specifies the default account configuration of the package.
Components	Specifies the services included in a package.
Dispatch	Summarises the dispatch documents of the package, and when and how they are sent.
Stationery	Summarises the accounting stationery that a package uses by default.
Order Form	Specifies the fields displayed on an a custom order form.
Plans	Specifies the plan, plan options and contracts of the package.



Figure 65: Package tabs

Create a new package

Packages are a bundle of services, plans and configuration information that can be added to an account or subscription as a group.

This task explains how to create a new package.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Packages page is displayed.
2. Click **Create a new package....**
The Package Templates page is displayed.
3. Click **Create** to the right of the required package template.
A **Create Package** window is displayed.
4. Type a name for the package in the **New Package Name** field. Complete additional fields as required.
5. Click **Create**.
The **Package** tab is displayed.
6. (Optional) Configure or edit the package tabs as required.
For more information, see [Package tabs](#).
7. Click **Save** on the **Package** tab.
The Packages page is displayed.



Figure 66: Create a new package

Publish a package

When a new package is created it begins in an unpublished state. It can be configured and edited, but is not available to Smile operators until it has been published. Publishing a package makes the package active.

This task explains how to publish a package.

1. Select **Packages** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to the right of the required package.

The **Package** tab is displayed.

3. Click **Publish**.

The Packages page is displayed. The package no longer displays the **This package has not been published** alert.

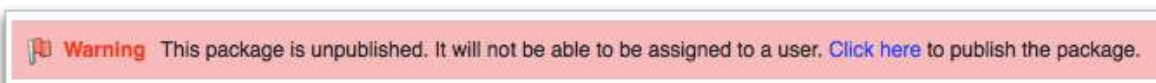


Figure 67: Unpublished package warning

Unpublish a package

Unpublishing a package makes a package inactive. An unpublished package cannot be ordered.

Note: Existing accounts will remain active on the package. The package cannot be changed. New accounts cannot use the package.

Note: Unpublishing a plan does not unpublish the included services.

This task explains how to unpublish a package.

1. Select **Packages** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to the right of a package.

The **Package** tab is displayed.

3. Click **Unpublish**.

The **Package** tab is displayed. A warning is displayed at the top of the page stating that the package is unpublished.

Package

The Package tab specifies the default configuration of the package, including the package name, account type and terms and package validity.

Package properties

Package ID	System generated package ID number. Required when creating packages via the Smile API.
Package Type	Specifies the type of package and who it is visible to. <ul style="list-style-type: none"> • Customer Package—available to everyone. • Operator Package—hidden from CAT. • System Package—Smile system packages. • Hidden Package—used when ordering through the Smile API or through workflows.
Name	Specifies the name of the package.
This package may be used to	Specifies how the package can be used with new or existing accounts. When a package has been published this selection cannot be modified. This setting is also used to determines in which groups the package is displayed on the Packages page. <ul style="list-style-type: none"> • Add services to existing accounts • Create new accounts or to add to existing accounts • Create new accounts
Account type	Specifies the account type of the package. For more information, see Account types .
Currency	Specifies the default currency used in the package. For more information, see Currency .
Default terms	Specifies the credit control account terms applied to the package. Account terms are defined in Credit control .
Description	Longer descriptive text field of the package.
Valid from	Specifies the date from which the packages is available and active.
Valid to	Specifies the date up to which the package is available for selection. To deprecate a package set the date to the current date or a date in the past.

Components

The Components tab specifies the services that are included in a package. Services are displayed in a summary list.

When you view a service from the Component tab the service properties are presented in the following tabs:

Component	Specifies how a package obtains the service username, the actions taken when adding a service to an existing account and in which order multiple services are added to an account.
Plan schedule	Specifies plans for the service, including an initial or introductory plan configuration.

Add a service to a package

Multiple services can be added to a package. When an order is placed all services will be ordered together.

This task explains how to add a service to a package.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Components** tab.

The **Components** tab is displayed.

4. Click **Add**.

The Package Component page is displayed.

Figure 68: Add a package component

5. Select a service from the **Service** drop-down.

The **Service ID Type** field is displayed.

6. Select an option for the **Service ID Type**.

7. (Optional) Complete the other **Component** and **Plan schedule** fields as required.

For more information, see [Component properties](#).

8. Click **Save** on the **Component** tab.

The **Components** tab is displayed. The service is added to the **Provided Services** summary list.

Add a plan schedule

A plan schedule specifies plans for the service, including an initial or introductory plan configuration.

This task explains how to add a plan schedule to a package service.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Components** tab.

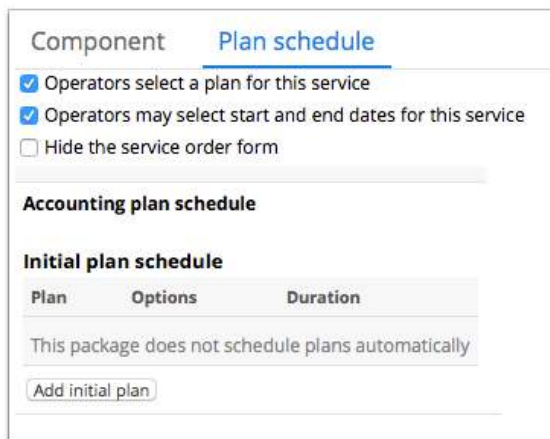
The **Components** tab is displayed.

4. Click **View** to the right of the required service in the **Provided Services** list on the package **Component** tab.

The **Component** tab is displayed.

5. Click the **Plan schedule** tab.

The **Plan schedule** tab is displayed.



The screenshot shows the 'Plan schedule' tab selected. It contains several checkboxes: 'Operators select a plan for this service' (checked), 'Operators may select start and end dates for this service' (checked), and 'Hide the service order form' (unchecked). Below these are sections for 'Accounting plan schedule' and 'Initial plan schedule'. The 'Initial plan schedule' section has a table with columns 'Plan', 'Options', and 'Duration'. A message states 'This package does not schedule plans automatically' and there is an 'Add initial plan' button.

Figure 69: Component Plan schedule tab

6. Click **Add initial plan**.

The Change Plan page is displayed.

7. Complete the required Change Plan fields.

For more information, see the **Accounting plan schedule** section in [Component properties](#).

8. Click **Save**.

The **Components** tab is displayed.

Components properties

Component

Service	Specifies the service. This list displays all published Available Services and System Services in Smile. For more information, see Configuring services .
Service ID Type	Specifies how a service username is created or obtained. <ul style="list-style-type: none"> • Entered by operator • Account ID • From other package component
When adding this package to an existing account	Specifies the action taken when adding a package to an existing account. <ul style="list-style-type: none"> • Always add this service • Only add this service if there is not already a service of this type • Skip this service
Sort Order	Specifies the order in which services are added when an order is placed. Services with a lower sort order number are added first.

Plan schedule

Operators select a plan for this service	When selected specifies that a Smile operator can select a plan to be implemented after the initial plan.
Operators may select start and end dates for this service	When selected specifies that a Smile operator can set validity dates on the service.
Hide the service order form	When selected specifies that the order form for the service is hidden when using the default Smile service order forms.

Accounting plan schedule

Initial plan schedule	Displays a summary list of schedule plan changes.
PSI	Displays the Plan Schedule Item number for the selected Plan .
Plan	Specifies a service plan. The plan options displayed are specified in the service. If a plan contains additional charging options these will be displayed. For more information, see Configuring plans .
Duration	Specifies the length of time that the plan is applied to the service. <ul style="list-style-type: none"> • Not set • Days • Months • Rating periods • Years • Hours

Add rating zone override	Specifies the addition of an override to the rating zone to which an SZU (Standard Zone Unit) is mapped, if the rating configuration uses rating zones.
Show tariff entry table	When selected allows tariff imports.
Show prefix entry	When selected allows prefix import and display.
Do not fall through to default prefixes	When selected disallows fall through to default prefixes.

Plan Schedule

Accounting plan schedule

PSI

Plan

Choose One...

Duration

Not set

Add rating zone override

☐ Do not fall through to default prefixes

Save

Figure 70: Accounting plan schedule properties

Dispatch

The Dispatch tab lists default dispatches and the rules to apply them to the package.

Dispatch rules added to a package do not affect existing package users. To apply package dispatch updates to all existing users click **Apply to existing users**.

Add a dispatch rule

Multiple dispatch rules can be configured in a package. The rules can be ordered so dispatches are sent at certain times, when an account meets particular rules. For example, a series of reminders can be dispatched if an invoice remains unpaid.

This task explains how to add a dispatch rule.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Dispatch** tab.

The **Dispatch** tab is displayed.

4. Click **Add default dispatch**.

A blank Package dispatch page is displayed.

Stationery Choose One...

Destination type Choose One...

Initial delay Days

Dispatch rule Choose One...

☒ Repeatedly send this notice

Repeat this notice 0 times every days

Save Delete

Figure 71: Dispatch properties

5. Complete the dispatch properties. Click **Save**.

For more information, see [Dispatch properties](#).

The **Dispatch** tab is displayed.

Dispatch properties

Stationery

Specifies the stationery document used for the dispatch. For more information, see [Stationery and forms](#).

Destination type

Specifies how the dispatch is sent.

- **Email**
 - **Email address**—Leave blank to use the account default.
- **Print**
- **SMS**
 - **Mobile Number**—Leave blank to use the account default.

Dispatch rule

Specifies the dispatch rule to apply. Dispatch rules are Smile system rules. The dispatch rule options displayed are dependant on the document type specified in the **Stationery** document selected for the dispatch. Dispatch rules do not apply to all document types. For more information, see the [Dispatch rules](#) table.

Dispatch rules

Table 12: Dispatch rules

Document type	Available rules
Invoice	<ul style="list-style-type: none"> • Account balance (including pending payments) in debt • All non-zero value invoices • Always • Bulk Invoices Only • Dispatch debtor item document action • Dispatch debtor item document action, remembering disposition • Non-zero value bulk invoices • Reminder • Unpaid
Receipt	<ul style="list-style-type: none"> • Always send • Bulk Receipts Only • Dispatch debtor item document action • Dispatch debtor item document action, remembering disposition • Unallocated
Recipient created tax invoice	<ul style="list-style-type: none"> • Always • Bulk only • Dispatch debtor item document action • Dispatch debtor item document action, remembering disposition • Unallocated
Statement	<ul style="list-style-type: none"> • Billing period closed • Billing period in approval status • Billing period in error status • Dispatching from account "Dispatch Statement" action
Usage alert	<ul style="list-style-type: none"> • Always

Stationery

Stationery specifies the default stationery documents that are used by an account created using a package. Stationery can be used to display different branding across different types of accounts or services. Multiple stationery documents can be specified such as invoice, receipt, statement and quote documents.

The Stationery tab displays a summary list of the stationery specified for the package.

Stationery added to a package does not affect existing package users. To apply package stationery updates to all existing users click **Apply to existing users**.



Warning: Updating or changing stationery settings will affect existing user accounts.

A package can only have one stationery document specified per document type.

For more information, see [Document types](#) and [Stationery and forms](#).

Add package stationery

A package can be configured with default stationery to be used.

Note: A package can only have one stationery document specified per document type.

This task explains how to add a stationery document to a package.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Stationery** tab.

The **Stationery** tab is displayed.

4. Select a type from the **Document type** drop-down.

For more information, see [Document Types](#).

5. Select a document from the **Stationery** drop-down.

If published stationery documents do not exist for the document type, no stationery will be available for selection. For more information, see [Stationery and forms](#).

6. Click **Add**.

The stationery document is added to the **Package Stationery** list.

Orders and order forms

When your Smile administrators create a package, they may choose to add an order form to the package. An order form contains a set of fields that may be mapped to many package components, for example, the username for each new subscription in the package. Order forms simplify the order process, because you enter only the minimum information required to set up the new account or subscription.

However, if a package contains a choice of many plans and contracts, the package may not have an order form. When you order a package without a custom order form, you enter the required information for each account and subscription individually on the default Smile service order forms.

The following screenshot shows you an example of an order form for the Triple Play package, which orders an account and four subscriptions (fixed voice, mobile, ADSL and CAT Access). The red boxes show you the account and subscription fields that correspond to the order form fields.

For example, the number in the Fixed Voice FNN field becomes the username and FNN for the new fixed voice subscription. The value in the DSL Username field becomes the username for both the ADSL and CAT Access subscriptions.

The screenshot shows the 'Order Triple Play' form. It includes an 'Order Status Report' button and several input fields. Red boxes on the right side of the form map specific input fields to account and subscription fields:

- Given Name** maps to **Account Contact given name**.
- Family Name** maps to **Account Contact family name**.
- Street Number** maps to **Account Billing address street number**.
- Street Name** maps to **Account Billing address street name**.
- Suburb** maps to **Account Billing address suburb**.
- Postcode** maps to **Account Billing address postcode**.
- Fixed Voice FNN** maps to **Example Telecom Fixed Voice FNN, Username**.
- Mobile FNN** maps to **Example Telecom Mobile FNN, Username**.
- DSL Username** maps to **Example Telecom ADSL2+ Username** and **CAT Access Username**.

The 'Plan' field is a dropdown menu currently set to 'Not Set'.

Figure 72: The Triple Play order form

Add an order form field

Adding a field to the Order Form fields list specifies the fields and the order they are displayed on a form.

Note: To add a field to an order form you must first create a custom field as the field name placeholder. For more information, see [Create a custom field](#).

Not all service options, overrides for example, are available through ordering. It may not be possible to create an order form for a complex package containing multiple services and plans. Order forms are advanced configuration. For more information, [contact Inomial](#).

This task explains how to add a field to an order form.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.
The Packages page is displayed.
2. Click **View** to right of the required package entry.
The **Package** tab is displayed.
3. Click the **Order Form** tab.
The **Order Form** tab is displayed.
4. Select a field from the **Add field** drop-down. Click **Add**.
The **Add field** list is populated by [Custom fields](#).
The Order Form Field page is displayed.
5. Complete order form field properties as required.
For more information, see [Order form field properties](#).
6. Select the appropriate service field(s) under **Mappings**. Click **Save**.
The **Order Form** tab is displayed. The field is displayed in the **Order Form Fields** list.
7. (Optional) Click **Up** or **Down** to the right of a field to change its display order in the order form fields list.

Enable order form

When used in an order process an order form can simplify the collection of account and service information. An order form will display the order form fields in the order they are configured. Information that may otherwise be entered on multiple pages can be entered on one page.

This task explains how to enable an order form.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Order Form** tab.

The **Order Form** tab is displayed.

4. Select **Use Order Form**. Click **Save**.

The order form will now be displayed when a package order is started.

Order form field properties

Label	Specifies a field name for the form entry. Displays the custom field attribute type name by default.
Field	Specifies the custom field name. For more information, see Custom fields .
Visibility	Specifies the visibility of the form field. <ul style="list-style-type: none"> • Visible and editable • Visible but not editable • Hidden (used by automated process)
This field is required	When selected specifies that the field is mandatory and must be completed during the order process.
Validation regular expression	Specifies formatting for particular information types. For example the format of a MAC or IP address.
Form attribute properties	Specifies additional custom field form properties.
Mappings	Specifies the Smile service field mapping for the order form field. An order form field can be mapped to multiple database fields. Not all service fields are displayed in the Mappings list. Map an order form field to Custom fields and the order form data is copied into a custom field in the service.

Plans

The Plans tab provides a method of setting plans in a package when using an order form, instead of through the services specified on the Components tab.

Package plans define the plan, plan options and contract combinations across all of the components offered in a package.

Add a package plan

Multiple plans for multiple services can be configured in a package.

This task explains how to add a package plan.

1. Select **Packages** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Packages page is displayed.

2. Click **View** to right of the required package entry.

The **Package** tab is displayed.

3. Click the **Plans** tab.

The **Plans** tab is displayed.

4. Click **New Package Plan**.

The Package Plan page is displayed.

5. Type a name for the plan in the **Name** field. Click **Add Component Plan**.

The Package Plan Component Plan page is displayed.

6. Select a service from the **Plan Component** drop-down.

Additional plan fields are displayed depending on the service selected.

7. Complete the required Package Plan Component Plan fields.

For more information, see [Package plan component properties](#).

8. (Optional) Click **Add Plan Option** to add plan options.

For more information, see [Add plan option](#).

9. Click **Save**.

The Package Plan page is displayed.

10. Click **Save**.

The **Plans** tab is displayed. The package plan is displayed in the **Package Plan** list.

Add plan option

Plan options can be specified for plan packages.

This task explains how to add a plan option.

1. Click **Add Plan Option** on the Package Plan Component Plan page.

The New Package Plan Component Plan Option page is displayed.

2. Complete the plan option fields.

For more information, see the Plan options section in [Package plan component properties](#).

3. Click **Save**.

The Package Plan Component Plan page is displayed.

Package plan component properties

Package Component	Specifies the service the plan applies to. The available services are specified on the Components tab.
Managed Plan Group	Specifies managed plan groups available to the service. Groups options are specified on the service. For more information, see Managed plans .
Plan Change Group choice	When a Managed Plan Group is selected specifies the plan choice.
Plan	When no Managed Plan Group is specified sets the service plan.
Plan Options	Plan options displays a summary list of any options specified on the plan. For more information, see Add plan option .
Contract	Specifies the contract of a plan. Contracts are configured on a service and applied to plans. For more information, see Contracts .

Package Component Choose One...

Plan Not Set

Plan Options

Option	Option Group	Quantity	Apply Always
No plan options have been configured for this plan			

Add Plan Option

Contract Not Set

Save

Figure 73: Package plan component properties

Plan options

Option Group	Specifies the plan option groups if configured for a plan.
Option	Specifies any options specified in the plan.
Select quantity from	If an option involves a quantity, specifies from where the quantity is selected.
Quantity	Specifies a numeric quantity.
Apply always	When selected specifies that the plan option is always applied.
Conditions	When Apply always is not selected specifies a condition that can be set on the plan option.
Add condition	Specifies a condition. Select from drop-down, click Add . Conditions are created via Custom fields .

Chapter 7

Configuring rating

Rating scripts

Rating scripts are used to handle special requirements and can change the way billing and rating is performed for a given service. The use of rating scripts are generally not required as the built in functionality of Smile covers most needs. Rating scripts can be implemented by Inomial for use in special circumstances to extend Smile's abilities. A service may use several scripts at once.

Smile has three types of rating scripts:

- **Invoice filter script**—Used to modify an invoice after creation. For example, to apply a discount.
- **Plan rating script**—Used to apply changes to a plan.
- **Service rating script**—Used before rating occurs on a service. For example, to apply new charge types or modify values from CDRs.

Rating scripts are advanced configuration. For more information, [contact Inomial](#).

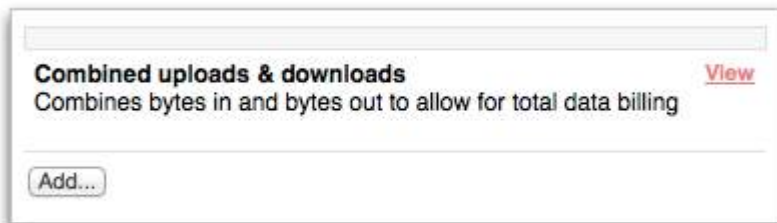


Figure 74: Service Rating Scripts page

View rating scripts

The Service Rating Scripts page displays all created scripts.

This task explains how to view rating scripts.

1. Select **Rating Scripts** under **Services, Ordering and Rating** on the Configuration and Tools page.

The Service Rating Scripts page is displayed.

2. (Optional) Click **View** to the right of a rating script entry.

The Rating Script page is displayed.

Script Name

Combined uploads & down

Script type

Service rating script

Script Description

Combines bytes in and bytes out to allow for total data billing

Script Source Code

```
function addBillingItem(t, ratingEngine, chargeType, billingPeriod, rateableEvent, planInfo,
ratedEvent)
{
  var st = new Packages.com.inomial.cms.billing.BillingSessionTotals()
  st.addSeconds(rateableEvent.getSeconds());

  var units =
    new java.math.BigInteger(rateableEvent.getBytesIn())
    .add(new java.math.BigInteger(rateableEvent.getBytesOut()));

  var billingUnit = new Packages.com.inomial.cms.billing.BillingUnit(
    chargeType, rateableEvent.getStartTimeOfDay(), rateableEvent.getStopTime(),
    units, rateableEvent.getEventId(), rateableEvent.getEbid(), null, null, "D",
    Packages.com.inomial.cms.billing.BillingUnit.QuantityType.QUANTITY, false, st, null);

  ratingEngine.addBillingUnit(t, ratedEvent, billingUnit, planInfo, true);
}
```

☒ Enabled

Save

Delete

Figure 75: Combined uploads & downloads rating script properties page

Disable or delete a rating script

Rating scripts can be disabled or deleted. Disabling a script will make a script inactive. It can still be assigned to a service, but will not function. Deleting a script removes it from Smile. If you attempt to delete a script that is still assigned to a service an error will be displayed.

This task explains how to disable or delete a rating script.

1. Click **View** to the right of the rating script entry.

The Rating Script page is displayed.

2. Do one of the following:

Option	Description
Disable the rating script	<ol style="list-style-type: none">1. Clear the Enabled checkbox.2. Click Save.
Delete the rating script	<ol style="list-style-type: none">1. Click Delete.2. Click Continue to confirm.

The Service Rating Scripts page is displayed.

Charge types and units

Charge types specify separate, identifiable elements of charges that are used in the rating of services provided to customers. For example, charge types include mobile and national flagfall and timed charges; data transmitted and received; and time online.

Smile includes a pre-configured set of default charge types.

Common charging units

Where applicable, each charge type will specify the unit or multiple units at which it is charged. Charge units define common quantities to describe blocks of units.

Table 13: Example of timed charging units

Units	Name
1	second
30	30 seconds
60	minute
3,600	hour

Table 14: Example of data charging units

Units	Name
1	byte
1,000	kB
1,000,000	MB
1,000,000,000	GB

View or edit a charge type

Smile is pre-configured with default charge types. These may be renamed or edited. When modifying charge types it is important to consider that the charge type may be in use in other areas of Smile.

This task explains how to view or edit charge types.

1. Select **Charge Types and Units** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Charge types page is displayed.

2. Click **View** to the right of a charge type.

The Charge Type property page is displayed.

Charge type name:

Quantity Format:

☐ Deprecated

Charge units define common quantities used to describe blocks of units of this charge. Examples for data charges are bytes (1 unit), kilobytes (1,000 units) and megabytes (1,000,000 units); examples for timed charges are seconds (1 unit), minutes (60 units) and hours (3,600 units).

Units	Name	
1	byte	View
1000	kB	View
1000000	MB	View
1000000000	GB	View

Figure 76: Downloaded Data Charge Type properties page

3. Edit the required fields. You can edit the following information of an existing charge type:
 - **Charge type name**—Descriptive name of the charge type.
 - **Quantity Format**—Specifies a string format to define how an amount is displayed. For more information, see [Quantity format](#).
 - **Common Charging Units**—Specifies the minimum unit and multiples of the charge unit for the charge type.
 4. Click **Save**.
- The Charge types page is displayed.

Add a charge type

Smile is pre-configured with default charge types. Additional charge types can be added to the charge type list.

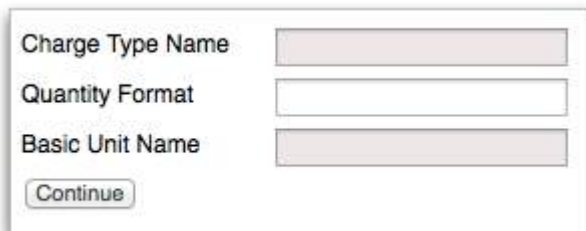
This task explains how to add a charge type.

1. Select **Charge Types and Units** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Charge types page is displayed.

2. Click **Add**.

A New Charge Type Form page is displayed.



The screenshot shows a form titled 'New Charge Type Form'. It has three text input fields stacked vertically: 'Charge Type Name', 'Quantity Format', and 'Basic Unit Name'. Below these fields is a button labeled 'Continue'.

Figure 77: New Charge Type Form page

3. Complete the presented fields. The following fields require additional explanation:

- **Change Type Name**—Descriptive name of the new charge type.
- **Quantity Format**—Specifies a string format to define how an amount is displayed. For more information, see [Quantity format](#).
- **Basic Unit Name**—Specifies the minimum charging unit. Charge units define common quantities to describe blocks of units.

4. Click **Continue**.

The Charge type detail page is displayed.

5. (Optional) Click **Add** to specify additional charging units.

The Charge Unit page is displayed.

6. Complete the presented fields:

- **Number of units**
- **Unit name**—Use the singular, lowercase form of the units name.

7. Click **Save**.

The Charge Type properties page is displayed.

8. (Optional) Repeat to add additional charging units.

9. Click **Save** when complete.

The Charge types page is displayed.

Delete or deprecate a charge type

Deleting a charge type removes the type from the charge type list. It will no longer be available or visible in Smile.



Warning: Deleting a charge type permanently removes the charge from the Smile database. To avoid data loss, we recommend that you only delete new charge types that were created in error.

To close a charge type, without deleting it, we recommend deprecating the type.

Note: Deprecating a charge type will not affect existing users. The deprecated option will not be available for new users.

This task explains how to delete a charge type.

1. Select **Charge Types and Units** under **Services, Ordering & Rating** on the Configuration and Tools page.

The Charge types page is displayed.

2. Click **View** to the right of a charge type.

The Charge Type properties page is displayed.

3. Do one of the following:

Option	Description
Delete the charge type	<ol style="list-style-type: none">1. Click Delete.2. Click Continue to confirm.
Deprecate the charge type	<ol style="list-style-type: none">1. Select the Deprecated checkbox.2. Click Save.

The Charge types page is displayed.

Chapter

8

Configuring user management

Operators and groups

An operator is the name for an account with Smile access. For example, customer service, accounts and helpdesk staff who use Smile are all operators. Operator accounts are created by Smile administrators.

An operator can be assigned to a single group or multiple groups. Groups are used for assigning access to different areas in Smile depending on an operators job function.

User management groups are not the same as [Helpdesk Groups](#), though they can be given the same names. Helpdesk groups are the groups to which tickets are assigned.

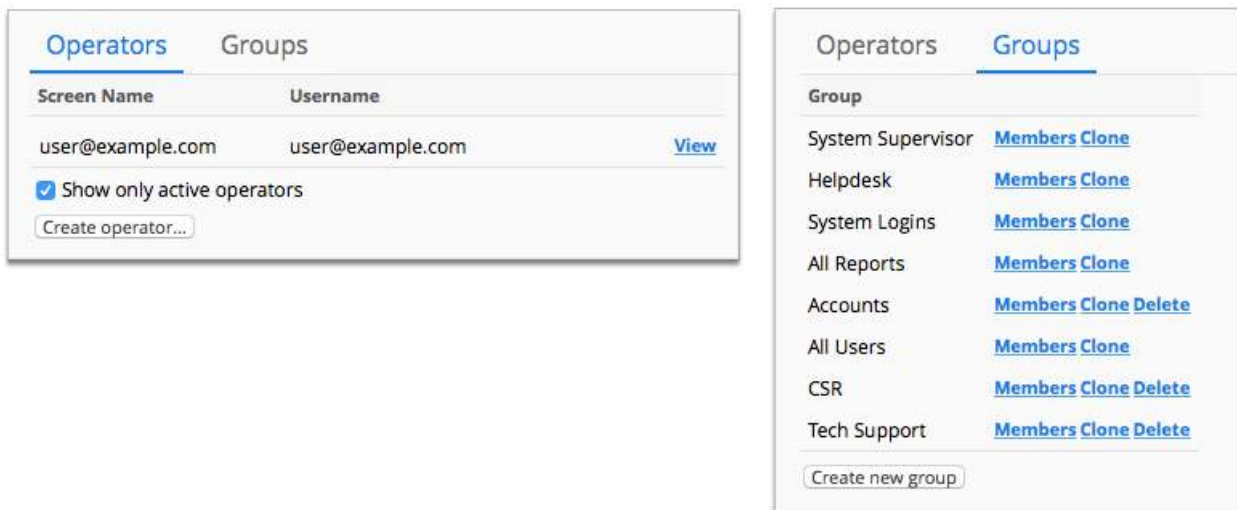


Figure 78: The Operators and Groups tabs

Create a Smile operator

Creating an operator provides user access to Smile. Access and permissions to various areas and functions of Smile can be set against the operator account.

Note: Usernames are case sensitive.

This task explains how to create a Smile operator.

1. Select **Operators and Groups** under **User Management** on the Configuration and Tools page.

The **Operators** tab is displayed.

2. Click **Create operator...**

The **Create Operator** window is displayed.

3. Select **Create a new account with operator privileges.**

4. Click **Continue...**

The Place Order page is displayed.

5. Click **Standard Account.**

A New Account page is displayed.

6. Complete account fields as required.

Note: This page displays a number of fields covering the operators name, address and contact information. There are no mandatory fields on this page. Complete the fields that are required by your configuration.

7. Click *Continue*.

The New Smile Access service page is displayed.

USN 2142421169

Username *eg: smith@example.com*

Password 2PfGpZGZM9S

Service start date 3/12/13

Service end date

Become member of System Supervisor

Screen name (required)

Contact Given Name

Contact Family Name

Email Address

Compose Email Settings

From name for email

From address for email

Email signature

Figure 79: Creating a Smile operator

8. Type a name in the *Username* field.**9. Complete the following fields:**

- **Screen name**
- **Email Address**
- **From name for email**
- **From address for email**

These fields may contain the same entry.

10. Complete any other required fields.**11. Click *Continue*.**

The operator account has been created. The operator's account page is displayed.

Create a group

Groups are used for pooling Smile operators with the same job functions or roles. Groups can then be used to assign permissions or access to functions in Smile.

This task explains how to create a group.



Tip: To create a group with the same or similar members of an existing group click **Clone** next to the group to create a copy that you can then give a new name.

1. Select **Operators and Groups** under **User Management** on the Configuration and Tools page.

The Operators page is displayed.

2. Click the **Groups** tab.

The Groups page is displayed.

3. Click **Create new group**.

The **Principal** window is displayed.

4. Type a group name in the **Name** field.

5. Click **Save**.

The **Groups** tab is displayed. The new group is added to the **Group** list.

Note: The new group currently has no members.

Modify group members

Modify groups to maintain appropriate operator membership. Depending on your user management configuration, an operator does not have to be in a group. The use of groups is more efficient to manage large groups of operators, and menu access and permissions.

You can perform actions that:

- add operators to a group
- remove operators from a group
- remove all operators from a group

Note: The following groups can not be modified:

- **System Logins**—contains all system Smile accounts
- **All Users**—contains all Smile system accounts and operators

This task explains how to modify groups.

1. Select **Operators and Groups** under **User Management** on the Configuration and Tools page.

The **Operators** tab is displayed.

2. Click the **Groups** tab.

The **Groups** tab is displayed.

3. Click **Members** to the right of the group to modify.
The **Members** list for the group is displayed.

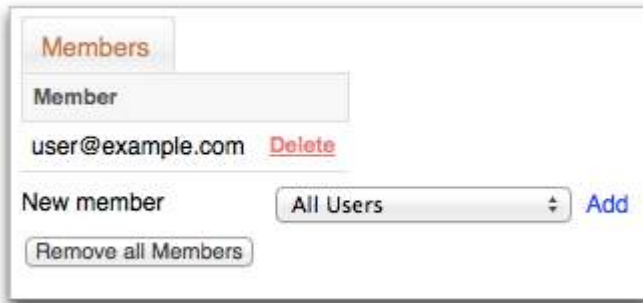


Figure 80: Modifying group members

4. Do one of the following:

Option	Description
Add a member to the group	<ol style="list-style-type: none"> 1. Select an operator from the New member drop-down. 2. Click Add. 3. Click Make user a member of group. <p>Note: If all Smile operators are currently a member of the group the New member drop-down will not be visible.</p>
Remove a group member	<ol style="list-style-type: none"> 1. Click Delete to the right of the operator's name in the Member list. 2. Click Continue.
Remove all members of a group	<ol style="list-style-type: none"> 1. Click Remove all Members. 2. Click Continue.

The modified **Members** list is displayed.

Restricted usernames

Restricted usernames is where you define usernames that are not allowed to be used in services.

For example, bad usernames can include:

- root
- accounts
- sales
- other names that are associated with special mailboxes or actions

Add a restricted username

Restricted usernames are displayed in a simple table.

