

**Framework 11**

**Business Process Framework R9.0**

**Solution Conformance Certification Report**

**Oracle Unified CRM & BRM**

**December, 2011**

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# 1 Introduction

## 1.1 Executive Summary

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This document provides details of Oracle's self-assessment and TM Forum's certification of Oracle's Unified CRM & BRM Solution including the methodology approach to product modeling and Product Lifecycle Management (PLM) against the TM Forum's Business Process Framework Release 9.0.

## 1.2 Representation of Oracle Unified CRM & BRM Functionality/Capability

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Worldwide, communications service providers are trying to hold onto existing customers and attract new ones by providing a more satisfying and personalized customer experience, one that strengthens loyalty while enabling carriers to effectively differentiate in the marketplace. Key to continued success is the ability to clearly understand the customers, their needs, and their behavior. To offer a true personalized experience, communication service providers need to enable their customer to use their channel of choice (including retail and partner settings, on-line self care, or traditional call centers) and to carry-on interactions across multiple channels. Also critical are the carrier's ability to adjust the interaction with the customer based on the customer's profile, behavior, and needs by making available within short timeframes new personalized offers, by proactively advise the customers on how to best manage their existing services, by proactively suggest the customer which promotional offers would be best for them, and by offering more efficient and engaging interactions that leverage existing customer data across systems and insights on customer behavior. Finally the communication service providers need to be able to foster the relationship with their customers and acknowledge and reward their loyalty. Carriers need to accomplish all this with lower operating costs.

Oracle offers a fully-integrated, product-based solution that enables delivery of a differentiated customer experience at a lower cost. Oracle Unified CRM and BRM (UCB) solution provides:

- Consistent and Personalized Customer Experience
- Accelerated time to revenue
- Low risk implementation and low OPEX

Oracle Unified CRM and BRM solution consist of Oracle's Siebel CRM, Oracle Communications Billing and Revenue Management (BRM), and Application Integration Architecture (AIA) for Communications. Optional applications include Oracle Business Intelligence Enterprise Edition (OBIEE) and the Information Framework (SID) certified Oracle Communications Data Model (OCDM), Oracle E-Business Suite, and Oracle Product Hub for Communications.

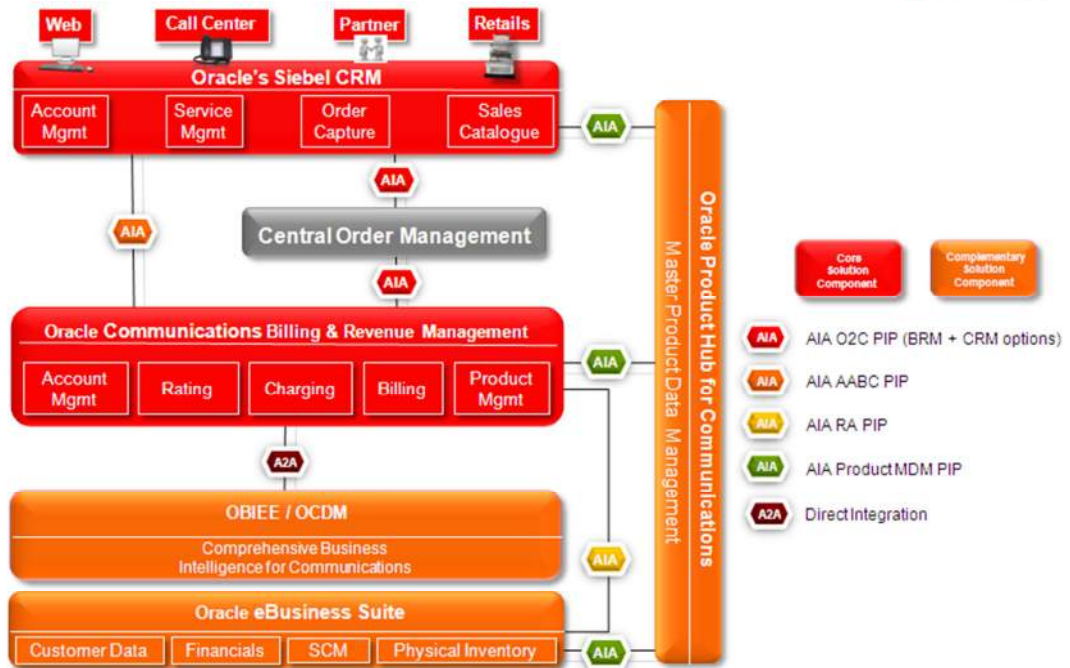


Figure 1.1 Oracle Unified CRM and BRM - Solution Components

Over a five-year period, Oracle has proactively sought input from over 50 different Service Providers worldwide, via Customer Advisory Boards as well as Special Interest Groups, to understand, identify and prioritize their needs across the Concept to Cash processes. This led to a multi-year cross-applications roadmap and investment program to develop the productized Unified CRM BRM solution as well as the other solutions within the overall Concept to Cash process.

