JET BILLING
BY OBSIDIAN CONSULTING GROUP

JET BILLING QUICK GUIDE

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Jet Billing Quick Guide

1. Introduction

The aim of this document is to provide a helpful guide of some of the more common procedures used in the Jet Billing system, including tips, explanations and instructions to make your introduction to using Jet Billing as easy as possible.

2. Overview

Jet Billing is a billing and rating system that allows you to manage your users and bill and rate your resources.

You can use Jet to create invoices to bill your clients for phone calls, internet, electricity, gas, water and solar use and much more.

The way Jet does this is by importing usage (phone calls, internet downloads/uploads, electricity, etc) and then rating that usage based on your pricebook. Jet also does all the other billing magic involved in billing users for their services; monthly fees, one off fees and charges; discounts, etc.

The premise of the system is pretty simple:

- you add your Users to Jet
- you set your Pricebook (Bundles, Plans, Fees, Bands)
- you assign Plans to your Users
- you assign Phone Numbers/IPs/Meters that are to be rated
- Jet bills!

Of course, there are always complexities in how this happens, so here are a few important things you need to remember:

2.1. Usage Imports

Jet imports usage data constantly (although this will vary depending on your setup). Typically Jet imports usage at least once a day, although Jet can import every second if there is data available.

When data is imported, it is assigned to a User. This is done by Jet by looking at the Service Data that is assigned to each User (this is explained more further in this document). If there is no service data available for a piece of usage, then Jet will assign the usage to the Unassigned category. You can run your unassigned usage report at any time to view this.

If you need to make changes to usage in the past (eg fix unassigned usage), then you need to ensure that the usage is re-assigned. You cannot currently do this yourself (although this feature is coming!), you need to contact Obsidian support to have your unassigned re-run.

If you need to change usage assignments in the past, you will also need to contact Obsidian support. If you are making changes in the present or the future, all is fine.

2.2 Invoices

Invoices are created as pdf documents and sit within each User's **Invoice Tool**.

Once an invoice is created, it is a static document and is not updated automatically when you make changes to the system.

Once the invoice is created, the system will not allow you to make changes that will impact the invoice (with the exception of registration invoices, this is explained later under section 9 'Managing Invoices').

If you want to make changes in the past that will change an invoice, you have administrative tools that will allow you to do this, however you will need to delete the invoice manually, make the changes, and then generate the invoice again.

Obsidian recommends making as few changes to existing invoices as possible, and instead utilising the **Line Items Tool** to make adjustments to accounts on the next invoice.

2.3 Automation

A number of functions can be automated in the system, most of these are turned off when the system is first handed over. Once you are comfortable with the system, you can ask to have these automated services turned on.

- Bill run
- Emailing of invoices
- Banking gateways
- Usage Imports (generally this is turned on)

2.4 Staging Site

As part of your signup to Jet Billing, you are provided with a staging site that Obsidian maintains and uses for testing purposes for new releases.

You can access this site if you want to have a play with the system, run in-house training, or simply do some analysis on changes to your pricebook.

Usage is not typically imported automatically to staging, but you can request this through support if you need it

If you wish to utilise staging for specific purposes (such as training etc), it is always a good idea to check in with Obsidian to ensure that your changes are kept, as the primary use of staging is for testing purposes.

2.5 Updates

You will receive emails from Obsidian letting you know about updates to the system.

These happen quite regularly and bring in new features that you can utilise in your realm, most features are free, although some will be modules that you can purchase.

Obsidian encourages all of its clients to submit feature requests if you find something you need. We try to accommodate as many of these as we can.

2.6 A Note to Remember

When you are using the Jet Billing System, a quick rule of thumb that is good to remember is the following:

The List of items across the top of the page frame – User – Reports – Products - Realm Admin - Logout – are all called '**Tabs**.'

The List of items running down the left-hand frame of the page are all called '**Tools**', these will change depending on the **Tab** you select.

