Smile 6 Migration Guide

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Contents

Chapter

1

Getting started

Who this guide is for

This guide is for Smile users and administrators making the transition from Smile 5.4 to Smile 6.x. This guide helps you navigate the new Smile interface, to locate existing Smile components and become familiar with new Smile functionality.

For more information on using Smile, see the *User Guide*.

For information about configuring Smile, see the *Configuration Guide*.

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

Log in

You access Smile through your web browser. Each company uses a different URL to access Smile. In this guide, the Smile URL is written as `http://smile.example.com`.

Before you log in to Smile for the first time, ask your system administrator for your username and password and your company's Smile URL.

This task explains how to log in to Smile.

1. Open a browser window and navigate to your company's Smile URL:

    `http://smile.example.com`

    The Administration Login page is displayed.
2. Enter your username and password, and click **Log In**.

    The Smile Dashboard is displayed or, if you are logging in to Smile for the first time, the Operator Welcome page appears.

Log out

To prevent security breaches and unauthorised access to customer information, ensure you log out of Smile each time you leave your workstation.

If you close the browser window, Smile automatically logs you out after a period of time has passed.

To log out, click your screen name on the **Smile Menu Bar**, then click **Logout**.

The Signed Out page is displayed. You are now logged out of Smile.

The Smile Dashboard

The Smile Dashboard is the first page you see when you log in to Smile. The dashboard has two sections:

- **Smile Menu Bar**—contains drop-down menus to common tasks and areas of functionality. The Smile Menu Bar is visible at the top of every Smile page.
- **Dashboard**—contains clickable graphical items that display informative charts, item counts or issues that may require attention.
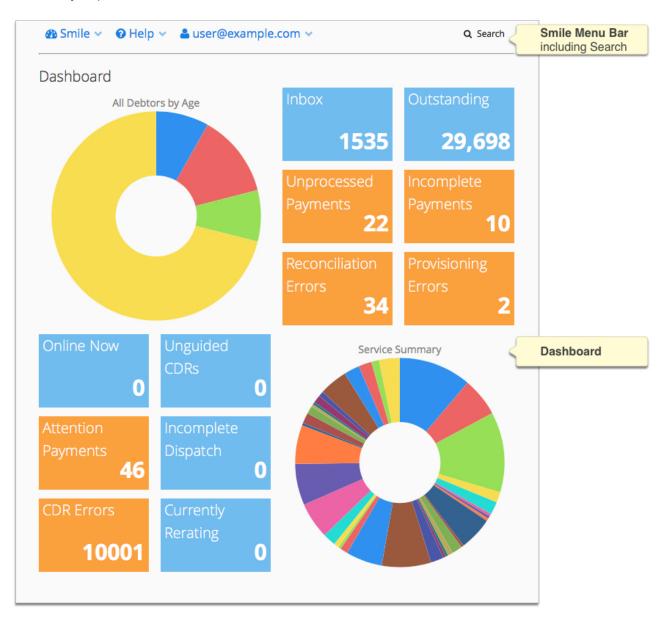
Figure 1: The Smile Dashboard

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Smile Menu Bar

The Smile Menu Bar contains drop-down menus to common tasks and areas of functionality. The Smile Menu Bar is visible at the top of every Smile page. The Menu Bar always contains a **Smile** menu, a **Help** menu, the name of the currently logged in user and **Search**. Additional menus will only be visible depending on the context of the Smile function you are currently using.

Smile menu

Smile is divided into a number of independent modules. Each module is available from the **Smile** menu, which is displayed on every page.
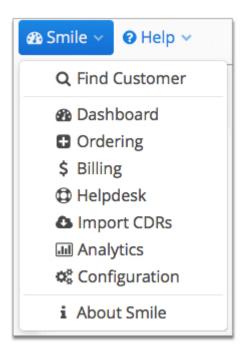
Figure 2: The Smile menu

Dashboard
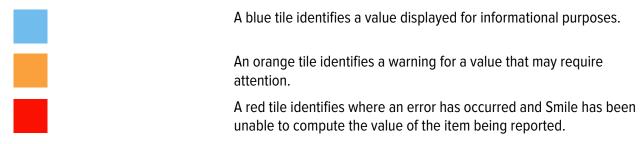
The Dashboard contains clickable graphical items that display informative charts, item counts or issues that may require attention, for example, provisioning errors or unprocessed payments.

Note: Your permissions determine the items you see on the Dashboard.

Dashboard tiles

Each tile item displays a count of items it is reporting. Click on a tile to display further information.

Colour-coding is used to highlight the status of each tile:

A blue tile identifies a value displayed for informational purposes.

An orange tile identifies a warning for a value that may require attention.

A red tile identifies where an error has occurred and Smile has been unable to compute the value of the item being reported.

The following screenshot shows an example of the Reconciliation Errors and Provisioning Errors tiles. Click on a tile to see a list of errors.

Figure 3: Dashboard tiles

Dashboard charts

Charts provide a graphical view of a report. Hover over a segment of the chart to view the report detail.
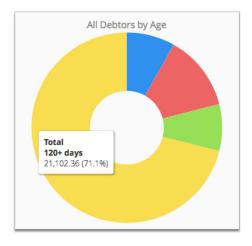
Figure 4: A chart on the Dashboard

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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	• Contact name • Phone numbers • Address details • USN (unique subscription number)
Subscription	• 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.

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

Account results

An account result means that your search term matched an account's contact name, phone number, address or USN.

The following screenshot shows you an example of an account result for Example Internet.
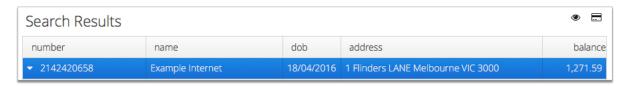
Figure 5: Account result

Subscription results

A subscription result means that your search term matched the subscription's username, past username or USN.

The following screenshot shows you an example of a subscription result for username 2352353@example.com. Note that the account associated with the subscription is also displayed in the search results.
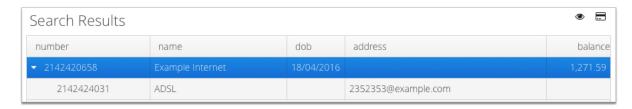
Figure 6: Subscription result

Invoice and receipt results

An invoice or receipt result means that your search term matched an invoice or receipt number.

The following screenshot shows you an example of an invoice result. Note that the account that the invoice is raised against is also displayed in the search results.
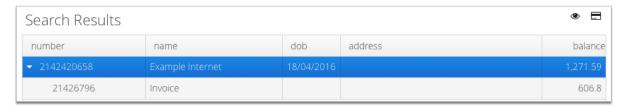
Figure 7: Invoice result

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Make a payment from search

You can pay an account or an invoice quickly from search.

This task explains how to make a payment from search.

1. Search for an account name or the number of the invoice to pay.

   A list of results that match your search term appears.
2. Do one of the following:
   - Select the account or invoice entry and then click the icon.
   - Right-mouse click on the required account or invoice entry and click **Payment**.

   A draft transaction New Payment page is displayed.
3. Complete any required payment details, then click **Pay**.

   The payment is applied and a receipt entry added to the Transactions page list.

Chapter
2

Accounts

View an account

An account holds all the business-related information about a customer, such as their billing address, payment details and transaction history. To find or change customer information, you must first view their account.

This task explains how to view an account.

1. Search for the account.
2. Double-click the account entry in the search results.

   The Account summary page is displayed. This page contains information about the account balance and provides a summary of other useful account information and settings.

The Account page

The Account page gives you an overview of an account's status and provides a summary of basic account settings.