### 1.3 Solution Certification Versions

The following provides the versions of the primary components in the UCB solution that have been assessed as part of this certification. For additional application versions supported in the context of the UCB solution, please refer to Oracle's documentation.

- Oracle's Siebel CRM [8.1.1.4]
- Oracle Communications Billing & Revenue Management (BRM) [7.4]
- Oracle Application Integration Architecture for Communications [2.5 IPS2]
  - Order to Cash Process Integration Pack – BRM Option
  - Order to Cash Process Integration Pack – CRM Option
  - Agent Assisted Billing Care Process Integration Pack
  - Revenue Accounting Process Integration Pack
- Oracle E-Business Suite [R12.1.3]
- Oracle Communications Data Model (OCDM) [11.2.3]
- Oracle Fusion Middleware 11g Release 1 (11.1.1.5.0)

## 1.4 Mapping Technique Employed

---

Business Process Framework L3 descriptions are analyzed by looking for implied tasks. (This is similar to how process decomposition can use Semantic Analysis). Each eTOM process is supported by descriptive text. In many cases, each process is aligned and mapped to appropriate company documentation references solution, methodology or modeling material.

The eTOM L3 descriptions are analyzed by looking for implied tasks. Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 3 process implied task:

- **GREEN** is used to highlight key words or key statements that are fully supported
- **YELLOW** is used to highlight key words/key statements that are partially supported
- **GREY** is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

### **Manual and Automated Support**

It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, “A”, “M”, or “AM” is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (A/M).