When you are on the **User Tab**, all the tools down the side are for the User you are currently editing. You can see the User you are editing in the top left hand corner under the search bar (The exception to this is the Add New User Tool which allows you to create a new user Account).

For example:

If you click on the **Products Tool** when in the **User Tab**, you are viewing and editing products for that User only.

If you click on the **Data Usage Tool** or **Voice Usage Tool** then you are viewing reports for that User.

When you are in the **Reports Tab**, the **Products Tab** and the **Realm Admin Tab** then you are making changes or running reports that affect the whole system (unless otherwise stated, such as 'Usage report – user'). If you make a change to a Plan while in the **Products Tab**, then that change will affect all Users on that plan.

3. Managing Your Pricebook

3.1. How to Add a New Bundle to Your Pricebook

Adding a new bundle will use the '**Products Tab**' located on the top navigation bar. Enter the '**Products Tab**' and click the '**Create a New Bundle**' button.

Here you will provide a name for your new Bundle and make a few administrative selections. Please do read the help text beside each item as it describes what each function does for the Bundle you are creating.

Then select the '**Add New Bundle**' button.
After the Bundle has been created Use the '**Return to Bundle List**' button.
Once at the Bundle List, select the newly created Bundle.

Here you can add Plans to your new bundle.

3.2. How to Add a New Plan to a Bundle

By Selecting a Bundle you will be taken into the Bundle Editor. Here you can add a new Plan to your Bundle using the '**Add a Plan to this Bundle**' button.

On the **Edit Plan Details** page you will have a number of fields you can fill in and selections to make using the tick boxes. Please be sure to have the Plan details correct as these settings will apply to any customers using this Plan.

By completing this form, you will be taken back to a modified version of the **Plan Editor**. In the upper part of the screen you will notice that you have new buttons available; '**Add New Band**', '**Add New Fee**', '**Add Service Data**' and '**Remove this Plan**'.

3.2.1. Add New Band

When you select the Add New Band button, you are adding a Band, or Band File to your Plan. Bands are typically used to rate usage, or apply different rules to usage at different points.

There are two ways to add a Band to your Plan:

1. Add a Band File

2. Add New Band button

To add a Band File, you simply need to select 'Choose file' from the section **Bands attached to this Plan**. Band Files must be in csv using UTF-8 format, and must use Jet's resource groups. If you are unsure on this, or receive errors when attempting to upload a file, please contact support.

To add a Band via the button, simply click on **Add New Band**. You can then assign Band information, such as cost for the first X amount of usage, cost for the next Y amount of usage etc, or even just cost per unit for usage.

3.2.2 Add New Fee

You must always add a Fee to a Plan. The Fee on the Plan tells the system to bill for the Plan each month. If a Plan does not have a Fee, then the Plan will not bill. You can have $0 fees.

You can have multiple Fees applied to a Plan, for example:

$50 - 12 Month Contract Monthly Fee

$40 - 24 Month Contract Monthly Fee

When you add a Fee, please ensure that you enter the correct information, as the fee may be used for monthly billing.

3.2.3 Add Service Data

Service Data is used at the User level to define certain data for that User. A Plan that has a Band File attached to it for rating phone calls must have the 'Full National Number (FNN)' Service Data applied to it. This allows the User's phone number/s to be added at the User level, allowing calls to be rated according to the Band File on the Plan.

Similarly, you can use Meter Number for metered billing such as Solar, Electricity, etc. Quantity allows you to allow User's to have the plan added multiple times without having to manually add the Plan each time, for instance a User who has purchased 4 modems may have a modem plan with a quantity of 4, therefore the plan will be billed 4 times each month.

You can have custom Service Data categories added by contacting support.

3.2.4 Remove a Plan

This button removes the Plan from your pricebook

3.3. How to Edit/Change a Plan

To change/edit an existing Plan, first find the Bundle it is a part of and click into the Bundle using the '**Products Tab**'. Once you're in the Bundle, you will be able to select the Plan you wish to change, click into the Plan and you will come to the '**Edit Plan Details**' page.

Here you can add new Fees, Service Data and can change the Band Files.