Note: Restricted usernames are case sensitive. To restrict all instances of a username you must add each variation to the restricted usernames table. For example, ACCOUNTS, accounts and Accounts.

This task explains how to add a restricted username.

1. Select **Restricted Usernames** under **User Management** on the Configuration and Tools page.
The Bad Usernames page is displayed.
2. Click **Add**.
The **Bad Username** field is displayed.
3. Type the username in the **Bad Username** field.
4. Click **Save**.
The Bad Usernames page is displayed.

Menus and permissions

Menus and permissions specify the configurable menus, menu groups and menu items in Smile and which Smile operators have permission to access the menus and the functions they contain. Operators will only be able to see and perform those functions that they are allowed. Permissions are set individually or by group.

For more information, see [Operators and groups](#).

The menus and permissions page displays a summary list of configured Smile menus and capability groups.

- **Menus**—specify a menu ID, title, display characteristics of the menu and any menu items. Menu items can be assigned to menu groups.
- **Capabilities**—specify individual account and subscription functions or tasks in Smile.

View menus and permissions

The Menus and Permissions page displays a summary list of Smile's menus and capabilities. Each menu entry contains information about the menu and specifies the configuration of menu items.

This task explains how to view menus and permissions.

1. Select **Menus and Permissions** under **User Management** on the Configuration and Tools page.

The Menus and Permissions page is displayed.

2. Select **View** to the right of the required menu entry.

One of the following is displayed:

- A capability entry will display the **Capabilities** tab.
- A menu item will display **Menu Items** and **Menu Details** tabs.

Menus

A menu specifies the configuration and appearance of the menu in Smile. A menu entry contains information about:


- appearance and layout
- menu items and descriptions
- menu groups
- permissions
- menu icons

A menu entry contains the following tabs:

- **Menu Details**—contains the menu title and display properties.
- **Menu Items**—specifies sub-menu items that the menu contains.



Attention: Adding a **New Menu** is advanced configuration. For more information, [contact Inomial](#).

 **Warning:** Applying the **Make Custom** option to a menu will result in Smile updates no longer being applied to the menu.

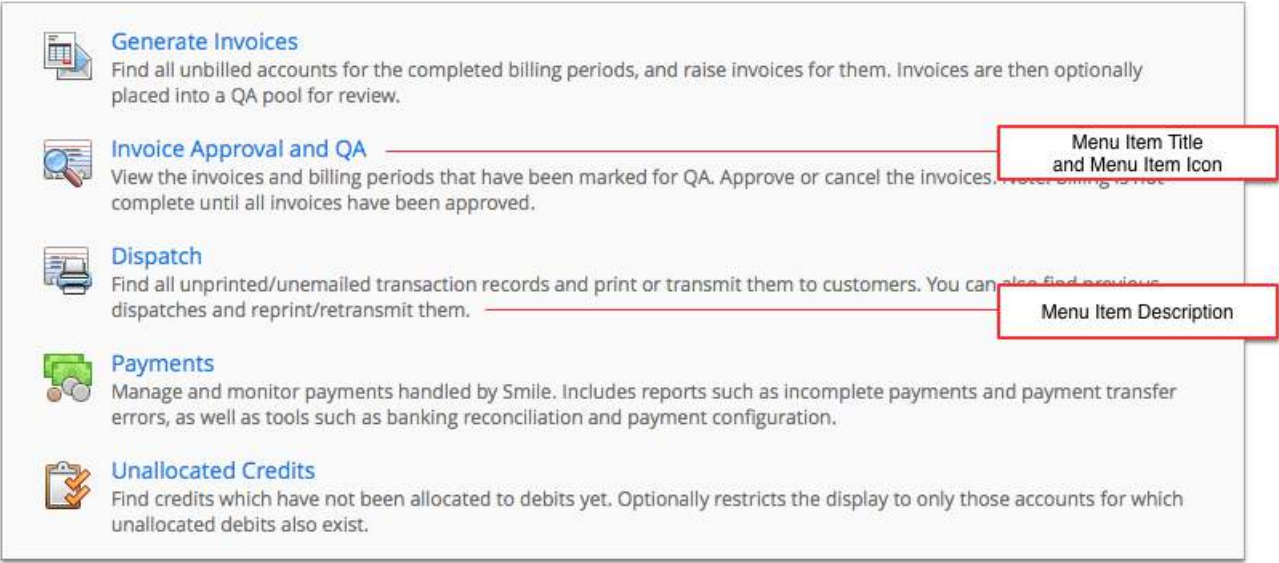


Figure 81: An example of a menu configured with a normal display style and 1 column

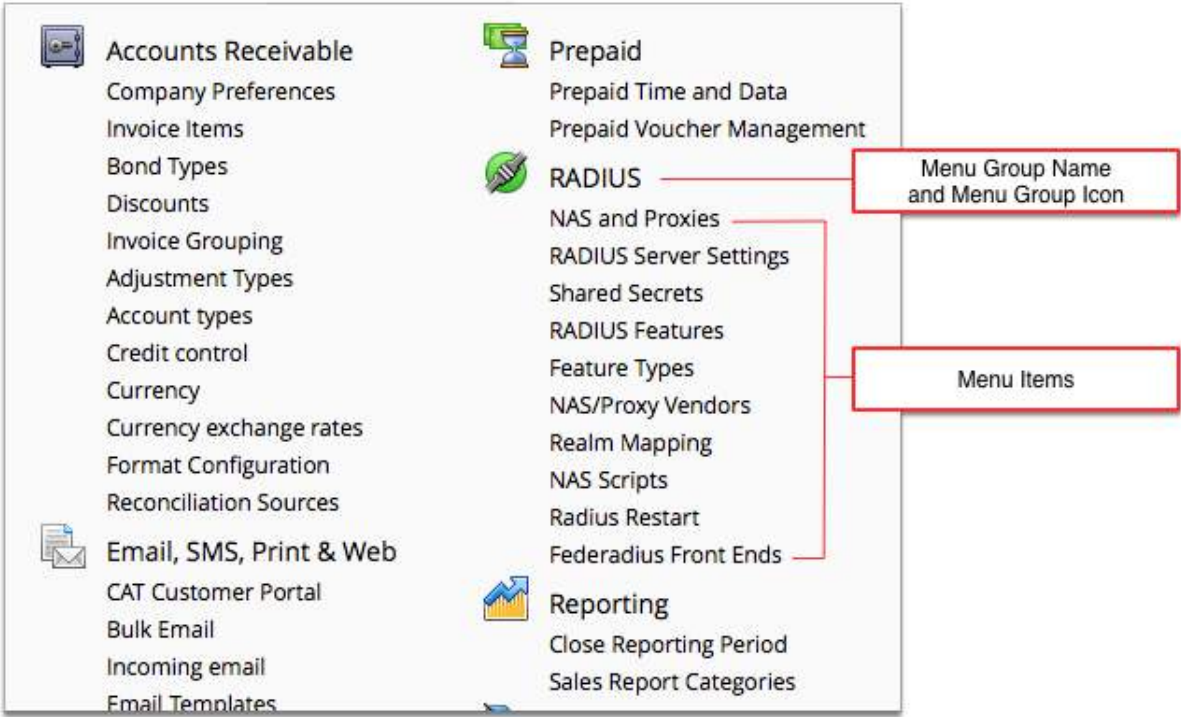


Figure 82: An example of a menu configured with a compact display style, menu groups and 2 columns

Menu details properties

Menu ID	Advanced configuration. For more information, contact Inomial .
Title	Specifies the menu name.
Tang Protocol name	Advanced configuration. For more information, contact Inomial .
This menu is disabled	When selected the menu is not visible to Smile operators.
Display style	Specifies the display format of menu items. <ul style="list-style-type: none"> • Normal—specifies that menu Item titles are displayed along with their Item description. • Compact—specifies that the menu Item title is displayed on its own.
Number of columns (1 - 3)	Specifies how the menu is presented. It can be displayed as a single column or up to 3 columns.

Menu items properties

Menu	Specifies the name of the menu that the menu item belongs to.
Menu item position	Specifies the menu item position in relation to other menu items. A lower number will display the menu item higher in a menu.
Item title	Specifies the displayed name of the menu item.
Menu group	Specifies if the menu item is member of a menu group. A menu can have multiple menu groups.
Item description	Specifies a description of the menu item and its purpose. This description is displayed when the Display style is set to Normal .
Icon URL (32x32)	Specifies an image file path and name of a menu icon.
Tang form name	Advanced configuration. For more information, contact Inomial .
Item Data (optional)	Advanced configuration. For more information, contact Inomial .
Action Name	Advanced configuration. For more information, contact Inomial .
Redirect URL	Advanced configuration. For more information, contact Inomial .
The menu item is disabled	When selected the menu item is not visible to Smile operators.
Custom item	When selected specifies that the menu item has been customised. Smile updates will no longer be applied to the menu item.
Inomial object ID	Advanced configuration. For more information, contact Inomial .

Allow these principals

Specifies the Smile operators and groups that have access to the menu item.

But deny these principals

Specifies the Smile operators and groups that have do not access to the menu item.

Menu group properties

Menu	Specifies the name of the menu the group belongs to.
Group name	Specifies the name of the menu group.
Menu group position	Specifies the menu group position in relation to other menu groups. A lower number will display the menu group higher in a menu.
Icon	Specifies an image file path and name of a menu group icon.

Capabilities

Capabilities specify individual functions or tasks and access to specific pages or tabs in Smile. Capabilities are defined for account and subscription functions.

Capabilities menu item properties

Menu	Specifies the name of the capability menu.
Item title	Specifies the name of the capability item.
Item description	Specifies a description of the capability item and its purpose.

Allow these principals

Specifies the Smile operators and groups that have access to the menu item.

But deny these principals

Specifies the Smile operators and groups that have do not access to the menu item.

Permissions

Permissions define the functions that a Smile operator can perform and the menus and shortcuts that are visible to them. Smile provides flexible and comprehensive access management through permissions.

Permissions can be set for individual Smile operators or for all members of a group.

Permissions can be set for an entire menu or capability or for an individual menu or capability item.



Attention: Adding a **New Menu** is advanced configuration. For more information, [contact Inomial](#).



Warning: Applying the **Make Custom** option to a menu will result in Smile updates no longer being applied to the menu.

Set permissions on a menu

Permissions can be set for an entire menu or capability. The permissions on a menu can be set for a single smile operator or for all members of a group.

For more information, see [Operators and groups](#).

This task explains how to set permissions on a menu.

1. Select **Menus and Permissions** under **User Management** on the Configuration and Tools page.

The Menus and Permissions page is displayed.

2. Select **View** to the right of the required menu.

The **Menu Items** or **Capabilities** tab is displayed.

3. Select an operator or group from the **Edit permissions for** drop-down.

Additional permission options are displayed.

4. Do one of the following:

Option	Description
Give the operator or group permission to access all listed items	<ol style="list-style-type: none"> 1. Click Allow All. 2. Click Continue to confirm.
Remove access from the operator or group to all listed items	<ol style="list-style-type: none"> 1. Click Deny All. 2. Click Continue to confirm.
Give or remove access to individual listed items	<ol style="list-style-type: none"> 1. Click Deny or Allow to the right of individual listed items as required.

The relevant permissions are updated.

Set permissions on a menu item

Permissions can be set on an individual menu item or capability. The permission on the item can be set for a single smile operator or for all members of a group.

For more information, see [Operators and groups](#).

This task explains how to set permissions on a menu item.

1. Select **Menus and Permissions** under **User Management** on the Configuration and Tools page.

The Menus and Permissions page is displayed.

2. Select **View** to the right of the required menu.

The **Menu Items** or **Capabilities** tab is displayed.

3. Click **Edit** to the right of the required item entry.

The Menu Item page is displayed.

4. Do one of the following:

Option	Description
To allow permission	<ol style="list-style-type: none">1. Select an operator or group from the Add principal drop-down in the Allow these principals section.2. Click Add.
To deny permission	<ol style="list-style-type: none">1. Select an operator or group from the Add principal drop-down in the But deny these principals section.2. Click Add.

The selected operator or group is added to the relevant **Permissions** list.

Commissions

A commission is a fee paid to a third party who sells products on your behalf. In Smile, you can pay commission on accounts, subscriptions and charge types.

Smile uses three entities to manage commissions:

- **commission earners**—represent a person who is paid commission.
- **commission structures**—specify the commission rates that you pay to a commission earner.
- **agents**—associate a commission structure with a commission earner.

Each agent contains one or more commission earners, and each commission earner is associated with a commission structure. Agents let you easily assign multiple commission earners to the same account or subscription.

For more information, see the *User Guide*.

Create a commission

Creating a commission lets you make commission payments to commission earners. This task explains how to create a commission with a single earner and structure.

1. [Create a commission earner](#).

A commission earner is a person who is paid commission.

2. [Create a commission structure](#).

A commission structure specifies the commission rates you pay.

3. [Create an agent](#).

An agent associates a commission structure with a commission earner.

4. [Assign an agent to an account or subscription](#).

The agent now earns commission on the account or subscription.

Create a commission earner

A commission earner represents a person who is paid commission. Smile treats commission earners as a special type of subscription, so each commission earner must be associated with a commission account.

Note: Before you create your first commission earner, [contact Inomial](#) for more information about configuring the commission earner service.

This task explains how to create a commission earner.

1. [Search](#) for the commission account to add the commission earner to, then double-click the commission account entry in the search results.

The Account summary page is displayed.

2. On the **Account** menu, click **Add Subscription**.

The Place Order page is displayed.

3. Click **Select** next to the commission earner package entry.

The Commission earner page is displayed.

4. Complete the following fields:

- **Name**—Specifies the name of the commission earner.
- **Service start date**—(Optional) Specifies the date the commission earner starts earning commission.
- **Service end date**—(Optional) Specifies the date the commission earner stops earning commission.

5. Click **Continue**.

Smile creates the commission earner and returns to the commission Account summary page.

Create a commission structure

A commission structure specifies the commission rates that you pay to commission earners. You can create a commission structure that assigns commission to accounts, subscriptions or a specific charge type, for example, a sign-up bonus or international calls.

When you create a commission structure, ensure that you create a default rule for the commission raised on any charge type on any service, even if that commission is \$0. Smile uses this default rule for processing purposes.

To create a commission structure for a leading commission, ensure that the initial invoice contains a line item that triggers the commission payment. For example, to pay a leading commission on a service that does not have a setup charge, create a \$0 setup fee for the service that is not printed on the invoice. After you create the setup fee, create a commission structure that pays commission on the setup charge.

This task explains how to create a commission structure.

1. On the **Smile menu, click **Configuration**.**

The Configuration and Tools page is displayed.

2. Under **User Management, click **Commissions**.**

The Commission Configuration page is displayed.

3. Click **New Commission Structure.**

The Commission Configuration page is displayed.

4. Complete the following fields:

- **Name**—Specifies the name of the commission structure.
- **Commission payment delay**—Specifies the period of time between when the invoice is paid and the commission is raised.
- **Commissions are paid for**—Specifies the length of time to pay commission after the account or subscription is created. If you leave this field blank, Smile pays commission indefinitely.

5. (Optional) Tick the **Only pay commissions to subscriptions on contracts checkbox.**

If you select this option, Smile pays commissions only on accounts or subscriptions that are under contract. The commission ends when the contract ends.

6. Click **New rate.**

The Commission Service page is displayed. This page lets you define a commission rule.

7. Select the service to apply the commission to in the **Service drop-down, and click **New charge type commission rate**.**

For example, select **Any service** to create a default rule for every service.

The Commission Rate page is displayed.

8. Complete the fields on this page. The following field names require additional explanation:

- **Invoice display order**—Specifies the order in which the commission rate is displayed on the RCTI. The commission rate with the lowest invoice display order number is displayed at the top of the RCTI.
- **Invoice description**—Specifies the commission rate text that appears on the RCTI.
- **Sales report category**—Specifies the sales report category that the commission rate is assigned to.
- **Discount/commission category**—Specifies the sales report category of the invoice item the commission is raised against.

Note: To raise a commission for a sign-up bonus, select **Setup charge** from the **Charge type** drop-down. To create a default rule for all charge types, select **All charge types** from the **Charge type** drop-down.

9. Click **Save**.

Smile returns to the Commission Service page.

10. Repeat Steps 7-9 for each charge type you want to add to the commission, then click **Save**.

The Commission Configuration page is displayed.

11. Click **Save**.

The Commission Configuration page is displayed. You can now assign the commission structure to an agent.

Create an agent

An agent associates a commission earner with a commission structure.

This task explains how to create an agent.

1. On the **Smile** menu, click **Configuration**.

The Configuration and Tools page is displayed.

2. Under **User Management**, click **Commissions**.

The Commission Configuration page is displayed.

3. Click **New Agent**.

The Agent page is displayed.

4. Type the name of the new agent in the **Name** field.

5. (Optional) Enter the dates from which the agent can earn commission in the **Valid from** and **Valid to** fields.

The dates in these fields do not affect commission calculations, but instead let you filter inactive agents from a displayed list of agents.

6. Add a commission earner to the agent, as follows:

- a. Click **New Commission Earner**.

The Commission Earner page is displayed.

- b. Click **Search** next to the **Commission earner** field, search for the name of the commission earner, then click **Select** next to the commission earner in the search results.

The **Name** column of the search results specifies the commission account name for each commission earner. If the account contains many commission earners, use the USN to identify each commission earner.

- c. Select the commission structure to apply to the commission earner in the **Earns commission** drop-down, and click **Save**.

Smile adds the commission earner to the agent. The Agent page is displayed.

7. Repeat Step 6 to add more commission earners to the agent.

8. Click **Save**.

Smile creates the agent. You can now assign the agent to accounts and subscriptions.



Attention: If an agent will have multiple commission earners, add the additional earners before assigning the agent to accounts or subscriptions. When you add an agent to an account or subscription only the current commission earners that are members of the agent will receive commission. If additional commission earners are added to an agent the new earners will only receive commission from accounts or subscriptions that the agent is added to after that point in time.

Assign an agent to an account or subscription

After you assign an agent to an account or subscription, the commission earners associated with the agent earn commission on the account or subscription.

If you assign an agent to an account, the commission earners associated with the agent also earn commission on each of the account's subscriptions. If an account is set as a bill-to account the account commission will not be applied to these additional invoices.



DANGER: When you add an agent to an account or subscription only the current commission earners that are members of the agent will receive commission. If additional commission earners are added to an agent the new earners will only receive commission from accounts or subscriptions that the agent is added to after that point in time.

This task explains how to assign an agent to an account or subscription.

1. [Search](#) for the account or subscription to assign the agent to, then double-click the account or subscription entry in the search results.

The Account summary page is displayed for an account result or the subscription summary page is displayed for a subscription result.

2. Do one of the following:

Option	Description
To assign an agent to an account	<ol style="list-style-type: none"> 1. On the Account Menu Tree, click the ► to the left of Account, then click Commissions. 2. Click Add.
To assign an agent to a subscription	<ol style="list-style-type: none"> 1. Click Add next to the Agents field.

The **Add Agent** window is displayed.

3. Select the agent in the **Agent** drop-down, optionally specify a date in the **Don't pay commission before** field, and click **Add**.

Note: If no date is set then the commission will apply from the start date of the account or subscription. Smile will generate past commission if applicable.

Smile assigns the agent to the account or subscription.

Chapter

9

Configuring resource management

Number pools

Number pools are managed groups of numbers that you can reserve for certain uses, for example particular customer groups or subscriptions. The number pools page displays a summary list of number pool names. A number pool defines the number range(s) the pool includes and duration settings for allocation and quarantine of a number.

A number in a pool has four allocation statuses:

- **temporary**—the number has been selected and cannot be selected elsewhere, but is not allocated until the selection has been saved.
- **pre-allocation**—the number has been allocated, but is not yet active or in use. The number can not be allocated elsewhere.
- **allocated**—the number is in use and cannot be allocated elsewhere.
- **quarantine**—the number is no longer in use, but cannot be re-allocated until it has been released.

Access to a number pool for allocation is accomplished through a custom field. A number pool is linked to a custom field with a field type of **Reservation from pool**. For more information, see [Custom fields](#).

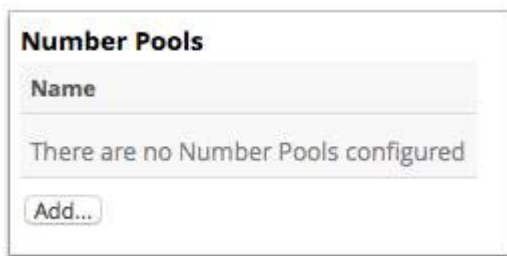


Figure 83: The Number Pools page

Add a number pool

A number pool defines a range of numbers that belong to a pool. A pool may have multiple ranges specified. A pool defines durations of temporary allocation and quarantine times.

This task explains how to add a number pool.

1. Select **Number Pools** under **Resource Management** on the Configuration and Tools page.

The Number Pools page is displayed.

2. Click **Add...**

A blank **Number Pool** page is displayed.

Figure 84: A blank Number Pool properties page

3. Type a name for the number pool in the **Name** field.

4. Select a pool type from the **Type** drop-down.

5. Complete the number pool duration fields.

For more information, see [Number pool properties](#).

6. Click **Add** to define a number range.

A **New Number Range** window is displayed.

7. Complete the number range fields.

For more information, see [Number pool properties](#).

8. Click **Create**.

The Number Pool properties page is displayed.

9. (Optional) Click **Add** to create additional number ranges.

10. Click **Save**.

Number pool properties

ID	Specifies a system generated identification number of the pool.
Name	Specifies a descriptive name for the number pool.
Type	Specifies the type of number pool. <ul style="list-style-type: none"> • IP4 Addresses • Numbers
Duration for temporary allocations	Specifies the length of time a number is temporarily held upon selection. The number is not allocated until the selection is saved.
Quarantine duration for pre-allocations	Specifies the length of time an allocated number is held while not active. If an allocated number is not activated in the specified time it is released for re-allocation.
Quarantine duration for allocations	<p>Specifies the length of time a number is not available for re-allocation after it has been released for use.</p> <p>Duration entries can be specified in days, hours, minutes and seconds. The field format is DD:HH:MM:SS. For example, 30 minutes is entered as 30 : 00. 3 days is entered as 3 : 00 : 00 : 00.</p> <p>Note: Durations entered as days will be converted to hours by Smile when the number pool properties are saved.</p>

Number Ranges

Number ranges display a summary list of contiguous ranges allocated to the number pool. A number pool can have multiple ranges specified.

Note: Multiple number ranges cannot overlap.

Name	Specifies a descriptive name for the number range.
Start	Specifies the first number of the range.
End	Specifies the last number of the range.
Start and end numbers in a range must have the same length format. Multiple number ranges in a pool may have different length formats. For example:	

Start	End
01	99
090	800
001000	500500

A screenshot of a web application window titled "New Number Range" with a close button (X) in the top right corner. The window contains three input fields labeled "Name", "Start", and "End", each with a corresponding text box. Below these fields is a "Create" button.

Figure 85: A New Number Range window

Reservation search

Reservation search displays a list of any numbers of a range that have been allocated or are in quarantine.

This task explains how to search for reservations in a number pool.

1. Click **Reservation Search...** on the configuration page of a number pool.

The Pool Search page is displayed.

2. Type the first number of the range to search in the **Start** field.
3. Type the last number of the range to search in the **End** field.
4. Click **Search**.

A **Reservations** table is displayed. Any active or quarantined reservations will be listed.

Chapter

10

Configuring prepaid

Prepaid time and data

In prepaid time and data you can create and define blocks of prepaid time or data volume to be used with data services.

Prepaid is based on either:

- **limited units**—for example, 5 GB or 100 minutes. This prepaid type expires when all the units are consumed or the expiry date of the prepaid block is reached.
- **unlimited units**—for example, unlimited access for three months. This prepaid type expires when the prepaid expiry date is reached.

You can create prepaid for any type of unit except cost, for example, data, minutes or faxes. Smile does not support prepaid currency.

Prepaid blocks

Prepaid blocks displays a table view of configured blocks, sorted by [charge type](#).

Each block defines the following:

- the plan(s) that the block is associated with
- the charge type, for example, data or online time
- the quantity or volume of the charge type
- the validity period of the block
- the purchase price
- invoice information
- prepaid block expiry warning types and thresholds
- availability of the block

Create a prepaid block

Multiple prepaid blocks can be configured specifying different time and data volume allowances.

This task explains how to create a prepaid block.

1. Select **Prepaid Time and Data** under **Prepaid** on the Configuration and Tools page.
The **Prepaid blocks** tab is displayed.

The screenshot displays the 'Prepaid blocks' tab within a configuration tool. At the top, there are three tabs: 'Prepaid blocks' (selected), 'Prepaid Types', and 'Prepaid Warnings'. Below the tabs is a search bar and a checkbox labeled 'Show all prepaid usage blocks, including expired and future blocks'. A 'List' section shows a table with columns 'Code', 'Description', 'Units', 'Kind', and 'Available'. The table is currently empty, with a message 'No prepaid usage blocks have been set up'. Below the table is a section titled 'Create a new prepaid usage type'. It contains a 'Prepaid type code' input field, a 'with currency' dropdown menu set to 'AUD - Australian Dollars', and a 'Create...' button.

Figure 86: The Prepaid blocks tab

2. Type a code into the **Prepaid type code** field. Click **Create...**
This code can not be edited once created.
The Prepaid Description page is displayed.
3. Complete all required prepaid block property fields.
For more information, see [Prepaid block properties](#).
4. Click **Save**.
The **Prepaid blocks** tab is displayed.

Prepaid block properties

A prepaid block property page specifies the accepted plans, purchase details, charges and availability of a prepaid block.

Prepaid Code	This is the short prepaid block code specified at the creation of the block. You cannot edit this code.
Display Name	Specifies a descriptive name for the plan. You can edit this name.
Prepaid Type	Specifies the prepaid type of the block. A prepaid block can only be a single type or untyped.
Can only be redeemed by customers on specific plans	When selected specifies that the prepaid block can only be used on specific plans. Plans are listed under Accepted Plans .
Accepted Plans	Lists any plans that the prepaid block can be used with. Accepted plans are selected either via the Add Plan to Accepted section below or by adding the block to Self Serve Prepaid on a plan.

Add Plan to Accepted

Choose Service for Plan	Specifies a service from which plans may be added to Accepted Plans .
Add Plan to accepted	When a service is selected for Choose Service for Plan then a list of corresponding plans is displayed.

Purchase Details

Prepaid charge type	Specifies a plan rule charge type element that the prepaid block is applied to. If an invalid charge type is selected, Smile displays an error.
Restrict use to	Depending on the Prepaid charge type selected, specifies the value and quantity type the prepaid use is restricted to.
Validity Period from time of purchase	Specifies the time period in which prepaid is valid for use from purchase. <ul style="list-style-type: none"> • Unlimited • Rating Periods • Months • Days • Hours • Minutes
Allow unlimited access until this block expires.	When selected allows unlimited access until block expiry. For example, a prepaid block with validity of one hour may have an unlimited download limit for that one hour period.

Charges

Invoiced Price	Specifies the purchase line item entry displayed on an invoice.
Usage line item	Specifies the usage line item text displayed on an invoice.
Quantity Format	Specifies a string format to define how usage quantity or volume is displayed. For more information, see Quantity format .

Prepaid Warning

Prepaid Warning Thresholds	<p>Lists any warning thresholds that have been configured for the prepaid block. Click New warning to set a threshold.</p> <p>For more information, see Add a prepaid warning threshold.</p>
-----------------------------------	---

Availability

Time of day restrictions	Displays a list of specified time of day restrictions. Visibility of time of day restrictions is dependant on selection at Prepaid charge type .
New restriction	Specifies time restrictions per day to add to the Time of day restrictions table.
Valid from	Specifies the start date validity of the prepaid block.
Valid to	Specifies the end date validity of the prepaid block.

Prepaid Description

Home > [Configuration and Tools](#) > Prepaid configuration > Prepaid Description

Prepaid Code **example**

Display Name

Prepaid Type

Currency **AUD - Australian Dollars**

☐ Can only be redeemed by customers on specific plans

Accepted Plans

Plan Code	Plan Name	CAT?	SOAP API?
No plans to accepted			

Add Plan to Accepted

Choose Service for Plan

User Object

Add custom field [Add](#)

Purchase Details

Prepaid charge type

Restrict usage to

Validity Period from time of purchase

☐ Allow unlimited access until this block expires.

Charges

Invoiced Price **\$0: Prepaid time purchased** [Change...](#)

Usage line item **Prepaid time used** [Change...](#)

Quantity Format


Prepaid Warning


Prepaid Warning Thresholds

Duration	Duration Type	Notification
No prepaid warning threshold is configured		

[New warning](#)

Availability

Valid from 

Valid to 

[Save](#) [Delete](#)

[Deprecate](#)

Figure 87: Properties of a prepaid block

Add a prepaid warning threshold

A prepaid warning threshold specifies the time period before a prepaid block expiry has been reached at which a warning is triggered. A warning can be sent by both email and SMS.

The prepaid warning threshold table, displayed on a prepaid block's properties page, lists alerts configured on a prepaid block. Multiple warning thresholds can be configured on a prepaid block.

Note: If at the time that a warning is configured to be sent there is no remaining data for the prepaid block, no warning will be sent.

This task explains how to set a new prepaid warning threshold.

1. Select **Prepaid Time and Data** under **Prepaid** on the Configuration and Tools page.

The **Prepaid blocks** tab is displayed.

2. Click **Edit** to the right of a prepaid block entry.

The prepaid block properties page is displayed. The **Prepaid Warning Thresholds** table is located near the bottom of the page.

3. Click **New warning**.

A Prepaid warning threshold property page is displayed.

4. Type a name for the threshold in the **Name** field.

5. Type a value in the **Duration** field.

This is the time period at which the warning will be triggered.

6. Select a type from the **Duration type** drop-down.

This specifies the time quantity of the period entered in the previous step. Select from **Calendar days**, **Hours**, **Minutes** or **Calendar months**.

7. Set notification method options. Multiple methods can be configured.

For more information, see [Notification method configuration](#).

8. (Optional) Select a date from the **Valid from** calendar.

Prepaid warnings before this date will not be sent.

9. (Optional) Select a date from the **Valid to** calendar.

Prepaid warnings after this date will not be sent.

10. Click **Save**.

The prepaid block properties page is displayed.

Prepaid warning threshold

Home > Configuration and Tools > Prepaid configuration > 5G Total Data > Prepaid warning threshold

Name

Duration

Duration type

Email

Template [New](#)

Schedule

☐ Account Email address

☐ Subscription Email address

SMS

Template [New](#)

Schedule

☐ Account Mobile phone


☐ Subscription Mobile phone

☐ Subscription Username

Print

Template

Schedule

Valid from 


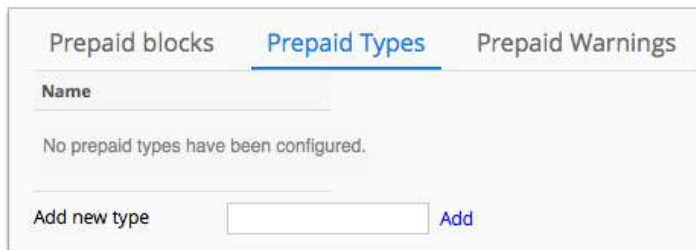
Valid to 

Figure 88: Prepaid block warning threshold properties

Prepaid types

The Prepaid Types tab displays a list of configured prepaid types. Prepaid types are used by [plan rules](#) and may be specified in a prepaid block.

If a plan rule specifies that prepaid usage is consumed, a prepaid type must be selected. If no prepaid exists of the correct type, then the plan rule is not applicable.



The screenshot shows a web interface with three tabs: 'Prepaid blocks', 'Prepaid Types' (which is selected and highlighted in blue), and 'Prepaid Warnings'. Below the tabs is a form with a 'Name' input field. Below the input field is a message: 'No prepaid types have been configured.' At the bottom of the form is a label 'Add new type' followed by an empty input field and a blue 'Add' button.

Figure 89: The Prepaid Types tab

Add a prepaid type

Multiple prepaid types can be specified. A prepaid type can be added to multiple prepaid blocks.

This task explains how to add a prepaid type.

1. Select **Prepaid Time and Data** under **Prepaid** on the Configuration and Tools page.

The **Prepaid blocks** tab is displayed.

2. Click the **Prepaid Types** tab.

the **Prepaid Types** tab is displayed.

3. Type a name for the prepaid type in the **Add new type** field. Click **Add**.

The new type is added to the Prepaid Type list.