The **Account** page has five sections:

- **Account Balance**—displays the current and aged account balance, along with the account's current treatment level. This section is always visible when working with accounts.
- **Unallocated Transactions**—displays summary information about the account history including pending payments, deferred invoice items, payment plans and open invoices.
- **Account Settings**—displays account billing settings.
- **Account Menu Tree**—provides links to account configuration. These menus can expand depending on the account activity or subscription you are viewing. The menu tree is always visible when working with accounts.
- **Account menu**—provides links to Account actions, for example, changing address details or printing unpaid invoices.

The following screenshot shows you the sections of the Account page.

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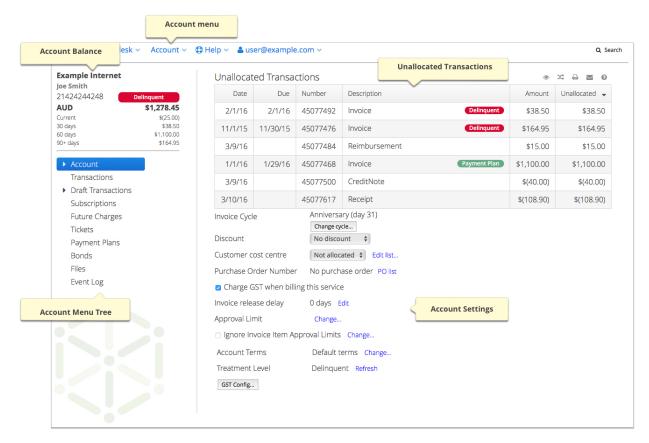
Figure 8: The Account page

Account Menu Tree

The Account Menu Tree is a dynamic, scrolling menu containing all of the many account settings along with objects you have recently worked on.

When you select an invoice or subscription to view, the selected object is dynamically added to the Account Menu Tree. To access sub-menus click the ▶ next to an entry. Items will disappear from the menu tree when you reload the page or search for another object.

Account

When you first view an account you are presented with a summary of the account details. Click the ▶ next to the **Account** entry to view more configuration options for the account.

Transactions

Transactions lists all transactions for an account. Double-click a transaction entry to view details of the transaction. When you open a transaction it appears in the Account menu tree under **Transactions**. You can view multiple transactions at once, without having to navigate between web pages. Click the ▶ next to the transaction item entry to view more information.

For more information, see The Transaction page.

Draft Transactions

Draft Transactions lists all transactions for an account that are still open. Click **View** next to a listed transaction entry to view details of the transaction. When you open a transaction it appears in the Account Menu Tree under **Draft Transactions**. You can view multiple draft transactions at once, without having to navigate between web pages.

Subscriptions

Subscriptions list all subscriptions for the account. Double-click a subscription entry to view details of the subscription. When you view a subscription in appears in the Account Menu Tree under **Subscriptions**. Click the ▶ next to the subscription entry to view more information. The sub-menus displayed depend on the type of subscription being viewed.

For more information, see Subscriptions.

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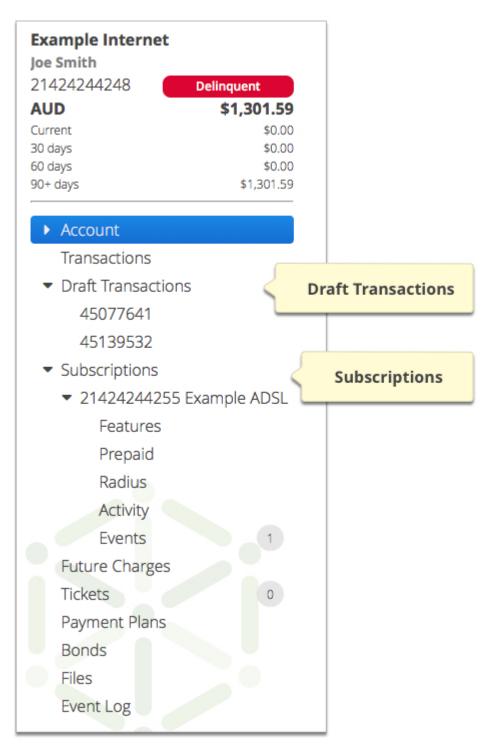
Figure 9: An example of an Account Menu Tree displaying draft transactions and a subscription and available sub-menus.

Account Menu

The **Account** menu is located at the top of the page on the Smile Menu Bar. The **Account** menu provides links to common tasks and is always visible when you view an account.

The following table provides more information about the purpose of each entry in the **Account** menu.

Table 2: Account menu entries

Name	Purpose
New Payment...	Enters a payment
New Invoice...	Creates a manual invoice
New Adjustment...	Raises an adjustment
New Reimbursement...	Raises a reimbursement
Add Subscription...	Adds a new subscription package to the current account
Automatically Allocate...	Unallocated payments are automatically allocated to unallocated debits
Transfer Between Accounts...	Transfers a credit or debit to another account
Print Unpaid Invoices	Creates a PDF version of all unpaid invoices for printing
Print Statement...	Creates a statement of transactions
Change Passwords...	Changes the password for the account or subscriptions
Flag Account as Disputed...	Flags an account and holds any dispatches or other notifications, and credit control actions until the dispute is resolved
Remove Dispute Flag from Account...	Unflags an account as being in dispute and reinstates dispatches or other notifications, and credit control actions
Merge Accounts	Merges two accounts
Adjust Balance to Zero...	Raises an itemized credit or debit to return the account balance to $0
GST Config...	Opens the accounts GST schedule
Delete Account...	Deletes the account and its associated subscriptions
Print Document...	Prints the selected document
Send Email...	Presents account type stationery for emailing

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Unallocated transactions

The **Unallocated Transactions** section on the Account page lists information about account transactions which are unallocated. For example, invoices that have not been paid or receipts not yet allocated against charges. Unallocated transactions include invoices, surcharges, receipts and adjustments. Scheduled payments, including payment plan payments and treatment levels, will be flagged on the associated unallocated invoices.

The following screenshot shows the **Unallocated Transactions** section displaying a list of unallocated transactions for an account. For quick review of an account, relevant transactions may be highlighted with a particular status, for example, **Delinquent**, **Scheduled**, **Payment Plan**.
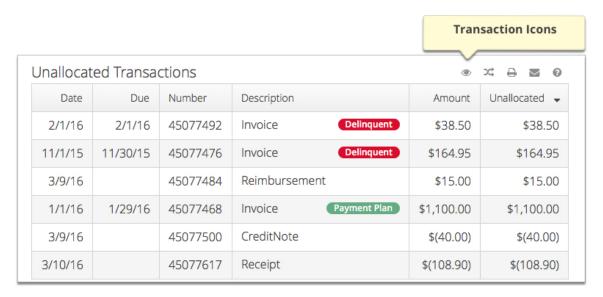
Figure 10: Unallocated Transactions section

Transaction icons

An icon set is displayed at the top right of a transaction list. Transaction lists are displayed on the Account and Transactions summary pages. These icons identify settings or functions that apply to the current list.

👁	Select to view more detail of the selected transaction
⤭	Select to allocate the selected credit transaction to a debit transaction
🖶	Select to print the selected transaction to screen
✉	Select to email the selected transaction
❓	Select to access transaction help

Note: If an icon is grey then the icon function or action is not available for the selected transaction.

The Transactions page

The Transactions page lists each transaction raised against the account throughout its lifecycle. This section does not include open quotes or unsuccessful payments, because these transactions do not affect the account balance.

Use the Transactions page to review invoices, receipts, surcharges and other transactions raised against the account.

The following screenshot shows you an example of the Transaction page.