You're able to have multiple Fees and Service Data on one Plan.

Please note, that any Users using the Plan will be affected with the updates, so if you change the monthly Fee, all the users assigned to that Fee will have the change. If you don't want existing Users to have their Fee changed, you can add a new Fee instead, so that the new price will be available for selection when adding this Plan to a User, but existing Users on the Plan will not have their Fee changed.

3.4. How to Edit a Band File

If your plan has an existing Band File and you wish to update it, there are two ways you can do this, depending on what you want to do. If you want to make changes to the call charges, you follow the instructions under 3.4.1: Editing an existing Band File. If you would like to add new Call Classifications to an existing Band File, follow the instructions under 3.4.2: Adding a new Call Type

3.4.1 Editing an Existing Band File

To edit the cost of calls, you need to browse to the Plan you wish to edit.
To do this you;

1. Select the **'Products Tab'** on the top bar
2. Select the Bundle the Plan is in
3. Select the Plan
4. Select 'Download list of available bands'
5. This should download your Band File.
6. Open the file, and adjust the costs as required.
7. DO NOT make any changes to the Bandid field.
8. Save file (Ensure it is saved as a csv in UTF-8 format)
9. Select 'Choose File' and upload the newly saved file.
10. Your bands should now be updated

3.4.2. Adding a New Call Type

There are two ways you can do this;

(a) Download an existing file and add new rows (3.4.2a)

(b) Add the new call types directly (2.2)

3.4.2.a Download an Existing File and Add New Rows

In this instance, you are downloading an existing file and adding new classifications to the file.

1. Select the **'Products Tab'** on the top bar
2. Select the Bundle the Plan is in
3. Select the Plan
4. Select 'Download list of available bands'
5. This should download your bandfile (you may need to right click and select 'download file')
6. Open the file, and add the new classifications at the end of the file (you need to check with Obsidian Support for the correct classification names)
7. DO NOT make any changes to existing Bandid's
8. Do NOT include a BandID on the new rows, leave this blank
   Be sure to include the correct information in the group_name, prepay, cost, min_block and max_usage fields
9. Save the file as a csv using UTF-8 format
10. Select 'Choose File' and upload the newly saved file
11. Your bands should now be updated

n.b. All Band Files must be in csv (Unicode UTF-8) format

3.4.2.b Add the New Call Types Directly

To do this you will need a file with the headers from an existing band file, bandid, product_code, group_name, prepay, cost, min_block, max_usage

1. Enter the new classification details
2. Do NOT include a BandID, leave this blank
3. Be sure to include the correct information in the group_name, prepay, cost, min_block and max_usage fields
   (you need to check with Obsidian Support for the correct names)
4. Save the file as a csv in UTF-8 format
5. Select 'Choose File' and upload the newly saved file
6. Your Bands should now be updated

4. Using the Quick Search

The Quick Search can be located in the top left-hand part of the User interface
(a search box under the logo).

Search is not available to general Users, and is used by administration groups such as Manager and Finance Groups. Search can also be used within a hierarchy, so if you have a Sales group, the Sales person can only view their accounts. It can also be used by Parents to view Child accounts (see Section 7: Utilising Hierarchies for more information.

4.1. Searchable Items

The following are the default searchable fields:

- Usernames
- First name
- Surname
- Company
- Invoice ID's (Type in inv.)
- Service Data, eg:
  - phone numbers (Type in FNN:)
  - Meter Number (meter_no:), etc

4.2 Using the * key

To search all Users, type in *

To do partial searches, eg, search for 'media', you can type m* and all users starting with M will come up. Refine the search by adding further details, such as med*

You can use * with Invoice and service data searches
– this is especially useful if you have service data (such as phone numbers) as a range (eg 0393557840 – 0393557850), as if you want to search for a number within this range, eg 93557844, you would need to search for 03935578*

5. Managing Your Users

This section instructs on how to Add a New User

5.1 Add a New User

To Add a New User, click on the '**User Tab**' and then select the '**Add New User Tool**'

This form page is where you enter all the information you need about your Users. If you need any additional information added to this page, please lodge a support ticket with the list of additional items, and Obsidian's support team will ensure these are added for you.