4. Click **Edit** to the right of the new type.

The Prepaid Type page is displayed.

5. Click **Add** to the right of a prepaid block.

The prepaid type is added to the prepaid block.

6. (Optional) Click **Add** to the right of additional prepaid blocks.

Note: A prepaid type can be added to multiple prepaid blocks. A prepaid block can only have one type.

A **Please confirm** window is displayed.

7. Click **Continue** to confirm the message **This will change this block's type. Are you sure you want to do this?**

The prepaid type is added to the prepaid block.

8. Click **Save**.

The **Prepaid Types** tab is displayed.

Prepaid warnings

The prepaid warnings tab displays a list of alerts that advise users when specified levels of usage have been exceeded.

A prepaid warning specifies the level at which the warning is triggered and the email template used for the warning message.

Add a prepaid warning

A prepaid warning specifies the charge type, the units remaining at which a warning is triggered and the email template used for the warning.

This task explains how to add a prepaid warning.

1. Select **Prepaid Time and Data** under **Prepaid** on the Configuration and Tools page.
The **Prepaid blocks** tab is displayed.
2. Click the **Prepaid Warnings** tab.
the **Prepaid Warnings** tab is displayed.
3. Click **Add** on the **Prepaid Warnings** tab.
A Prepaid warning level page is displayed.

Figure 90: Prepaid warning level properties

4. Select a type from the **Warning type** drop-down.
5. Select a type from the **Charge type** drop-down.
6. Type a quantity in the **Units** field.
The warning will be sent when this many prepaid units are left. The units are the base unit of the selected **Charge type**. For example, seconds or bytes. For more information, see [Charge types and units](#).
7. Type a name for the warning level in the **Name** field.
8. Select an email template from the **Warning message** drop-down.
For more information, see [Email templates](#).
9. Click **Save**.
The **Prepaid Warnings** tab is displayed.

Prepaid voucher management

Prepaid voucher management controls the creation and distribution of prepaid vouchers. Vouchers can be exported for printing or distribution.

A voucher type is created based on a single prepaid block. Vouchers contain:

- **a voucher number**—uniquely identifies the voucher across the company.
- **a secret code**—authenticates the voucher number.
- **an expiry date**—defines the length of time the voucher is valid.

Add a voucher type

Before vouchers can be generated a voucher type is created. The voucher type specifies the prepaid block type of the voucher, the retail price of the voucher and the default number of vouchers generated when a new batch is created.

This task explains how to add a voucher type.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.
The **Voucher Types** tab is displayed.
2. Click **Add Type**.
A New Voucher Type page is displayed.



Figure 91: Voucher type properties

3. Type a name for the voucher in the **Name** field.
4. Select a type from the **Prepaid Block Type** drop-down.
This block is added to the customer's account when a voucher of this type is activated.
5. Type a figure in the **Retail Price** field.
6. Type a quantity in the **Batch Size** field.
7. Click **Save**.
The **Voucher Types** tab is displayed. The voucher is added to the **Voucher Types** table.

Generate a voucher batch

A voucher batch contains a specified quantity of vouchers with individual voucher numbers and secrets. A batch is based on a specific voucher type. For more information, see [Add a voucher type](#).

This task explains how to generate a voucher batch.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.

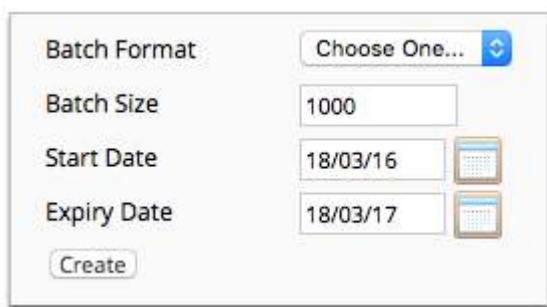
The **Voucher Types** tab is displayed.

2. Click **View** to the right of a voucher type.

The **Batches** tab is displayed.

3. Click **New batch**.

The Create Batch page is displayed.



The screenshot shows a 'Create Batch' form with the following fields and values:

Batch Format	Choose One...
Batch Size	1000
Start Date	18/03/16
Expiry Date	18/03/17
<input type="button" value="Create"/>	

Figure 92: Voucher batch properties

4. Select a format from the **Batch Format** drop-down.

For more information, see [Add a voucher format](#).

5. (Optional) Type a quantity in the **Batch Size** field.

By default **Batch Size** contains the batch size quantity specified for the voucher type.

6. Select a **Start Date** from which vouchers can be activated.

7. Select an **Expiry Date** after which the vouchers can no longer be activated.

Once a voucher is redeemed its use is determined by the validity settings specified in the prepaid blocks properties.

8. Click **Create**.

The **Batch Details** tab is displayed.

Export a voucher batch

Voucher batches can be emailed to a recipient from within Smile. Each voucher will be formatted according to the voucher format, separated by lines.

The voucher format of a batch is selected when the batch is created. This cannot be changed. Additional batches created for the same voucher type can have different voucher formats specified.

This task explains how to export a voucher batch.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.

The **Voucher Types** tab is displayed.

2. Click **View** to the right of a voucher type.

The **Batches** tab is displayed.

3. Click **View** to the right of a batch entry.

The **Batch Details** tab is displayed.

4. Click **Export**.

The Export Voucher Batch page is displayed.

5. (Optional) Type an email address in the **From** field.

The current Smile operators email address is displayed by default. This can be edited.

6. Type a recipient email address in the **To** field.

7. (Optional) Type a subject in the **Subject** field.

The prepaid voucher batch number is displayed by default. This can be edited.

8. Click **Export**.

The **Batch Details** tab is displayed. A summary of the export is displayed under **Export details**.

Encrypt a voucher batch

When a voucher batch is encrypted, the voucher's secret is encrypted in the database. The secret can then only be read by Smile.

This task explains how to encrypt a voucher batch.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.
The **Voucher Types** tab is displayed.
2. Click **View** to the right of a voucher type.
The **Batches** tab is displayed.
3. Click **View** to the right of a batch entry.
The **Batch Details** tab is displayed.
4. Click **Encrypt**.
A **Please confirm** window is displayed.
5. Click **Continue** to encrypt the secrets.
The **Batch Details** tab is displayed.

Add a voucher format

A voucher format specifies what details are included and how information is displayed when a voucher batch is exported. Substitution codes are used to display voucher information.

This task explains how to add a voucher format.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.
The **Voucher Types** tab is displayed.
2. Click the **Formats** tab.
The **Formats** tab is displayed.
3. Click **Add Format**.
The Voucher Format New Export Format page is displayed.
4. Type a name in the **Format Name** field.
5. Type a format in the **Voucher Format** field.
6. Click **Save**.
The **Format** tab is displayed. The format is added to the **Formats** table.



Format Name

Voucher Format

Voucher number: {number}
 Voucher Secret: {cleartext}
 Voucher Expiry: {ref.batch.expiryDate}

Figure 93: Voucher Format properties

Voucher format substitution codes

Substitution codes can be used with regular text to create a standard format or template that displays specific details of prepaid vouchers. For more information, see [Substitution codes](#).

Table 15: Voucher format substitution codes

Field	Substitution code
Voucher number	number
Voucher secret	cleartext
Voucher activation start date	ref.batch.startDate
Voucher activation end date	ref.batch.expiryDate

The following is an example of the use of voucher format substitution codes:

Input	Output
Voucher Number: {number}	Voucher Number: 12345
Voucher Secret: {cleartext}	Voucher Secret: 112233
Voucher Expiry: {ref.batch.expiryDate}	Voucher Expiry: 01/07/15

Search for a voucher

You can view the current status and validity of prepaid vouchers

This task explains how to search for a voucher.

1. Select **Prepaid Voucher Management** under **Prepaid** on the Configuration and Tools page.

The **Voucher Types** tab is displayed.

2. Click the **Search** tab.

The **Search** tab is displayed.

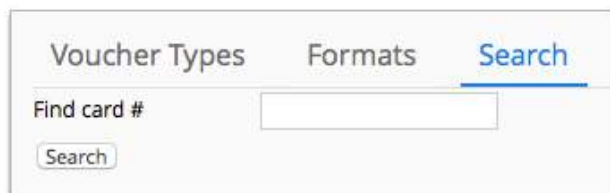


Figure 94: Prepaid Vouchers Search tab

3. Enter a voucher number in the **Find card #** field.

4. Click **Search**.

The Prepaid voucher properties page is displayed.

Chapter

11

Configuring RADIUS

About RADIUS

Remote Authentication Dial In User Service (RADIUS) is an industry-standard networking protocol for providing Authentication, Authorisation, and Accounting (AAA) management for users that connect and use a network service.

The RADIUS client is typically a Network Access Server (NAS). The client passes user information to the RADIUS server and acts on the response that is returned. The RADIUS server receives user connection requests and authenticates the user with information in a trusted database.

If a match is found and the user's credentials are correct, the RADIUS server sends an Access-Accept message to the NAS and the configuration information necessary for the client to deliver service to the user. The NAS may then forward accounting information to the RADIUS server to document the transaction. The RADIUS server may store or forward this information as needed to support billing for the services provided.

If a match is not found or a problem is found with the user's credentials, the server returns an Access-Reject message. The NAS then terminates the user's connection.

A RADIUS server can act as a proxy client to other RADIUS servers or other kinds of authentication servers.

Authentication

Authentication is the process of verifying a user's identity.

Authorisation

Authorisation is the process of determining whether the user is allowed on the network and applying network access values based on a defined security policy.

Accounting

Accounting is the process of generating log files that record session statistics used for billing, system diagnosis, and usage planning.

RADIUS server settings

The RADIUS server settings page displays the configuration of the RADIUS server used by Smile.

Note: For instances of hosted Smile these settings are maintained by Inomial and cannot be edited.

Server name	Specifies a descriptive name of the RADIUS server.
Listening address	Specifies the IP address that Smile expects RADIUS packets to appear on.
Authentication port	Specifies the number of the port used for authentication packets.
Accounting port	Specifies the number of the port used for accounting packets.
Authentication server threads	Specifies the number of concurrent authentication processes.
Accounting responder threads	If early accounting acknowledgement is enabled, specifies the number of threads available to process acknowledgement packets. For more information, see General settings .
Accounting handler threads	Specifies the number of threads available to handle accounting packets.
Activate this RADIUS server when Smile starts.	When selected specifies that the RADIUS server is activated when Smile starts.
Server permissions	When Activate this RADIUS server when Smile starts is selected, specifies the Smile system user account RADIUS runs as. <ul style="list-style-type: none"> • Select from list
Restart	Restarts the RADIUS server. A restart is required when configuration changes are made.
Stop server	Stops the RADIUS server.
Start server	Starts the RADIUS server.

The screenshot shows a web interface for RADIUS server settings. At the top, a blue notification bar states "Note: The RADIUS server is running." Below this, the settings are listed in a table-like format:

- Server name: Smile RADIUS server
- Listening address: 0.0.0.0
- Authentication port: 1812
- Accounting port: 1813
- Authentication server threads: 3
- Accounting responder threads: 1
- Accounting handler threads: 1
- ☒ Activate this RADIUS server when Smile starts.
- Server permissions: radius (with a dropdown arrow)

At the bottom, there are three buttons: "Save", "Restart", and "Stop server".

Figure 95: RADIUS server settings page

NAS and proxies

NAS and proxies manage both directly connected NAS (network access server) devices and RADIUS proxies, which connect to Smile's RADIUS server.

The NAS and proxies main page displays a summary list of NAS or proxy server entries. Each entry represents one or more servers that communicate with Smile. Each entry specifies its own vendor information, special features and mapping between RADIUS service types and Smile services.

To view network access server information, select **NAS and Proxies** under **RADIUS** on the Configuration and Tools page.

NAS and proxies tabs

A NAS or proxy server entry has a number of configuration tabs.

NAS and proxy server tabs are accessible from the NAS and Proxies page. On the Network access servers page do one of the following:

- click **Add**
- click **View** to the right of an existing server entry

Table 16: NAS and proxies tabs

Tab	Purpose
General Settings	Specifies the network address(es), location, type of server and accounting settings.
NAS type	Specifies type, model name and operating system of the server.
RADIUS	Specifies RADIUS connection settings.
Service mapping rules	Specifies mapping rules for RADIUS ports, services and realms.
Features	Specifies the features and their rules applied to a server.
Advanced	Specifies advanced messaging, tariff and connection settings.

Clear sessions

Each NAS and proxies tab displays a **Clear Sessions** button at the bottom of the page. This button applies to the server, not just the tab page currently visible.

Clicking **Clear Sessions** will remove all current session information from RADIUS for the NAS. It is intended to stop concurrent login errors from occurring if Smile has not detected that the NAS has failed.



Warning: Clearing RADIUS sessions may cause billing data to be lost.

Merge

Each NAS and proxies tab displays a **Merge** button at the bottom of the page. This button applies to the server, not just the tab page currently visible.

Clicking **Merge** will merge the relevant settings of the current open NAS with the NAS selected from the **Merge with** drop-down. The current NAS will be deprecated.

Add network access server

Multiple NAS and proxy servers can be configured in Smile.

This task explains how to add a network access server entry.

1. Select **NAS and Proxies** under **RADIUS** on the Configuration and Tools page.

The Network access servers page is displayed.

2. Click **Add**.

The **General Settings** tab is displayed.

3. Complete the required fields and settings.

For more information, refer the to individual [NAS and proxies tabs](#).

4. Click **Save**.

The RADIUS Server Restart page is displayed.

5. Do one of the following:

- Click **Restart** to restart the RADIUS server and apply all changes.
- Click **Don't Restart** to save your changes. Your changes will not take effect until the RADIUS server is restarted.

The Network access servers summary page is displayed.

General settings properties

The General Settings tab specifies the default network address, type of server and accounting settings of the NAS.

NAS ID	Specifies a Smile assigned NAS ID code.
NAS name	Specifies a descriptive name for the NAS or proxy server entry.
Default Call Type	Specifies the default call type of the usage generated by the NAS. <ul style="list-style-type: none"> • Event count • Data • Video Call • Forwarded Voice • Imported Charge • MMS • SMS • Unknown • Voice • WAP • Fax
Device Type	Specifies the type of server. <ul style="list-style-type: none"> • Access Server (LNS, DSLAM, BRAS, Etc) • Proxy Server
Physical Location	Specifies the physical location of the NAS. For information only.
NAS IP Address	Specifies the IP address of the NAS.
RFC2865 NAS-Identifier	A unique string that identifies the NAS. A NAS-Identifier is not required if the NAS IP Address is specified.
Asterisk NAS	When selected specifies that the NAS is an Asterisk VOIP appliance.
NAS/Proxy Servers	Displays a summary list of server IP addresses and their secrets. Click Add Server... to add servers to the list.
Send early accounting acknowledgements	When selected specifies that Smile sends an acknowledgement before processing packets. Received packets are queued for processing. <p>Note: If Smile is restarted queued packets may be lost.</p>
Default Service	Specifies which service corresponds to RADIUS packets. If other service mapping rules do not match, this service is used by default. For more information, see Configuring services .
Default realm	Specifies the default realm if a received username does not include a realm to produce a fully qualified username.

Authenticate user connections without a password

When selected specifies that no password is required for connection authentication.

Comments

For information only.

This NAS is no longer in use

When selected specifies that the NAS is deprecated and no longer in use.

General Settings
NAS type
RADIUS
Service mapping rules
Features
Advanced

NAS ID
364

NAS name

Default Call Type

Device Type

Physical Location

NAS IP Address

RFC2865 NAS-Identifier

☐ Asterisk NAS

NAS / Proxy Servers

Description	IP	Secret
No NAS / Proxy Servers		

☒ Send early accounting acknowledgements

Default Service

Default realm

☐ Authenticate user connections without a password

Comments

☐ This NAS is no longer in use

Figure 96: General Settings tab

NAS type properties

The NAS type tab holds information about the NAS hardware and software.

NAS Type

Specifies a type name for the NAS. Used to control which RADIUS attributes are used.

- **Select from list**

Click **New** to add a new type name to the drop-down.

NAS model name

Specifies the model name of the NAS. For information only.

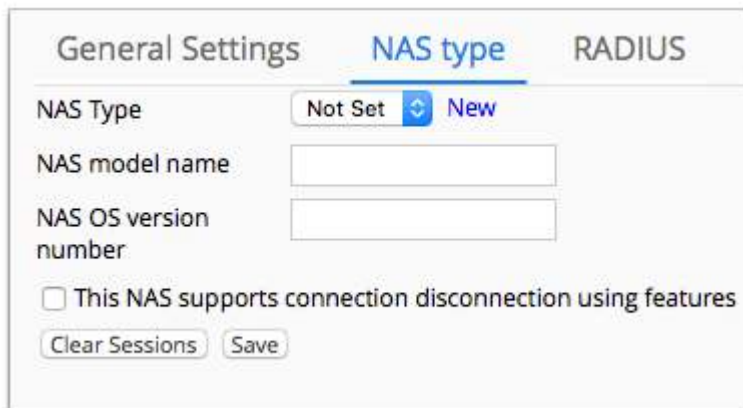
NAS OS version number

Specifies the operating system version of the NAS. For information only.

This NAS supports connection disconnection using features

When selected specifies that the NAS device supports connection and disconnection actions through features. For more information, see [Features properties](#).

Can be used to provide a session disconnect button when viewing a subscription.



The screenshot shows the 'NAS type' configuration tab within a window titled 'General Settings'. The tab is selected, and the 'RADIUS' tab is also visible. The 'NAS Type' field is a dropdown menu currently showing 'Not Set' with a blue 'New' button next to it. Below this are two text input fields for 'NAS model name' and 'NAS OS version number'. At the bottom, there is a checkbox labeled 'This NAS supports connection disconnection using features' which is currently unchecked. Below the checkbox are two buttons: 'Clear Sessions' and 'Save'.

Figure 97: NAS type tab

RADIUS properties

The RADIUS tab specifies connection settings RADIUS uses when communicating with a NAS or proxy. These settings must correspond to the settings used by the NAS or proxy.

Retry Interval	Specifies how long in seconds the NAS will wait without action before resending a packet. If Smile receives a packet older than the time specified Smile will ignore it.
Interim update time	Specifies how long in seconds that Smile tells the NAS that it should send interim updates. This may or may not be honoured by the NAS.
Interim update timeout	Specifies how long in seconds until Smile considers a session to have ended despite not receiving an accounting stop message. Note: If no interim time settings have been specified, interim updates will be ignored by Smile.
RADIUS CoA from address	Specifies the address from which RADIUS sends Change of Authorisation (CoA) messages.
NAS-IP-Address value	Specifies the network address used by CoA. <ul style="list-style-type: none">• Smile's RADIUS IP• Copy NAS-IP-Address from RADIUS packet• RADIUS client's IP
RADIUS CoA from port	Specifies the RADIUS CoA port number.
RADIUS CoA to address	Specifies the RADIUS CoA to address.
RADIUS CoA port	Specifies the RADIUS CoA port number.
CoA Retry interval	Specifies the period of time after which a COA message will be resent if there has been no acknowledgement.
CoA Retry count	Specifies the number of times a CoA message will be retried if there has been no acknowledgement.

General Settings NAS type **RADIUS**

Retry Interval 60 seconds

Interim update time seconds

Interim update timeout

RADIUS CoA from address

NAS-IP-Address value Smile's RADIUS IP ↕

RADIUS CoA from port

RADIUS CoA to address

RADIUS CoA port

CoA Retry interval

CoA Retry count

Clear Sessions Save

Figure 98: RADIUS tab

Service mapping rules properties

The Service mapping rules tab displays a summary list of RADIUS port, realm and service mappings that apply to the NAS or proxy.

If the service mapping rules are not set or do not match, then the **Default Service** set on the [General Settings](#) tab comes into effect.

Click **New mapping** to add a mapping rule.

Radius port type

Specifies the RADIUS port type condition. The default is **All radius service types**. The drop-down is populated with system defined port types.

Realm

Specifies the realm condition.

Service

Specifies the service that messages are applied to if the port type and realm conditions are met. Service drop-down is populated with Smile service names. For more information, see [Configuring services](#).

Features properties

The Features tab displays a summary list of features or policies specified in [RADIUS Features](#). The Features tab provides access to the configuration of the feature or policy as it applies the current NAS or proxy server. In some cases devices external to RADIUS manage policy.

Click **Edit** to the right of the required feature to access its implementation properties.

Network Access Server	Specifies the descriptive name of current NAS configuration.
Feature Name	Specifies the descriptive name of the feature.
Includes the feature's attributes in access accept packets	When selected specifies feature attributes are included in Access-Accept packets.

Shell script configuration

Run a shell script	When selected specifies that a shell script is run as part of the feature.
Unix username	Specifies an authorised username to execute the shell script.
Start Command	Specifies the command that applies the feature.
Stop Command (optional)	Specifies the command that stops applying the feature.
Consider the features applied upon successful completion of the shell scripts	When selected specifies that Smile will record a feature as applied after the script has successfully run and will stop attempting to apply the feature.

Action Form configuration

Execute a Tang action	When selected specifies that a tang action is run as part of the feature.
Form name	Advanced configuration. For more information, contact Inomial .
Additional Parameters	Advanced configuration. For more information, contact Inomial .
Consider the features applied upon successful completion of the action form's actions	When selected specifies that Smile will record a feature as applied after the action has successfully run and will stop attempting to apply the feature.

SNMP configuration

Set an SNMP property	When selected specifies that an SNMP property is applied as part of the feature.
SNMP host name	Specifies the SNMP host name address.
SNMP port	Specifies the SNMP port.
SNMP Community	Specifies the SNMP community name.
Enable by setting the OID x to the x	Enable the feature by setting the SNMP object identifier to the specified string, integer or IP address value.

Disable by setting the OID x to the x

Disable the feature by setting the SNMP object identifier to the specified string, integer or IP address value.

Consider the features applied upon successfully setting the SNMP vars

When selected specifies that Smile will record a feature as applied after successfully applying the SNMP settings and will stop attempting to apply the feature.

Change of Authorisation (CoA) configuration

Update the connection using RADIUS CoA

When selected specifies that a connection is updated using RADIUS Change of Authorisation.

Send a DisconnectMessage

When selected specifies that a DisconnectMessage is sent regardless of other features or usage.

Consider the features applied upon successful completion of RADIUS CoA/DM

When selected specifies that Smile will record a feature as applied after successfully sending a CoA or DisconnectMessage and will stop attempting to apply the feature.

Send the ACCT-SESSION-ID in the CoA/DM packet

When selected specifies that the ACCT-SESSION-ID is included in the CoA or DisconnectMessage packet.

Send the Framed-IP-Address in the CoA/DM packet

When selected specifies that the Framed-IP-Address is included in the CoA or DisconnectMessage packet.

Send the Username in the CoA/DM packet

When selected specifies that the Username is included in the CoA or DisconnectMessage packet.

Strip the realm from the username

When selected specifies that the realm is removed for the username.

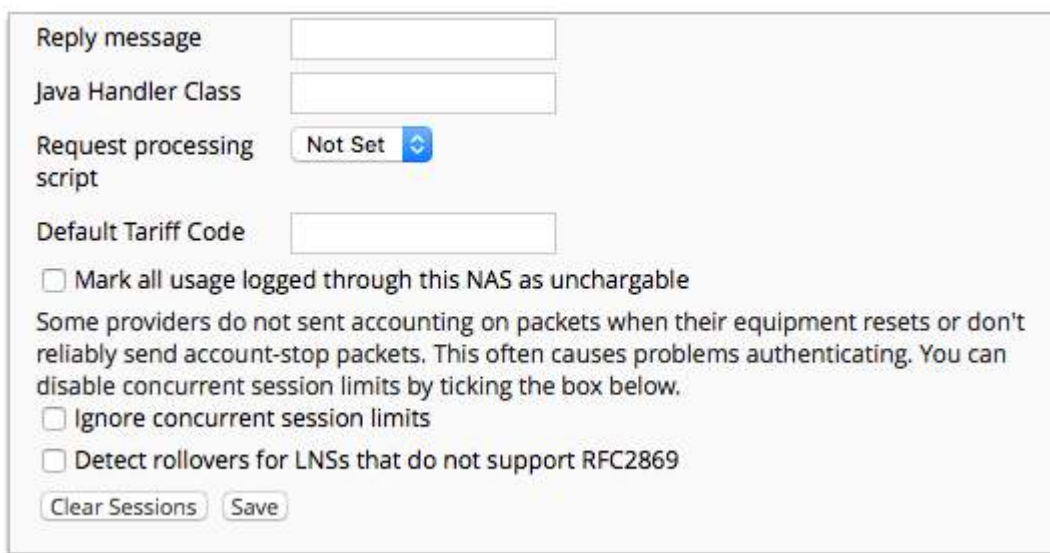
Deny authentication

When selected specifies that users cannot reconnect after being disconnected.

Advanced properties

The Advanced tab specifies advanced messaging, tariff and connection settings.

Java Handler Class	Advanced configuration. For more information, contact Inomial .
Request processing script	Advanced configuration. For more information, contact Inomial .
Default Tariff Code	Specifies a default tariff code, unless vendor specific attributes with a different tariff code handler is in use.
Mark all usage logged through this NAS as unchargeable	Specifies that all authentication packets are marked as unchargeable.
Ignore concurrent session limits	When selected specifies that multiple concurrent subscription sessions are allowed.
Detect rollovers for LNSs that do not support RFC2869	Specifies the action taken for older servers that do not increment sessions that have exceeded 2Gbs of use.



The screenshot shows a configuration window for the Advanced tab. It contains the following elements:

- Reply message:** A text input field.
- Java Handler Class:** A text input field.
- Request processing script:** A dropdown menu currently showing "Not Set" with a blue arrow icon.
- Default Tariff Code:** A text input field.
- Mark all usage logged through this NAS as unchargeable:** An unchecked checkbox.
- Some providers do not send accounting on packets when their equipment resets or don't reliably send account-stop packets. This often causes problems authenticating. You can disable concurrent session limits by ticking the box below.** (This is a descriptive text block.)
- Ignore concurrent session limits:** An unchecked checkbox.
- Detect rollovers for LNSs that do not support RFC2869:** An unchecked checkbox.
- Buttons:** "Clear Sessions" and "Save" at the bottom left.

Figure 99: Advanced tab

Shared secrets

A shared secret is a case-sensitive text string used to validate communications between a RADIUS server and client. You should configure shared secrets that are long enough and random enough to resist attack. You should avoid using the same shared secret throughout your network.

All network access servers and proxy servers are required to specify a secret to communicate with RADIUS. Each remote device may have a different secret. Each server configured with a secret is displayed in a summary list on the RADIUS shared secrets page.

Shared secrets are often configured through NAS and proxies. Smile's shared secret configuration is used when a separate configuration is required.

Add a shared secret

Shared secret entries can be added for multiple NAS and proxy servers.

This task explains how to add a shared secret.

1. Select **Shared Secrets** under **RADIUS** on the Configuration and Tools page.
The RADIUS shared secrets page is displayed.
2. Click **Add**.

A blank RADIUS shared secrets configuration page is displayed.

A screenshot of a web form for adding a shared secret. The form has a title 'NAS ID' at the top left. Below it are four input fields: 'Description', 'IP Address', and 'Secret'. Each field is followed by a light gray rectangular box. At the bottom left of the form are two buttons: 'Save' and 'Close'.

Figure 100: RADIUS shared secret properties

3. Type a description of the configuration in the **Description** field.
4. Type the IP address of the server in the **IP Address** field.
This address cannot be edited after the entry has been saved. To fix an incorrect IP address or update an address you need to add a new shared secret entry.
5. Type the secret in the **Secret** field.
6. Click **Save**.
The RADIUS shared secrets page is displayed. The entry is added to the shared secret summary list.

RADIUS features

Radius features allow you to specify a group of attributes which implement a specific network feature. For example, you can set up attributes to specify your DNS primary and secondary servers, or an access-list to prevent users from using an SMTP server other than your own. Features can also be used in provisioning processes. For example, you can enable and disable value added services (VAS).

These features can be:

- added to all users by default
- added to specific users with the per-user RADIUS page
- added to plans

The Radius Features main page displays features as a summarised line item.

Add a RADIUS feature

Additional RADIUS features can be configured as required.

This task explains how to add a RADIUS feature.

1. Select **RADIUS Features** under **RADIUS** on the Configuration and Tools page.

The RADIUS Features page is displayed.

2. Click **Add**.

The Service Feature page is displayed.

3. Type a name in the **Feature Name** field.

4. Complete the following fields and sections as required:

- **Add this feature to all logins.**
- **Show on the active feature report**
- **User Object**
- [Add attribute](#)
- **Recurring Charges** (not visible until an attribute is added or the feature saved)

For more information, see [RADIUS feature properties](#).

5. Click **Save**.

The Radius Features page is displayed.

RADIUS feature properties

Feature ID	Specifies a feature ID code. This code is system generated by Smile.
IOID	Specifies an object identifier code. This code is system generated by Smile.
Feature Name	Specifies a name for the feature.
Add this feature to all logins.	When selected this feature is added to all user services.
Show on the active feature report	When selected displays the feature on the active feature report. This option is selected by default.
Description (optional)	Specifies a longer description of the feature and its function.

User Object

User objects can be used by Smile or external systems to enact behaviour in a configurable manner. For example, to enable/disable value added services.

Add custom field	Provides a list of custom fields that are available for selection. Multiple custom fields can be added to a feature. Select a field from the drop-down and click Add . For more information, see Custom fields .
-------------------------	---

Attributes

Displays a summary table of attributes applied to the feature.

Add Attribute	Click Add Attribute to add an attribute to the feature. For more information, see Add attribute .
Connections applying this feature	Displays a summary list of current connections that are applying the feature.

Recurring Charges

Displays a summary list of recurring charges applied to the feature. The Recurring Charges table is not visible until an attribute has been added or the feature has been saved.

Recurring charges are only applied to features that are enabled via plans or manually added to subscriptions.

For more information, see [Recurring charges](#).

Currency	Specifies the currency used for the charge.
Add Charge	Click Add Charge to add a recurring charge to the feature. For more information, see Add a recurring charge .

Feature ID 836

IOID

Feature Name

☐ Add this feature to all logins.

☒ Show on the active feature report

Description (optional)

User Object

Add custom field Select a custom field to add Add

Attributes

Order	Description	ID	Value
No RADIUS attributes have been added to this feature.			

Add Attribute Connections applying this feature Save

Figure 101: RADIUS feature properties page

Add attribute

A feature can have multiple attributes. Attributes will be added based on their attribute order.

This task explains how to add an attribute to a RADIUS feature.

1. Click **Add Attribute** on a Service Feature page.

A blank Radius Attribute page is displayed.

2. Complete the required attribute fields.

For more information, see [Feature attribute properties](#).

3. Click **Save**.

The Service Feature page is displayed. The attribute is added to the **Attributes** summary list.

Feature attribute properties

Attribute order	Specifies the order that attributes are added to the RADIUS response. Lower numbered attributes are added first.
Description (optional)	Specifies attribute description text.
Feature Attribute Type	Specifies the feature attribute type. <ul style="list-style-type: none"> • String • Number • IP Address
This attribute is vendor-specific	When selected specifies that the attribute is a vendor-specific attribute (VSA).
This attribute is a RADIUS tunneling attribute (RFC 2868)	When selected specifies that the attribute supports the provision for compulsory tunneling in dial-up a network. This property is not available when This attribute is vendor-specific is selected.
Apply to <i>n</i> NASes	Specifies the NAS type the attribute applies to. <ul style="list-style-type: none"> • all • Select from list Click New to add a new NAS type.
Vendor ID	When This attribute is vendor-specific is selected specifies the vendor name. <ul style="list-style-type: none"> • Not Set • Select from list For more information, see NAS/proxy vendors .
Tag	When This attribute is a RADIUS tunneling attribute (RFC 2868) is selected, the tag field provides a means of grouping attributes in the same packet which refer to the same tunnel.
Attribute ID	Specifies the attribute ID number. If this is a vendor-specific attribute, the ID is the vendor-attribute ID.
Attribute value	Specifies the attribute value.
Remove other occurrences of this attribute from RADIUS packets before adding this one	When selected specifies that existing occurrences of this attribute are removed from the RADIUS packet before adding this attribute.

Attribute order

Description (optional)

Feature Attribute Type Choose One...