## 2 Assessment Scope

### 2.1 Business Process Framework Level 2 Scope

### eTOM - UCB mapping

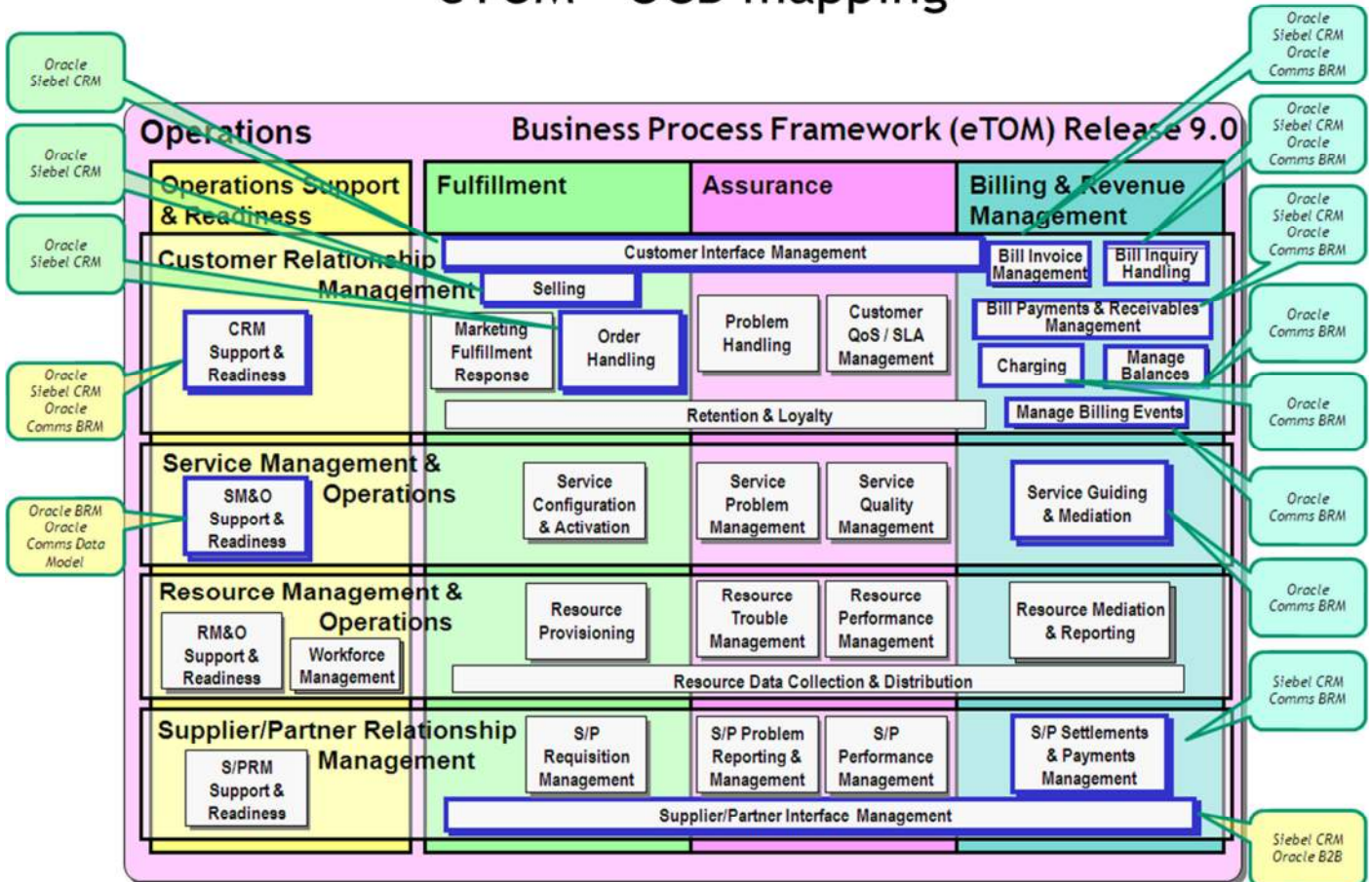


Figure 2.1 represents Business Process Framework Level 2 processes (blue background) that were presented in scope for the assessment, and the textual callouts represent the framework and component solution of the Oracle Unified CRM & BRM Solution that were assessed and support the corresponding eTOM processes.

# eTOM - UCB mapping

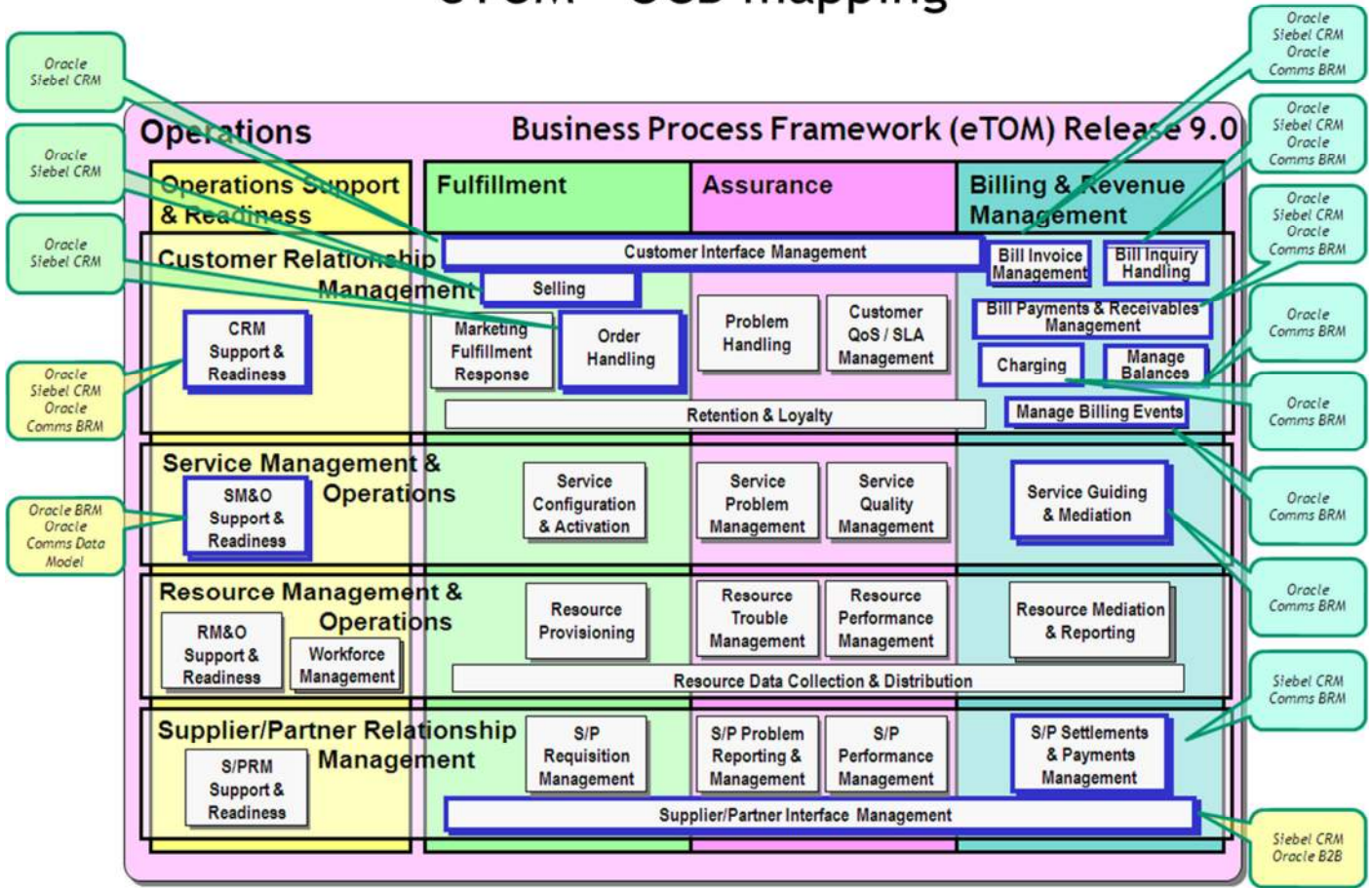


Figure 2.1 Business Process Framework Level 2 Scope<sup>1</sup>

<sup>1</sup> Note that some processes were assessed as part of the Oracle RODOD Conformance Certification Assessment.