Most of the fields are self-explanatory, however, below is some further information on a few fields:

Username
This is the unique field that is used to identify your Users, it should always start with a letter and there can not be any spaces in the username.

Email Correspondence
If this is set to **Yes**, then users will be automatically sent their invoices when they are generated.

Referred By
You can use this if you would like to track Users against Sales Users. In this instance, you would need to have Users who are assigned the User Group 'Sales'. You can report on how many Users a Sales person has brought on board, and the Sales User can view their Users within the system.

User Group
This is the type of User you are adding to the system. The system comes with the following default user groups:

User
These are your end customers. If you are allowing your customers to login to Jet, they will only be able to view their own information, they will not have access to the Search Tool or any other Tabs.

Manager
This User has full access to the system

Finance
A finance User. They can view all Users, can edit a User, run all reports and can view and edit the pricebook.

Sales
A Sales person, if they have Users assigned to them under Referred by, can view their Users.

Helpdesk
Can view all Users and add notes, generally helpdesk can't make changes.

You can add new Groups by lodging a support ticket with your request.
You can also change the permissions for each User Group (eg, what that Group can view/edit within the system), again, simply lodge a ticket with the changes you would like made.

Date of Change
This is under the Heading **Add Bundle to User**, which can be a bit confusing if you are adding an administrative User such as a Finance or Helpdesk person, as these Users will not have any Plans/Bundles added to them. However, the Date of Change sets when the User is added to the system, and must be used.

Please remember that the date you add a User to the system is the date that they are valid from. You can not add a Plan to a User prior to the date they were added to the system, so if you add a User on Jan 1, then you can only add a Plan/Product to that user after Jan 1.

Add Bundle to User
This is where you add products to your new User.

At this point you can only add a single Bundle to a User when using the Add New User Tool. A release is coming out later in 2017 with changes to this, but as it stands, only a single Bundle can be added at a time. You can add multiple Plans from within the Bundle.

1. Select the **RADIO Button** of the **Bundle** you are adding.

2. Select the **Plan/s** you wish to add by clicking in the check box

3. Select the **Fee** from the dropdown list beside the plan (if there is a list)

Check your Date of Change is correct.
Click on the *Add New User* button, which is situated just above the *Add Bundle to User* section.

Your User has been added. You should now check the User's details by clicking on the **View/Edit Details Tool**, and then check that the User's products are correct by clicking on the **Products Tool**.

5.1.1 Adding Phone/Meter/IP Numbers, Service Data, Quantities and Discounts to Your New User

Once your User has been added to the system, you may need to do some further management of the Users products.

For example, if the User is being billed for usage, then you will need to enter the Phone number, or IP Address, or Meter Number that is to be associated with the User so that they can be billed. If you do not add the Phone Number/Meter Number/ IP Address to the User, then Jet will be unable to assign usage to the User. You also need to ensure that the Plan you add the numbers to have the correct Rate Table (or Band File) applied to it, so that Jet can rate the usage accordingly.

You may also want to apply a Discount or Price Override, add a Quantity or other Service Data to the User. To do this, you need to be in the **User Tab**, and then select the **Products Tool**. Once you are on the Products Tool page, you can view and edit the products that your User is on.

5.1.2 Add a Phone Number/Meter Number/IP Address to a User

In the **User Tab**, select the **Products Tool** and click on the **More Info** button of the Product that will rate your usage (e.g. Voice Call Rates). You should now be able to add in the appropriate data that you need to enter, eg Phone Number in the FNN (Full National Number) field, IP Address or Meter Number. If the product does not have a field available, then this will be because the Service Data has not been added to the Plan. See the section on Managing your Pricebook on how to add Service Data to a Plan.