☐ This attribute is vendor-specific

☐ This attribute is a RADIUS tunnelling attribute (RFC 2868)

Apply to all NASes New

Attribute ID

Attribute value

☐ Remove other occurrences of this attribute from RADIUS packets before adding this one

Figure 102: RADIUS Features attribute properties page

Edit a RADIUS feature

Features can be edited as required.

This task explains how to edit or a view a RADIUS feature.

1. Click **Edit** to the right of a feature name in the summary list on the Radius Features page.
The Service Feature page is displayed.
2. Edit the required fields.
3. Click **Save**.
The Radius Features page is displayed.

Clone a RADIUS feature

Clone an existing feature to create a new feature with similar properties.

This task explains how to clone a RADIUS feature.

1. Click **Clone** to the right of a feature name in the summary list on the Radius Features page.
The Service Feature page is displayed.
2. Edit the **Feature Name** fields.
By default Smile adds `clone` to the end of the current name.
3. Edit any other required options or attributes.
4. Click **Save**.
The Configuration and Tools page is displayed.

Feature types

Feature types are used to configure ordered groups of features. Individual features specified in [RADIUS features](#) can be bundled together to be applied as a group. The features in a group are applied in the order listed in the feature type group. A feature can only be included in one feature type group. It is unavailable for selection in other feature types, if it is already a member of an existing feature type.

Feature types are not selected or applied directly. When a feature is applied Smile will check if it is part of a feature type and apply the highest relevant feature in the group.

The Feature Types page display a summary list of feature type groups.

Add a feature type

Multiple feature type groups can be specified with different feature configurations.

This task explains how to add a feature type.

1. Select **Feature Types** under **RADIUS** on the Configuration and Tools page.

The Feature Types page is displayed.

2. Click **New feature type**.

A blank Feature Type page is displayed.

Figure 103: Feature Type property page

3. Type a name for the feature type in the **Name** field.
4. Select a feature from the **Select a feature to add** drop-down. Click **Add**.
The selected feature is added to the summary table.
5. Select additional features from the feature drop-down and add them to the summary list as required.
6. (Optional) Click **Up** or **Down** to the right of a feature in the summary list to change its position in the list.
Features in a group are applied in the order they are listed.
7. Click **Save**.

The Feature Type page is displayed. The feature type is added to the summary list.

NAS/proxy vendors

NAS/proxy vendors specifies a list of vendor names for access and proxy equipment. For more information, see [Feature attribute properties](#).

A NAS/proxy vendor entry is required when using vendor-specific attributes in RADIUS packets. Vendor [enterprise number](#) assignments are managed by the [The Internet Assigned Numbers Authority \(IANA\)](#).

The Radius Vendors page display a summary list of vendors.

Add a NAS/proxy vendor

Vendor entries are required for assigning vendor-specific feature attributes.

This task explains how to add a NAS/proxy vendor.

1. Select **NAS/Proxy Vendors** under **RADIUS** on the Configuration and Tools page.

The RADIUS Vendors page is displayed.

2. Click **Add**.

A blank Radius Vendor page is displayed.

A screenshot of a web form for adding a vendor. It contains two text input fields: 'Vendor ID' and 'Vendor Name'. Below the 'Vendor Name' field is a 'Save' button. The form is enclosed in a light gray border with a subtle drop shadow.

Figure 104: NAS/proxy vendor properties

3. Type an ID in the **Vendor ID** field.

The vendor ID must match the RADIUS vendor ID.

4. Type a name in the **Vendor Name** field.

The **Vendor Name** is a free text field.

5. Click **Save**.

The Radius Vendors page is displayed. The vendor is added to the vendor summary list.

Realm mapping

Realm mapping allows the RADIUS server to associate a realm with a specific indial number, or to map one (deprecated) realm to another.

Unqualified usernames can dial a specific number and have the correct realm added automatically.

Unqualified usernames can be changed to another realm.

Select **Realm Mapping** under **RADIUS** on the Configuration and Tools page to view the Realm mapping page.

The realm mapping page has two configuration tabs:

- [Call line Mapping](#)— specifies mappings of called line IDs to realms.
- [Realm mapping](#)—specifies mappings of one realm to another realm.

Call line mapping

The **Call line Mapping** tab manages mappings from called line IDs to realms. Call line mappings are useful if you have a NAS authenticating for multiple dialup numbers that map to different realms.

A mapping consists of the phone number that is dialled and the realm that it maps to. If no match is found in the call line mapping table then the NAS's default is used.

The **Call line mapping** tab displays a summary table of mappings.

Add a call line mapping

The **Call Line Mapping** tab manages mappings from called line IDs to realms. Multiple mappings can be created in Smile.

This task explains how to add a call line mapping.

1. Select **Realm Mapping** under **RADIUS** on the Configuration and Tools page.

The **Call line Mapping** tab on the Realm mapping page is displayed.

2. Click **New**.

A blank Dialed line to Realm mapping page is displayed.

3. Type a phone number in the **Map from** field.

4. Type a realm address in the **Map to** field.

5. (Optional) Type a description for the mapping in the **Description** field.

6. (Optional) Type additional comments or information in the **Comments** field.

7. Click **Save**.

The **Call line Mapping** tab is displayed. The mapping is displayed in the summary table.

Realm mapping

The **Realm mapping** tab manages mappings of one realm to another realm.

For example, if a user specifies the realm `realm1.example.com`, but their actual realm in Smile is `realm2.example.com`, a realm mapping is used to correct the users realm.

The **Realm mapping** tab displays a summary table of mappings.

Add a realm mapping

The **Realm mapping** tab manages mappings of one realm to another realm. Multiple mappings can be created in Smile.

This task explains how to add a realm mapping.

1. Select **Realm Mapping** under **RADIUS** on the Configuration and Tools page.

The **Call line Mapping** tab on the Realm mapping page is displayed.

2. Click the **Realm mapping** tab.

The **Realm mapping** tab is displayed.

3. Click **New**.

A blank Realm to Realm mapping page is displayed.



The screenshot shows a web form for creating a realm mapping. It contains the following fields:

- Map from**: A text input field.
- to**: A text input field.
- Description**: A text input field.
- Comments**: A large text area for additional information.
- Save**: A button at the bottom left of the form.

Figure 105: Mapping properties

4. Type a realm address in the **Map from** field.
5. Type a realm address in the **Map to** field.
6. (Optional) Type a description for the mapping in the **Description** field.
7. (Optional) Type additional comments or information in the **Comments** field.
8. Click **Save**.

The **Realm mapping** tab is displayed. The mapping is displayed in the summary table.

NAS scripts

NAS scripts specify scripting for RADIUS. NAS equipment can be associated with RADIUS scripts which can process and transform received RADIUS packets and provide additional authentication pathways to Smile.

Scripts are advanced configuration. For more information, [contact Inomial](#).

The NAS Scripts page displays a summary list of compiled scripts.

Add a NAS script

Multiple NAS scripts can be added to Smile.

This task explains how to add a NAS script.

1. Select **NAS Scripts** under **RADIUS** on the Configuration and Tools page.

The NAS Scripts page is displayed.

2. Click **Add...**

A blank NAS Script page is displayed.

3. Type a name for the script in the **Script name** field.

4. Type or paste the script text into the **Script** field.

5. Click **Save**.

An error will be displayed if the script cannot be compiled.

The NAS Script page is displayed. The script is added to the summary list.

RADIUS restart

RADIUS restart is used when the RADIUS configuration has been changed. For changes to take effect the server must be restarted. A restart may take a several seconds.

Select **Radius Restart** under **RADIUS** on the Configuration and Tools page to view the RADIUS Server Restart page.

Click **Restart** to restart the RADIUS server.

Federadius

Federadius manages the Smile configuration for Federadius. Federadius configuration is only relevant if you have Federadius installed. The Smile-side configuration must match the physical Federadius setup.

The Federadius Configuration page displays the following tabs:

- **Federadius Front Ends**—displays a summary list of Federadius front ends and their current status.
- **Accounting servers**—displays a summary list of RADIUS servers that can be used as accounting servers in a Federadius front end configuration.

Add Federadius front end

Federadius front end configuration is only relevant if you have Federadius installed. Federadius front end entries cannot be deleted. They can be set as inactive when they are no longer required.

This task explains how to add a Federadius front end.

1. Select **Federadius** under **RADIUS** on the Configuration and Tools page.

The Federadius Configuration page and the **Federadius Front Ends** tab is displayed.

2. Click **New**.

A blank Federadius Front End page is displayed.

3. Complete Federadius front end fields as required.

For more information, see [Federadius front end properties](#).

4. Click **Save**.

The **Federadius Fronts Ends** tab is displayed. The front end is displayed in the summary list.

5. Click **Push updated configuration** to apply Federadius front end configuration.

Federadius front end properties

Front end ID	Specifies a Smile generated front end identification code.
Name	Specifies a descriptive name for the Federadius front end configuration.
Active	When selected specifies that the configuration is active. Untick this option to set the front end configuration as inactive.
Listen IP4 address	Specifies the IP address that Smile listens to for Federadius packets.
IP4 auth port	Specifies the port on which Smile listens for Federadius authentication packets.
IP4 acct port	Specifies the port on which Smile listens for accounting packets.
Listen IP6 address	Specifies the IP or realm address that Smile listens to for Federadius packets.
IP6 auth port	Specifies the port on which Smile listens for Federadius authentication packets.

IP6 acct port	Specifies the port on which Smile listens for Federadius accounting packets.
Primary accounting Server	Specifies the primary server that manages accounting packets. Select server from the drop-down. The server list is populated by the server name specified in RADIUS server settings .
Accounting from IP	Specifies the IP address from which Federadius sends accounting packets to Smile.
Accounting from port	Specifies the port from which Federadius sends accounting packets to Smile.
Accounting secret	Specifies a case-sensitive text string used to validate accounting communications between a Federadius server and client. The secret must match the secret configured on the NAS.
Shadow accounting servers	Displays any assigned secondary accounting servers. Click Add shadow accounting server to add a server. The list of available accounting servers is populated from RADIUS server settings and Federadius Accounting servers .

The screenshot shows the 'Federadius Front End' configuration window. It has two tabs: 'Configuration and Tools' (selected) and 'Federadius Configuration'. The settings are as follows:

- Front end ID:** 53ae4f81-cfbb-4577-80cc
- Name:** (empty text field)
- Active:** ☒
- Listen IP4 address:** (empty text field)
- IP4 auth port:** (empty text field)
- IP4 acct port:** (empty text field)
- Listen IP6 address:** (empty text field)
- IP6 auth port:** (empty text field)
- IP6 acct port:** (empty text field)
- Primary accounting Server:** Choose One... (dropdown menu)
- Accounting from IP:** (empty text field)
- Accounting from port:** (empty text field)
- Accounting secret:** (empty text field)

Shadow accounting servers

Name	Hostname
Accounting is sent only to the primary server	

Buttons: Add shadow accounting server, Save

Figure 106: Federadius front ends properties

Add accounting server

Accounting servers can be used as primary or secondary accounting servers for Federadius front ends. The primary accounting server has all RADIUS accounting packets proxied to it. Responses, for example, acknowledgements, are proxied back to the accounting server. When a secondary account server is configured for a front end, Federadius will send a copy of all accounting packets received from the RADIUS client to that server. The Federadius front end does not listen for acknowledgements from the secondary server.

This function can be used to advise network devices necessary information to apply policy, data retention purposes, to facilitate legal intercept and inform other services that map users to IP addresses.

This task explains how to add a Federadius accounting server.

1. Select **Federadius** under **RADIUS** on the Configuration and Tools page.
The Federadius Configuration page and the **Federadius Front Ends** tab is displayed.
2. Click the **Accounting servers** tab.
The **Accounting servers** tab is displayed.
3. Click **New**.
A blank Federadius Front End page is displayed.
4. Complete the accounting server configuration fields. The following fields require additional explanation:
 - **Name**—Specifies a descriptive name of the accounting server.
 - **Hostname**—Specifies an ASCII string or IP address that identifies the accounting server.
 - **Accounting port**—Specifies the port to which Federadius sends accounting packets.
5. Click **Save**.
The **Accounting servers** tab is displayed. The server is displayed in the summary list.
6. Click **Push updated configuration** to apply Federadius accounting server configuration.

Chapter 12

Configuring reporting

Close reporting period

Close reporting period sets the reporting cut-off date for an accounting period. Once closed it is not possible to enter any account transaction with an effective date on or before this date. Any report produced for dates on or before the cut-off will not materially change unless the database is manipulated.

The accounting period should be closed after billing, but before printing final reports for company financials. Closing the period ensures that the value of the financial reports will not change over time.

Close accounting period

The Close Accounting Period page displays the last set cut-off date. You update the date when a new accounting period ready is ready to close.

Note: All invoicing periods must be processed before the required cut-off date. You cannot close a reporting period if they have not been processed. An error is displayed if you attempt to close a reporting period that contains unprocessed invoice periods.

This task explains how to close an accounting period.

1. Click **Close Reporting Period** under **Reporting** on the Configuration and Tools page.

The Close Accounting Period page is displayed.

2. Click  to the right of the **Close accounts before** field.

A calendar showing the current month is displayed.

3. Click the required close date.

The calendar closes and the selected date is added to the **Close accounts before** field.

4. Click **Close**.

A **Please confirm** window is displayed.

5. Click **Continue**.

The Configuration and Tools page is displayed.

Sales report categories

Every invoice item generated by Smile is associated with a line on the sales report. Sales report categories provide a means of aggregating line items into groups to produce reports of your revenue streams.

View a sales report category

Smile is preconfigured with many categories. These can be edited or additional categories created.

This task explains how to view a sales report category.

1. Select **Sales Report Categories** under **Reporting** on the Configuration and Tools page.

The Sales Report Categories page is displayed.

2. Click **View** to the right of a sales report category entry.

The properties page for the selected category is displayed.

Sales report category properties

Code	Unique alpha-numeric sales report category code. Limit of 8 characters.
Name	Specifies the sales report category item text.
General ledger export code	Specifies the corresponding general ledger code that the sales report category is assigned to. General ledger codes are not defined in Smile.
Valid from	Specifies the start date validity of the sales report category. If only a start date is specified Smile will view the sales report category as valid from this date onwards.
Valid to	Specifies the end date validity of the sales report category. If only an end date is specified Smile will view the sales report category as valid up to this date only.

Usage

Specifies the type of transaction the category can be used with. A category can be assigned multiple uses. The usage list is not customisable.

- **Allow on receipts**
- **Allow on receipt reversals**
- **Allow on invoices**
- **Allow on invoice reversals**
- **Allow on credit notes**
- **Allow on debit notes**
- **Allow on credit allocations**
- **Allow on debit allocations**
- **Allow on credit transfers**
- **Allow on debit transfers**
- **Allow on surcharges**
- **Allow on surcharge reversals**
- **Allow on itemised credits**
- **Allow on itemised credit reversals**
- **Allow on itemised debits**
- **Allow on itemised debit reversals**
- **Allow on commissions**
- **Allow on commission reversals**
- **Allow on bonds**
- **Allow on bond reversals**
- **Allow on bond releases**
- **Allow on bond release reversals**
- **Allow on reimbursements**
- **Allow on reimbursement reversals**

Deprecate

A Deprecated sales report category will no longer be available or visible in Smile. You can not assign transactions against a deprecated category.

To view deprecated sales report categories clear **Hide deprecated** on the Sales Report Categories page.

To retrieve a sales category deprecated in error, view the category properties page and remove the **Valid to** date.

Delete...

To delete a category you have to merge the item with an existing category.

Note: Merging report categories will affect previous sales reports.

Assign Invoice items

Specifies the invoice item associated with a sales report category.

Note: An invoice item must be created before it can be assigned to a sales report category. For more information, See [Invoice items](#).

For more information, see [Assign invoice items](#).

Add a sales report category

Smile comes preconfigured with many sales report categories. You can add additional sales report categories as required.

This task explains how to add a sales report category.

1. Click **Add** at the bottom of the Sales Report Categories page.
A New sales report category page is displayed.
2. Type a sales report category code in the **Code** field.
3. Type a sales report category description in the **Name** field.
4. Complete the required fields. For more information, see [Sales report category properties](#).
5. Click **Save**.

The Sales Report Categories page is displayed.

Assign invoice items

Invoice items are defined items used on manually created invoices and quotes. Whilst an invoice item requires assignment to a sales report category, a sales report category does not require assignment to an invoice item.

Note: An invoice item must be created before it can be assigned to a sales report category. For more information, see [Invoice items](#).

This task explains how to add invoice items.

1. Click **Assign invoice items**.
The All Item Descriptions page is displayed.
2. Click **View** to the right of the required **Item Description**.
The Invoice line item page is displayed.
3. Select the new sales report category description from the **Sales report category** drop-down.
4. Click **Save**.

The All Item Descriptions page is displayed.

Chapter

13

Configuring helpdesk

About the helpdesk

The helpdesk lets you raise, manage and close tickets that track the status of a business process or workflow, for example:

- resolving a customer issue
- placing an order
- tracking customer communication
- making appointments

You can use the helpdesk in two different ways:

- **as a helpdesk**—manage customer issues, track software bugs or manage other feedback.
- **as a workflow manager**—define, track and complete a series of tasks to achieve an outcome.



Tip: Because you can configure helpdesk to meet many different business requirements, the helpdesk appearance varies between Smile installations. The screenshots in this guide may not match the appearance of the helpdesk in your Smile installation.

Helpdesk hours

Helpdesk hours is where you set your open/available support business hours. You can also set any applicable exclusions to these days and times, such as public holidays.

Helpdesk hours are used by ticket timers. Timers will only be applied to your set support business hours.

Recurring hours

Every	Starts	Ends	
Monday	09:00:00	16:59:59	Edit
Tuesday	09:00:00	16:59:59	Edit
Wednesday	09:00:00	16:59:59	Edit
Thursday	09:00:00	16:59:59	Edit
Friday	09:00:00	16:59:59	Edit

Exclusion

Date	Starts	Ends	Label
No working hours are excluded			

New Schedule Item

Figure 107: Helpdesk hours page

Set helpdesk hours

Helpdesk hours are the hours during the support business day that ticket timers are applied against.



Tip: Helpdesk hours comes configured with a number of day and time ranges set as default. You can keep these entries and adjust them to your specific requirements by clicking **Edit** next to the specific entry.

This task explains how to set helpdesk hours.

1. Select **Helpdesk Hours** under **Help Desk** on the Configuration and Tools page.

The Helpdesk hours page is displayed.

2. Click **New Schedule Item**.

The Helpdesk Schedule Item page is displayed.

The screenshot shows a form titled 'Helpdesk Schedule Item'. It contains the following fields and controls:

- Type:** A dropdown menu currently showing 'Recurring'.
- Start:** A text input field with a placeholder example 'Eg: 09:00:00'.
- End:** A text input field with a placeholder example 'Eg: 16:59:59'.
- Every:** A dropdown menu currently showing 'Select one'.
- Label:** A text input field.
- Save:** A button at the bottom left of the form.

Figure 108: Helpdesk Schedule Item page

3. Select **Recurring** from the **Type** drop-down.

4. Type a time in the **Start** field.

5. Type a time in the **End** field.

Note: The **Start** and **End** times are entered in 24 hour time format. For example, 3pm = 15:00:00.

6. Select the day of the week from the **Every** drop-down.

The entered **Start** and **End** time will be applied to every instance of the selected day.

7. (Optional) Type a name for the entry in the **Label** field.

8. Click **Save**.

The Helpdesk hours page is displayed.

9. (Optional) Repeat the above steps for additional helpdesk hours entries.

Set helpdesk exclusions

Setting exclusions for helpdesk provides more accurate use of ticket timers. Timers will **not** be applied to excluded days and times.

This task explains how to set excluded days and times.

1. Select **Helpdesk Hours** under **Help Desk** on the Configuration and Tools page.

The Helpdesk hours page is displayed.

2. Click **New Schedule Item**.


The Helpdesk Schedule Item page is displayed.

The screenshot shows the 'Helpdesk Schedule Item' page. On the left, there are input fields: 'Type' (a dropdown menu showing 'Exclusion'), 'Start' (a text box with 'Eg: 09:00:00'), 'End' (a text box with 'Eg: 16:59:59'), 'Exclusion Date' (a text box with a calendar icon to its right), and 'Label' (a text box). Below these is a 'Save' button. On the right, a calendar for 'March 2016' is displayed, showing days from Sunday to Saturday. The date '18' is highlighted in green.

Figure 109: Helpdesk Schedule Item page for exclusions

3. Select **Exclusion** from the **Type** drop-down.
4. Type a time in the **Start** field.
5. Type a time in the **End** field.

Note: The **Start** and **End** times are entered in 24 hour time format. For example, 3pm = 15:00:00.

6. Click  to the right of the **Exclusion Date** field. Click the required date.
7. (Optional) Type a name for the entry in the **Label** field.
8. Click **Save**.

The Helpdesk hours page is displayed.

9. (Optional) Repeat the above steps for additional helpdesk hours entries.

Helpdesk groups

Helpdesk groups are the support groups to which Smile operators are a member of and to which tickets are assigned. Helpdesk groups are different to [departments](#). For example, you can assign a ticket from the Support ticket department to the Customer Support or Technical Support assignment groups.

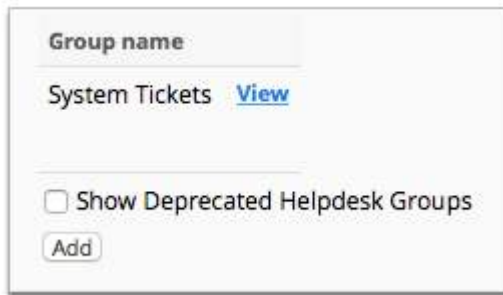


Figure 110: Helpdesk Groups page

Add helpdesk groups

Adding helpdesk groups allows you to manage Smile users and the types of tickets they are responsible for.

This task explains how to add helpdesk groups.

1. Select **Helpdesk Groups** under **Help Desk** on the Configuration and Tools page.

The Helpdesk Groups page is displayed.

2. Click **Add**.

The New Group page is displayed.

Figure 111: New Group page

3. Type a name in the **Group Name** field.
4. (Optional) Select an email type from the **Send an email when new tickets are entered** drop-down.

Note: This is a list of available email templates configured in your instance of Smile. For more information, see [Email templates](#).

5. Click **Save**.

An empty **Groups Members** list will be displayed.

6. Click **Add** next to a Smile operator listed under **Add a user to this group**.
The operator will be added to the **Group Members** list.
7. (Optional) Repeat the previous action to add another operator to the group.
8. Click **Edit** next to each group member to set their **Subscription Conditions**.
 - **Always subscribe me to tickets of my group** (default)
 - **Subscribe me only if I'm the ticket owner**
 - **Never subscribe me**
9. Click **Save**.
10. Click **Save**.

The Helpdesk Groups page is displayed.

Ticket types

Ticket types provide options and actions that can be configured to handle particular events, business processes or workflows. These can be relatively simple ticket types and actions or built into complex workflows with multiple actions and event triggers.

An overview of the ticket type windows and tabs is provided in this section. As there are many options available, depending on the action configured, a number of use examples are provided to illustrate possible ticket actions and workflows. Use these examples as a basis to configure your own. For more information, see [Configuring workflows](#).

Two tabs are visible on the Ticket Types page.

- **Tickets**—standard ticket types.
- **Appointments**—based on standard ticket types with additional functions to configure scheduling of appointments. Appointments can be part of workflows. For more information, see [Appointments](#).

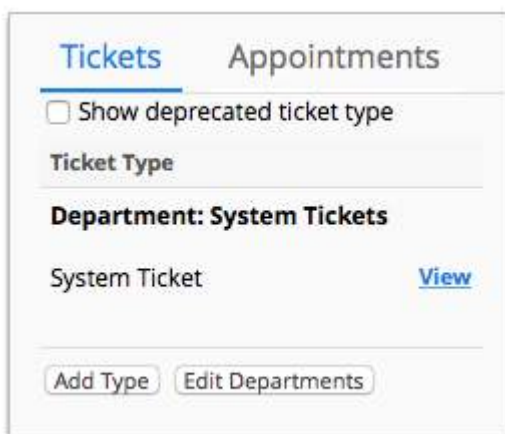


Figure 112: Tickets Types page

Ticket types tab pages

Ticket types have a number of pages and tabs covering the various options that can be selected as part of a ticket. When configuring a ticket type you only need to use those options you need.

The ticket type tabs are accessible from the Ticket Types page by doing one of the following:

- Click **Add Type**
- Click **View** next to an existing ticket type

Table 17: Ticket types tab pages

Tab	Sub-tab	Purpose
Ticket Type		Basic ticket information, such as ticket type name, department and group assignment, actions and ticket timers
Status		Ticket status messages
Fields		Ticket field visibility and custom field options
Actions		Action buttons applied to a ticket
	Action Details	Basic action information, such as action label
	Ticket Actions	A range of actions that can be applied to the ticket, such as change of status, assignment, priority and hold
	Comments	Public and private comments that are added to a ticket as a result of an action
	New Ticket	Option to create a new ticket
	Parent Actions	Set parent ticket type
	Ordering	Specify ticket actions for ordering such as order creation, completion and cancellation
	Email	Template to be used if the action triggers an email
	Subscription Actions	Close a subscription
	Account Actions	Create a bond
	Timers	Cancel existing ticket timers and start new timers
Timers		Ticket timers

Add a ticket type

Ticket types are the basis for configuring actions on a ticket. This task creates and names a new ticket type. It does not explain how to configure additional actions.

This task explains how to add a new ticket type.

1. Select **Ticket Types** under **Help Desk** on the Configuration and Tools page.

The Ticket Types page is displayed.

2. Click **Add Type**.

The Ticket type New Ticket Type page and tabs is displayed.

Figure 113: Ticket Type tab

3. Type a name for the type in the **Ticket type** field.

4. Click **Save**.

The Ticket Types page is displayed.

Note: For more information about configuring other ticket type actions and preferences, see [Configuring workflows](#).

Add a department

Departments specify the business department to which the ticket relates, for example, Support, Sales or system tickets. Departments are different to [Helpdesk groups](#).

This task explains how to edit departments.

1. Select **Ticket Types** under **Help Desk** on the Configuration and Tools page.

The Ticket Types page is displayed.

2. Click **Edit Departments**.

The Departments page is displayed.

3. Click **Add Department**.

The Ticket Department page is displayed.

4. Type a name in the **Department Name** field.

5. Click **Save**.

The Departments page is displayed.

Edit a department

This task explains how to edit departments.

1. Select **Ticket Types** under **Help Desk** on the Configuration and Tools page.

The Ticket Types page is displayed.

2. Click **Edit Departments**.

The Departments page is displayed.

3. Click **Edit** to the right of the department to modify.

The Ticket Department page is displayed.

4. Complete the changes.

5. Click **Save**.

The Departments page is displayed.

Ticket status types

Ticket status type are used to notify other Smile operators and customers of the current high-level state of a ticket. Some status types may be applied to specific ticket types.

This is a list of the ticket status values that can be applied to tickets.

Some status types may be applied only to a specific ticket type.

Ticket Status		
Private Message	Public message	Ticket type
Closed	Closed	Edit
In Progress	In Progress	Edit
New	New	Edit

[Add...](#)

Figure 114: Ticket Status List page

Add a ticket status type

Addition of descriptive status types helps operators and clients see the high level status of a ticket.

This task explains how to add a new ticket status.

1. Select **Ticket Status Types** under **Help Desk** on the Configuration and Tools page.

The Ticket Status List page is displayed.

2. Click **Add...**

The **Ticket status** window is displayed.

3. Select the **Ticket type** from the drop-down.

Note: This list is populated from [Ticket types](#).

4. Type a message in the **Public message** field.

A public message is visible to users who have access to CAT.

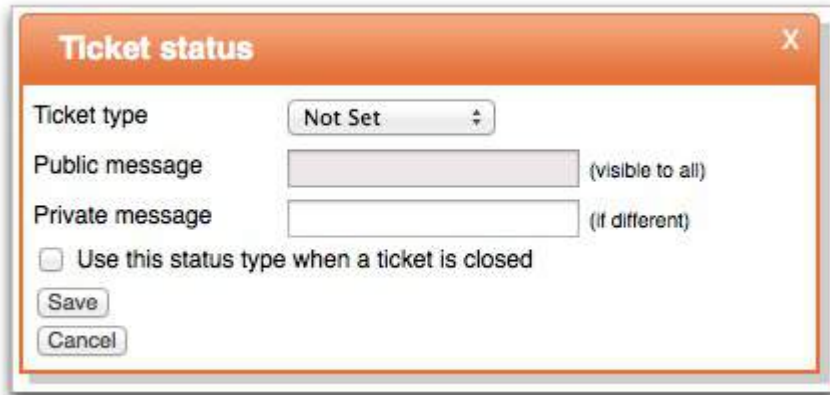
5. If different to your public message, type a message in the **Private message** field.

Private messages are only visible to Smile operators.

6. (Optional) Select the checkbox for **Use this status type when a ticket is closed**.

7. Click **Save**.

The Ticket Status List page is displayed.



The image shows a 'Ticket status' configuration window. It has an orange header bar with the title 'Ticket status' and a close button 'X'. The main area contains the following fields and controls:

- Ticket type:** A dropdown menu currently showing 'Not Set' with a small arrow icon.
- Public message:** A text input field with the placeholder text '(visible to all)'.
- Private message:** A text input field with the placeholder text '(if different)'.
- ☐ **Use this status type when a ticket is closed**
- Save** button
- Cancel** button

Figure 115: New Ticket status window

Priorities

Ticket priorities allow you to set the urgency or impact of a ticket issue in relation to other tickets. Tickets are displayed from highest to lowest priority in the Helpdesk.

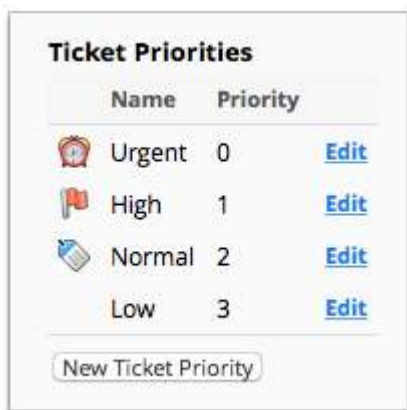


Figure 116: Ticket Priorities page

Create a ticket priority

Priorities are ordered by the **Priority Level** value. Keep this in mind when planning priority settings.

This task explains how to create a new ticket priority.



Tip: Ticket priorities are configured with a set of default priorities. You can keep these entries and adjust them to your requirements by clicking **Edit** next to the specific entry.

1. Select **Priorities** under **Help Desk** on the Configuration and Tools page.

The Ticket Priorities page is displayed.

2. Click **New Ticket Priority**.

The Ticket Priority page is displayed.

Name

Priority Level

Small Icon URL

Big Icon URL

☐ Tickets with this priority are urgent

[Save](#)

Figure 117: New Ticket Priority page

3. Type a name in the **Name** field.

4. Type a value in the **Priority Level field.**

This is a numerical value. Smaller numbers are of higher priority. This affects how tickets are sorted in the helpdesk. For example, a priority level of 1 is the highest priority. 10 may be the lowest.

5. (Optional) Type an address in the **Small Icon URL field.**

You can not browse for the file. You must enter the full file location manually.

6. (Optional) Type an address in the **Big Icon URL field.**

You can not browse for the file. You must enter the full file location manually.

7. (Optional) Select the checkbox to mark **Tickets with this priority are urgent.**

Note: Tickets with this priority setting will be included in the column count of Urgent in the Work Queues page.

8. Click **Save.**

The Ticket Priorities page is displayed.

Default priority icons

Smile provides three default priority icons in small and big format.

- Small icon—16x16 pixels
- Big icon—32x32 pixels

Icon image**URL**

/images/smile/ticket_urgent_16.png

/images/smile/ticket_urgent_32.png

/images/smile/ticket_high_16.png

/images/smile/ticket_high_32.png

/images/smile/ticket_normal_16.png

/images/smile/ticket_normal_32.png

Template tickets

Template tickets set the initial state of a ticket. Templates are useful for common types of tickets. Base information can be pre-defined to reduce the need to set each field individually each time a new ticket is created.



Template tickets		
Number	Subject	description
TMPL1	System Ticket	View
TMPL1_1	System Ticket	View

[Create New ...](#)

Figure 118: Template tickets page

Create a template ticket

Many ticket values can be defined as part of a template. As the use of these values will depend on the template purpose or your Smile configuration this task provides an overview of creating and saving a template. It does not cover all the individual fields and options that may be contained in a ticket.