Transactions					
Date ▾	Due	Number	Description	Amount	Unallocated
15/04/16		45081015	Receipt	$(111.20)	$0.00
15/04/16		45081023	Surcharge	$2.30	$0.00
15/04/16		45081056	Reimbursement	$20.00	$0.00
24/03/16	7/04/16	45078276	Invoice **Delinquent**	$359.02	$359.02
22/03/16	3/04/16	45077914	Invoice	$22.00	$0.00
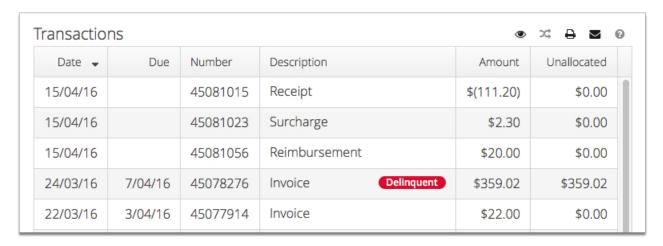
Figure 11: The Transactions page

The following column names require additional explanation:

Description	Specifies the transaction type.
Amount	Specifies the total transaction value. Credit transactions are enclosed in brackets.
Unallocated	Specifies the unallocated value of the transaction. For example, if the transaction is a receipt, this column shows the receipt's outstanding balance.

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Transaction types

The following transaction types may appear on the Transactions page:

- **invoice**—a list of itemised charges raised against an account or subscription over a given period of time.
- **surcharge**—an extra fee added to another fee or charge.
- **receipt**—an acknowledgement of a completed payment.
- **credit note**—an adjustment that adds a credit to an account.
- **debit note**—an adjustment that adds a debit to an account.
- **itemised credit**—a credit note that contains an itemised list of charges that make up the credit.
- **transferred credit**—the account received a credit from another account, or transferred a debit to another account.
- **transferred debit**—the account transferred a credit to another account, or received a debit from another account.
- **credit transferred credit**—a receipt from a different account was allocated to an invoice on this account.
- **credit transferred debit**—a receipt from this account was allocated to an invoice on another account.
- **reimbursement**—an amount refunded to an account or subscription that has already been paid.
- **recipient created tax invoice (RCTI)**—an invoice from a creditor requesting payment, generated by your company on behalf of the creditor. Smile uses RCTIs to track commission payments.
- **reversal**—a transaction that negates another transaction.

The following transaction types may appear on the Draft Transactions page:

- **quote**—a formal statement of the cost to provide services and accounts to a customer, also known as a draft transaction or open invoice. A quote is a precursor to an Invoice. An open quote does not affect the account balance.

Chapter

3

Subscriptions

View subscriptions

A subscription is a single instance of a service that you provide to a customer, for example, a mobile number or ADSL connection. Each subscription is assigned to an account, and an account can have multiple subscriptions. To find or change subscription information, you must first view the subscription.

This task explains how to view the subscriptions on an account.

Tip: To quickly view a specific subscription, search for the subscription then double-click the subscription entry in the search results.

1. Search for the account for which you want to view subscriptions, then double-click the account entry in the search results.

   The Account summary page is displayed.

2. On the Account Menu Tree, click **Subscriptions**.

   The Subscriptions summary page appears and displays the subscriptions on the account. If you assign subscriptions to cost centres, Smile groups the subscriptions by cost centre.

3. (Optional) Use the **Service**, and **Cost centre** drop-down lists to filter the displayed subscriptions.

4. Double-click a subscription entry to view further information.

   The subscription's summary page is displayed. This page contains information about the subscription's plan and contract. Additional information and functionality is accessed by expanding the subscription entry on the Account Menu Tree.

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Subscription sub-menus

The Subscriptions page displays a summary of all subscriptions on an account. When you view a subscription, the subscription's summary page is displayed. When viewing individual subscriptions click the ▶ to the left of the subscription entry in the Account Menu Tree to access additional subscription menu entries that display usage and configuration data for the subscription.

An individual subscription entry in the Account Menu Tree is displayed in the format of *service ID service name*. The following screenshot shows an example of the Account Menu Tree displaying 3 subscription entries.
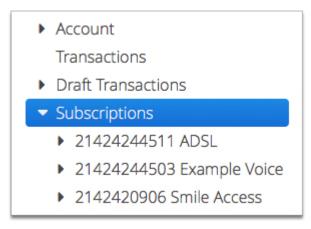
Figure 12: Subscriptions sub-menu entries

The sub-menu entries displayed for each subscription will vary for each type of service. For example, the usage and configuration data that Smile displays for an ADSL subscription is different to the data displayed for a mobile subscription.

The following table briefly summarises the main sub-menus that may be displayed under a subscription entry. Depending on your Smile configuration, Smile may also display pages that are not listed here.

Table 3: Sub-menus of a subscription on the Account Menu Tree

Menu	Service	Purpose
Access	Customer Portal/CAT Access	Displays the subscriptions that can access CAT.
Activity	Data	Displays subscription usage data.
Calls	Telephony	Displays subscription usage data.
CAT Ordering Options	Customer Portal/CAT Access	Displays the packages a customer can order through CAT.
Destinations	Telephony	Displays custom destinations for the subscription.
Events	All	Displays each change or other action that occurs on the subscription.

Menu	Service	Purpose
Features	All	Displays additional features added to a subscription.
Personal Groups	Smile Access	Displays the groups of which the operator is a member.
Prepaid	Prepaid	Displays the prepaid purchase history, and lets you add prepaid blocks to the subscription.
Radius	Data	Displays the subscription's configuration information, static IP addresses and features.
subscription ID service name	All	Displays plan, contract and accounting information, and contains shortcuts to other functionality.
Timesheet	Smile Access	Displays timesheet entries for the operator.

The following screenshot shows you the sub-menus of a Subscription for a prepaid data subscription. Smile displays the subscription summary page, **Features**, **Prepaid**, **Radius**, **Activity** and **Events** menus for this subscription.
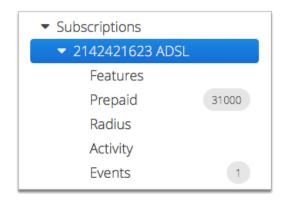
Figure 13: Data subscription sub-menus

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View subscription activity

Viewing subscription activity helps you resolve disputed invoices and charges, answer customer queries and troubleshoot problems. You can view a subscription's usage data or events.

For example, view usage data when you need to:

- review the charge for a call or data session
- make usage unchargeable
- check that usage data was correctly imported

View events when you need to check actions such as:

- shaping or unshaping
- authentication errors due to an incorrect password
- prepaid usage

This task explains how to view subscription activity, including usage data and events.

1. Search for the subscription for which you want to view usage, then double-click the subscription entry in the search results.

The subscription's summary page is displayed.

2. On the Account Menu Tree, click the ▶ to the left of the subscription entry to view sub-menu entries. Do one of the following:

- To view usage data for telephony subscriptions, click **Calls**.
- To view usage data for data subscriptions, click **Activity**.
- To view events, click **Events**.

The Calls page

The Calls page provides a summary of the number of calls a subscription makes in a rating period. The following screenshot shows you an example of the Calls page.

Period	Status	Calls	
28/02/14	Open	215	View
31/01/14	Open	448	View
31/12/13	Closed	472	View
30/11/13	Closed	421	View
31/10/13	Closed	0	View

☑ Hide billing periods that start in the future.

Figure 14: The Calls page

Click **View** next to a rating period to view the **Detailed call information** window.

The Detailed call information window

The Detailed call information window lists each call and charge raised against a telephony subscription in a rating period. Use this page to review disputed calls and invoices and to make usage unchargeable.

The following screenshot shows you an example of the **Detailed call information** window.