You MUST apply the phone/meter/IP number to the Plan/Product that has the rating table applied to it. For instance, if you have a plan called "Standard Call Rates" or "Standard Electricity Rates" that have the rates for your usage applied, then this Plan should always be applied to the User, and the Phone/Meter/IP Number applied to the Plan through the Products Tool.

5.1.3 Discounts and Price Overrides

There are two types of discount types available — Recurring Discounts and Once-Off Discounts, you can apply Price Overrides, % discounts (positive and negative % can be applied) or $ (positive and negative $ can be applied) discounts to these.

- Recurring Discounts: This discount is applied to the Recurring Fee charge
- Once off Discounts: This is applied to the Initial Fee charge

Once you add an Override or Discount, always remember to go to the **Invoices Tool** and regenerate the Registration Invoice that was created when the product was added. You need to do this to apply the new price to the Invoice, as the .pdf is created when the product is added, and needs to be manually regenerated to apply new changes.

5.1.4 Quantity and Service Data

You can add a Quantity to a Plan, for example, if a User has purchased a Plan that includes one item, but they have purchased 5 of this item, then you can add a Quantity against the Plan, instead of adding the Plan 5 times.
You can also add other Service Data such as serial numbers and contract length

Once you add a Quantity, always remember to go to the **Invoices Tool** and regenerate the Registration Invoice that was created when the product was added. You need to do this to apply the new price to the Invoice, as the .pdf is created when the product is added, and needs to be manually regenerated to apply new changes.

5.2 Adding Plans to a User

If you have already created a User and wish to add another Plan it is very simple to add one. Whilst editing that particular User and using the '**User**' tab, select the **Products Tool** in the side menu, there you will have a list of the Bundles the User is on as well as the Plans attached to those bundles. On the right of your screen you will be able to see an 'Add Plan to Bundle' button. Simply click on that and then make your Plan selection.

5.3 Assigning a Number (Phone/Meter/IP) to a User

When a User is created and put onto a Plan you will need to assign the Phone Number(s)/Meter number/IP Address to that Plan manually. This can be done by using the '**User Tab**' and going into the '**Products Tool**' on the side menu.
Use the '**More Info**' button and this will take you into the Plan details page. If you have set up the Service Data correctly there should be a field in which you can add you Phone Number/Meter Number/IP Address.

Simply fill the empty field and make sure the '**Date of Change**' selection has been filled. And then use the '**Update Plan**' button.

5.4 Using Quantity

The Quantity feature lets you have multiples of the same Plan without having to manually create each individual one. This feature is made accessible through the 'Add Service Data' Button. It is a selection you can make in the drop-down menu.

Once this has been added to your desired Plan, using the '**User Tab**' and then the '**Products Tool**' in the side menu, select '**More Info**' on the Plan and you will see a field in which you can assign a Quantity to the Plan. An example of using Quantity would be:

To add 30 different numbers for an office building, you can use the 10 DID Plan and by using the Quantity function you can enter the value of 3.

Once you add a Quantity, always remember to go to the '**Invoices Tool**' and regenerate the Registration Invoice that was created when the Product was added. You need to do this to apply the new price to the Invoice, as the .pdf is created when the product is added, and needs to be manually regenerated to apply new changes.

5.5 Cancel a Plan

To Cancel a Plan from a User, simply browse to the '**Products Tool**', select the Plan you wish to cancel and change the Drop Down Menu from 'Active' to 'Cancelled'. Be sure to add the correct Date of Change. Jet will automatically generate a cancellation pro-rata for the next invoice, or straight away if there are no other products active.

5.6 Cancel a Bundle

You can cancel a User from a Bundle by browsing to the '**Products Tool**' and then selecting 'Cancel Bundle'. This will cancel the User from the Bundle on the Date you specify on the 'Date of Change'. Jet will automatically generate the Cancellation Invoice for you.

5.7 Deleting Plans

To delete a Plan there is a Big red 'X' button next to it's description on the '**Products Tool**' side menu. Deleting something will make it so it never existed in the system, so this feature should be used very carefully as there is no way to undo a deletion.