## 2.2 Product Scope

Figure

2-2

# eTOM - UCB mapping

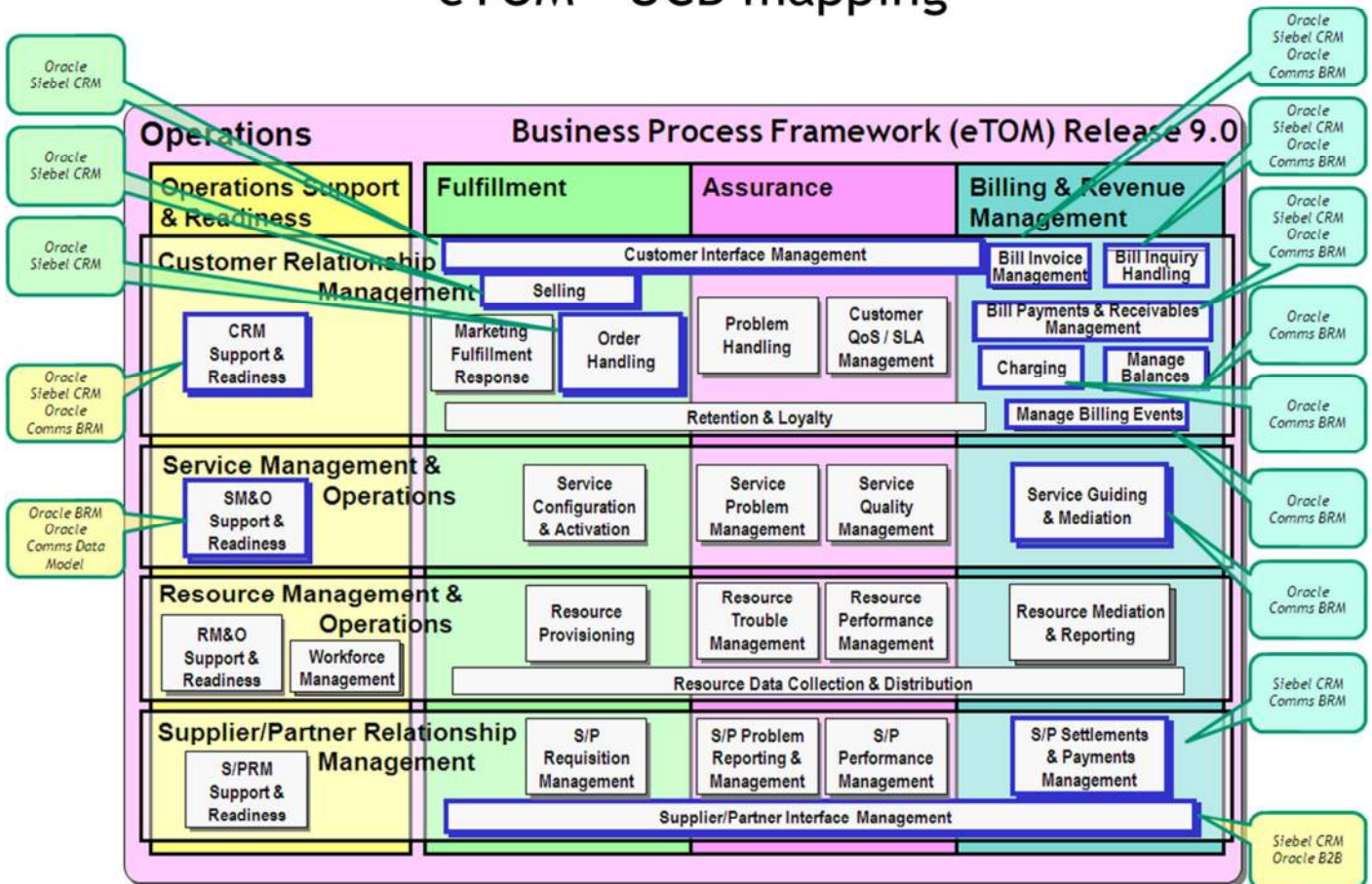


Figure 2.1 represents the Oracle Unified CRM & BRM Solution underpinned by the PLM (Product Lifecycle Management) and product modeling methodologies. The Oracle solution that is presented in scope is shown with a blue border. The textual callouts represent the TM Forum Business Process Framework Level 2 processes that were assessed and that are supported by Oracle according to the Conformance Results in Chapter 4.