Period ending	31/01/14 (bpid 2522)
Processing Status	Open
Total connection time	1:50
Calls	2
Total Charge	$0.00 Re-Rate
Search for number	[ ] Go

* indicates calls included in the free call allowance

Calls

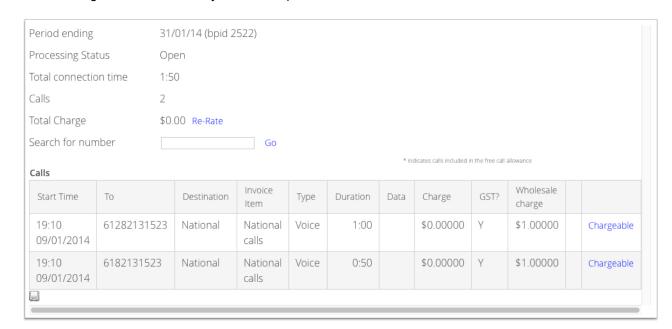| Start Time	To	Destination	Invoice Item	Type	Duration	Data	Charge	GST?	Wholesale charge	
19:10 09/01/2014	61282131523	National	National calls	Voice	1:00		$0.00000	Y	$1.00000	Chargeable
19:10 09/01/2014	6182131523	National	National calls	Voice	0:50		$0.00000	Y	$1.00000	Chargeable

Figure 15: The Detailed call information window

The section at the top of the page provides a usage summary for the period to date.

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Tip: If you change a customer's plan or tariffs, click **Re-Rate** to re-rate any existing usage with the new charging rates. Re-rating the usage helps you review the effect of plan changes and check that any corrections you make to a plan give the expected results. Re-rating is only available for open billing periods.

Note: If a billing period is open and Smile is not configured for pre-rating or Real Time Rating, some columns such as **Charge** will be empty. They will be filled in by Smile when the invoice for the period is approved. When you click **Re-Rate** Smile will temporarily calculate and display data for these columns. Smile will recalculate the data when the billing period is approved.

The following column names and links require additional explanation:

Destination	Specifies the call destination, for example, local or national. Smile uses the destination to calculate the usage charge for the call.
	Note: To display information in this column, click **Re-Rate**.
Invoice item	Specifies the invoice item to which the call is allocated.
	Note: To display information in this column, click **Re-Rate**.
Duration	Specifies the call duration.
Data	Specifies the amount of data downloaded during the mobile session.
Charge	Specifies the usage charge for the call.
	Note: To display information in this column, click **Re-Rate**.
GST?	Specifies if the usage charge includes GST.
	Values: Y (yes), N (no)
	Note: To display information in this column, click **Re-Rate**.
Wholesale charge	Specifies the wholesale charge for the call, excluding tax, if the provider has included this information in the CDR feed to Smile.
Chargeable	Click **Chargeable** to change the call from chargeable to unchargeable. Click **Unchargeble** to reverse this and make the call chargeable again.

The Activity page

The Activity page provides a summary of the data a subscription uses in a rating period. If the subscription is currently logged in, the Activity page also provides a summary of the current session.

The following screenshot shows you an example of the Activity page.

Period	Status	Online Time	Uploads	Downloads	
31/05/16	Open	30:00	16.76 MB	66.76 MB	View
30/04/16	Open	90:40	12.04 MB	98.98 MB	View
31/03/16	Closed	60:00	60.96 MB	11.76 MB	View
31/08/14	Closed	40:23	8.98 MB	12.04 MB	View
31/05/14	Closed	10:13	16.76 MB	68.81 MB	View
31/12/13	Closed	8:00	48.98 MB	88.98 MB	View
30/11/13	Closed	30:01	17.76 MB	6.76 MB	View
31/10/13	Closed	44:00	88.98 MB	98.90 MB	View
30/09/13	Closed	10:13	6.76 MB	116.76 MB	View
31/08/13	Closed	40:00	8.98 MB	48.98 MB	View
31/07/13	Closed	130:00	66.76 MB	60.96 MB	View
30/06/13	Closed	80:08	48.98 MB	12.04 MB	View

Page 1 ⬍ of 2

Figure 16: The Activity page

Green text at the top of the page highlights that a customer is currently using the subscription. Click **Details** in the Current Connections section to view more information about the current session.

Tip: To view information about all current sessions, click **Online Now** on the Dashboard.

Double-click a rating period entry in the **Activity** table to view the period usage information chart.

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Period usage information chart

The period usage information chart displays a graph of the subscription's usage throughout the rating period. The chart can display usage by **Uploads**, **Downloads** or **Combined** data.

By default data for **All dates** for the period is displayed in the graph. If you select a specific date from the **Date** drop-down, Smile displays an hourly usage graph for that day.

On the Account Menu Tree two sub-menu entries are displayed under the period entry, **Usage Alert Group Activity** and the **Billable Items**.

Usage Alert Group Activity

The Usage Alert Group Activity page displays usage alert group totals for the period being viewed. Click **View** beside a usage alert group entry to display usage details.
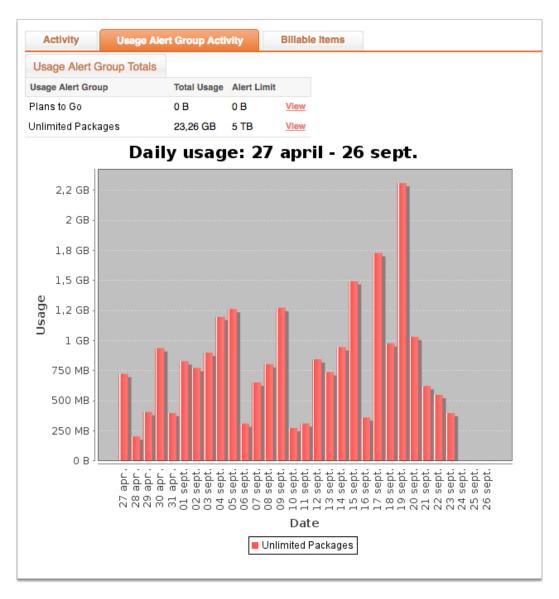

Figure 17: Usage Alert Group Activity page

Billable Items

The Billable Items page provides summaries of the overall usage for the period and the usage on each day. The following screenshot show you an example of the Billable Items page.
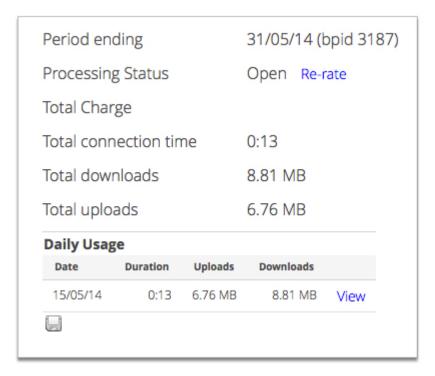

Figure 18: The Billable Items page

The section at the top of the page provides a usage summary for the period to date.

> **Tip:** If you change a customer's plan or tariffs, click **Re-Rate** to re-rate any existing usage with the new charging rates. Re-rating the usage helps you review the effect of plan changes and check that any corrections you make to a plan give the expected results. Re-rating is only available for open billing periods.

Note: If a billing period is open and Smile is not configured for pre-rating or Real Time Rating, some columns such as **Charge** will be empty. They will be filled in by Smile when the invoice for the period is approved. When you click **Re-Rate** Smile will temporarily calculate and display data for these columns. Smile will recalculate the data when the billing period is approved.

Click **View** next to a date in the Daily Usage section to view information about each data session on that day.