This task explains how to create a new ticket template.

1. Select **Template Tickets** under **Help Desk** on the Configuration and Tools page.

The Template tickets page is displayed.

2. Click **Create New....**

The Create a new ticket page is displayed.

3. Click **Select** next to the required base template in the list displayed.

The **Please enter a subject for the new ticket** window is displayed.

4. Type a subject name for the template. Click **Continue**.

The new template ticket is displayed.

Note: Configure other options as required.

5. Click **Save**.

The Template tickets page is displayed.

Appointments

Appointments are based on standard ticket types with additional functions to configure scheduling and assignment of appointments. Appointments handle the allocation of bookings taking into account appointment duration, travel time and operator availability.

A number of elements are required to use Smile appointment functionality. These are:

- operator availability
- a helpdesk group
- an appointment ticket type
- an appointment template ticket

In addition to setting appointments, appointment type tickets can also include other workflow functions and actions.

Appointment tickets are viewed through their own filter. Click **Appointments** in the Quick Links section. For information on using appointments, see the *User Guide*.

Set operator availability

To search and book appointments for Smile operators each operator must have their availability defined. This includes both the days and times they are available to take appointments and those they are not.

For example, a technician may have a standard Monday to Friday work week when they are available, which includes a daily lunch break when they are unavailable. In addition any days they are unavailable, due to annual leave for example, can be excluded.

This task explains how to set operator availability.

1. [Search](#) for an operator account for which you want to set availability, then double-click the subscription entry in the search results.

The subscription's summary page is displayed.

2. Expand the subscription entry in the account sidebar, then click **Availability**.

The Availability page showing the **Recurring hours** and **Exclusion** lists is displayed.

3. Click **New Schedule Item**.

The **Operator Schedule Item** window is displayed.

Figure 119: New Operator Schedule Item window

Recurring

Recurring hours are the days and times that an operator is regularly available to take appointments.

This task explains how to set recurring hours.

1. On the **Operator Schedule Item** window, select **Recurring** from the **Type** drop-down.
2. Type a time in the **Start** field.
3. Type a time in the **End** field.

Note: The **Start** and **End** times are entered in 24 hour time format. For example, 3pm = 15:00:00.

4. Select the day of the week from the **Every** drop-down.

The entered **Start** and **End** time will be applied to every instance of the selected day.

5. (Optional) Type a name for the entry in the **Label** field.
6. Click **Save**.

The Availability page is displayed.

7. (Optional) Repeat the above steps for additional recurring hours entries.


Exclusion

Exclusions are the days and times that an operator is unavailable to take appointments. For example, annual leave or public holidays.

This task explains how to set excluded days and times.

1. On the **Operator Schedule Item** window, select **Exclusion** from the **Type** drop-down.
2. Type a time in the **Start** field.
3. Type a time in the **End** field.

Note: The **Start** and **End** times are entered in 24 hour time format. For example, 3pm = 15:00:00.

4. Click  to the right of the **Exclusion Date** field. Click the required date.
5. (Optional) Type a name for the entry in the **Label** field.
6. Click **Save**.

The Availability page is displayed.

7. (Optional) Repeat the above steps for additional exclusion entries.

Create appointment group

For operators that can take appointments to be searchable they must be a member of the same group together.

This task explains how to create an appointment group.

1. Select **Helpdesk Groups** under **Help Desk** on the Configuration and Tools page.

The Helpdesk Groups page is displayed.

2. Click **Add**.

The New Group page is displayed.

3. Type a name in the **Group Name** field.

4. (Optional) Select an email type from the **Send an email when new tickets are entered** drop-down.

Note: This is a list of available email templates configured in your instance of Smile. For more information, see [Email templates](#).

5. Click **Save**.

An empty **Groups Members** list is displayed.

6. Click **Add** next to a Smile operator listed under **Add a user to this group**.

The operator is added to the **Group Members** list.

7. (Optional) Repeat the previous action to add another operator to the group.

8. Click **Edit** next to each group member to set their **Subscription Conditions**.

- **Always subscribe me to tickets of my group** (default)
- **Subscribe me only if I'm the ticket owner**
- **Never subscribe me**

9. Click **Save**.

10. Click **Save**.

The **Helpdesk Groups** page is displayed.

Create appointment ticket type

An appointment ticket type includes extra information for the duration of and travel time to an appointment. All other standard ticket type options are available for configuration in appointment ticket types.

This task explains how to add appointment types.

1. Select **Ticket Types** under **Help Desk** on the Configuration and Tools page.

The Ticket Types page is displayed.

2. Click the **Appointments** tab on the Ticket Types page.

The Appointments page is displayed.

3. Click **Add Type**.

The Ticket type New Ticket Type window and tabs is displayed.

Ticket Type		Status	Fields	Actions	Timers
Department	Default				
Ticket type	Appointment				
Assign new tickets to group	OnSite Tech				
Run ticket action upon ticket assignment	None				
Ticket "From" address					
Ticket subject					
Appointment Duration Interval	120	min(s)			
Travel Duration Interval	30	min(s)			
<input checked="" type="checkbox"/> Show tickets of this type in the work queues list <input type="checkbox"/> Tickets of this type are visible to customers					
Start Ticket Timers On Ticket Creation					
Timer	Action				
No ticket timer will be started on ticket creation					
Start A Ticket Timer	Not Set Add				
Save Clone Deprecate					

Figure 120: Ticket Type tab displaying appointment property fields

4. Type a name in the **Ticket type** field.
5. Select the entry for the appointment group created in [Create appointment group](#) from the **Assign new tickets to group** drop-down.
6. Type a value in the **Appointment Duration Interval** Field.
7. Type a value in the **Travel Duration Interval** field.

When creating new appointment tickets the duration and travel time is presented in blocks of time based on the values you enter here. For example, if the **Appointment Duration Interval** is set as 30 minutes the duration option will be displayed as 30 minutes, 1 hour, 1 hour 30 minutes, 2 hours, continuing up to 8 hours.

8. (Optional) Complete other ticket type actions and options as required.
9. Click **Save**.

The Ticket Types page is displayed.

Default appointment and travel duration interval

If no time is specified for **Appointment Duration Interval** or **Travel Duration Interval** in the appointment ticket type a default interval of 15 minutes is used by Smile.

An alternate default interval time is specified under **Advanced options** of **Company Preferences**. For more information, [contact Inomial](#).

Create appointment template ticket

A template ticket is used when a new ticket is created. An appointment template displays the appointment duration and travel duration interval fields completed in [Create appointment ticket type](#).

This task explains how to create an appointment ticket template.

1. Select **Template Tickets** under **Help Desk** on the Configuration and Tools page.
The Template tickets page is displayed.
2. Click **Create New....**
The Create a new ticket page is displayed.
3. Click **Select** next to the required base template in the list displayed.
The **Please enter a subject for the new ticket** window is displayed.
4. Type a subject name for the template. Click **Continue**.
The new template ticket is displayed.
5. Click **Edit** to the right of the **Status** field.
The **Ticket properties** window is displayed.
6. If a department was set on the ticket type during [Create appointment ticket type](#), select the same department in the **Ticket Department** drop-down.
7. Select the entry for the ticket type created in [Create appointment ticket type](#) from the **Ticket Type** drop-down.
8. Select the entry for the appointment group created in [Create appointment group](#) from the **Assignment group** drop-down.
9. Click **Save**.
10. (Optional) Configure other options as required.
11. Click **Save**.
The Template tickets page is displayed.

Chapter

14

Configuring payment processing

Payment methods

Payment methods manage the types of payment that Smile can accept and process. Methods can be configured with delays and retry limits for automatic payments.

View payment methods

The payment methods page displays a summary list of payment types configured in Smile. The payment type name is listed along with its handler type, attempt limit and retry interval.

This task explains how to access the payment methods page.

1. Select **Payment Methods** under **Payment Processing** on the Configuration and Tools page.

The Payment Types page is displayed.

Payment Types				
Name	Handler	Attempt limit	Retry interval	
BPoint	BPoint	2	1 hour	Edit
Australia Post Billpay	Manual	3	24 hours	Edit
BPAY	Manual	3	24 hours	Edit
Cash	Manual	3	24 hours	Edit
Cheque	Manual	3	24 hours	Edit
Diner's Club	Manual	3	24 hours	Edit
Direct debit	Manual	3	24 hours	Edit
EFTPOS	Manual	3	24 hours	Edit
Money Order	Manual	3	24 hours	Edit
Other credit card	Manual	3	24 hours	Edit
Other payment type	Manual	3	24 hours	Edit
Token Only	Manual	3	1 hour	Edit
Visa	Manual	3	24 hours	Edit
Westpac PayWay	Manual	1	1 hour	Edit
Gift Voucher	NAB Transact Batch	3	24 hours	Edit
Mastercard	NAB Transact Credit Card	3	24 hours	Edit
Planned manual payment	Planned manual payment	1	1 hour	Edit
American Express	Smile manual batch	3	24 hours	Edit
Batched cash	Smile manual batch	1	1 hour	Edit
Swipe	Swipe	1	1 hour	Edit
Westpac Direct Debit	Westpac Direct Debit	3	1 hour	Edit
<input checked="" type="checkbox"/> Hide deprecated				
Add...				

Figure 121: The Payment Types page

2. (Optional) To view deprecated payment types, untick the **Hide deprecated** checkbox.

Add a payment method

Smile is configured with default payment types. You can create additional payment types as required.

This task explains how to add a payment type.

1. Click **Add**.

The **Create payment method** window is displayed.

A screenshot of a web-based dialog box titled "Create payment method" with a close button (X) in the top right corner. The dialog contains three input fields: "Name" with a text input box, "Payment handler" with a dropdown menu showing "Choose One...", and "Currency" with a dropdown menu showing "AUD - Australian Dollars". At the bottom left of the dialog are two buttons: "Create" and "Cancel".

Figure 122: Create payment method window

2. Complete the following fields, then click **Create**.

- **Name**
- **Payment handler**

The payment type properties page is displayed.

3. Complete additional payment type fields as required.

For more information, see [Payment type properties](#).

4. Click **Save**.

The Payment Types page is displayed.

Payment type properties

Name	Specifies a short descriptive name of the payment type.
Payment handler	<p>Specifies the payment handler that processes the payment.</p> <ul style="list-style-type: none"> • Commonwealth Bank BatAuch • Dialect • EWay • EZI Debit • Manual • NAB Transact Batch • NAB Transact Credit Card • PayChoice Direct Debit • Planned manual payment • SecurePay • St George • Westpac Credit Card <p>For more information, See Payment handlers and gateways.</p>
Receipt reporting category	Specifies the category that the payment type is allocated to for reporting purposes.
Payment Type Code	Specifies a unique code that can be used by other processes in Smile to refer to payment type.
Handler data	Specifies a string that can provide extra information to the payment handler.
Attempt Limit	Specifies the maximum number of times Smile will attempt to process the transaction.
Hint Type	<p>Specifies if all, part or none of an account or credit card number is displayed in Smile.</p> <ul style="list-style-type: none"> • Full Number • No Hint • Obscured
Retry Interval	<p>Specifies the maximum amount of time between retry attempts.</p> <ul style="list-style-type: none"> • 1 hour • 4 hours • 8 hours • 24 hours • 48 hours
Automatically add a \$<i>n</i> surcharge (ex gst)	Specifies a flat fee charged on a payment. Excludes tax.

Automatically add a <i>n</i>% surcharge	Specifies a fee charged on a payment. The fee is a percentage of the payment amount. Excludes tax.
Minimum surcharge (ex gst) \$	Specifies a minimum surcharge raised if the dollar and % surcharges are less than this amount. Excludes tax.
Charge a decline fee	<p>Specifies when a payment decline fee is raised.</p> <ul style="list-style-type: none"> • Every time a payment transfer is declined • If the first transfer attempt is declined • The last time a payment is attempted • Don't charge a decline fee
Stationery text	Specifies text that can be displayed on stationery.
Valid from	Specifies the start date validity of the payment type. Outside of the validity period existing payments will still be processed, but the payment type will not be available for selection when modifying payment details.
Valid to	Specifies the end date validity of the payment type. Outside of the validity period existing payments will still be processed, but the payment type will not be available for selection when modifying payment details.

Entry labels

Specifies the field labels for collecting relevant customer payment information of different payment types. If a label is left blank the field will not be displayed for this payment type.

Name label	Specifies a label for the name of the payment. For example, a customer name, an account name or name of the card holder
Number label	Specifies a label for the number field. For example, a credit or debit card number, account number or cheque number.
CVV label	Specifies a card verification value field for collecting the 3 digit CVV of a credit card.
Branch number label	Specifies a label for a bank or branch number for the payment. For example, a BSB (Bank State Branch) number.
Expiry date label	Specifies a label for an expiry field. For example, the expiry month/year of a credit card.
Token label	Specifies a label for a payment token field.
Do not run expiry actions on accounts with stored payment details of this type	When selected specifies that expiry actions are not run on accounts with stored payment details of this type. For more information, see Automatic payment .









Name	<input type="text" value="Visa"/>	
Payment handler	<input type="text" value="Manual"/> 	
Currency	AUD - Australian Dollars	
Receipt reporting category	<input type="text" value="General Receipt"/> 	
Payment Type Code	<input type="text"/>	
Handler data	<input type="text"/>	
Attempt Limit	<input type="text" value="3"/>	
Hint Type	<input type="text" value="Obscured"/> 	
Retry Interval	<input type="text" value="1 hour"/> 	
Automatically add a	<input type="text" value="\$"/> surcharge (ex gst)	
Automatically add a	<input type="text" value=""/> % surcharge	
Minimum surcharge (ex gst)	<input type="text" value="\$"/>	
Charge a decline fee	<input type="text" value="Don't charge a decline fee"/> 	
Stationery text	<div style="border: 1px solid #ccc; height: 60px;"></div>	
Valid from	<input type="text"/>	
Valid to	<input type="text"/>	
Payment details entry permitted by	All Users Delete	
	<input type="text" value="Not Set"/>  Add	
Entry labels		
Name label	<input type="text"/>	
Number label	<input type="text"/>	
CVV label	<input type="text"/>	
Branch number label	<input type="text"/>	
Expiry date label	<input type="text"/>	
Token label	<input type="text"/>	
<input type="button" value="Save"/> <input type="button" value="Deprecate"/> <input type="button" value="Delete"/>		

Figure 123: Visa payment method properties page

Payment handlers and gateways

Payment handlers and gateways manage advanced configuration of the behaviour of payment types.

To activate a gateway, additional software may be required. For more information, [contact Inomial](#).

View payment handlers and gateways

The payment handlers and gateways page displays a summary list all current payment handlers and their processing mode configured in Smile. Additional software may be required to activate a gateway.

This task explains how to access the payment handlers and gateways page.

1. Select **Payment Gateways** under **Payment Processing** on the Configuration and Tools page.

The Payment Handlers and Gateways page is displayed.

Payment Handlers		
Name	Processing Mode	
Always Accept	Online	Edit
BPoint	Online	Edit
Commonwealth Bank BatAuch	Offline	Edit
Dialect	Online	Edit
EWay	Online	Edit
EZI Debit	Offline	Edit
Manual	Manual	Edit
NAB Transact Batch	Offline	Edit
NAB Transact Credit Card	Online	Edit
PayChoice Direct Debit	Online	Edit
Planned manual payment	Scheduling only	Edit
SecurePay	Online	Edit
Smile manual batch	Offline	Edit
St George	Online	Edit
Swipe	Online	Edit
Westpac Credit Card	Online	Edit
Westpac Direct Debit	Offline	Edit
Add		

Figure 124: The Payment Handlers and Gateways page

2. Click **Edit** to the right of a payment handler.

The payment handler properties is displayed.

Automatic payment options

Smile can automatically schedule payments that let you periodically deduct an agreed amount from a customer's bank account or credit card. An automatic payment is triggered when a debit is created. These scheduled payments are known as automatic payments.

Automatic payment options contain the configuration for scheduling payments of invoice amounts and account balances.

Smile provides the following default automatic payment options:

No Auto Payment	Smile never schedules automatic payments.
Schedule Payment of Invoice Amount	Smile schedules an automatic payment for the invoice value after a bulk invoice is generated, taking into consideration the account balance and pending payments.
Schedule Payment of Account Balance	Smile schedules an automatic payment for the value of the account balance after a bulk invoice is generated, taking into consideration pending payments.

Automatic payment options are advanced configuration. For more information, [contact Inomial](#).

Name	Java Class	
No Auto Payment	com.inomial.cms.billing.autoPayment.NoAutoPaymentOption	Edit
Schedule Payment of Invoice Amount	com.inomial.cms.billing.autoPayment.InvoiceAmountScheduledPaymentOption	Edit
Schedule Payment of Account Balance	com.inomial.cms.billing.autoPayment.AccountBalanceScheduledPaymentOption	Edit
Add		

Figure 125: Auto Payment Options page

View automatic payment options

The auto payment options page displays a summary list of option names and their java class.

This task explains how to access the auto payment options page.

1. Select **Automatic Payment Options** under **Payment Processing** on the Configuration and Tools page.
The Auto Payment Options page is displayed.
2. Click **Edit** to the right of a payment option.
The auto payment option properties is displayed.

Chapter

15

Logging and tasks

Error log

If an error occurs within Smile it is displayed to the end-user with a **Tracking ID**. You can use Smile's error log for troubleshooting. You can locate an error in the system error log by using the tracking ID. A stack trace report is displayed when you view the details of an error.

Select **Error Log** under **Logging and Tasks** on the Configuration and Tools page to view the System Error Log page.

Click **View** to the right of a listed error to view the error details.

The following screenshot shows you an example of an unexpected error.

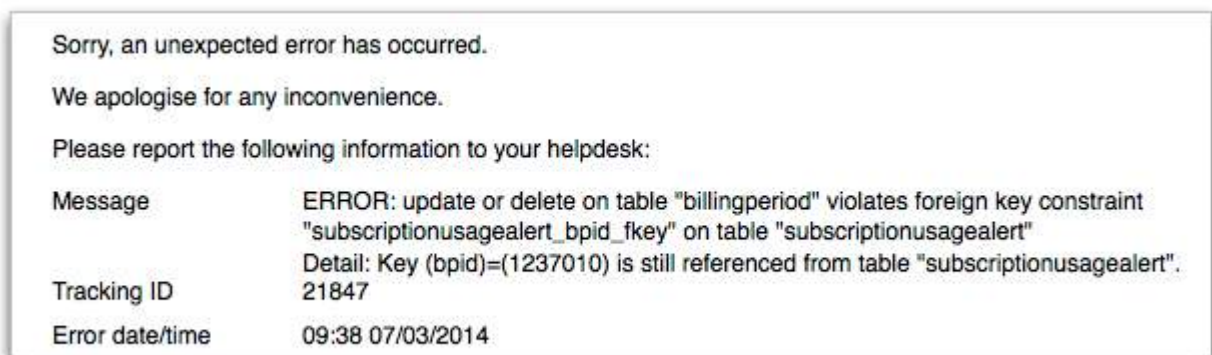


Figure 126: An unexpected error

Logging level

Logging level in Smile provides server debugging. Turning debugging on for a specific module will result in increased logging to the Smile log file. Logs are typically written to `/var/log/smile/..` and `/var/log/radius/log.0`

Note: Logging level is only relevant to non-hosted Smile.

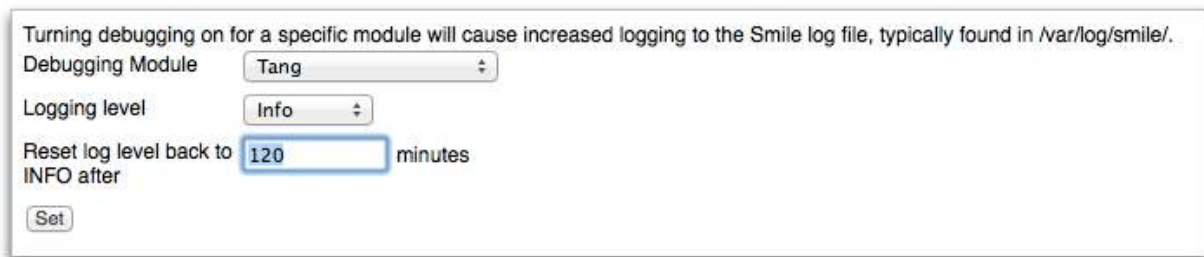


Figure 127: The Server Debugging page

Set a logging level

A logging level specifies the debugging module, the level of logging information and how long the logging level is set.

This task explains how to set a logging level.

1. Select **Logging Level** under **Logging and Tasks** on the Configuration and Tools page.
The Server Debugging page is displayed.
2. Select a module from the **Debugging Module** drop-down:
 - **Not Set**
 - **Other**—Type an ID in the **Module ID** field.
 - **Tang**
 - **LDAP**
 - **Web Server**
 - **SQL**
 - **All Radius**
 - **Radius accounting**
 - **Radius authentication**

3. Select a level from the **Logging level** drop-down:

- **None**—Specifies that no messages are logged.
- **Severe**—Specifies a message level indicating a serious failure.
- **Warning**—Specifies a message level indicating a potential problem.
- **Info**—Specifies a level for informational messages.
- **Config**—Specifies a level for static configuration messages.
- **Fine**—Specifies a message level providing tracing information.
- **Finer**—Specifies a fairly detailed tracing message.
- **Finest**—Specifies a highly detailed tracing message.
- **All**—Specifies that all messages are logged.

4. Type a value in the **Reset log level back to INFO after** field.

5. Click **Set**.

The Configuration and Tools page is displayed.

Task scheduling

In task scheduling you can schedule recurring and one-off Smile tasks. Recurring tasks can be scheduled to run at specified intervals for a set period of time or indefinitely.

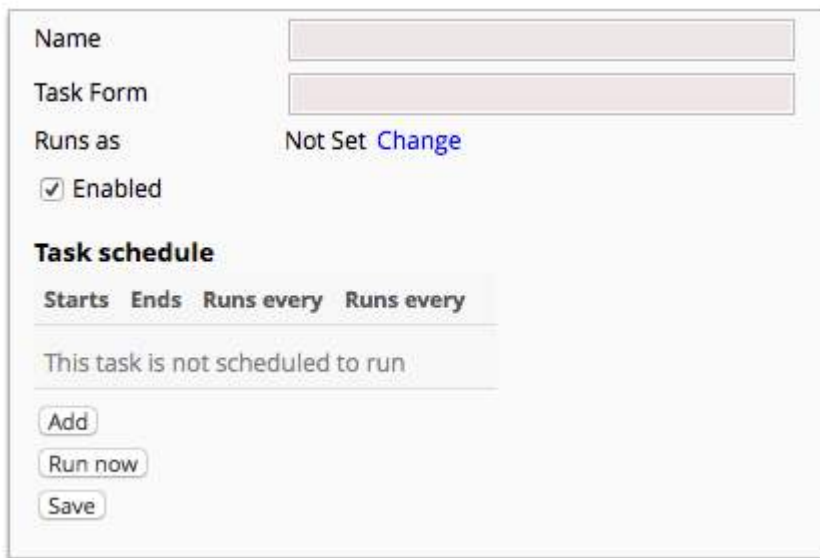
Inomial develops task functions on an as requested basis and are advanced configuration. For more information, [contact Inomial](#).

Tasks can be created to complete actions such as:

- dispatch
- credit card processing
- CDR importing
- plan change polling
- provisioning polling

The Tasks page displays a summary list of tasks with their status, when the task was last run and how they are run.

Select **Task scheduling** under **Logging and Tasks** on the Configuration and Tools page to view the Tasks page. Click **Configure** to the right of task entry to view or edit the task configuration.



The screenshot shows a web form for configuring a new task. It includes input fields for 'Name' and 'Task Form'. The 'Runs as' field is set to 'Not Set' with a 'Change' link. There is a checked 'Enabled' checkbox. Below this is a 'Task schedule' section with a table header: 'Starts', 'Ends', 'Runs every', and 'Runs every'. The table body contains the text 'This task is not scheduled to run'. At the bottom are three buttons: 'Add', 'Run now', and 'Save'.

Figure 128: A New task page

Add new task

You can configure multiple tasks in Smile. These can be one-off tasks or tasks that recur on a set schedule.

This task explains how to add a task item.

1. Select **Task scheduling** under **Logging and Tasks** on the Configuration and Tools page.

The Tasks page is displayed.

2. Click **New task**

A New task page is displayed.

3. Type a descriptive name for the task in the **Name** field.

4. Type the form name in the **Task Form** field.

This is the name of the task form created by Inomial. For more information, [contact Inomial](#).

5. Click **Change** to the right of **Run as**.

The Find User page is displayed.

6. Type a system login service account name in the **Search for** field. Click **Search**.

Matching user results are displayed in the **Matching Users** list.

7. Click **Select** to the right of the required matching user.

The username selected must be an account with system service access. An error is displayed if the selected account does not have appropriate access.

The task configuration page is displayed.

8. (Optional) Clear the **Enabled** checkbox to disable the task.

By default new tasks are enabled. A disabled task will be displayed in the **Tasks** list, but will not run until enabled.

9. Do one of the following:

Option	Description
Save the new task and return to the Tasks page	1. Click Save .
Add a task to the Task schedule list that runs immediately	1. Click Run now . 2. Click Save .
Create a recurring task schedule	1. Click Add . 2. For more information, see Add task schedule .

Add task schedule

You have the ability to run tasks once or set a schedule for a recurring task. When you set a schedule you specify the period during which a task will run and how often it will run.

This task explains how to add a task schedule.

1. Click **Add** on the configuration page of a task item.

The Task Schedule Item page is displayed.

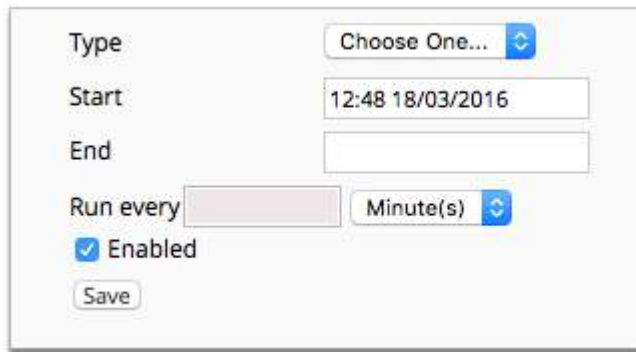


Figure 129: A Task Schedule Item page

2. Select an entry from the **Type** drop-down:

- **Runs once**—Specifies that the task only runs once at the specified date and time.
- **Recurring**—Specifies that the task will repeat for the duration and interval set.

3. Type a time and date in the **Start** field.

The current time and date is entered by Smile as default.

Note: Adjust the time to suit schedules that you want to recur at specific times of the day. For example, set the time to 00:00 for a task that runs at midnight.

4. (Optional) Type a time and date in the **End** field.

If no end date is specified the task will recur indefinitely.

5. Select an interval option from the **Run every** drop-down:

- **Minute(s)**
- **Hour(s)**
- **Day(s)**
- **Week(s)**

6. Type a value for the interval time in the **Run every** field.

The task will **Run every** *n* intervals from the specified **Start** time and date.

7. (Optional) Clear the **Enabled** checkbox to disable the task.

By default new schedules are enabled. A disabled schedule will be displayed in the **Task schedule** list, but will not run until enabled.

8. Click **Save**.

The task configuration page is displayed. The schedule is displayed in the **Task schedule** list.

Event listeners

Custom listeners can take action upon certain events. For example, account creation.

Inomial develops listeners on an as requested basis and are advanced configuration. For more information, [contact Inomial](#).

The Event listeners page displays a summary list of listener forms and their status.

Add a listener

You can add multiple events to the listener form list.

This task explains how to add a listener.

1. Select **Event listeners** under **Logging and Tasks** on the Configuration and Tools page.

The Event listeners page is displayed.

2. Click **New listener**.

A Message listener page is displayed.



The image shows a web form for adding a new listener. It has a label 'Listener Form' followed by a text input field containing 'form.' and a cursor. Below the input field is a checkbox labeled 'Enabled' which is checked. At the bottom left of the form is a 'Save' button.

Figure 130: A blank Message listener page

3. Type a form name in the **Listener Form** field.

The name must be a valid form that implements the `eventListenerForm` interface. This is the name of the listener form created by Inomial. For more information, [contact Inomial](#).

4. Click **Save**.

The Event listener page is displayed. The listener is added to the event listeners table.

Admin log

Admin log provides access to the Smile system log. The system log displays a summary list of object creations, modifications and deletions in Smile.

Click **View** to the right of a log entry to view details of the event.

Search the admin log

You can search the admin log for entries based on from date, smile operator, form or keywords.

This task explains how to search the admin log.

1. Select **Admin Log** under **Logging and Tasks** on the Configuration and Tools page.

The Administration Log page is displayed.

2. Select an option from the **Search for** drop-down:

- **Nothing**—No search criteria is specified, except for the date set at **From Date**.
- **Operator**—Click **Select Operator** to search log entries for a specific Smile operator.
- **Form**—Type a form name to specify log entries for a specific Smile form type.
- **Message**—Type keywords present in the message.

3. Click the  to the right of **From Date** field and select a date from the calendar.

The Administration Log table updates and displays the search results.

Chapter

16

Configuring workflows

Workflows

Smile provides many features that can be combined to create powerful workflows. The components or functions included in a workflow are determined by your own business requirements. To discuss possible solutions, [contact Inomial](#).

Some of the actions that Smile can undertake are:

- create new tickets
- re-assign tickets
- close tickets
- email the customer
- set and remove a hold on tickets
- send attachments
- create orders
- create bonds
- close subscriptions

Use case - Customer support request

This use case outlines the creation of a workflow that handles customer support requests tickets. It covers the ticket lifecycle from ticket creation to closure.

This use case involves a number of major steps with sub-steps. They are presented in the order required to build this workflow from scratch.

This use case is presented as an example. Build on or modify these tasks to create you own workflow.

The following flowchart gives you an overview of the customer support request workflow.

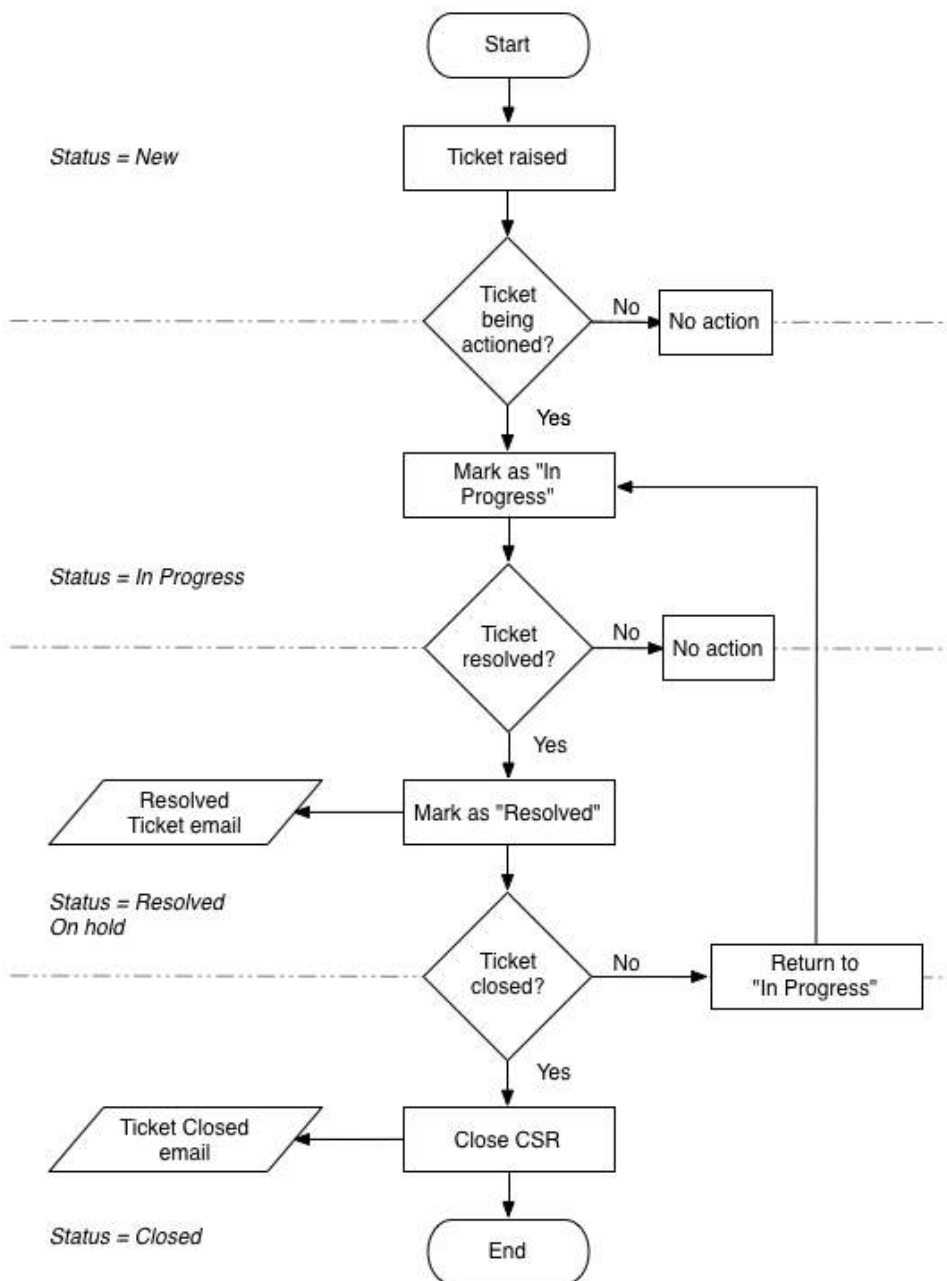


Figure 131: Use case - customer support request workflow

Customer support request overview

This task explains how to create a simple workflow process for customer support requests.