# UCB-eTOM mapping – Existing UCB Solution

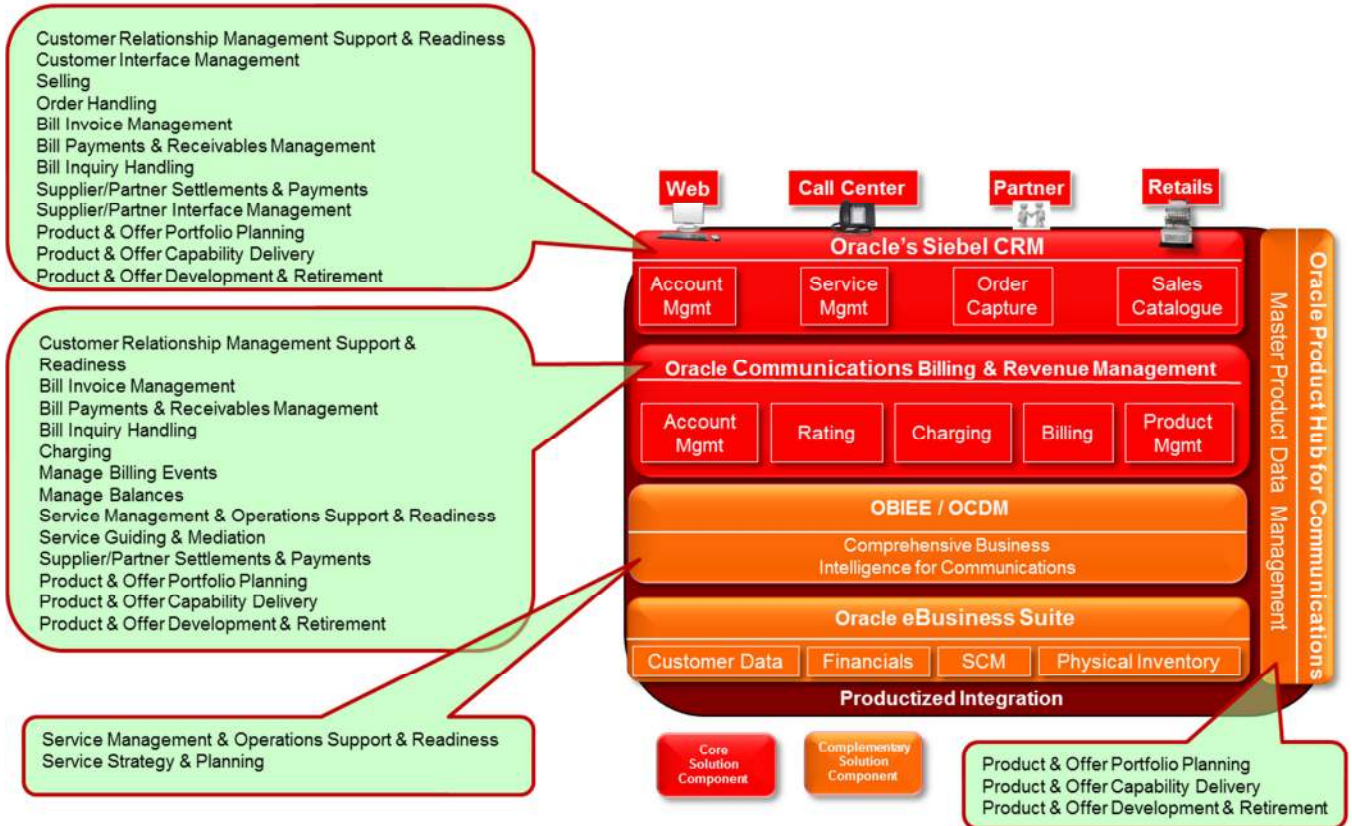


Figure 2.2 Oracle Unified CRM & BRM – Solution Scope<sup>2</sup>

<sup>2</sup> Note that some processes were assessed as part of the Oracle RODOD Conformance Certification Assessment.



### 3 Self-Assessment – Process Mapping Descriptions

The following sections include the Mapping Tables submitted as output from the self-assessment process and reviewed by the TM Forum Subject Matter Expert.