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The Events page

An event is an action or other change that occurs on a subscription. Viewing events lets you check when an action occurred on a subscription and helps you answer customer enquiries and troubleshoot problems.

The Events page (or subscription log) displays information about subscription events, for example:

- barring and locking
- shaping
- plan changes
- provisioning
- authentication errors due to an incorrect password
- prepaid usage
- any other changes made by an operator

The Events page does not display authentication errors due to incorrect usernames, because Smile cannot match an incorrect username to a subscription.

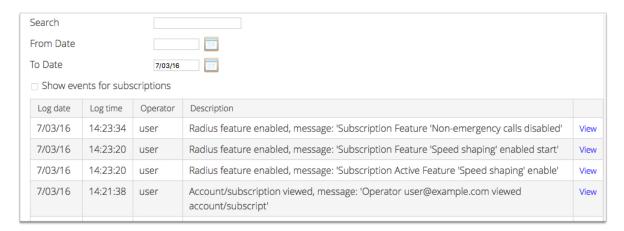The following screenshot shows you an example of the Events page.

Search					
From Date					
To Date	7/03/16				
☐ Show events for subscriptions					

Log date	Log time	Operator	Description	
7/03/16	14:23:34	user	Radius feature enabled, message: 'Subscription Feature 'Non-emergency calls disabled'	View
7/03/16	14:23:20	user	Radius feature enabled, message: 'Subscription Feature 'Speed shaping' enabled start'	View
7/03/16	14:23:20	user	Radius feature enabled, message: 'Subscription Active Feature 'Speed shaping' enable'	View
7/03/16	14:21:38	user	Account/subscription viewed, message: 'Operator user@example.com viewed account/subscript'	View

Figure 19: The Events page

To filter the events that are displayed, do one of the following:

- Enter a keyword in the **Search** field to display events that contain the keyword.
- Enter a date in the **From Date** field to display events that occurred on and after that date.

Click **View** next to an event to view detailed information about the event.

View unbilled charges

Viewing unbilled charges lets you check the value of:

- usage charges in the current rating period
- recurring charges and deferred charges for future rating periods

When you view unbilled charges, Smile generates a future invoice for a specified rating period. A future invoice assumes that all previous future invoice periods have been invoiced. Only the recurring and deferred charges for a specific invoice period are included in the future invoice for that period. Smile does not add future invoices to the account balance.

This task explains how to view unbilled charges for a subscription.

1. Search for the subscription for which you want to view unbilled charges, then double-click the subscription entry in the search results.

   The subscription's summary page is displayed.

2. Click **Future Billing**.

   The **Future invoices** window is displayed and lists the value of each future invoice.

3. Click **View** next to an invoice to view the charges on that invoice.

   Note: To view usage charges for the current period, click **View** next to the first invoice in the list.

View recent dispatches

Viewing recent dispatches lets you view account and subscription-specific documents that Smile has recently sent to a customer. For example, usage alerts, invoices, receipts and credit control documents.

This task explains how to view recent dispatches.

1. Search for the account or subscription for which you want to view recent dispatches, then double-click the entry in the search results.

   The account or subscription's summary page is displayed.

2. On the Account Menu Tree, click the ▶ to the left of **Account**, then click **Document Dispatch**.

   The Document Dispatch page is displayed. Smile displays any recent dispatches in the **Recent Dispatch** table.

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Chapter
4

Purchase orders

Add a purchase order

Purchase orders can be used to invoice an end-customer for related charges independently of other charges. For example, Smile can be instructed to generate an invoice for charges on purchase orders separate to other charges that would be raised on the end-customer's account.

Purchase order numbers can be assigned to an account and displayed on invoices and invoice line items so that customers' accounts payable departments can easily map invoices to purchase orders.

A purchase order can specify validity dates and the subscription(s) it is applicable to. A purchase order may be selected manually when raising a manual charge.

This task explains how to add a purchase order.

1. Search for the account for which you want to add a purchase order, then double-click the account entry in the search results.

   The Account summary page is displayed.

2. On the Account Menu Tree, click the ▶ to the left of **Account**, then click **Purchase Orders**.

   The Purchase Orders page is displayed.

3. Click **New purchase order...**

   The **Add purchase order** window is displayed.

4. Type the purchase order number in the **Number** field.

5. (Optional) Complete additional purchase order fields as required.

   - **Start date**—Specifies the date from which the purchase order is valid.
   - **Expiry date**—Specifies the date after which the purchase order is no longer valid.
   - **Subscription**—Specifies subscription(s) to which the purchase order applies. Select a subscription from the drop-down, click **Add**. Repeat to add multiple subscriptions.
   - **Invoice charges for this purchase order separately from other charge**—Specifies that charges covered by this purchase order are not combined with other charges.

6. Click **Save**.

   The purchase order is added to the table on the Purchase Order page.

Chapter
5

Invoices

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.
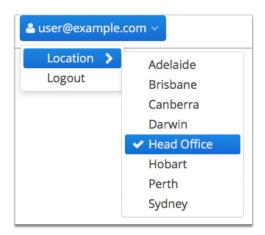

Figure 20: Example of locations available to a logged in Smile operator in the Smile Menu Bar

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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.
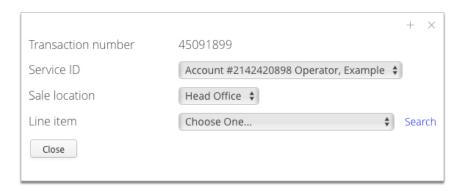

Figure 21: The Add Item window displaying the sale location field

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.

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Invoice grouping

Invoice grouping is a way of specifying how charge items are displayed on an invoice. Invoice grouping can be used to display bundle charges on an invoice without showing the customer the individual charges that apply to the bundle.

Charge type 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.

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

The following is an example of roll up grouping behaviour. The invoice displays one line item for Mobile Subscription (0466666666) that contains 5 charges. Opening the roll up entry displays the individual charge types and the charges that have been included. You can configure how group or roll up entries are displayed on a printed or emailed invoice.
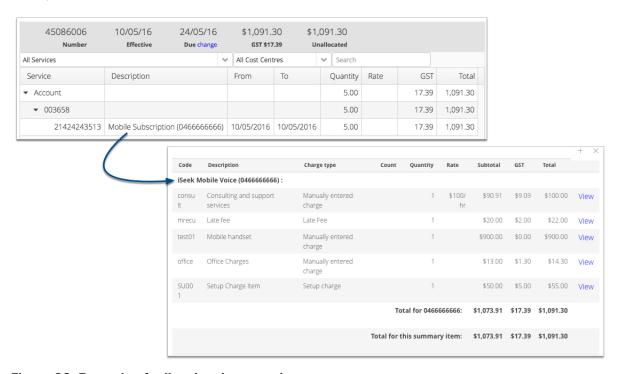

Figure 22: Example of roll up invoice grouping

How invoice grouping is implemented

Configuration and Tools

In Smile's Configuration and Tools you configure invoice groupings that specify what charge types are included in the grouping and the behaviour for each type. You can also specify charge types that are excluded from grouping behaviour.

Account

At the account level you create invoice groupings that specify which subscription(s) are included in that grouping. You can set multiple invoice groupings on an account, for example, you may create a grouping for each subscription on the account or you may pool multiple subscriptions in one grouping.

Note: charges applied at the account level cannot be grouped.

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Chapter

6

Credit control

Credit control overview

Smile's credit control functionality lets you automate the management of overdue accounts.

After you set up credit control, Smile can automatically apply a set of actions when an unpaid account reaches a treatment level. The longer an account remains unpaid, the stricter the actions become. For example, actions can include issuing an email with an attached invoice or statement, setting a feature such as shaping or barring on an account or raising a helpdesk ticket. Smile can be configured to automatically restore access to services when an account's treatment level improves, for example, when it is settled.