(Note* this will only delete the Product from the User, it will still be in the Pricebook. It is also important to note that if you have Invoices related to the deleted Plan you will need to regenerate these for the changes to apply to them. It will not be done automatically.)

5.8 Deleting Bundles

Much like deleting a Plan, you are able to Delete a Bundle. This means it will remove **all** plans associated with that particular Bundle and make it so that User never had that Bundle to begin with. (Note* this will only delete the Bundle from the User, the Bundle will still be in the Pricebook).

5.9 Changing Plans

How to make changes to a Plan currently in use

5.9.1 Changes in the Past

Firstly, you'll need to delete the Invoices up to the date of the change. So for example if it is currently June and you wish to go back and change a Plan in February, you will have to delete all the Invoices/Payments up until January.

Then you can make the change and start the new Plan from the date in February.

Once the change has been made then you will have to go through and generate the Invoices again. It is important to note that this isn't automatic, you need to do this yourself.

5.9.2 Changes in the Future

When making changes for the future, be sure to have the date set correctly. If this change is to replace another Plan, you'll need to cancel the existing Plan on the same day. Then add the new Plan. It must be done in this order otherwise both Plans are billing for the same number. The process Jet takes is to add that specific number to the unassigned usage list. You cannot have 2 Plans with the same number assigned to it.

5.9.3 Changes in the Present

This is very similar to making changes in the future, the process is the same.

Cancel the Plan on the correct date first, then add the new Plan on the same day.

6. Line Items vs Adjust Account

The **Line Item Tool** allows you to schedule a '**line item**' which will appear on the User's next Invoice only. This can be a credit to the account or a charge.

Using the **Adjust Account Tool** will change the User's current balance straight away and will create a Receipt Invoice showing the amount and date of the adjustment.

*Obsidian advise using the Line Items method if you are attempting to make changes in the past, as you will not need to change previous invoices as all adjustments will be added to the next Periodic Invoice.

7. Utilising User Hierarchies

Jet comes with a built in hierarchy management system, which enables a parent-child relationship to be added to your users.

There are 3 types of relationship that you can set up:

7.1. Billing

A Billing relationship means that the Parent will receive the bills for the Child accounts. The relationship includes:

- A Parent can have multiple Child accounts.
- The Parent Invoice will show the Parent's account details first, then will itemise each Child's Invoice amounts.
- A Parent can view and manage a Child through the web interface
- The Child account will not have any Invoices against their account.

7.2 Contact

A contact relationship allows the Parent to view the Child account through the web interface. The Child account will retain its own Invoices.

7.3 Organisation

An Organisation relationship allows the Parent to view and manage the Child account. The Child account will retain its own Invoices.

8. How to Make a Payment

To make a payment you will need to use the '**Adjust Account Tool**' in the side menu. This under the '**User**' Tab.

Firstly, make sure that you are editing the correct user.

When on the Adjust Account page you will have the option to charge or credit the account. Select 'Credit Account' and enter the desired amount. You will also need to provide a reason as to why you are adjusting the account. In this instance you would say, "June payment" or a description that indicates what you are doing.

You're also able to select a date. This is useful for instance, where you have to delay the payment.

9. Managing Invoices

This section will deal with the '**Invoices Tool**'.

To manually generate an Invoice simply click the '**Invoice**' button in the upcoming Billing section. Please note that if the usage hasn't happened yet it won't show on the Invoice.

When you make a change to a User's products and the change was in the past, you will need to go back to when the change was made and regenerate that Invoice. This is because Jet does not automatically do this for you.

For example, if you had made a change back in Feb, you will need to delete all the Invoices back to Feb and then regenerate that Feb Invoice, then go and generate the Invoices back to the present day. This will have the newly changed product in the Invoice.

If you need to email the Invoice out to a customer you can use the '**Email Invoice**' Button, this will only work if you have an email address associated with that User's account and if email correspondence has been selected for that User.

There are multiple Invoice types:

9.1 Periodic Invoices

The Periodic Invoice contains the monthly costs of a User's account.