#### 3.1 Customer Relationship Management [1.1.1]

##### 3.1.1 Customer Relationship Management Support & Readiness [1.1.1.1]

| Business Process Framework Process Element                 | Software Vendor Mapping   |  |
|--|---|--|
| 1.1.1.1 - CRM - Support & Readiness                        | Alignment   | Mapping Comment  |
| <p><b>1.1.1.1.13 - Support Bill Invoice Management</b></p> | <p>Siebel Communications Guide Page 63</p> <p>Oracle BRM Technical Whitepaper Page 47</p> | <p><b>Brief Description</b></p> <p>Ensure that all information, materials, systems and resources are available so that the Bill Invoice Management processes can be completed without delay.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Support Bill Invoice Management processes is to make sure that there is capability (for example, information, materials, systems and resources) so that the Bill Invoice Management processes can operate effectively. (A/M)</p> <p><i>The UCB Solution provides process integration for Bill Invoice Management between Siebel, CRM and Oracle BRM. (A/M)</i></p> <p><i>In the USB Solution the Billing Profile manages all information that are required in the Bill Invoice Management (A)</i></p> <p><i>The BRM Operations Management Framework monitors materials, systems and resources to make sure Bill Invoice Management processes can operate effectively. (A)</i></p> <p><i>For example BRM Operations Management Framework collects information from all Processes (Rating for Instance) that BRM needs to support the Bill Invoice process.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>BRM Documentation · System Administration Guide - Monitoring and maintaining your BRM system - About KPI status and alert notifications</p> | <p>Examples are information needed to generate invoices like taxes, charges, prices, etc., (A)</p> <p>BRM provides a utility to ensure that all information needed to generate in invoice is available. This is done according to KPI's. In case KPI's are missed a notification is created.<br/>This is the case for example if information are missing to calculate taxes.</p>  |
|  | <p>Order to Bill 2.5 Implementation Guide Page 148</p>   | <p>information needed to deliver bills to customers such as address formats and post/zip codes structures, (A)</p> <p>Information needed to delivers bills to the customer is included in the Billing Profile. For a bill profile address, the city, state, and zip are required. (A)</p> <p>systems needed to create bills, requests for provisioning of additional resources where it has been identified that current levels will impact on timely bill preparation. (A)</p> |
|  | <p>Oracle BRM Technical Whitepaper Page 46: Centralized Management Console</p>   | <p>The Oracle Application Management Pack for BRM provides a consolidated view across BRM processes and the process topology. The topology includes the system needed for the Bill Invoice Management process. (A)</p>  |
|  | <p>Oracle BRM Technical Whitepaper Page 46: Performance Alerts</p>   | <p>The Oracle Communications BRM operations management is instrumented to collect appropriate performance information, and compare this data with the predefined configuration settings. Alerts are displayed if performance drops below the predefined thresholds and will impact on timely bill preparation. (A)</p> <p>Where a commercial agreement has been</p>   |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>established with a customer to present a billing invoice in a particular customer specific format (M) these processes are responsible for establishing and maintain the customer specific billing invoice formats, and any interaction with specific customers to modify the format. (A)</p> <p>Siebel Communications Guide Page 63</p> <p>Order to Bill 2.5 Implementation Guide Page 77</p> <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 22</p> <p>BRM Documentation · Billing Customers · Setting up invoices - Designing and generating invoices in Oracle Business Intelligence Publisher - Designing invoices</p> <p>Siebel Communications Guide Page 63<br/>Agent Assisted Billing Care 2.5 Implementation Guide Page 22</p> | <p><i>The UCB Solution uses the CRM Billing Profile to manage the Bill Invoice Preferences of a customer.</i></p> <p><i>In the Billing Profile the Bill Type is used to define/modify the customer specific format (Bill Invoice template to be used). (M)</i></p> <p><i>The Billing Profile information is created/modified in BRM in the context of an order. (A)</i></p> <p><i>The Bill Invoice template design is done using Oracle BI Publisher, which is an integrated Component in the Oracle BRM Solution. (M)</i></p> <p>These processes maintain lists of customers who are eligible for receiving bills in electronic format, and maintain the form of electronic format to be used on a customer basis. (A)</p> <p><i>In the Billing Profile the Bill Media information is managing the delivery format of Bill Invoices. List of Bill Media includes for instance Email or Mail. (A)</i></p> <p>Support Bill Invoice Management processes define</p> |



| Business Process Framework Process Element                                    | Software Vendor Mapping  |  |
|---|--|--|
|   | <p>Siebel Communications Guide Page 64</p> <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 22</p> <p>BRM Documentation · Billing Customers · Setting up and running billing - About billing- About billing cycles</p> <p>Oracle BRM Technical Whitepaper Page 48/49</p> | <p>the billing cycles and respective dates (A) according to cash flow needs as established by Financial Management processes. See Note 3</p> <p><i>The Billing Profile also manages the Billing Cycle Frequency (monthly, yearly, quarterly, etc.). (A) For every Billing frequency BRM manages the respective accounting days of month (DOM). BRM determines the accounting day of month (DOM) by the billing segment and/or the customer’s account. (A)</i></p> <p>These processes undertake trend analysis on invoice generation, production and distribution issues, including volume per billing cycle (A/M)</p> <p><i>Oracle BRM captures and save the performance related information during a specified time period(A). This will enable users to compare and analyze system performance between different time periods and provide information for future trends. (M)</i></p> |
| <p><b>1.1.1.1.14 - Support Bill Payments &amp; Receivables Management</b></p> |  | <p><b>Brief Description</b></p> <p>Ensure that all information and systems are available so that the Bill Payments &amp; Receivables Management processes can be completed without delay.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Support Bill Payments &amp; Receivables Management processes is to make sure that there is capability (for example, established collection channels, information and systems) so that the Bill Payments &amp; Receivables Management processes can operate effectively. (A/M)</p> <p><i>The UCB Solution provides process integration for</i></p>  |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
|  | <p>Siebel Communications Guide Page 128</p>  | <p><i>Bill Payments &amp; Receivables Management between Siebel, CRM and Oracle BRM.</i></p> <p><i>In the UCB Solution the CSR's can capture am view customer payments using Siebel CRM. (M)</i></p>   |
|  | <p>Oracle BRM Technical Whitepaper Page 47</p>   | <p><i>The BRM Operations Management Framework monitors materials, systems and resources to make sure Payments &amp; Receivables Management processes can operate effectively. (A)</i></p>  |
|  | <p>BRM Documentation · Managing Payments and A/R · Managing Payments · Collecting overdue balances - Understanding Collections Manager - About Collections Manager</p> | <p><b>Examples are collection channels capable of processing customer bill payments, (...) (A)</b></p> <p>BRM provides a Collections Manager to:</p> <ul style="list-style-type: none"> <li>• Configure collections criteria</li> <li>• Determine which bills have overdue balances</li> <li>• Apply your collections criteria to those bills</li> <li>• Perform automatic collections activities, such as imposing late fees and sending dunning letters</li> <li>• Initiate manual collections activities through a CSR</li> </ul> <p><b>(...) information on payments done by customers, systems needed to process the payments and make the customer bill account balance. (A/M)</b></p> |
|  | <p>Siebel Communications Guide Page 135<br/>Page132</p>  | <p><i>The UCB Solution provides process integration for customer bill payments using the CRM. A CSR can capture payments for a customer on Account-Level Payments” or Invoice-Level Payments. (M)</i></p> <p><i>Using the Process Integration for accessing or updating Billing information in Siebel a CSR's get full visibility of customer payments. (M)</i></p>  |
|  | <p>BRM Documentation · Managing Payments and A/R · Managing Payments · Collecting overdue balances - Understanding</p>   | <p><i>When a customer is doing a payment his account balance is updated accordingly</i></p> <p><i>An account is removed from collections when the overdue amount and any late fees are paid or when the debt is written off.</i></p> <p><i>If no payment is received as the result of the first collections action, additional steps can be taken.(A)</i></p>  |