In addition to treatment levels Smile can be configured with responsive credit control terms. Customers can be automatically moved between account terms based on an accounts' past payer behaviour. Before computing an account's treatment level an account on responsive terms first evaluates a set of rules to determine which account terms apply to the account. These rules count the number of overdue invoices over the account's recent past to determine the account's payment behaviour which may result in Smile moving the account to different credit control terms. For example, if an account has sufficient overdue invoices in the past the account may move to more vigilant terms. An account will move to less strict terms or return to default terms in time if the payment behaviour improves. If a change of account terms causes a change in treatment level, then the actions associated with the newly assigned treatment level will be carried out.

You can apply credit control actions to both accounts and invoices. You can also set a minimum value for credit control. Smile does not take action against accounts or invoices with an outstanding balance that is less than the minimum value.

Smile suspends credit control actions against invoices for which an automatic payment is scheduled or if an account is in dispute.

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 the *Configuration Guide*.

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.

Figure 23: Responsive terms tab

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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.

Figure 24: 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. For more information, see the *Configuration Guide*.
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**.

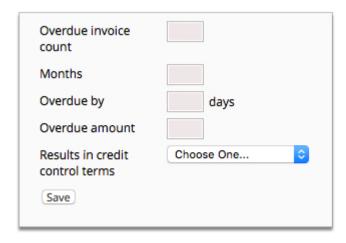   A blank responsive term rule properties page is displayed.

Figure 25: 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. For more information, see the *Configuration Guide*.

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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.

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 26: 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 the *Configuration Guide*.

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 in the *Configuration Guide*.
Action	Specifies the action: • **Disable dispatch of invoices, reminders and statements** • **Enable dispatch of invoices, reminders and statements**

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For more information, see Advanced in the *Configuration Guide*.

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.

Managing an account dispute

When an account is being disputed Smile provides a mechanism to manage dispatches and credit control processes until the 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 are disabled

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

Flag an account as in dispute

Flagging an account as in dispute will defer regular dispatches and notifications, and credit control reminders until the dispute has been resolved. The account is identified as in dispute in the account's **Account Balance** panel.

This task explains how to flag an account as in dispute.

1. Search for the account, then double-click the account entry in the search results.

   The Account summary page is displayed.

2. On the **Account** menu, click **Flag Account as Disputed...** Click **Continue**.

   The account is flagged as in dispute and the dispute status is displayed in the **Account Balance** panel.
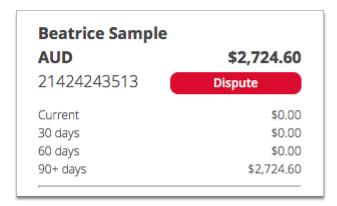

Beatrice Sample
AUD   **$2,724.60**
21424243513   Dispute

Current	$0.00
30 days	$0.00
60 days	$0.00
90+ days	$2,724.60

Figure 27: An account flagged as in dispute.

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Remove dispute flag from an account

Removing a dispute flag from an account returns the account to its current disposition which will be displayed in the account's **Account Balance** panel. Regular dispatches and credit control reminders will resume.

This task explains how to remove a dispute flag from an account.

1. Search for the account, then double-click the account entry in the search results.

    The Account summary page is displayed.

2. On the **Account** menu, click **Remove Dispute Flag from Account...** Click **Continue**.

    The dispute flag is removed from the account and the current account status is displayed in the **Account Balance** panel.

View dispatch status

Whilst an account is in dispute an account's Document Dispatch page will list the dispatches that have not been sent and credit control notifications that have been disabled.

This task explains how to view the dispatch status of an account.

1. Search for the account, then double-click the entry in the search results.

    The account's summary page is displayed.

2. On the Account Menu Tree, click the ▶ to the left of **Account**, then click **Document Dispatch**.
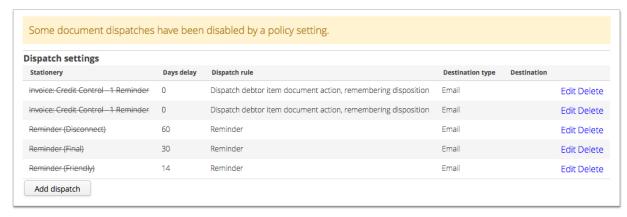
    The Document Dispatch page is displayed.

Figure 28: An account's Document Dispatch page showing disabled credit control reminders.

Chapter

7

Helpdesk

View the helpdesk inbox

The helpdesk inbox displays any tickets assigned to you and your assignment group(s). From the helpdesk inbox you can view your tickets, search for tickets and save ticket searches for repeated use.

This task explains how to view the helpdesk inbox.

Do one of the following:

- On the **Dashboard**, click the **Inbox** tile.
- On the **Smile** menu, click **Helpdesk**.
- On the **Helpdesk** menu, click **Inbox**.

The Help Desk page appears and displays any tickets assigned to you and your assignment group(s).

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The Helpdesk menu

The Helpdesk menu appears when accessing the helpdesk and provides links to common tasks. Use this menu to access helpdesk functions and perform ticket tasks.

The following screenshot shows you an example of the Helpdesk menu.
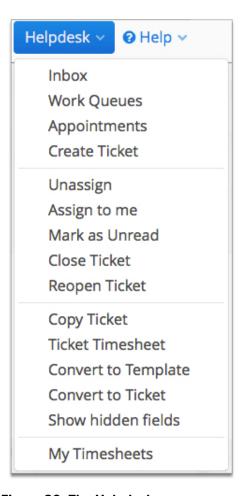

Figure 29: The Helpdesk menu

Ticket actions

Ticket action menu entries are only selectable when viewing a ticket. The following table provides more information about the purpose of each ticket action in the Helpdesk menu.

Table 4: Ticket actions

Link	Purpose
Unassign	Unassigns the ticket and changes the ticket status to Not Assigned
Assign to me	Assigns the ticket to the current operator
Mark as Unread	Marks the ticket as new and unread
Close Ticket	Closes the ticket
Reopen Ticket	Reopens the ticket
Copy Ticket	Creates a ticket with the same ticket properties
Ticket Timesheet	View all timesheet entries and create new timesheet entries for a specific ticket
Convert to Template	Creates a ticket template from the ticket
Convert to Ticket	Converts a template to a regular closed ticket
Show hidden fields	Displays any of the ticket's hidden workflow fields

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Chapter

8

Analytics

Analytics overview

Smile provides more than 70 predefined reports to help you track your accounting and operational data. Smile may generate reports on screen or create a document in PDF or CSV format.

You generate reports from **Analytics**. This page groups similar reports together so you can see at a glance the reports available for each area of functionality.

In the Smile interface for Analytics you can:

- set frequently used reports as a favourite
- view recently used reports
- search for reports
- export reports

Select **Analytics** from the **Smile** menu to view the Analytics interface and the current default report.
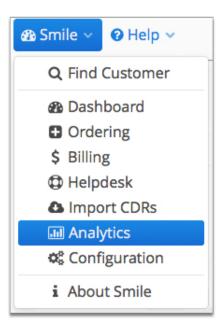
Figure 30: Accessing Analytics from the Smile menu

Navigating Analytics

Analytics is where you view reports and access report functions. It is accessed by selecting **Analytics** from the **Smile** menu.

The Analytics console has three sections:

- **Analytics menu**—contains menu items for report actions.
- **Analytics Menu Tree**—contains links to individual reports, grouped by type.
- **Report panel**—displays the selected report along with any relevant report selection criteria or filters and report icons.