The Periodic Invoice can be generated manually at any time, or can be scheduled to be generated on a specific date each month. The Invoice includes any periodic Fees (Fees are generally charged in advance), and any usage from the past month.

9.2 Receipts

Receipt Invoices contain a Receipt for a payment the User has made. Usually to pay for the Periodic Invoice.

9.3 Registration Invoices

Registration Invoices appear when a new product is added. It contains the registration Fee if one is associated with the product.

9.4 Registration $0 Invoices

For those who have the option of Delayed Billing switched on, there are a few things you'll need to know:

When adding a new Plan to a User there will be a $0 Registration Invoice that will appear. The reason for this is that Jet is recognising the new Plan with the Registration, however, because of Delayed Billing it won't be charged straight away. The new Plan and all the usage will appear on the next month's invoice. You can view the Registration costs in the **User's Line Item Tool**.

Please note, if you make changes to the Plan, such as add Quantity or a Discount/ Override, you will need to re-generate the Registration Invoice to have the new cost appear

9.5 Cancellation Invoices

This Invoice appears when a Product or Plan has been cancelled. It will charge the user up until the cancellation date (the costs are done monthly so if the cancellation happens before the end of the month it will calculate the cost appropriately).

9.6 Invoice Administration Tools

Manager accounts will have the following tools for Periodic Invoices:

9.6.1 Create Invoice

At the bottom of the **User Invoice Tool**, there is a section that tells you when the next Invoice date is, called 'Upcoming Billing'. Under this title is the manual Invoice button that allows you to create the next Periodic invoice.

9.6.2 Email Invoices

You can email the Invoice to the email address listed on the User's account

9.6.3 Regenerate Invoices

You can regenerate the last created Invoice, use this function if you have made ANY changes to the User's account that will affect the Invoice. Remember that the Invoice is a static pdf document, it will *not* be updated automatically, you must manually update the Invoice when you make changes in the past.

This includes changes to Plans and Service Data. Please remember that this rule applies to $0 Registration and Registration Invoices; if you add a Product to a User, and then edit the Service Data (Add an Override, Discount, Quantity, etc), then you will need to regenerate the Registration Invoice and $0 Registration Invoice.

9.6.4 Delete Invoices

You can delete the most current Invoice.

10. Unassigned Usage Report

Running the Unassigned Usage Report will let you know if there is any usage that you need to assign to a product. There are many different error codes that come up in this report which will point you in the right direction and help you make adjustments. Some of the error codes are as follows:

NOPROD - means it that the system couldn't find a band to bill these calls on that account for that number. You would want to check the bands to ensure that there is a cost for those calls.

NOASSIGN - means that the number associated with record has not been assigned to anyone at the time of that call. You need to check that you have added the FNN on the correct date.

INVALIDDEST - means that whatever destination is in the call record isn't valid and cannot be classified. This is something that is usually taken up with your upstream provider.

MULTIPROD - more than one band is set up to bill this call. Which means that you will be billing for it twice. You will need to adjust your bands to make sure that it only bills for that number once.

MULTIUSER - means that this number is assigned to multiple Users at the time of that call. You will need to sort out the time/date of when the individual users have the number and make sure that it is added correctly to each User so that there is no overlapping time between them.

NOCONNECT - means the call didn't connect. These generally won't come through from most suppliers. Can usually safely be ignored.

NOSUBMAP - when using the upstream provider classifications. This indicates that classification wasn't seen. This may be that the upstream has changed or have modified their classifications.

11. Things to Check Before Your Bill Run

Have you:

1. Run your Unassigned Usage Report and checked that all your usage is assigned?
2. Re-run any Registration Invoices that should have Discounts or Quantities added to them?
3. Checked that your Users have email correspondence turned to 'Yes' if you are expecting them to have the Invoices automatically emailed to them?

End Note

Thank you for using Jet Billing, we hope you enjoy using your new system.
If you have any feedback or need any assistance please don't hesitate to contact us.

All the best from Obsidian Consulting Group.

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