| Business Process Framework Process Element             | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>Collections Manager - About Collections</p><br><p>BRM Documentation · BRM Reports Guide -BRM base reports - Accounts receivable reports</p><br><p>Oracle BRM Technical Whitepaper Page 46: Performance Alerts</p> | <p>These processes undertake trend analysis on customer billing debts, alerting when pre-determined thresholds are tended to be exceeded. (A)</p> <p>Oracle BRM ships with a number of standard Reports for Bill Payments &amp; Receivables including:</p> <ul style="list-style-type: none"> <li>• Accounts Receivable Summary report</li> <li>• Accounts Receivable Detail report</li> <li>• Payments Summary report</li> <li>• Payments Detail report</li> <li>• Reversals Summary report</li> <li>• Reversals Detail report</li> <li>• Refunds Summary report</li> <li>• Refunds Detail report</li> <li>• Bad Debt Write-Offs report</li> </ul> <p>(A)</p> <p>The Oracle Communications BRM operations management allows defining performance Thresholds and alerts are created if performance drops below the predefined thresholds. (A)</p> |
| <p><b>1.1.1.15 - Support Bill Inquiry Handling</b></p> | <p>Siebel Communications Guide Page 128</p>  | <p><b>Brief Description</b></p> <p>Allow different operations to be performed on the managed balance.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Support Bill Inquiry Handling processes is to make sure that there is capability (for example, information, systems and resources) so that the Bill Inquiry Handling processes can operate effectively. (A/M)</p> <p>The UCB Solution provides process integration for Support Bill Inquiry Handling between Siebel, CRM and Oracle BRM including:</p> <ul style="list-style-type: none"> <li>• Viewing Service Balance &amp; Account Balances</li> <li>• Viewing Unbilled</li> <li>• Viewing Bills</li> <li>• Viewing Payments</li> <li>• Viewing Adjustments</li> <li>• Viewing Invoices</li> </ul>       |





| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
|  | <p>Oracle BRM Technical Whitepaper Page 47</p>                                 | <p>(M)</p> <p><i>The BRM Operations Management Framework monitors materials, systems and resources to make sure Bill inquiry handling processes can operate effectively. (A)</i></p>   |
|  | <p>Siebel Communications Guide Page 128: Accessing Billing Information</p>     | <p><b>Examples are information on how to respond to current billing issues being raised by customers,</b></p> <p><i>To resolve customer inquiries, CSR's first find the billing account. The CSR can access the most recent invoice or retrieve past invoices. They can view invoice details, such as line items, after selecting the invoice. In addition, they can view the image of an already sent invoice bill. (M)</i></p> <p><i>In the billing profile portal a CSR can view details about a billing profile, including balance groups, unbilled usage, bills, payments, and adjustments. (M)</i></p> |
|  | <p>Oracle BRM Technical Whitepaper Page 46: Centralized Management Console</p> | <p><b>systems needed to create customer bill inquiry and complaint reports, requests for provisioning of additional resources where it has been identified that current levels will impact on timely billing complaint handling. (A)</b></p> <p><i>The Oracle Application Management Pack for BRM, Siebel and AIA provide a consolidated view across BRM processes and the process topology. The topology includes the system needed for the Bill Inquiry Handling process. (A)</i></p>  |
|  | <p>Oracle BRM Technical Whitepaper Page 46: Performance Alerts</p>             | <p><i>The Oracle BRM operations management is instrumented to collect appropriate performance information, and compare this data with the predefined configuration settings. Alerts are displayed if performance drops below the predefined thresholds and will impact on timely billing complaint handling. (A)</i></p>   |
|  | <p>Siebel Communications Guide Page 141 Page 236</p>                           | <p><b>These processes are responsible for managing billing policies associated with customer billing dispute settlements. (M)</b></p> <p><i>When a customer logs a Bill dispute an Adjustment request is created using the CRM BRM Process Integrations. (M)</i></p>   |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
|  | <p>Siebel Workflow Guide<br/>Page 340</p><br><p>BRM Documentation ·<br/>BRM Reports Guide<br/>- BRM base reports<br/>- Miscellaneous Adjustments reports</p> | <p><i>The Policy execution is done in the Workflow process that is triggered on Adjustment request submission.. (A)</i></p> <p><i>The Policy Definition is done in Siebel Workflow administration. (M)</i></p> <p><b>These processes undertake trend analysis on billing queries and complaints.</b></p> <p>BRM provides standard reports enabling undertaking trend analysis to billing queries and complaints. (M)</p> |