The following screenshot shows the Analytics interface.

Figure 31: The Analytics console

Analytics menu

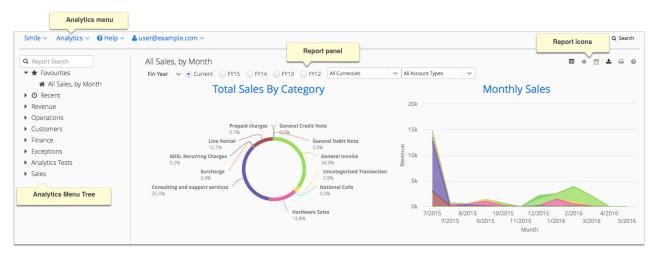The Analytics menu contains entries for report actions. The first group of menu items display actions that are also accessible through the report icons that are displayed at the top right corner of a report in the report panel.

Note: Your permissions determine the entries you see in the Analytics menu.

The following screenshot shows the Analytics menu. Some menu entries are context sensitive.
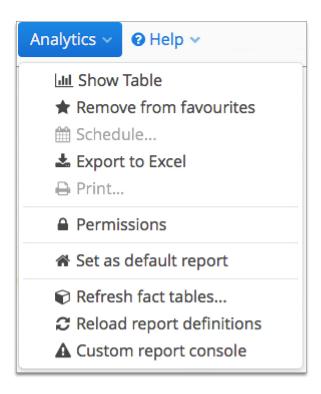
Figure 32: The Analytics menu

The Analytics menu has the following entries:

Show Charts	Select to switch the current report from table to chart format.
Show Table	Select to switch the current report from chart to table format.
Add to favourites	The current report is not set as a favourite. Select to make the report a favourite.
Remove from favourites	The current report is set as a favourite. Select to remove the report from favourites.
Schedule...	Select to configure a report run schedule. (Coming soon.)
Export to Excel	Download a structured XLSX file of the current report. (only available for table format)
Print...	Print the current report.

Set as default report	Sets the report currently displayed in the report panel as the default report.
Refresh fact tables...	Clears and refreshes your Smile data in the fact tables for fast reporting from the live database.
Reload report definitions	Refreshes the sidebar report list. Use this, for example, so that Analytics can recognise newly added or changed custom reports.
Custom report console	Displays a list of custom reports and any current error messages.

Analytics menu tree

The Analytics Menu Tree presents links to individual reports, grouped by type. The menu tree also displays the current default report, reports marked as favourites and recently accessed reports. Click the ▶ to expand a report group.

The Analytics Menu Tree has the following report entries and standard report groups:

Menu	Purpose
Report Search	Text field for searching for report names.
Favourites	Displays reports selected as a favourite.
Recent	Displays the 10 most recently accessed reports.
Revenue	Lists revenue related reports. For example, sales, aged debtors, invoice and payment reports.
Operations	Lists reports related to operational activity. For example, helpdesk, timesheets, features and network activity.
Customers	Lists customer related reports. For example, new and past accounts, plans and service usage and provisioning reports.
Finance	Lists reports related to financial liability. For example, commissions, bonds, credit, debt and other transactions.
Exceptions	Lists reports related to potential exceptions or issues. For example, reports on incomplete, inactive or erroneous activity and accounts.
Sales	Lists reports related to sales activity and history.

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Report icons

An icon set is displayed at the top right of the report panel. These icons identify settings or functions that apply to the current report. These functions can also be accessed through the Analytics menu.

	Select to switch the current report from table to chart format
	Select to switch the current report from chart to table format
	The current report is set as the default report
	The current report is not set as a favourite. Click to add the report to Favourites.
	The current report is set as a favourite. Click to remove the report from Favourites.
	Select to configure a report run schedule
	Export a structured XLSX file of the current report (only available for table format)
	Print the current report
	Access Analytics help

Note: Except for the default report, if an icon is grey then the icon function or action is not available for the current report.

Report formats

The majority of Analytic reports are displayed in table format. Reports that can also be displayed in chart format are identified in the Analytics Menu Tree with the ⊞lıl icon.

The following screenshot shows reports in the Recent menu identified with a chart icon.

Figure 33: The Recent menu displaying reports that are available in chart format

You can switch between chart and table format of a report by clicking ⊞lıl or ⊞ in the report icon set at the top right of the report.

Tables

Reports using the Analytics table format display a ▶ to the left of any data row that can be expanded. Click on the ▶ to display the entries that are part of the data group.

The following screenshot shows a report with data rows that can be expanded to display the items that constitute the report category result.
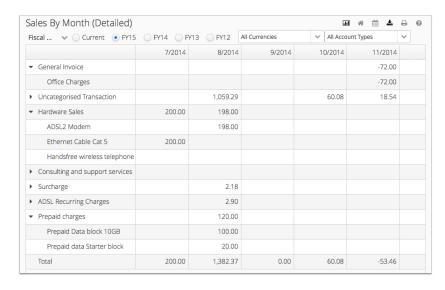

Sales By Month (Detailed)

Fiscal ... ⌄ ◯ Current ◉ FY15 ◯ FY14 ◯ FY13 ◯ FY12	All Currencies ⌄	All Account Types ⌄			
	7/2014	8/2014	9/2014	10/2014	11/2014
▾ General Invoice					-72.00
Office Charges					-72.00
▸ Uncategorised Transaction		1,059.29		60.08	18.54
▾ Hardware Sales	200.00	198.00			
ADSL2 Modem		198.00			
Ethernet Cable Cat 5	200.00				
Handsfree wireless telephone					
▸ Consulting and support services					
▸ Surcharge		2.18			
▸ ADSL Recurring Charges		2.90			
▾ Prepaid charges		120.00			
Prepaid Data block 10GB		100.00			
Prepaid data Starter block		20.00			
Total	200.00	1,382.37	0.00	60.08	-53.46

Figure 34: An example report with expandable data rows

> **Tip:** This additional data is also exported when you download an XLSX file of the report.

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Charts

When working with charts you can see additional information about the data points or chart areas by hovering over the relevant area. A label is displayed with the name of the data collection and the total it represents.

The following screenshots show examples of labels displayed on a pie chart and a line chart.
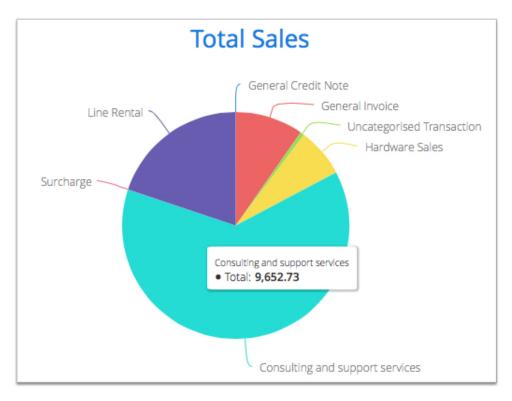

Figure 35: Examples of labels displayed on charts

Set the default report

When first entering the Analytics interface the report that has been set as default is displayed in the report panel. The current default report is the first entry under **Favourites** in the Analytics Menu Tree and identified with the ⌂ icon.

This task explains how to set the default Analytics report.

1. Open the report you want to set as the default.
2. On the **Analytics** menu, click **Set as default report**.

   When a report is already set as the default, this menu option will not be selectable.

   The report will be set as the default and the ⌂ icon will be displayed in the report icon set at the top right of the report. The report will be the first report listed in the **Favourites** menu.

Figure 36: An example of an icon set of a report set as the default

Set a favourite report

You can set reports you use regularly as favourites. All reports set as a favourite will be listed in the **Favourites** menu in the Analytics Menu Tree.