1. [Create email templates.](#)

This step lets you create email templates that will be used to notify the customer of changes or actions during the ticket lifecycle.

2. [Create custom field.](#)

This step creates a custom field to be used as the ticket reply to email address.

3. [Create helpdesk group.](#)

This step creates a customer support group and member Smile operators.

4. [Create ticket type department.](#)

This step creates a ticket type business department to which tickets relate.

5. [Create ticket type.](#)

This step creates the ticket type to which ticket statuses and actions are applied.

6. [Create ticket status.](#)

This step creates a number of ticket statuses that a ticket can be set to.

7. [Add ticket field.](#)

This step creates a ticket field to use the reply to address created as a custom field.

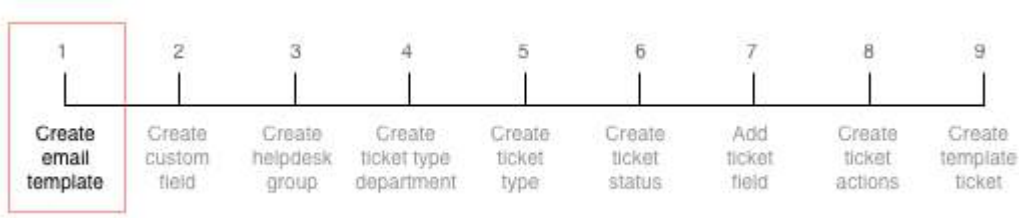
8. [Create ticket actions.](#)

This step creates a number of actions buttons that will be visible on a customer support request ticket.

9. [Create template ticket.](#)

This step creates the template ticket to which the ticket type is applied to.

Create email template



Email templates can be used for bulk messaging or providing a standard response to defined actions or triggers.

For more information, see [Email templates](#).

Two templates are created as part of the customer service request workflow. These are:

- **Resolved Ticket**—when the ticket action of **Mark as "Resolved"** is selected this template will be used to email the customer.
- **Ticket Closed**—when the ticket action of **Mark as "Closed"** is selected this template will be used to email the customer.

This task explains how to create email templates.

Select **Email Templates** under **Email, SMS, Print & Web** on the Configuration and Tools page.

The Email templates page is displayed.

Template - "Resolved Ticket"

1. Click **New.**

A blank email template is displayed.

2. Select **Ticket from the **Document type** drop-down.**

3. Type the following details:

- **Name**—Resolved Ticket
- **From**—ticket-`{ticketNumber}`@example.com
- **Subject**—Ticket `#{ticketNumber}` - `{ticketSubject}` - Resolved
- **Body**—

Dear Customer

Ticket number: `{ticketNumber}`

Ticket subject: `{ticketSubject}`

This email is to notify you that we believe that this ticket has been resolved. To receive prompt attention if this is not the case, please reply to this email within seven days.

If we don't hear from you within seven days of this email then we may close the ticket permanently. Once the ticket is closed you will need to lodge a new ticket in order to receive assistance about this issue, which may delay final resolution of the issue.

Regards

Example Helpdesk

4. Click **Save.**

The Email templates page is displayed.

Template - "Ticket Closed"

1. Click **New**.

A blank email template is displayed.

2. Select **Ticket** from the **Document type** drop-down.

3. Type the following details:

- **Name**—Ticket Closed
- **From**—support@example.com
- **Subject**—Ticket #{ticketNumber} - {ticketSubject} - Closed
- **Body**—

Dear Customer

Ticket number: {ticketNumber}

Ticket subject: {ticketSubject}

This email is to notify you that we have now closed this ticket, as advised previously.

As the ticket is now closed, you will need to create a new ticket if you require additional assistance with this issue.

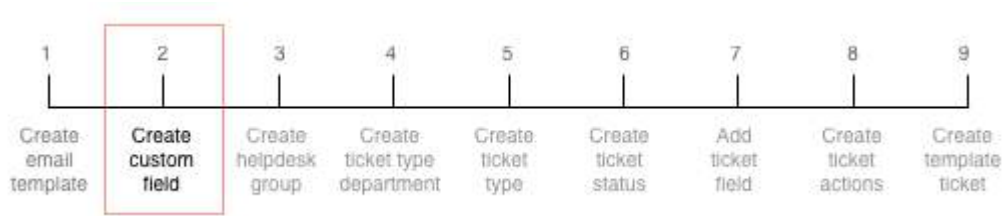
Regards

Example Helpdesk

4. Click **Save**.

The Email templates page is displayed.

Create custom field



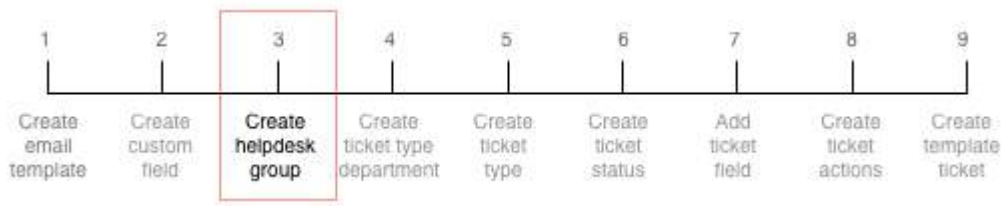
To add a field on a ticket that provides a reply to customer email address you need to create a custom field for this information.

For more information, see [Custom fields](#).

This task explains how to create a custom field.

1. Click **Custom Fields** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Custom Fields page is displayed.
2. Click **Create new...**
The **Create New Field** page is displayed.
3. Type `Ticket Reply to Address` in the **Field name** field.
4. Type `ticket_replyto_address` in the **Field_ID (optional)** field.
5. Select **Email Address** from the **Field type** drop-down.
6. Select **Ticket** from the **Only allow this field to be added to:** drop-down.
7. Click **Create Field**.
The Custom Fields page is displayed.

Create helpdesk group



Customer support requests will be assigned to the Customer Support helpdesk group. This step assumes there are existing Smile operators to add to the group.

For more information, see [Helpdesk groups](#).

This task explains how to create a help desk group and add operators to the group member list.

1. Click **Helpdesk Groups** under **Help Desk** on the Configuration and Tools page.

The Helpdesk Groups page is displayed.

2. Click **Add**.

The New Group page is displayed.

3. Type `Customer Support` in the **Group Name** field.

4. Click **Save**.

The Customer Support group page is displayed.

5. Click **Add** next to a Smile operator listed in the **Add a user to this group** list.

The user will be moved to the **Group Member** list.

6. (Optional) Repeat the previous step to add additional Smile operators to the Customer Support group.

7. Click **Edit** next to the first operator in the **Group members list**.

The operators' subscription details are displayed.

8. Select **Subscribe me only if I'm the ticket owner** from the **Ticket Subscription Conditions** drop-down.

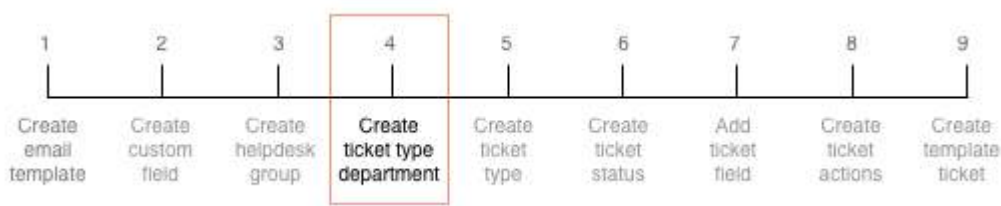
9. Click **Save**.

The Customer Support group page is displayed.

10. Click **Save**.

The Helpdesk Group page is displayed.

Create ticket type department



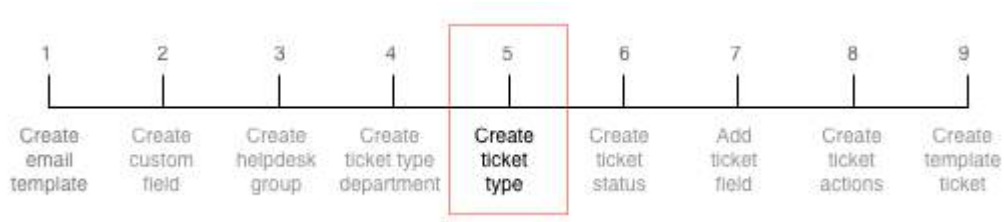
A ticket type department specifies what business area the ticket relates to.

For more information, see [Adding departments](#).

This task explains how to add a department in Ticket Types.

1. Select **Ticket Types** under **Help Desk** on the Configuration and Tools page.
The Ticket Types page is displayed.
2. Click **Edit Departments**.
The Departments page is displayed.
3. Click **Add Department**.
The Ticket Department page is displayed.
4. Type `Customer Support` in the **Department Name** field.
5. Click **Save**.
The Departments page is displayed.
6. Click **Edit** next to the **Customer Support** entry in the **Name** list.
The Ticket Department page is displayed.

Create ticket type



Creating a ticket type is the first step in adding actions in a workflow.

For more information, see [Ticket types](#).

This task explains how to add a ticket type.

1. Click **Add Type.**

The Ticket type New Ticket Type page is displayed.

2. Select **Customer Support from the **Department** drop-down.**

3. Type `Customer Support Request` in the **Ticket type field.**

4. Select **Customer Support from the **Assign new tickets to group** drop-down.**

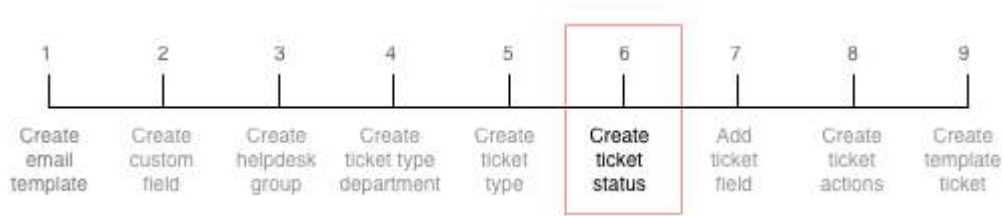
5. Type `ticket-{number}@example.com` in the **Ticket "From" address field.**

6. Type `Re: {subject}` in the **Ticket subject field.**

7. Click **Save.**

The Ticket Department page is displayed.

Create ticket status



Ticket status provides Smile operators and customers a high level view of the current state of a ticket, for example, whether it is open or has been closed.

Three statuses are created as part of the customer service request workflow. These are:

- In Progress
- Issue Resolved
- Ticket Closed

This task explains how to create ticket type statuses.

1. Click **View** next to the **Customer Support Request** entry in the **Ticket types in this department** list.
The **Ticket Type** tab you just created is displayed.
2. Click the **Status** tab.

Ticket status - "In Progress"

1. Click **Add**.
The Ticket status window is displayed.
2. Select **Customer Support Request** from the **Ticket type** drop-down.
3. Type `In Progress` in the **Public message** field.
4. Type `In Progress` in the **Private message** field.
5. Click **Save**.
The ticket status will be added to the **Ticket Status** message list.

Ticket status - "Issue Resolved"

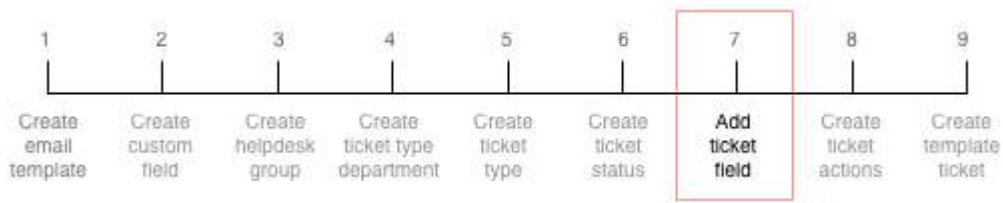
1. Click **Add**.
The Ticket status window is displayed.
2. Select **Customer Support Request** from the **Ticket type** drop-down.
3. Type `Issue Resolved` in the **Public message** field.
4. Type `Issue Resolved` in the **Private message** field.
5. Click **Save**.
The ticket status will be added to the **Ticket Status** message list.

Ticket status - "Ticket Closed"

1. Click **Add**.
The Ticket status window is displayed.
2. Select **Customer Support Request** from the **Ticket type** drop-down.
3. Type `Ticket Closed` in the **Public message** field.
4. Type `Ticket Closed` in the **Private message** field.
5. Select the **Use this status type when the ticket is closed** checkbox.
6. Click **Save**.

The ticket status will be added to the **Ticket Status** message list.

Add ticket field



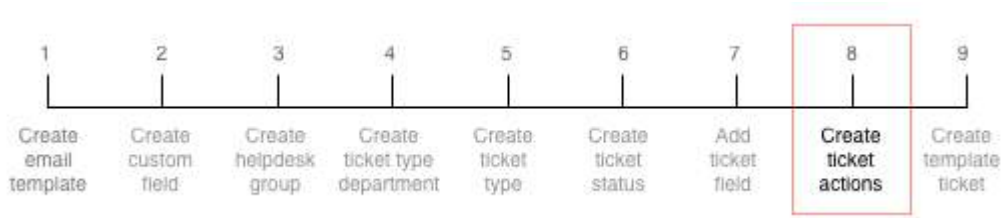
In step 2, [Create custom field](#) you created a ticket reply to custom field. This custom field needs to be added to the ticket page to be visible.

This task explains how add a ticket field.

1. Click the **Fields** tab.
2. Select **Ticket Reply to address** from the **Add field** drop-down.
3. Click **Add**.

Ticket Reply to Address is added to the **Form Fields** list.

Create ticket actions



Ticket actions create visible buttons on a ticket. The buttons can have individual or multiple actions and behaviours assigned to them.

Four actions are created as part of the customer service request workflow. These are:

- **Mark as "In Progress"**—this will set the current ticket status to **In Progress**
- **Mark as "Resolved"**—this will set the current ticket status to **Resolved**, place the ticket on hold for 168 hours (7 days), add a comment to the ticket and email the customer.
- **Return to "In Progress"**—this will change the ticket status to **In Progress** and add a comment to the ticket.
- **Close CSR**—this will close the ticket, change the ticket status to **Ticket Closed**, take the ticket out of hold and email the customer.

This task explains how to create ticket actions.

Click the **Actions** Tab.

Ticket action - "Mark as "In Progress""

1. Click **Add**.

The Ticket Actions page and **Action Details** tab is displayed.

2. Type **Mark as "In Progress"** in the **Action label** field.

3. Click **Save**.

The **Actions** tab is displayed.

4. Click **View** next to the **Mark as "In Progress"** entry in the actions list.

5. Click the **Ticket Actions** tab.

6. Select **In Progress** from the **Change ticket status to** drop-down.

7. Click **Save**.

The **Actions** tab is displayed.

Ticket action - "Mark as "Resolved""

1. Click **Add**.

The Ticket Actions page and **Action Details** tab is displayed.

2. Type `Mark as "Resolved"` in the **Action label** field.
3. Select **In Progress** from the **Show this action for status** drop-down.
4. Click **Save**.

The **Actions** tab is displayed.

5. Click **View** next to the **Mark as "Resolved"** entry in the actions list.
6. Click the **Ticket Actions** tab.
7. Select **Issue Resolved** from the **Change ticket status to** drop-down.
8. Type `168` in the **Put ticket on hold for** field.
9. Click the **Comments** tab.
10. Type the following in the **Add public comment to ticket** field: `We believe this issue is now resolved. Please let us know if you are not satisfied. We will close the ticket in seven days if we don't hear from you.`
11. Click the **Email** tab.
12. Select **Resolved Ticket** from the **Send email using template** drop-down.
13. Select **Custom field** from the **Get email address from** drop-down
14. Select **Ticket Reply to address** from the **Field name of email address** drop-down.
15. Click **Save**.

The **Actions** tab is displayed.

Ticket action - "Return to "In Progress""

1. Click **Add**.

The Ticket Actions page and **Action Details** tab is displayed.

2. Type `Return to "In Progress"` in the **Action label** field.
3. Select **Issue Resolved** from the **Show this action for status** drop-down.
4. Click **Save**.

You will be returned to the **Actions** tab.

5. Click **View** next to the **Return to "In Progress"** entry in the actions list.
6. Click the **Ticket Actions** tab.
7. Select **In Progress** from the **Change ticket status to** drop-down.
8. Select the **Comments** tab.
9. Type `Issue Reopened` in the **Add public comment to ticket** field.
10. Click **Save**.

The **Actions** tab is displayed.

Ticket action - "Close CSR"

1. Click **Add**.

The Ticket Actions screen and **Action Details** tab is displayed.

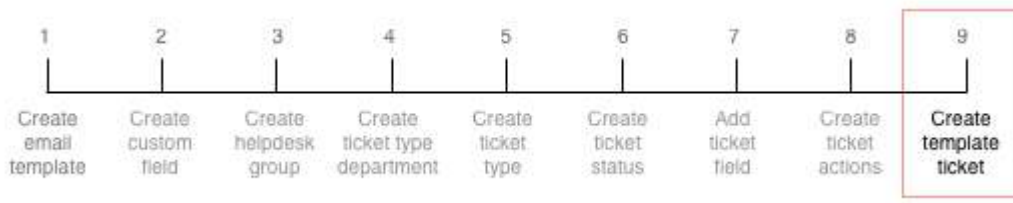
2. Type `Close CSR` in the **Action label** field.
3. Select **Issue Resolved** from the **Show this action for status** drop-down.
4. Click **Save**.

The **Actions** tab is displayed.

5. Click **View** next to the **Close CSR** entry in the actions list.
6. Click the **Ticket Actions** tab.
7. Select the **Close the ticket** checkbox.
8. Select **Ticket Closed** from the **Change ticket status to** drop-down.
9. Type 0 in the **Put ticket on hold for** field.
10. Click the **Email** tab.
11. Select **Ticket Closed** from the **Send email using template** drop-down.
12. Select **Custom field** from the **Get email address from** drop-down.
13. Select **Ticket Reply to address** from the **Field name of email address** drop-down.
14. Click **Save**.

The **Actions** tab is displayed.

Create template ticket



A template ticket is created to assign the **Customer Support** ticket type to.

For more information, see [Template tickets](#).

This task explains how to create a template ticket.

1. Select **Templates Tickets** under **Help Desk** on the Configuration and Tools page.
The Templates tickets page is displayed.
2. Click **Create New....**
The Create a new ticket page is displayed.
3. Click **Select** to the right of **System Ticket** in the **Select a base template...** list.
The Please enter a subject for the new ticket window is displayed.
4. Type `Customer Support Request` in the text field. Click **Continue**.
The template page will be displayed.
5. Click **Edit** to the right of the **Status** line.
The **Ticket properties** window is displayed.
6. Select **Customer Support** from the **Ticket Department** drop-down.
7. Select **Customer Support Request** from the **Ticket Type** drop-down.
8. Select **Customer Support** from the **Assignment Group** drop-down.
9. Click **Save**.
The template page will be displayed.
10. Select **Ticket Reply to address** from the **Add custom field** drop-down.
11. Click **Save**.
The Template tickets page is displayed.

Customer support request screens

The following are screenshots of what the customer support request workflow produces.

Ticket main screen

The following screenshot shows you a view of the ticket. This ticket has been **Marked "As Resolved"**. As a result the ticket has the following states or conditions:

- **Status** is set as **Issue Resolved** and is **On hold**
- Ticket action button **Mark as "In Progress"** is visible
- Ticket action button **Return to "In Progress"** is visible
- Ticket action button **Close CSR** is visible

54 - Customer Support Request
Customer Support Request

Status: Issue Resolved - On hold until Thu Dec 19 10:14:46 EST 2013 [Edit](#)

Submitted: today by jennifer@inomial.com

Alarm time: 10:14 12/12/2013

Assignment Group: Customer Support

Assigned to: Not assigned

Customer: Not assigned

Subscription: No subscription selected [View](#)

Ticket Reply to Address:

Template ticket - Customer Support Request

Ticket status - Issue Resolved
Ticket action - Resolved, On hold

Helpdesk group - Customer Support

Custom field - Ticket Reply to Address

Ticket action - Mark as "In Progress"

Ticket action - Return to "In Progress"

Ticket action - Close CSR

Mark as "In Progress" Return to "In Progress" Close CSR Add a comment... Send mail... Add Attachment

Save Close

Figure 132: CSR workflow ticket

Resolved ticket email

The following screenshot shows you an example of the Resolved Ticket email template.

The screenshot shows a web-based configuration window titled "Email" with a close button (X) in the top right corner. The window contains the following fields and controls:

- From:** ticket-53@example.com
- To:** customer@example.com [Delete](#)
- To:** A dropdown menu with a plus icon, an empty text input field, and "Add" and "Lookup" buttons.
- Subject:** Ticket #53 - Customer Support Request - Resolved
- Mail template:** Resolved Ticket (dropdown menu)
- Content type:** Text (dropdown menu)
- Body:** A large text area containing the following text:

Dear Customer

Ticket number: 53
Ticket subject: Customer Support Request

This email is to notify you that we believe that this ticket has been resolved. To receive receive prompt attention if this is not the case, please reply to this email within seven days.

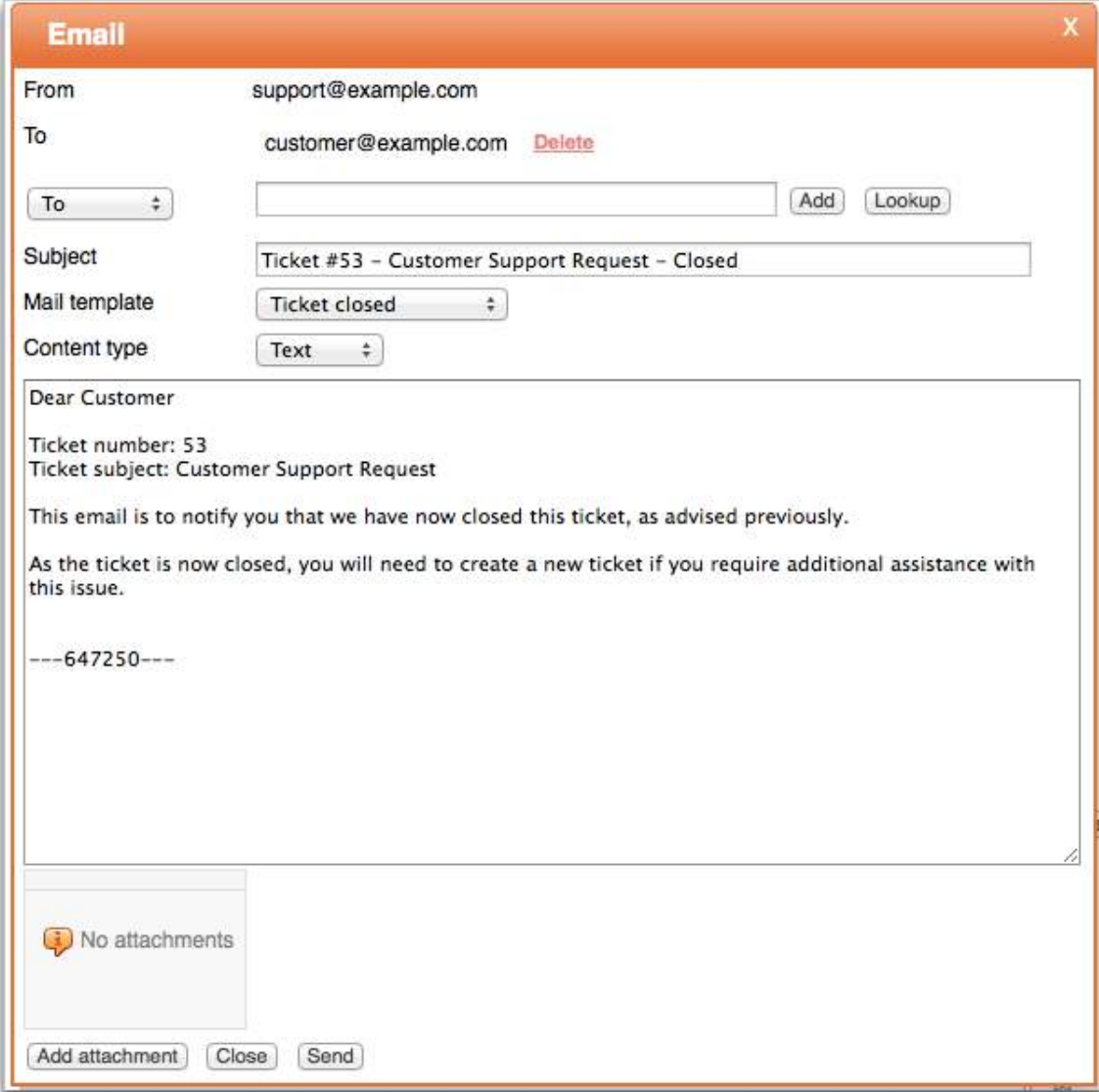
If we don't hear from you within seven days of this email then we may close the ticket permanently. Once the ticket is closed you will need to lodge a new ticket in order to receive assistance about this issue, which may delay final resolution of the issue.

---645524---
- Attachments:** A box with an information icon and the text "No attachments".
- Buttons:** "Add attachment", "Close", and "Send" at the bottom.

Figure 133: CSR resolved email template

Ticket closed email

The following screenshot shows you an example of the Ticket Closed email template.



The screenshot displays a web-based configuration window titled "Email" with a close button (X) in the top right corner. The window contains the following fields and controls:

- From:** support@example.com
- To:** customer@example.com [Delete](#)
- To:** A dropdown menu with a plus icon, an empty text input field, and "Add" and "Lookup" buttons.
- Subject:** Ticket #53 - Customer Support Request - Closed
- Mail template:** Ticket closed (dropdown menu with a plus icon)
- Content type:** Text (dropdown menu with a plus icon)

The main body of the email template is displayed in a large text area:

Dear Customer

Ticket number: 53
Ticket subject: Customer Support Request

This email is to notify you that we have now closed this ticket, as advised previously.

As the ticket is now closed, you will need to create a new ticket if you require additional assistance with this issue.

---647250---

At the bottom left, there is a section for attachments showing a "No attachments" message with an icon. At the bottom right, there are three buttons: "Add attachment", "Close", and "Send".

Figure 134: CSR closed email template

Appendix

A

Quantity format

Quantity format

Quantity formats are a format string that specifies how a number is displayed.

Note:

- All quantity formats are case-sensitive.
- Enter a space before and after a format quantity code if you insert a quantity into a line with other data or text.
- If you insert a quantity format and the attribute is not populated, the string will appear blank.

The following table lists the formats you can use for quantities in Smile.

Table 18: Quantity formats

Format	Effect
%D	Total days
%H	Hours within the day
%m	Minutes within the hour
%s	Seconds within the minute
%h	Total number of hours
%M	Total minutes
%S	Total seconds
%G	GiB. Gibibyte. A GB using 1024 bytes as the basis.
%U	MiB. Mebibyte A MB using 1024 bytes as the basis.
%3	kB. Kilobyte. Using 1000 bytes as the basis.
%6	MB. Megabyte. Using 1000 kilobytes as the basis.
%9	GB. Gigabyte. Using 1000 megabytes as the basis.
%b	Number of bits with smart precision. Displays kB, MB, GB where appropriate, using 1000 bytes as the basis.

Format	Effect
%B	Number of bytes with smart precision. Using 1000 bytes as the basis.
%i	Number of bytes with smart precision. Using 1024 bytes as the basis.
%%	A percent sign
%%\$	The original number unformatted

Table 19: Quantity format expression examples

Format	Number	Result
%h:%m:%s	123456	34:17:36
%D:%H:%m:%s	123456	1:10:17:36
%S seconds	123456	123456 seconds
%B	123456	123.46 kB
%B	12345678	12.35 MB
%B	1234567890	1.23 GB
%i	123456	120.56 KiB
%i	12345678	11.77 MiB
%i	1234567890	1.15 GiB
%%\$%%	123	123%

Appendix

B

Substitution codes

About substitution codes

Substitution codes are tags that let you insert attributes to personalise emails, documents and other correspondence. For example, substitution codes can appear in the subject line of an email or in the email's body. The client's own information is displayed when the message is delivered.

Note:

- All substitution codes are case-sensitive.
- Enter a space before and after a substitution code when you insert a substitution code into a line with other data or text.
- If you insert a substitution code, and the attribute is not populated, the string will appear blank in the email or message.

How to use substitution codes

Enclose the substitution code in curly braces.

The following is an example using ticket substitution codes:

Input	Output
Ticket #{ticketNumber} - {accountCompanyName}	Ticket #12345 - Example Internet Pty Ltd

When using substitution codes in stationery you select the relevant field name from a list.

Usage in Smile

Substitution codes are used in the following areas in Smile:

- [bulk email](#)
- [email templates](#)
- [stationery and forms](#)

Substitution codes groups

The following table summarises what document types are available for use in Smile.

Bulk email	Email templates	Stationery and forms
<ul style="list-style-type: none"> Subscription 	<ul style="list-style-type: none"> Account Bond Invoice Itemized credit Itemized debit Journal Payment Prepaid expiry warning Quote Receipt Recipient created tax invoice Reimbursement Renewal Spend limit alert Statement Subscription Surcharge Ticket Usage alert Value pool alert 	<ul style="list-style-type: none"> Account Bond Invoice Itemized credit Itemized debit Journal Payment Quote Receipt Recipient created tax invoice Reimbursement Renewal Spend limit alert Statement Subscription Surcharge Ticket Usage alert Value pool alert

Conditional substitution codes

Conditional substitution codes or fields can be used to create dynamic content in a message or document for individual recipients. Conditional text or fields can be displayed in a document based on a response of either true or false to a specified code.

In Smile only specific fields of particular document types can be used for conditional responses.

Document type	Field
Account	<ul style="list-style-type: none"> Account is not in default disposition Has auto Debit?
Invoice	<ul style="list-style-type: none"> Account is not in default disposition Has auto Debit? Has pending payment? Invoice is overdue Invoice is paid
Itemised credit	<ul style="list-style-type: none"> Account is not in default disposition Has auto Debit? Has pending payment? Invoice is overdue Invoice is paid
Journal	<ul style="list-style-type: none"> Account is not in default disposition Has pending payment? Note has been fully allocated
Quote	<ul style="list-style-type: none"> Account is not in default disposition
Receipt	<ul style="list-style-type: none"> Account is not in default disposition Receipt has been fully allocated
Recipient created tax invoice	<ul style="list-style-type: none"> Account is not in default disposition Has auto Debit? Has pending payment? Invoice is overdue Invoice is paid
Surcharge	<ul style="list-style-type: none"> Account is not in default disposition Has pending payment?
Ticket	<ul style="list-style-type: none"> Is closed?

Email and SMS message templates

To use conditional substitution codes in message templates you create conditional blocks. Each block contains the response to display if the true or false condition is met.

The syntax of a conditional block:

```
[substitutioncode]
output-if-condition-met
[/substitutioncode]
[!substitutioncode]
output-if-condition-not-met
[/!substitutioncode]
```

The first section of the block contains the response to display if the condition of the substitution code is true. The second section of the block contains the response to display if the condition of the substitution code is false.

The following is an example using invoice substitution codes.

```
Amount Due: {currencyCode} {accountBalanceIncludingPending}
[hasPendingPayment]
Payment Scheduled: {pendingPaymentDate}
[/hasPendingPayment]
[!hasPendingPayment]
Date Due: {dueDate}
[/!hasPendingPayment]
```

The displayed response when the condition is true:

```
Amount Due: $ 110.50
Payment Scheduled: 15/11/2015
```

The displayed response when the condition is false:

```
Amount Due: $ 110.50
Date Due: 20/11/2015
```

Stationery and forms

In a stationery document conditional fields are set in the properties of fields in a page layout. For more information, see [Field properties](#).

Invoice Field

Text Placement

Pending payment date

Style Settings

Inherited

Inherited

Inherited

Inherited

Position: Top 1.0 Left 1.0 mm

Dimensions: Width x Height mm Overflow behavior: Inherit

Format of field: Default

Alignment: Left

Background image (No graphic selected)

☒ Conditionally display this field

Show only when: Has pending payment? is True

☒ Display this field

Update Save Delete Styles... Cancel

{Pending payment date} is displayed when {Has pending payment?} is true

Figure 135: Conditional field display in stationery field properties

Account

This topic contains a quick reference to substitution codes for account.

Table 20: Account substitution codes

Field	Substitution code
Account balance	accountBalance
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account number	accountNumber
Activity since previous invoice and current invoice	balanceBetweenPreviousAndCurrentInvoice
Activity since previous invoice until now (excluding current invoice)	activitySincePreviousInvoiceExcludingCurrentInvoice
Aged Balance (1st period)	agedBalanceOne
Aged Balance (2nd period)	agedBalanceTwo
Aged Balance (3rd period)	agedBalanceThree
Aged Balance (3rd+ period)	agedBalanceThreePlus
Aged Balance (4th+ period)	agedBalanceFourPlus
Aged Balance (Current)	agedBalanceCurrent
Australia Post Address without Contacts Name	australiaPostAddressWithoutContact
Australia post address	australiaPostAddress
Balance at previous invoice	balanceAtPreviousInvoice
Billing address	billingAddress
Branch Number	branchNumber
CAT password	catPassword
CAT username	catUsername
Company Name	companyName
Contact name (Mr Example Man)	contactName
Contact/Company name	accountCompanyName
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol

Field	Substitution code
Current invoice balance	currentInvoiceBalance
Customer first name	contactGiven
Customer last name	contactFamily
Date only	todaysDateOnly
Disposition date	dispositionDate
Disposition text	dispositionText
Earliest unpaid invoice due date	earliestUnpaidDueDate
Email address	emailAddress
HTML Formatted Australia Post Address without Contacts Name	htmlFormattedAustraliaPostAddressWithoutContact
Has auto debit?	hasAutoDebit
Home phone number	homePhone
Message number	messageNumber
Mobile phone	mobilePhone
Notice number	noticeNumber
Overdue Balance	overdueBalance
Page count	pageCount
Page number	pageNumber
Sequence number	sequenceNumber
Stored payment details account name	paymentDetailsAccountName
Stored payment details expiry date	paymentDetailsExpiryDate
Stored payment details type	paymentDetailsType
Time only	todaysTimeOnly
Today's date	todaysDate
Work phone	workPhone

Account example

This topic contains an example message template including account substitution codes and the resulting message output.

Message template

```
Subject: Credit card expiry warning

Dear {contactGiven},

The {paymentDetailsType} used to pay your account {accountNumber}
with us will expire at {paymentDetailsExpiryDate}.

Please provided us with your new card details when you have them by:
- updating your details using your logon and password at
  www.example.com/cat
- contact us by phone: 1300 123 123

Yours sincerely,

Example Telecom
```

Message output

```
Subject: Credit card expiry warning

Dear John,

The Visa used to pay your account 01259547895 with us will expire at 09/15.

Please provided us with your new card details when you have them by:
- updating your details using your logon and password at www.example.com/cat
- contact us by phone: 1300 123 123

Yours sincerely,

Example Telecom
```

Bond

This topic contains a quick reference to substitution codes for bond.

Table 21: Bond substitution codes

Field	Substitution code
Account Name	accountName
Account Number	ucn
Allocated Bond Amount	allocatedAmount
Alternate Account Number	alternateAccountNumber
Bill from UID	billFromUid
Bill from contact name	billFromContactName
Bill from raw username	billFromUsername
Bill from service username	billFromServiceName
Bill from user service name	billFromUserServiceName
Billing Address	longAddress
Billing Address (1st line only)	billAddress
Bond Amount	bondAmount
Bond Description	description
Bond Quantity	quantity
Company Name	companyName
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily
Issue date	issueDate
Name and Billing address	nameAndBillAddress
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds

Field	Substitution code
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds
Unallocated Bond Amount	unallocated

Bond example

This topic contains an example message template including bond substitution codes and the resulting message output.

Message template

```
Subject: Bond applied to account {usn}

Dear {contactGiven},

The following bond is being held against your account, {usn}:

Date           Description           Quantity    Amount
{issueDate} {description}           {quantity} {bondAmount}
```

Message output

```
Subject: Bond applied to account 2142420658

Dear John,

The following bond is being held against your account, 2142420658:

Date           Description           Quantity    Amount
5/10/2015      Bond - supplied hardware           1           $110.00
```


Invoice

This topic contains a quick reference to substitution codes for invoice.

Table 22: Invoice substitution codes

Field	Substitution code
Account Balance at Invoice Creation Date	accountBalanceEnteredDate
Account Balance at Invoice Creation Time	totalPayableExAutoPayments
Account Name	accountName
Account Number Hint	hint
Account Term	acTerms
Account amount payable	accountAmountPayable
Account balance	accountBalance
Account balance at last invoice	balanceAtLastInvoice
Account balance including pending payments	accountBalanceIncludingPending
Account contact name	accountContactName
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account number	ucn
Account type	accountType
Activity since last invoice	activitySinceLastInvoice
Activity since previous balance	totalBeforeInvoice
Activity since the last invoice up til now	activitySinceLastInvoiceUntilNow
Adjustments since last invoice	adjustmentsSinceLastInvoice
Aged (1st period) at Invoice Creation Date	agedBalanceEnteredDateOne
Aged (2nd period) at Invoice Creation Date	agedBalanceEnteredDateTwo
Aged (3rd+ period) at Invoice Creation Date	agedBalanceEnteredDateThree
Aged (Current) at Invoice Creation Date	agedBalanceEnteredDateCurrent
Aged Balance (1st period)	agedBalanceOne
Aged Balance (2nd period)	agedBalanceTwo
Aged Balance (3rd period)	agedBalanceThree
Aged Balance (3rd+ period)	agedBalanceThreePlus

Field	Substitution code
Aged Balance (4th+ period)	agedBalanceFourPlus
Aged Balance (Current)	agedBalanceCurrent
Allocated/Paid	allocated
Alternate Account Number	alternateAccountNumber
Australia Post Bill Pay Payment Total Amount	australiaPostBillPayPaymentTotal
Australia Post Bill Pay Surcharge	australiaPostBillPaySurcharge
Australia Post BillPay Code	australiaPostBillPayCode
Australia post address	australiaPostAddress
Balance before invoice	balanceBeforeInvoice
Bank Account Name	bankAccountName
Billing Address	longAddress
Billing Address Country	billCountry
Billing Address Postcode	billPostcode
Billing Address State	billState
Billing Address Suburb	billSuburb
Billing address (1st line only)	billAddress
Branch Number	branchNumber
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Contact name (Mr Example Man)	contactName
Credits since last invoice	creditsSinceLastInvoice
Credits since previous balance	creditsSincePrevious
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily
Customer email address	customerEmailAddress

Field	Substitution code
Customer home phone number	customerHomePhone
Customer mobile phone number	customerMobilePhone
Customer work phone number	customerWorkPhone
Date only	todaysDateOnly
Debits since last invoice	debitsSinceLastInvoice
Debits since previous balance	debitsSincePrevious
Display Statement	displayedStatement
Disposition text	dispositionText
Due date	dueDate
Expiry date	expiryDate
Formatted Total Payable	formattedTotalPayable
GST value	gst
Has auto debit?	hasAutoDebit
Has pending payment?	hasPendingPayment
Invoice Date	invoiceDate
Invoice Number	invoiceNumber
Invoice amount payable	invoiceAmountPayable
Invoice end date	invoicingEnd
Invoice is overdue	invoiceOverdue
Invoice is paid	invoicePaid
Invoice start date	invoicingStart
Invoice total balance	totalBalance
Invoice total balance excluding GST	totalBalanceExGst
Invoice total inc payment surcharge	invoiceAmountPlusInvoiceSurcharge
Invoice unpaid balance	unpaidBalance
Invoiced Amount(2 periods ago)	invoicedAmount2PeriodsAgo
Invoiced Amount(3 periods ago)	invoicedAmount3PeriodsAgo
Invoiced Amount(previous period)	invoicedAmountPreviousPeriod
Invoicing end date - 2 periods ago	endDate2PeriodAgo
Invoicing end date - 3 periods ago	endDate3PeriodAgo

Field	Substitution code
Invoicing end date - previous period	endDatePreviousPeriod
Invoicing start date - 2 periods ago	startDate2PeriodAgo
Invoicing start date - 3 periods ago	startDate3PeriodAgo
Invoicing start date - previous period	startDatePreviousPeriod
Issue date	issueDate
Message number	messageNumber
Name and Billing address (1st line only)	nameAndBillAddress
New charges	newCharges
Operators Account Name	operatorName
Operators Email Address	operatorEmail
Operators First Name	operatorFirstName
Operators Last Name	operatorLastName
Overdue balance	overdueBalance
Page Count	pageCount
Page Number	pageNumber
Payment Instructions	paymentInstructions
Payment processing surcharge	surchargeOnInvoiceAmount
Payment type	paymentType
Payment type's stationery text	paymentTypeText
Payments since last invoice	paymentsSinceLastInvoice
Pending payment date	pendingPaymentDate
Pending payment number	paymentNumber
Pending payment value	pendingPaymentValue
Post bill pay account number (with check digit)	postBillPayAccountNumber
Previous balance	previousBalance
Scheduled payments value	scheduledPayments
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate

Field	Substitution code
Total bonds at time of printing	totalBonds
Total discount	totalDiscount
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total payable	totalPayable
Total pending payment value	totalPendingPaymentsValue
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Invoice example

This topic contains an example message template including invoice substitution codes and the resulting message output.

Message template

```

{companyName}                                Tax Invoice
ABN {abn}
{CompanyPaymentAddress}

This invoice: ${totalBalance}

{accountName}                                Please pay by: {dueDate}
{longAddress}

Invoice Number: {invoiceNumber}      Invoice Date: {invoiceDate}
Account Number: {ucn}

Description                                Quantity      Rate      Amount

Total

Page {pageNumber} of {pageCount}

```

Message output

```

Example Internet Pty Ltd                    Tax Invoice
ABN 00 000 000 000
27 Example Boulevard, Melbourne, VIC 3000

This invoice: $149.95

Smith, John                                Please pay by: 15/10/2015
1 High Street
Melbourne, VIC 3000

Invoice Number: 0123987                    Invoice Date: 2/10/2015
Account Number: 2142420658

Description                                Quantity      Rate      Amount

Total

Page 1 of 1

```

Itemized credit

This topic contains a quick reference to substitution codes for itemized credit.

Table 23: Itemized credit substitution codes

Field	Substitution code
Account Balance at Invoice Creation Date	accountBalanceEnteredDate
Account Balance at Invoice Creation Time	totalPayableExAutoPayments
Account Name	accountName
Account Number Hint	hint
Account Term	acTerms
Account amount payable	accountAmountPayable
Account balance	accountBalance
Account balance at last invoice	balanceAtLastInvoice
Account balance including pending payments	accountBalanceIncludingPending
Account contact name	accountContactName
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account number	ucn
Account type	accountType
Activity since last invoice	activitySinceLastInvoice
Activity since previous balance	totalBeforeInvoice
Activity since the last invoice up til now	activitySinceLastInvoiceUntilNow
Adjustments since last invoice	adjustmentsSinceLastInvoice
Aged (1st period) at Invoice Creation Date	agedBalanceEnteredDateOne
Aged (2nd period) at Invoice Creation Date	agedBalanceEnteredDateTwo
Aged (3rd+ period) at Invoice Creation Date	agedBalanceEnteredDateThree
Aged (Current) at Invoice Creation Date	agedBalanceEnteredDateCurrent
Aged Balance (1st period)	agedBalanceOne
Aged Balance (2nd period)	agedBalanceTwo
Aged Balance (3rd period)	agedBalanceThree
Aged Balance (3rd+ period)	agedBalanceThreePlus

Field	Substitution code
Aged Balance (4th+ period)	agedBalanceFourPlus
Aged Balance (Current)	agedBalanceCurrent
Allocated/Paid	allocated
Alternate Account Number	alternateAccountNumber
Australia Post Bill Pay Payment Total Amount	australiaPostBillPayPaymentTotal
Australia Post Bill Pay Surcharge	australiaPostBillPaySurcharge
Australia Post BillPay Code	australiaPostBillPayCode
Australia post address	australiaPostAddress
Balance before invoice	balanceBeforeInvoice
Bank Account Name	bankAccountName
Billing Address	longAddress
Billing Address Country	billCountry
Billing Address Postcode	billPostcode
Billing Address State	billState
Billing Address Suburb	billSuburb
Billing address (1st line only)	billAddress
Branch Number	branchNumber
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Contact name (Mr Example Man)	contactName
Credits since last invoice	creditsSinceLastInvoice
Credits since previous balance	creditsSincePrevious
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily
Customer email address	customerEmailAddress

Field	Substitution code
Customer home phone number	customerHomePhone
Customer mobile phone number	customerMobilePhone
Customer work phone number	customerWorkPhone
Date only	todaysDateOnly
Debits since last invoice	debitsSinceLastInvoice
Debits since previous balance	debitsSincePrevious
Display Statement	displayedStatement
Disposition text	dispositionText
Due date	dueDate
Expiry date	expiryDate
Formatted Total Payable	formattedTotalPayable
GST value	gst
Has auto debit?	hasAutoDebit
Has pending payment?	hasPendingPayment
Invoice Date	invoiceDate
Invoice Number	invoiceNumber
Invoice amount payable	invoiceAmountPayable
Invoice end date	invoicingEnd
Invoice is overdue	invoiceOverdue
Invoice is paid	invoicePaid
Invoice start date	invoicingStart
Invoice total balance	totalBalance
Invoice total balance excluding GST	totalBalanceExGst
Invoice total inc payment surcharge	invoiceAmountPlusInvoiceSurcharge
Invoice unpaid balance	unpaidBalance
Invoiced Amount - 2 periods ago	invoicedAmount2PeriodsAgo
Invoiced Amount - 3 periods ago	invoicedAmount3PeriodsAgo
Invoiced Amount - previous period	invoicedAmountPreviousPeriod
Invoicing end date - 2 periods ago	endDate2PeriodAgo
Invoicing end date - 3 periods ago	endDate3PeriodAgo

Field	Substitution code
Invoicing end date - previous period	endDatePreviousPeriod
Invoicing start date - 2 periods ago	startDate2PeriodAgo
Invoicing start date - 3 periods ago	startDate3PeriodAgo
Invoicing start date - previous period	startDatePreviousPeriod
Issue date	issueDate
Message number	messageNumber
Name and Billing address (1st line only)	nameAndBillAddress
New charges	newCharges
Operators Account Name	operatorName
Operators Email Address	operatorEmail
Operators First Name	operatorFirstName
Operators Last Name	operatorLastName
Overdue balance	overdueBalance
Page Count	pageCount
Page Number	pageNumber
Payment Instructions	paymentInstructions
Payment processing surcharge	surchargeOnInvoiceAmount
Payment type	paymentType
Payment type's stationery text	paymentTypeText
Payments since last invoice	paymentsSinceLastInvoice
Pending payment date	pendingPaymentDate
Pending payment number	paymentNumber
Pending payment value	pendingPaymentValue
Post bill pay account number (with check digit)	postBillPayAccountNumber
Previous balance	previousBalance
Scheduled payments value	scheduledPayments
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate

Field	Substitution code
Total bonds at time of printing	totalBonds
Total discount	totalDiscount
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total payable	totalPayable
Total pending payment value	totalPendingPaymentsValue
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Itemized credit example

This topic contains an example message template including itemised credit substitution codes and the resulting message output.

Message template

```
{companyName}           Phone: 1300 123 456           CREDIT NOTE
ABN {abn}               Fax: 1300 123 789
{CompanyPaymentAddress} Email: sales@example.com

    {accountName}        Credit Note Number: {invoiceNumber}
    {longAddress}        Issue Date: {issueDate}
                        Account Number: {ucn}

Description              Quantity      Rate          Amount

                        Total {totalBalance}
                        Page {pagenumber} of {pageCount}
```

Message output

```
Example Internet Pty Ltd      Phone: 1300 123 456      CREDIT NOTE
ABN 00 000 000 000          Fax: 1300 123 789
27 Example Boulevard, Melbourne, VIC 3000 Email: sales@example.com

    Smith, John              Credit Note Number: 001 555
    1 High Street            Issue Date: 21/1/2018
    Melbourne, VIC 3000      Account Number: 2142420658

Description                  Quantity      Rate          Amount

                                Total $98.50
                                Page 1 of 1
```

Itemized debit

This topic contains a quick reference to substitution codes for itemized debit.

Table 24: Itemized debit substitution codes

Field	Substitution code
Formatted account balance	formattedAccountBalance
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Itemized debit example

This topic contains an example message template including itemized debit substitution codes and the resulting message output.

Message template

```
Total unpaid bonds at invoice date: ${totalUnpaidBondsAtInvoiceDate}
Total paid bonds at invoice date:    ${totalPaidBondsAtInvoiceDate}

Total bonds at invoice date:         ${totalBondsAtInvoiceDate}

Formatted account balance:           {formattedAccountBalance}
```

Message output

```
Total unpaid bonds at invoice date: $200.00
Total paid bonds at invoice date:    $600.00

Total bonds at invoice date:         $800.00

Account balance:                     $149.95
```

Journal

This topic contains a quick reference to substitution codes for journal.

Table 25: Journal substitution codes

Field	Substitution code
Account balance	accountBalance
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account name	accountName
Account number	ucn
Alternate Account Number	alternateAccountNumber
Amount	paymentTotal
Billing address	longAddress
Billing address (1st line only)	billAddress
Card/Account number	cardNumber
Comment	comment
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	paymentAddress
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer first name	customerFirstName
Customer last name	customerLastName
Date only	todaysDateOnly
Disposition text	dispositionText
Has pending payment?	hasPendingPayment
Issue date	issueDate
Message number	messageNumber
Name and Billing address	nameAndBillAddress

Field	Substitution code
Note date	entryDate
Note has been fully allocated	isFullyAllocated
Note number	noteNumber
Payment Instructions	paymentInstructions
Payment type	paymentType
Payment unallocated balance	unallocatedBalance
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Journal example

This topic contains an example message template including journal substitution codes and the resulting message output.

Message template

```
{companyName} Adjustment
ABN {abn}
{paymentAddress}

{accountName} Account Number: {ucn}
{longAddress}

Adjustment Number: {noteNumber}
Adjustment Date: {entryDate}
Adjustment Amount: ${paymentTotal}
```

Message output

```
Example Internet Pty Ltd Adjustment
ABN 00 000 000 000
27 Example Boulevard, Melbourne, VIC 3000

Smith, John Account Number: 2142420658
1 High Street
Melbourne, VIC 3000

Adjustment Number: 012345
Adjustment Date: 15/12/2014
Adjustment Amount: $100.60
```


Payment

This topic contains a quick reference to substitution codes for payment.

Table 26: Payment substitution codes

Field	Substitution code
Account balance	accountBalance
Account contact name	accountContactName
Account custom field	accountCustomField
Account number	ucn
Account/Card holder name	accountName
Alternate Account Number	alternateAccountNumber
Amount	amount
Australia post address	australiaPostAddress
Branch Number	branchNumber
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Credit card number hint	hint
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Date only	todaysDateOnly
Display Amount	displayAmount
Expiry Date	expiryDate
Message number	messageNumber
Payment Hint	paymentHint
Payment Instructions	paymentInstructions
Payment number	paymentNumber
Payment type	paymentType
Scheduled transfer time	nextTransfer

Field	Substitution code
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate

Payment example

This topic contains an example message template including payment substitution codes and the resulting message output.

Message template

```
Subject: Payment complete ({paymentNumber})

Dear {accountContactName},

Thank you for your payment for account {ucn}.

Payment details:
Date: {todaysDateOnly}
Payment Amount: ${amount}
Paid by: {paymentType}
Card Details: {hint}

Current account balance: {accountBalance}

With thanks,

{companyName}, ABN {abn}
{companyPaymentAddress} - Phone: 1300 123 456
```

Message output

```
Subject: Payment complete (001155)

Dear John,

Thank you for your payment for account 2142420658 .

Payment details:
Date: 5/10/2014
Payment Amount: $49.95
Paid by: Visa
Card Details: xxxx xxxx xxxx 1234

Current account balance: $0.00

With thanks,

Example Internet Pty Ltd, ABN 00 000 000 000
27 Example Boulevard, Melbourne, VIC 3000 - Phone: 1300 123 456
```

Prepaid expiry warning

This topic contains a quick reference to substitution codes for prepaid expiry warning.

Table 27: Prepaid expiry warning substitution codes

Field	Substitution code
Today's date	todayDate
Today's time	todayTime
Subscription description	subDescription
Subscription USN	subUsn
Account contact family name	acctContactFamilyName
Account contact display name	acctDisplayName
Account company name	acctCompanyName
Account contact given name	acctContactGivenName
Account contact name	acctContactName
Subscription contact given name	subContactGivenName
Subscription contact name	subContactName
Subscription contact family name	subContactFamilyName
Subscription company name	subCompanyName
Subscription contact display name	subDisplayName
Subscription username	subUsername
Alternate account number	alternateAccountNumber
Account USN	acctUsn
Usage block formatted purchased units	prepaidFormattedPurchasedUnits
Usage block unformatted purchased units	prepaidUnformattedPurchasedUnits
Usage block description	prepaidDescription
Usage block formatted units consumed	prepaidFormattedUnitsConsumed
Usage block unformatted units consumed	prepaidUnformattedUnitsConsumed
Usage block days to expiry	prepaidDaysToExpiry
Usage block hours-of-day to expiry	prepaidHoursOfDayToExpiry
Usage block expiry date	prepaidExpiryDate
Usage block expiry time	prepaidExpiryTime

Field	Substitution code
Usage block formatted units remaining	prepaidFormattedUnitsRemaining
Usage block unformatted units remaining	prepaidUnformattedUnitsRemaining
Usage block start date	prepaidStartDate
Usage block start time	prepaidStartTime
Usage block consumed percentage	prepaidConsumedPercent
Usage block remaining percentage	prepaidRemainingPercent

Prepaid expiry warning example

This topic contains an example message template including prepaid expiry warning substitution codes and the resulting message output.

Message template

```
Dear {subContactGivenName},

Your "{prepaidDescription}" prepaid usage for mobile
number {subUsername} will expire on {prepaidExpiryDate}
at {prepaidExpiryTime}, in {prepaidDaysToExpiry} days
{prepaidHoursOfDayToExpiry} hours time.

You have {prepaidFormattedUnitsRemaining} of usage remaining.

To top up your account, please call 123 or visit http://example.com/prepaid/topup/.

Yours sincerely,

Example Telecom
```

Message output

```
Dear John,

Your "Talkaholic special pack" prepaid usage for mobile number 0412345678 will expire on 4/7/2015 at
16:50:00, in 3 days and 0 hours time.

You have 4:35:00 of usage remaining.

To top up your account, please call 123 or visit http://example.com/prepaid/topup/.

Yours sincerely,

Example Telecom
```

Prepaid vouchers

This topic contains a quick reference to substitution codes for prepaid vouchers.

Table 28: Prepaid voucher substitution codes

Field	Substitution code
Voucher number	number
Voucher secret	cleartext
Activation start date	ref.batch.startDate
Activation end date	ref.batch.expiryDate

Prepaid vouchers example

This topic contains an example message template including prepaid vouchers substitution codes and the resulting message output.

Message template

```
Subject: Prepaid Voucher Batch

Voucher Number: {number}
Voucher Secret: {cleartext}
Voicher Start: {ref.batch.startDate}
Voucher Expiry: {ref.batch.expiryDate}
```

Message output

```
Subject: Prepaid Voucher Batch

Voucher Number: 43265
Voucher Secret: 565237
Voucher Start: 1/08/15
Voucher Expiry: 31/08/15
```

Quote

This topic contains a quick reference to substitution codes for quote.

Table 29: Quote substitution codes

Field	Substitution code
Account Balance	accountBalance
Account Name	accountName
Account Number	ucn
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Aged Balance 1st Period	agedBalanceOne
Aged Balance 2nd Period	agedBalanceTwo
Aged Balance 3rd Period	agedBalanceThree
Aged Balance 3rd+ Period	agedBalanceThreePlus
Aged Balance 4th+ Period	agedBalanceFourPlus
Aged Balance Current	agedBalanceCurrent
Alternate Account Number	alternateAccountNumber
Amount	amount
Amount (ex-GST)	amountExGst
Billing Address	longAddress
Billing Address 1st Line	billAddress
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Creation Date	createdDate
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily

Field	Substitution code
Date only	todaysDateOnly
Disposition text	dispositionText
GST	gst
Invoice Number	invoiceNumber
Message number	messageNumber
Name and Billing Address	nameAndLongAddress
Name and Billing Address 1st Line	nameAndBillAddress
Operators Account Name	operatorAccountName
Operators Email Address	operatorEmail
Operators First Name	operatorFirstName
Operators Last Name	operatorLastName
Page Count	pageCount
Page Number	pageNumber
Payment Instructions	paymentInstructions
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Valid Until	dueDate

Quote example

This topic contains an example message template including quote substitution codes and the resulting message output.

Message template

```
{companyName}           Phone: 1300 123 456           QUOTE
ABN {abn}               Fax: 1300 123 789
{CompanyPaymentAddress} Email: sales@example.com

    {accountName}
    {longAddress}                Quoted Amount:${amount}
                                   Quote Valid Until:{dueDate}

    Account Number: {ucn}        Page {pagenumber} of {pageCount}

Description              Quantity      Rate      Amount
Quotation for the supply of services    5    $100/hr  ${amountExGst}
Includes 10% GST                        ${gst}      ${gst}

Total for this quote                                $500.00
```

Message output

```
Example Internet Pty Ltd           Phone: 1300 123 456           QUOTE
ABN 00 000 000 000             Fax: 1300 123 789
27 Example Boulevard, Melbourne, VIC 3000 Email: sales@example.com

    Smith, John
    1 High Street
    Melbourne, VIC 3000                Quoted Amount:    $500.00
                                   Quote Valid Until:    2/02/16

    Account Number: 2142420658                Page      1 of 1

Description              Quantity      Rate      Amount
Quotation for the supply of services    5    $100/hr  $454.55
Includes 10% GST                        $45.46    $45.46

Total for this quote                                $500.00
```

Receipt

This topic contains a quick reference to substitution codes for receipt.

Table 30: Receipt substitution codes

Field	Substitution code
Account Name	accountName
Account balance	accountBalance
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account number	ucn
Alternate Account Number	alternateAccountNumber
Billing Address	longAddress
Billing address (1st line only)	billAddress
Card/Account Number	hint
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily
Date only	todaysDateOnly
Disposition text	dispositionText
Issue date	issueDate
Message number	messageNumber
Name and Billing address	nameAndBillAddress
Payment Instructions	paymentInstructions
Payment Total (negated)	paymentTotalNegated
Payment account name	receiptAccountName

Field	Substitution code
Payment branch number	receiptBranchNumber
Payment expiry	date receiptExpiryDate
Payment total	paymentTotal
Payment type	paymentType
Payment type's stationery text	paymentTypeText
Payment unallocated balance	unallocatedBalance
Receipt Date	entryDate
Receipt Number	receiptNumber
Receipt has been fully allocated	isFullyAllocated
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Receipt example

This topic contains an example message template including receipt substitution codes and the resulting message output.

Message template

```
{companyName}
Receipt
ABN {abn}
{companyPaymentAddress}

    {accountName}
    {longAddress}

Account Number: {ucn}

Receipt Number: {receiptNumber}
Receipt Date: {entryDate}
Amount: ${paymentTotal}
Payment Type: {paymentType}
Card/Account Number: {hint}
```

Message output

Example Internet Pty Ltd
ABN 00 000 000 000
27 Example Boulevard, Melbourne, VIC 3000

Receipt

Smith, John
1 High Street
Melbourne, VIC 3000

Account Number: 2142420658

Receipt Number: 0224477
Receipt Date: 1/1/2010
Amount: \$34.98
Payment Type: Visa
Card/Account Number: xxxx xxxx xxxx 1234

Recipient created tax invoice

This topic contains a quick reference to substitution codes for recipient created tax invoice.

Table 31: Recipient created tax invoice substitution codes

Field	Substitution code
Account Balance at Invoice Creation Date	accountBalanceEnteredDate
Account Name	accountName
Account Term	acTerms
Account amount payable	accountAmountPayable
Account balance	accountBalance
Account balance at last invoice	balanceAtLastInvoice
Account balance including pending payments	accountBalanceIncludingPending
Account contact name	accountContactName
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Account number	ucn
Account type	accountType
Activity since last invoice	activitySinceLastInvoice
Activity since previous balance	totalBeforeInvoice
Activity since the last invoice up til now	activitySinceLastInvoiceUntilNow
Adjustments since last invoice	adjustmentsSinceLastInvoice
Aged (1st period) at Invoice Creation Date	agedBalanceEnteredDateOne
Aged (2nd period) at Invoice Creation Date	agedBalanceEnteredDateTwo
Aged (3rd+ period) at Invoice Creation Date	agedBalanceEnteredDateThree
Aged (Current) at Invoice Creation Date	agedBalanceEnteredDateCurrent
Aged Balance (1st period)	agedBalanceOne
Aged Balance (2nd period)	agedBalanceTwo
Aged Balance (3rd period)	agedBalanceThree
Aged Balance (3rd+ period)	agedBalanceThreePlus
Aged Balance (4th+ period)	agedBalanceFourPlus
Aged Balance (Current)	agedBalanceCurrent

Field	Substitution code
Allocated/Paid	allocated
Alternate Account Number	alternateAccountNumber
Australia post address	australiaPostAddress
Balance before invoice	balanceBeforeInvoice
Billing Address	longAddress
Billing Address Country	billCountry
Billing Address Postcode	billPostcode
Billing Address State	billState
Billing Address Suburb	billSuburb
Billing address (1st line only)	billAddress
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Contact name (Mr Example Man)	contactName
Credits since last invoice	creditsSinceLastInvoice
Credits since previous balance	creditsSincePrevious
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer ABN	endCustomerAbn
Customer First Name	contactGiven
Customer Last Name	contactFamily
Customer email address	customerEmailAddress
Customer home phone number	customerHomePhone
Customer mobile phone number	customerMobilePhone
Customer work phone number	customerWorkPhone
Date only	todaysDateOnly
Debits since last invoice	debitsSinceLastInvoice
Debits since previous balance	debitsSincePrevious

Field	Substitution code
Display Statement	displayedStatement
Disposition text	dispositionText
Due date	dueDate
Formatted Total Payable	formattedTotalPayable
GST value	gst
Has auto debit?	hasAutoDebit
Has pending payment?	hasPendingPayment
Invoice Date	invoiceDate
Invoice Number	invoiceNumber
Invoice amount payable	invoiceAmountPayable
Invoice end date	invoicingEnd
Invoice is overdue	invoiceOverdue
Invoice is paid	invoicePaid
Invoice start date	invoicingStart
Invoice total balance	totalBalance
Invoice total balance excluding GST	totalBalanceExGst
Invoice total inc payment surcharge	invoiceAmountPlusInvoiceSurcharge
Invoice unpaid balance	unpaidBalance
Issue date	issueDate
Message number	messageNumber
Name and Billing address (1st line only)	nameAndBillAddress
New charges	newCharges
Operators Account Name	operatorName
Operators Email Address	operatorEmail
Operators First Name	operatorFirstName
Operators Last Name	operatorLastName
Page Count	pageCount
Page Number	pageNumber
Payment Instructions	paymentInstructions
Payment processing surcharge	surchargeOnInvoiceAmount

Field	Substitution code
Payment type's stationery text	paymentTypeText
Payments since last invoice	paymentsSinceLastInvoice
Pending payment date	pendingPaymentDate
Pending payment number	paymentNumber
Pending payment value	pendingPaymentValue
Previous balance	previousBalance
Scheduled payments value	scheduledPayments
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total payable	totalPayable
Total pending payment value	totalPendingPaymentsValue
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Recipient created tax invoice example

This topic contains an example message template including recipient created tax invoice substitution codes and the resulting message output.