This task explains how to set a report as a favourite.

1. Open the report you want to set as a favourite.
2. Do one of the following:

   • Click ☆ in the icon set at the top right of the report.

   • On the **Analytics** menu, click **Add to favourites**.

   The report icon will change to ★ and the report will be added to the **Favourites** group on the Analytics Menu Tree.

Figure 37: An example of an icon set of a report set as a favourite

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Generate a report

You generate reports from **Analytics**. This page groups similar reports together, so you can see at a glance the reports available for each area of functionality.

This task explains how to generate a report.

1. On the **Smile** menu, click **Analytics**.

   The Anaytics page appears and your default report is displayed.

2. Do one of the following:
   - Click the name of the report you want to generate from your **Favourites** list in the Analytics Menu Tree.
   - On the Analytics Menu Tree, click the ▶ to the left of the required report grouping, click the report entry name.
   - Type the name of the report in the **Report Search** field, press enter.

   You may need to enter report criteria before a report is genrated. For example, the start and end dates of a period.

   Smile generates the report.

3. (Optional) Click ⬇ to export the report if it is displayed on screen.

Report groups

The Analytics Menu Tree groups similar reports together, so you can see at a glance the reports available for each area of functionality.

Revenue reports

Revenue reports provide information about your company's financial status, invoices and overdue accounts.

Revenue reports summarise information about:

- payment methods
- account, invoices and billing items that may require attention
- open invoices and deferred invoice items
- the charges that make up an invoice, for example, the total call ratings for a period
- overdue accounts and invoices, aged debt and payment plans.
- sales

Reports in the revenue category include:

- **Active payment plans**—displays accounts that currently have an active payment plan.
- **Aged debtors report**—displays the aged balances of outstanding accounts, and lists the unpaid invoices for each outstanding account.
- **All sales report**—displays debits and credits for each sales category in a specified period.
- **Call ratings**—displays the gross call profit for each service over a specified period, including wholesale charges, rated totals and charged totals.
- **Credit card expiry**—displays the accounts associated with credit cards used for automatic payments that expire before a specified date.
- **Credit limit report**—displays all subscriptions that have exceeded their credit limit, or the subscriptions that have exceeded the credit limit for a specified service.
- **Deferred invoice items**—lists all invoice items deferred to future invoices.
- **Expired recurring charges**—displays the recurring charges that expire during a specified period.
- **Invoice age at time of payment**—lists invoices that were paid in a specified period, and were over a specified age at the time of payment.
- **Open invoices**—lists the date, balance and account of all draft invoices.
- **Overdue accounts**—groups overdue accounts by responsive credit terms and disposition, which lets you easily follow up on the most overdue accounts.
- **Overdue invoice list**—lists each outstanding invoice, sorted by invoice age.
- **Overdue planned payments**—displays overdue payment plan payments.
- **Overdue unallocated debits report**—lists each unallocated debit, such as an invoice or debit note, within a specified period.
- **Payment plan payments**—displays all scheduled and overdue payment plan payments.
- **Payment type report**—lists all accounts that use a specific payment type, or displays all accounts grouped by payment type.

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- **Spend limit report**—displays all subscriptions that have exceeded a spend limit for a specified service.
- **Trial balance**—displays the aged balances of outstanding accounts.

Operations reports

Operations reports provide audit information about events that may require attention and network status.

Reports in the operations category include:

- **Active features**—displays all active connections for which a specified feature is currently active.
- **Active NAS port usage**—displays the ports used for each NAS for a specified period.
- **Credit limit report**—displays all subscriptions that have exceeded their credit limit, or the subscriptions that have exceeded the credit limit for a specified service.
- **Daily connection report**—displays a daily summary of usage data for each service, including downloads, uploads, call durations and sessions.
- **Events**—displays the numbers of events that occurred in a given period, and lets you drill down to a detailed list of when each event occurred.
- **Inactive accounts**—displays accounts with an outstanding balance and no activity in a specified period. These accounts may be candidates for zeroing - when an itemized credit or debit is raised to return the account balance to $0.
- **International rates**—displays the international charging rates for a specified service.
- **Network Access Server callers**—displays the unique callers to a specified NAS for a specified period.
- **Order Group Report**—lists order groups that are not completed.
- **Server status report**—displays the status of the Smile server, including the VM status, transaction pool and thread tree.
- **Spend limit report**—displays all subscriptions that have exceeded a spend limit for a specified service.
- **Timesheet entries - by customer**—lists the timesheet entries raised against each account, grouped by ticket and ticket type.
- **Timesheet entries - by operator**—displays each operator's timesheet entries for a specified period.
- **Who's online**—lists information about all subscriptions that are currently online, including total time online and IP address.

Tip: To quickly view the Who's online report, click **Online Now** on the Dashboard.

Customers reports

Customers reports provide information about your customers' usage patterns and the status of account and subscription orders.

Reports in the customers category include:

- **Churn report**—displays the number of new, inactive and locked accounts for a period.
- **Contract expiry report**—lists each account with a contract that expires in a specified period.
- **Current period usage report**—displays usage data in the current period for a specified service, including downloads, uploads and online time.
- **First connections**—lists all subscriptions on a service that first connected in a specified period.
- **Pending activations**—displays subscriptions awaiting activation.
- **Plan users**—lists a count of subscriptions by plan for one or all services.
- **Powertel preselection failures**—displays preselection failures that can be scheduled for eBill churns.
- **Provisioning results report**—lists the status of provisioning requests for all services for a specified period.
- **Purchased prepaid blocks**—displays the prepaid blocks purchased in a period.
- **Service and account creation report**—lists all accounts and subscriptions created in a specified period, grouped by service type.
- **Service order approvals**—displays orders that require approval.
- **Service usage report**—displays usage data for the top users of a specified service, including downloads, uploads and duration.

Finance reports

Finance reports provide information about your company's financial status, including sales reports, liability reports and your company's top customers.

Reports in the finance category include:

- **Accounts in credit report**—lists all accounts with a positive balance on a specified date.
- **Banking report**—displays payments in a specified period by payment type or operator.
- **Customer revenue summary**—displays a graphical summary of the revenue range customers spent each month.
- **Debt drift**—displays outstanding debt in foreign and home currency for each date in a specified period.
- **Liability report**—displays a summary of your company's liabilities, including accounts in credit and services not delivered.
- **Sales per account**—displays the monthly spend for each account to help you identify and troubleshoot abnormal trends.
- **Top customer summary**—compares the monthly spend of top tier customers to all customers for a specified period.
- **Top customers**—displays the accounts with the highest spend for a specified period.
- **Transaction search**—lists all transactions for a specified period, or searches transactions by type, date and amount.
- **Transactions by customer**—lists all transactions raised against all accounts in a specified period.

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Exceptions reports

Exceptions reports provide information about accounts, invoices and billing items, provisioning requests and services and subscriptions that may require attention.

Reports in the exceptions category include:

- **Custom feature report**—displays information about accounts with custom features, including plan, service and rating cycle.
- **Inactive users**—lists subscriptions that have not used a specified service for a specified period.
- **Incomplete service listing**—displays subscriptions on an account that are not fully configured and require further action.
- **Non-dispatching accounts**—lists the accounts without dispatch settings for a specified document type.
- **Outstanding provisioning requests**—lists all outstanding provisioning requests.
- **Provisioning errors report**—lists all current provisioning errors.
- **Unassociated billing items**—displays billing items that cannot be associated with a subscription, so cannot be included in the billing run.
- **Undispatched invoices**—displays all undispatched invoices, sorted by invoice age.
- **Usage alert level report**—lists each subscription that has a reached a usage alert level for a specified service.