Message template

```

                                RECIPIENT CREATED TAX INVOICE

{companyName}                Phone: 1300 123 456
ABN {abn}                    Fax: 1300 123 789
{CompanyPaymentAddress}      Email: sales@example.com

To:                          From: {accountName} Reference No: {invoiceNumber}
                             ABN {abn}           Date Raised: {invoiceDate}

Summary of Commissions
Account  Service      Invoice  Date   User      Amount  Commission
                                           Paid

                                           Total {totalBalance}
Page {pagenumber} of {pageCount}

```

Message output

```

                                RECIPIENT CREATED TAX INVOICE

Example Internet Pty Ltd      Phone: 1300 123 456
ABN 00 000 000 000          Fax: 1300 123 789
27 Example Boulevard, Melbourne, VIC 3000  Email: sales@example.com

To:                          From: Example Mobile      Reference No: 00 111 55
                             ABN 00 000 000 000          Date Raised: 22/08/2015

Summary of Commissions
Account  Service      Invoice  Date   User      Amount  Commission
                                           Paid

                                           Total $98.50
                                           Page 1 of 1

```

Reimbursement

This topic contains a quick reference to substitution codes for reimbursement.

Table 32: Reimbursement substitution codes

Field	Substitution code
Account Name	accountName
Account Number	ucn
Allocated Amount	allocatedAmount
Alternate Account Number	alternateAccountNumber
Amount	amount
Billing Address	longAddress
Billing Address (1st line only)	billAddress
Comment	comment
Company Name	companyName
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Customer First Name	contactGiven
Customer Last Name	contactFamily
Issue date	issueDate
Name and Billing address	nameAndBillAddress
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds
Unallocated Amount	unallocated

Reimbursement example

This topic contains an example message template including reimbursement substitution codes and the resulting message output.

Message template

```
Dear {contactGiven},

The following reimbursement has been processed for account
{accountName}:

    Receipt Date:      {issueDate}
    Account Number:    {ucn}

    Allocated Amount:  ${allocatedAmount}
    Unallocated Amount: ${unallocated}
    Amount:            ${amount}

Yours sincerely,

{companyName}
```

Message output

```
Dear John,

The following reimbursement has been processed for account Smith, John:

    Receipt Date:      8/6/2014
    Account Number:    2142420658

    Allocated Amount:  $35.00
    Unallocated Amount: $5.00
    Amount:            $40.00

Yours sincerely,

Example Telecom Pty Ltd
```

Renewal

This topic contains a quick reference to substitution codes for renewal.

Table 33: Renewal substitution codes

Field	Substitution code
Account custom field	accountCustomField
Alternate Account Number	alternateAccountNumber
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Date only	todaysDateOnly
Message number	messageNumber
Payment Instructions	paymentInstructions
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate

Renewal example

This topic contains an example message template including renewal substitution codes and the resulting message output.

Message template

```
{companyName}           Phone: 1300 123 456           {todaysDate}
ABN {abn}                Fax: 1300 123 789
{companyPaymentAddress}  Email: sales@example.com

Your account {accountName} is due for renewal.
Payments must be completed by Bpay, biller code {bPayCode}
```

Message output

```
Example Internet Pty Ltd           Phone: 1300 123 456           5/04/2017
ABN 00 000 000 000                Fax: 1300 123 789
27 Example Boulevard, Melbourne, VIC 3000 Email: sales@example.com

Your account 2142420658 is due for renewal.
Payments must be completed by Bpay, biller code 123456
```

Spend limit alert

This topic contains a quick reference to substitution codes for spend limit alert.

Table 34: Spend limit alert substitution codes

Field	Substitution code
% Consumed	percentConsumed
Account Company Name	accountCompanyName
Account Contact Display Name	accountDisplayName
Account Contact Family Name	accountContactFamily
Account Contact Given Name	accountContactGiven
Account Contact Name	accountContactName
Alert Limit	currentLimit
Alert Threshold %	currentThreshold
Company Name	companyName
Company Name	subscriptionCompanyName
Contact Display Name	displayName
Contact Family Name	contactFamily
Contact Given Name	contactGiven
Contact Name	contactName
Current Billing Period End	periodEnd
Current Plan Code	currentPlanCode
Current Plan Name	currentPlanName
Current Spend	currentSpend
Current Time	nowTimeOnly
Formatted Alert Limit	formattedLimit
Formatted Current Spend	formattedSpend
Next Billing Period Start	nextPeriodStart
Raw Username	rawUsername
Sequence Number	sequenceNumber
Spend Limit Name	spendLimitName
Subscription Description	description

Field	Substitution code
Today's Date	nowDateOnly
Today's Date and Time	todayDate
User Service Name	userServiceName

Spend limit example

This topic contains an example message template including spend limit alert substitution codes and the resulting message output.

Message template

```
Subject: You have used {currentThreshold}% of your {currentPlanName}
quota

Dear {contactName},

You have consumed {percentConsumed}% of your {currentPlanName} plan.
Your current spend is ${formattedSpend}.

Your next billing period begins on the {nextPeriodStart}.

Regards,

Example Telecom
```

Message output

```
Subject: You have used 80% of your Prepaid Talk & Text quota

Dear John,

You have consumed 82% of your Prepaid Talk & Text plan.
Your current spend is $82.00.

Your next billing period begins on the 1/3/2016.

Regards,

Example Telecom
```


Statement

This topic contains a quick reference to substitution codes for statement.

Table 35: Statement substitution codes

Field	Substitution code
Account Balance	accountBalance
Account Balance (1st period)	agedBalanceOne
Account Balance (2nd period)	agedBalanceTwo
Account Balance (3rd period)	agedBalanceThree
Account Balance (3rd+ period)	agedBalanceThreePlus
Account Balance (4th+ period)	agedBalanceFourPlus
Account Balance (current)	agedBalanceCurrent
Account Name	accountName
Account Number	ucn
Account custom field	accountCustomField
Activity since previous invoice until now (excluding current invoice)	activitySincePreviousInvoiceExcludingCurrentInvoice
Alternate Account Number	alternateAccountNumber
Australia post address	australiaPostAddress
Balance at previous invoice	balanceAtPreviousInvoice
Billing address	longAddress
Billing address 1st line only	billAddress
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	paymentAddress
Currency Code	currencyCode
Currency Name	currencyName
Currency Symbol	currencySymbol
Current invoice balance	currentInvoiceBalance
Customer First Name	contactGiven

Field	Substitution code
Customer Last Name	contactFamily
Date only	todaysDateOnly
End Date	endDate
HTML Formatted Australia Post Address without Contacts Name	htmlFormattedAustraliaPostAddressWithoutContact
Message number	messageNumber
Overdue Balance	agedBalanceOverdue
Overdue Balance	overdueBalance
Page Count	pageCount
Page Number	pageNumber
Payment Instructions	paymentInstructions
Sequence number	sequenceNumber
Start Date	startDate
Time only	todaysTimeOnly
Today's date	todaysDate

Statement example

This topic contains an example message template including statement substitution codes and the resulting message output.

Message template

```
{companyName}                                     Statement
ABN {abn}
{CompanyPaymentAddress}

    {accountName}                                Current: {agedBalanceCurrent}
    {longAddress}                                30 Days: {agedBalanceOne}
                                                60 Days: {agedBalanceTwo}
                                                90+ Days: {agedBalanceThreePlus}
    Account Balance: {accountBalance}

    Account Number: {ucn}
    Statement from {startDate} to {endDate}

Date      Number      Description                                GST      Amount

Total

Page {pagenumber} of {pageCount}
```

Message output

```
Example Internet Pty Ltd                                     Statement
ABN 00 000 000 000
27 Example Boulevard, Melbourne, VIC 3000

    Smith, John                                Current: $149.95
    1 High Street                                30 Days: $95.90
    Melbourne, VIC 3000                        60 Days: $60.25
                                                90+ Days: $35.20
    Account Balance: $341.30

    Account Number: 2142420658
    Statement from 1/4/2015 to 31/4/2015

Date      Number      Description                                GST      Amount

Total

Page 1 of 1
```

Subscription

This topic contains a quick reference to substitution codes for subscription.

Table 36: Subscription substitution codes

Field	Substitution code
ABN	customerAbn
Account Billing Address	accountBillingAddress
Account Email	accountEmail
Account Fax	accountFax
Account Home Phone	accountHomePhone
Account Mobile Phone	accountMobilePhone
Account Name	accountName
Account Number	accountNumber
Account Work Phone	accountWorkPhone
Account company name	accountCompanyName
Account custom field	accountCustomField
Alternate Account Number	alternateAccountNumber
Australia post formatted address	australiaPostAddress
Billing address	billAddress
Billing building name	billBuildingName
Billing country	billCountry
Billing floor number	billFloorNumber
Billing lot number	billLotNumber
Billing number	billStreetNumber
Billing postal delivery type	billPostalDeliveryType
Billing postcode	billPostcode
Billing print name	billPrintName
Billing state	billState
Billing street name	billStreetName
Billing street type	billStreetType
Billing sub unit	billSubUnit

Field	Substitution code
Billing suburb	billSuburb
CAT password	catPassword
CAT username	catUsername
Comments	comments
Company ABN	abn
Company BPay Biller Code	bpayCode
Company Name	companyName
Company Payment Address	companyPaymentAddress
Contact title	contactTitle
Contact's family name	contactFamily
Contact's given name	contactGiven
Contact/Company name	contactName
Contract Name	contractName
Created date	createdDate
Date of birth	dateOfBirth
Date only	todaysDateOnly
Email address	emailAddress
FAX	fax
Gender	gender
Home phone	homePhone
Jabber address	jabberAddress
Message number	messageNumber
Mobile phone	mobilePhone
Order Form	orderForm
Payment Instructions	paymentInstructions
Provisioning Contact	provisioningContact
Residential address	streetAddress
Residential building name	resBuildingName
Residential country	resStreetCountry
Residential floor number	resFloorNumber

Field	Substitution code
Residential lot number	resLotNumber
Residential number	streetNumber
Residential postal delivery type	resPostalDeliveryType
Residential postcode	resPostcode
Residential print name	resPrintName
Residential state	resState
Residential street name	resStreetName
Residential street type	resStreetType
Residential sub unit	resSubUnit
Residential suburb	resSuburb
Secret Answer	secretAnswer
Secret Question	secretQuestion
Sequence number	sequenceNumber
Service Password	password
Time only	todaysTimeOnly
Today's date	todaysDate
UCN	ucn
Username	username
Work phone	workPhone

Subscription example

This topic contains an example message template including subscription substitution codes and the resulting message output.

Message template

```
Subject: Welcome to Example Telecom

Dear {contactGiven},

We have just created a logon to our system for you. Using this you
can access your account, check invoices and update your details
along with other functions..

The details you need to access our system are as follows:

- URL: www.example.com/cat
- username: {catUsername}
- password: {catPassword}

Enjoy your new service.

Yours sincerely,

Example Telecom
```

Message output

```
Subject: Welcome to Example Telecom

Dear Jane,

We have just created a logon to our system for you. Using this you can access your account, check
invoices and update your details along with other functions..

The details you need to access our system are as follows:

- URL: www.example.com/cat
- username: jane.smith
- password: Gni98hRkk

Enjoy your new service.

Yours sincerely,

Example Telecom
```

Surcharge

This topic contains a quick reference to substitution codes for surcharge.

Table 37: Surcharge substitution codes

Field	Substitution code
Account custom field	accountCustomField
Account is not in default disposition	accountNotInDefaultDisposition
Date only	todaysDateOnly
Disposition text	dispositionText
Has pending payment?	hasPendingPayment
Message number	messageNumber
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Total bonds at invoice date	totalBondsAtInvoiceDate
Total bonds at time of printing	totalBonds
Total paid bonds at invoice date	totalPaidBondsAtInvoiceDate
Total paid bonds at time of printing	totalPaidBonds
Total unpaid bonds at invoice date	totalUnpaidBondsAtInvoiceDate
Total unpaid bonds at time of printing	totalUnpaidBonds

Surcharge example

This topic contains an example message template including surcharge substitution codes and the resulting message output.

Message template

```
{todaysDateOnly} - {DispositionText}
```

Message output

```
20/7/15 - Settled
```


Ticket

This topic contains a quick reference to substitution codes for ticket.

Table 38: Ticket substitution codes

Field	Substitution code
Account ABN	accountAbn
Account Address	accountAddress
Account Address without contact name	accountAddressNoName
Account Address without contact name in one line	australiaPostAddressWithoutContactInLine
Account Billing Address	accountBillAddress
Account Company Name	accountCompanyName
Account Email	accountEmail
Account Fax	accountFax
Account Home Phone	accountHomePhone
Account Mobile Phone	accountMobilePhone
Account Name	accountName
Account Number	accountNumber
Account Work Phone	accountWorkPhone
Account contact name	accountContactName
Account custom field	accountCustomField
Account phone number	accountBestPhone
Appointment Date	appointmentStartDate
Appointment Date and Time	appointmentStartDateTime
Appointment Duration	appointmentDuration
Appointment Time	appointmentStartTime
Appointment Total Duration	totalDuration
Appointment Travel Duration	travelDuration
Assigned to	assignedTo
Billing Address	longAddress
Closed time	closedTime
Created	created

Field	Substitution code
Created by	createdBy
Date only	todaysDateOnly
From email (if any)	fromEmail
Is closed?	isClosed
Message number	messageNumber
Order Account Billing Address	orderAccountBillAddress
Order Account Billing Address Country	orderAccountBillCountry
Order Account Billing Address Long	orderAccountLongAddress
Order Account Billing Address Postcode	orderAccountBillPostcode
Order Account Billing Address State	orderAccountBillState
Order Account Billing Address Suburb	orderAccountBillSuburb
Order Account Contact Given Name	orderAccountContactGiven
Order Account Contact Surname	orderAccountContactFamily
Order Account Custom Field	orderAccountCustomField
Order Account Email address	orderAccountEmailAddress
Order Account Fax	orderAccountFax
Order Account Home Phone	orderAccountHomePhone
Order Account Mobile Phone	orderAccountMobilePhone
Order Account Number	orderAccountUsn
Order Account Work Phone	orderAccountWorkPhone
Order group number	orderGroupNumber
Priority	priority
Private status	privateStatus
Public status	publicStatus
Regarding account #	regardingUcn
Regarding service	regardingService
Sequence number	sequenceNumber
Ticket Description	ticketDescription
Ticket Subject	ticketSubject
Ticket class	ticketClass

Field	Substitution code
Ticket custom field	ticketCustomField
Ticket group	ticketGroup
Ticket number	ticketNumber
Ticket type	ticketType
Time only	todaysTimeOnly
Today's date	todaysDate
Updated	updated

Ticket example

This topic contains an example message template including ticket substitution codes and the resulting message output.

Message template

```
Dear Customer

Thank you for contacting Example Telecom support. The details of your
ticket are:

Date logged: {created}
Ticket number: {ticketNumber}
Ticket subject: {ticketSubject}

Ticket group: {ticketGroup}
Assigned to: {assignedTo}

Ticket description:
{ticketDescription}

Yours sincerely,

Example Telecom
```

Message output

```
Dear Customer

Thank you for contacting Example Telecom support. The details of your ticket are:

Date logged: 27/7/2015
Ticket number: 286446
Ticket subject: Change password

Ticket group: Helpdesk
Assigned to: Mary Jones

Ticket description:
Request to reset password for Joe Brown.

Yours sincerely,

Example Telecom
```

Usage alert

This topic contains a quick reference to substitution codes for usage alert.

Table 39: Usage alert substitution codes

Field	Substitution code
Account Company Name	accountCompanyName
Account Company Name	subscriptionCompanyName
Account Contact Display Name	accountDisplayName
Account Contact Family Name	accountContactFamily
Account Contact Given Name	accountContactGiven
Account Contact Name	accountContactName
Account custom field	accountCustomField
Alert level percent	percentUsed
Alternate Account Number	alternateAccountNo
Contact Name	contactName
Date only	todaysDateOnly
Description	description
Display Name	displayName
Message number	messageNumber
Over 100% Usage	usageOverLimit
Plan limit	planLimit
Raw username	username
Sequence number	sequenceNumber
Time only	todaysTimeOnly
Today's date	todaysDate
Usage Alert Name	usageAlertName
User service name	userServiceName

Usage alert example

This topic contains an example message template including usage alert substitution codes and the resulting message output.

Message template

```
Subject: Usage Warning - {percentUsed}% used at {todaysDateOnly}

Dear {contactName},

Your subscription {userServiceName} has used {percentUsed}% of its
{planLimit} quota for this month.

Regards,

Example Telecom
```

Message output

```
Subject: Usage Warning - 80% used at 25/11/17

Dear John,

Your subscription 2436597520 has used 80% of its 100Gb quota for this month.

Regards,

Example Telecom
```

Value pool alert

This topic contains a quick reference to substitution codes for value pool alert.

Table 40: Value pool alert substitution codes

Field	Substitution code
% Consumed	percentConsumed
Account Company Name	accountCompanyName
Account Company Name	subscriptionCompanyName
Account Contact Display Name	accountDisplayName
Account Contact Family Name	accountContactFamily
Account Contact Given Name	accountContactGiven
Account Contact Name	accountContactName
Alert Threshold %	currentThreshold
Amount Consumed	amountConsumed
Company Name	companyName
Contact Display Name	displayName
Contact Family Name	contactFamily
Contact Given Name	contactGiven
Contact Name	contactName
Current Billing Period End	periodEnd
Current Plan Code	currentPlanCode
Current Plan Name	currentPlanName
Current Time	nowTimeOnly
Formatted Amount Consumed	formattedAmountConsumed
Next Billing Period Start	nextPeriodStart
Raw Username	rawUsername
Reset timestamp	resetTimestamp
Reset timestamp (customer timezone)	resetTimestampCustomerTZ
Sequence Number	sequenceNumber
Subscription Description	description
Today's Date	nowDateOnly

Field	Substitution code
Today's Date and Time	todaysDate
User Service Name	userServiceName
Value Pool Amount	valuePoolAmount
Value Pool Formatted Amount	formattedValuePoolAmount
Value Pool Name	valuePoolName

Value pool alert example

This topic contains an example message template including value pool alert substitution codes and the resulting message output.

Message template

```
Subject: You have used {currentThreshold}% of your {valuePoolName}
quota

Dear {contactName},

You have consumed {percentConsumed}% of your {valuePoolName} quota.
Your current spend is ${formattedAmountConsumed} of your
${formattedValuePoolAmount} {valuePoolName} allowance.

Your next billing period begins on the {nextPeriodStart}.

Regards,

Example Telecom
```

Message output

```
Subject: You have used 80% of your SMS & MMS Cap quota

Dear John,

You have consumed 82% of your SMS & MMS Cap quota.
Your current spend is $41.00 of your $50.00 SMS & MMS Cap allowance.

Your next billing period begins on the 1/3/2016.

Regards,

Example Telecom
```

Appendix

C

LDAP authentication

About LDAP

The Lightweight Directory Access Protocol (LDAP) is an open, vendor-neutral, industry standard application protocol for accessing and maintaining distributed directory information services over an Internet Protocol (IP) network.

A common usage of LDAP is to provide a "single sign on" where one password for a user is shared between many services. LDAP authentication can be configured via user interface for Smile login services.

Smile will use the LDAP server for verifying the password only. To be successfully authenticated, the Smile Access subscription still needs to exist in Smile, and the authorisation will still be performed by Smile. Permissions applied will be the ones defined by the subscription, not taken from LDAP. Smile will not do internal authentication, so the password of the Smile subscription will be ignored.

Configure LDAP authentication

Configuring LDAP authentication is advanced configuration and, if mis-configured, can prevent access to Smile. Before editing the Smile Access service you can create a new system service based on the Smile Access service as back up.

This task explains how to configure Smile for LDAP authentication.

1. [Contact Inomial](#) to assist with the deployment of `ldapAuth.ear`.
2. Select **Services and Plans** under **Services, Ordering and Rating** on the Configuration and Tools page.
The Services and Plans page is displayed.
3. Select **System Services** from the **Show** drop-down.
All system services will be displayed.
4. Click **View** to the right of **Smile Access** service.
The Smile Access Service **Billing** tab is displayed.
5. Click the **Settings** tab.
The **Settings** tab is displayed.
6. Set the **Default realm** to the Active Directory (AD) User Principal Name (UPN) suffix.
7. Click the **Authentication** tab.
The **Authentication** tab is displayed.

8. Click New.

The **JNDI Name** field is displayed.

9. Type `java:global/ldapAuth/ldapAuth/LdapPasswordAuthenticator` in the **JNDI Name field.****10. Click Add.**

A **Configuration Property** window is displayed.

11. Type the **Key and **Value** of the first entry in the **LDAP properties** table in their respective fields. Click **Save**.**

The property is added to the **Configuration Properties** list.

12. Repeat steps 10 and 11, until all properties listed in the **LDAP properties table are displayed in the **Configuration Properties** list.****13. Click Save.**

The **Authentication** tab is displayed.

14. (Optional) [Contact Inomial](#) to change the default domain to match the UPN suffix if you want users to be able to login with just their username, instead of their UPN.**15. Test the configuration by getting another user to log in to Smile.**

LDAP properties

All of the listed LDAP properties must be set for LDAP authentication to work with Smile.

Key	Example Values	Description
ldap.auth	simple, none	The LDAP Authentication type. Only simple has been tested.
ldap.url	ldaps://ldap.example.com/ ldap://ldap.example.com/	The URL of the primary LDAP server.
ldap.secondary.url	ldaps://ldap2.example.com/ ldap://ldap2.example.com/	The URL of the failover LDAP server.
ldap.bind.principal	user@example.com	The user to connect as, in order to search for the user logging in.
ldap.bind.credentials	thepassword	The credentials, according to the authentication type (eg password).
ldap.search.filter	(&(userPrincipalName={username}) (objectClass=user))	The LDAP search string. Smile will replace {username} with the username, and {USN} with the USN.
ldap.timeout.millis	Defaults to 10000 (10 seconds)	The length of time to wait for a response from LDAP before giving up, and trying the failover server.
ldap.base.dn	OU=Smile, DC=example, DC=com	Where to search for the user.

Note: When `ldaps://` is used, instead of `ldap://`, for `ldap.url` and `ldap.secondary.url` [contact Inomial](#) to assist with the import of SSL certificates to the truststore.

Considerations for LDAP failover

For best results during active directory server failures the primary LDAP should also be the first nameserver in `resolv.conf`. Otherwise if the second active directory server goes down it could cause DNS resolution delays and slow down LDAP authentication.

Take note of your server hostnames and IP addresses. The hostnames and IPs in the table are for example only and are used in the following document examples.

LDAP server priority in Smile	Hostname	IP
Primary (<code>ldap.url</code>)	DC.example.intranet	192.0.2.190
Secondary (<code>ldap.secondary.url</code>)	DC2.example.intranet	192.0.2.195

The primary LDAP server IP should also be the first name server in `resolv.conf`.

[/etc/resolv.conf](#)

```
nameserver 192.0.2.190
nameserver 192.0.2.195
```

If using `resolv.conf`, also set the name servers in `/etc/network/interfaces` or they will be replaced on the next boot.

[/etc/network/interfaces](#)

```
iface eth0 inet static
...
    dns-nameservers 192.0.2.190 192.0.2.195
```

Reduce logon timeout delays

If the primary AD server is down then it can cause significant delays logging into Smile. This can be improved by adjusting settings which will drop that delay down to under 15 seconds, or less than 5 seconds if using `/etc/hosts`.

This task explains how to reduce login delay timeouts.

1. Do one of the following at the command line:

- Set `options timeout:1` in `/etc/resolv.conf`. If using `resolvconf` then add it to `/etc/resolvconf/resolv.conf.d/tail`.

```
echo "options timeout:1" >> /etc/resolvconf/resolv.conf.d/tail
```

- Define your LDAP servers in `/etc/hosts`. This method is about 10 seconds faster than setting the timeout to 1 second in `resolv.conf`.

`/etc/hosts`

```
192.0.2.190 DC1.example.intranet
192.0.2.195 DC2.example.intranet
```

2. Edit the `ldap.timeout.millis` [LDAP property](#) in the Smile Access **Authentication Configuration Properties** list to 3000 (3 seconds).

Appendix

D

Support

Support

If you have trouble interacting with Smile, email support@inomial.com for assistance. Provide as much information as you can about the problem in your email, including:

- details of the account or user affected
- examples of other users affected
- any system-generated output about the error, such as error messages or log reports
- when the problem occurred
- level of urgency
- your contact details

Emergency support

For emergency support, call Inomial's 24-hour support line on +61 3 9663 3554. Emergency support is only available if the problem affects more than one end user. Please call, not email, to advise us of urgent problems so we can quickly resolve the issue.

If your call is after hours, listen to the recorded instructions on the support line, call the number provided and leave a number on which we can contact you personally. If you have an outage, ensure that the number you leave can accept calls.

Glossary

account

A customer, company or debtor in the accounts receivable system to whom one or more subscriptions are provided. For example, you can provide mobile subscription 0401234567 to the account of Joe Smith. The account defines who bills are sent to, how much the customer owes and their payment terms.

account terms

The credit control settings for an account. Account terms specify the duration of treatment levels and the action taken at each treatment level, among other settings.

account type

A reporting concept that helps you report on different groups of accounts in your company. For example, you may have different account types for different companies that you have acquired or for GST exempt and non-GST exempt accounts.

activity statement

An itemised list of subscription usage over a period of time.

ACMA

The Australian Communications and Media Authority. ACMA is an independent statutory authority tasked with ensuring most elements of Australia's media and communications legislation, related regulations, and numerous derived standards and codes of practice operate effectively and efficiently, and in the public interest.

adjustment

A transaction that increases or decreases the amount charged for another transaction.

agent

An entity that associates a commission structure with a commission earner.

alert threshold

A percentage of value that, when consumed, triggers a notification and raises a message. For example, you can configure alert thresholds at 60%, 80% and 100% of a value pool. Alert thresholds apply to spend limits, usage alert groups and value pools.

BSS

Business support system. A system that manages your customer-facing operations, for example, creating orders, tracking payments and managing plans.

CAT

Customer access toolkit. Smile's online customer portal that lets customers view their usage history, download invoices and pay online.

CDR

Call detail record. The usage data associated with a phone call, for example, destination, tariff type and duration.

commission earner

A person who is paid commission. Each commission earner is added to at least one agent and associated with a commission structure.

commission payment delay

The period of time between when an invoice is fully paid and the commission is raised. The commission payment delay ensures that you do not pay commission on invalid payments.

commission structure

The commission rates that you pay to a commission earner.

credit control

A series of actions that Smile automatically applies when an unpaid account reaches a treatment level.

credit limit

The account balance at which a customer's access to one or more subscriptions is suspended. When calculating a credit limit, Smile includes the value of outstanding account balances and any usage in the current billing cycle. The credit limit includes all subscriptions for an account. For example, if an account has a mobile subscription and a DSL subscription and the customer exceeds the credit limit on the account, Smile suspends both subscriptions.

debtor close date

A date that prevents changes to earlier transactions and ensures long-term report stability. You cannot change a transaction that was raised earlier than the debtor close date. The debtor close date lags behind real time to give you a window of time to correct mistakes before the transaction is locked.

deprecated

Items marked as deprecated are obsolete, no longer in use or being phased out.

disposition

The debtor status of an account. An account's disposition is also known as its treatment level.

feature

An item that modifies a subscription and that can be switched on and off, for example, voicemail, call forwarding or DSL shaping. Features have their own schedule, for example, the start and end dates for the period that call forwarding is active on a subscription.

invoice

A list of charges raised against a subscription or account over a given period of time. The invoice may contain usage charges, recurring charges, GST or other taxes, discounts and rounding amounts. Each invoice is associated with an account, although the invoice may contain charges for any subscriptions associated with the account.

invoicing cycle

Specifies when an invoice is generated. When you perform a billing run, Smile generates an invoice for all accounts that have subscriptions with an invoicing period that ends on the date of the billing run.

invoicing period

An instance of an invoicing cycle. For example, a subscription may have an invoicing period that ends on the 1st of each month and an invoicing period of 2 August-1 September.

IPDR

Internet protocol detail record. The usage data associated with an internet session, for example, duration, bytes uploaded and bytes downloaded.

operator

An account that can access Smile. For example, customer service representatives (CSRs), helpdesk staff and accounting staff may all be operators.

OSS

Operational support system. A system that manages the network services that support your business, for example, provisioning and customer access to the network.

package

A bundle of services added as a group to an account. Packages specify default values for bill layout and billing frequencies, and are used to order subscriptions and accounts.

payment plan

An agreed series of payments that lets customers pay outstanding invoices in installments. Smile suspends credit control actions against each invoice in a payment plan.

PCI DSS

The Payment Card Industry Data Security Standard (PCI DSS) is a proprietary information security standard for organizations that handle branded credit cards from the major card brands.

plan

The set of rules that determine how much is charged for a subscription. A plan can include recurring charges, usage charges, minimum charges, included usage and access rules such as modem speed.

plan schedule

Specifies the plans a subscription uses throughout its lifecycle. The plan schedule is made up of plan schedule items.

plan schedule item (PSI)

Specifies when a plan becomes active for a subscription.

pre-rating

A process that runs at intervals in open periods and provides an indication of subscription usage in the period to date.

rating cycle

Specifies the period for which usage charges are calculated. Rating periods can end at the end of each month or at a preset, recurring interval after the subscription was created.

rating period

An instance of a rating cycle. For example, a subscription may have a rating period that ends on the 1st of each month and a rating period of 2 August-1 September.

RCTI

Recipient created tax invoice. An invoice from a creditor requesting payment that is created by and addressed to a company. Smile generates RCTIs on behalf of creditors to manage commission payments. RCTIs include GST and other tax where applicable.

recurring charge

A regular charge that is not based on usage, for example, an insurance surcharge.

service

A generic kind of product that can be provided to customers, for example, ADSL or mobile telephony.

setup charge

An initial charge to add a customer to a plan, for example, an ADSL connection fee.

SID

Service ID. A number that uniquely identifies each Smile service.

spend limit

A limit that tracks the amount a subscription spends on a particular type of usage in each rating period, and lets you take action when a customer exceeds spend limit alert thresholds. For example, you can define a spend limit of \$100 on premium SMS for a mobile service. Default spend limits are defined on a service, but you can override and customise the default spend limits for a subscription.

stationery

The format of printed documents. Smile's stationery functionality lets you specify the logos, background images and layout for invoices, journal entries, receipts and statements.

subscription

A single instance of a service that is provided to a customer, for example, a single mobile number. Subscriptions belong to an account and are often the source of usage and recurring charges.

SZU

Standard zone unit. An SZU is a geographic area of a charging zone specified by ACMA. Australia is divided into almost 2100 SZUs.

treatment level

The debtor status of an account. Smile has three default treatment levels: settled (account is paid before the due date), overdue (the account is overdue by 14 days or less) and delinquent (the account is overdue by 15 days or more), although you can configure additional treatment levels. An account's treatment level is also known as its disposition.

UO

User object. Related to custom fields, attributes and forms.

usage alert group

The physical amount of included usage in a plan. For example, you can define a usage alert group for 50 GB of included data on a ADSL plan, or 100 included SMS on a mobile plan.

usage charge

A charge that specifies how much to charge for different blocks of continuous use, for example, telephone flagfall and timed charges, the number of pages in a fax transmission or mobile internet downloads.

USN

Unique subscription number. A number that uniquely identifies each account and subscription in your database. A USN is associated with the same account or subscription throughout its lifecycle and is not reused after the account or subscription is closed.

value pool

The monetary amount of included usage in a plan.

walled garden

An environment that limits the content and services a customer can access.

workflow

The steps through which a process moves as it progresses from initiation to completion.

xDR

A generic term for a usage record for a service. For example, CDRs and IPDRs are both types of xDRs.