### 3.1.2 Customer Interface Management [1.1.1.2]

These following three Level 3 processes within the Customer Interface Level 2 process were assessed via the ORACLE RODOD Solution Conformance Assessment.

- 1.1.1.2.1 Manage Contact
- 1.1.1.2.2 Manage Request (Including Self Service)
- 1.1.1.2.4 Mediate & Orchestrate Customer Interactions

These processes cover 3 of the 4 processes defined for Customer Interface Management.

For further details see the ORACLE RODOD Solution Conformance Certification Results at:

<http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html>



### 3.1.3 Selling [1.1.1.4]

These following three Level 3 processes within the Selling Level 2 process were assessed via the ORACLE RODOD Solution Conformance Assessment.

- 1.1.1.4.4 Acquire Customer Data
- 1.1.1.4.3 Negotiate Sales Contract
- 1.1.1.4.5 Cross/Up Selling
- 1.1.1.4.7 Manage Sales Accounts

These processes cover 4 of the 7 processes defined for Selling.

For further details see the ORACLE RODOD Solution Conformance Certification Results at:

<http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html>



### 3.1.4 Order Handling [1.1.1.5]

These following three Level 3 processes within the Order Handling Level 2 process were assessed via the ORACLE RODOD Solution Conformance Assessment.

- 1.1.1.5.1 Determine Customer Order Feasibility
- 1.1.1.5.2 Authorize Credit
- 1.1.1.5.4 Track & Manage Customer Order Handling
- 1.1.1.5.5 Complete Customer Order
- 1.1.1.5.6 Issue Customer Orders
- 1.1.1.5.7 Report Customer Order Handling
- 1.1.1.5.8 Close Customer Order

These processes cover all 7 processes defined for Order Handling.

For further details see the ORACLE RODOD Solution Conformance Certification Results at:

<http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html>



**3.1.5 Bill Invoice Management [1.1.1.10]**

| Business Process Framework Process Element                                       | Software Vendor Mapping  |   |
|--|--|---|
| 1.1.1.10 - Bill Invoice Management   | Alignment  | Mapping Comment   |
| <p><b>1.1.1.10.1 - Apply Pricing, Discounting, Adjustments &amp; Rebates</b></p> | <p>BRM Documentation - Understanding BRM - About charging customers for your services - About billable events</p><br><p>BRM Documentation - Understanding BRM - Introducing BRM - About charging customers for your services - About rating / Defining how to rate billable events in your price list</p> <p>BRM Documentation - Setting up Pricing and Rating - About creating a pricelist - About Price lists / Glossary</p> | <p><b>Brief Description</b><br/>                     Ensure that the bill invoice is reflective of all the commercially agreed billable events and any bill invoice adjustments agreed between the Service Provider and the customer. (A)</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><i>To ensure all commercially agreed billable events and any bill invoice adjustments are reflected for every Customer bill, Oracle BRM manages an account balance for Every Subscribed customer.</i></p> <p><i>The Account Balance is impacted by billable event. A credit balance impact adds to the balance, a debit balance impact subtracts from the balance. To determine how much to charge a customer for a billable event, BRM rates the event. During Rating BRM measures the event, applies the customer specific charge to the resulting measurement and finally adds the charge to the customer’s account balance.</i></p> <p><i>BRM rates, usage events, product purchase events, monthly subscription events, product cancellation events and administrative events. The balance impacts for billable event is stored in a bill item.</i></p> <p><b>Extended Description</b><br/>                     The purpose of the Apply Pricing, (A)</p> <p><i>Price lists are used to determine how much your customers pay for your services and merchandise Price lists define how Oracle Communications Billing and Revenue Management (BRM) rates events, and consist of the following components: resources, rates, products, deals, and plans</i></p> <p><b>Discounting, (A)</b><br/> <i>Discounts are used to reduce the charges associated with billable events like usage charges, purchase fees and recurring charges. You can discount events at rating time, in real time and by pipeline batch rating, and at billing time.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up discounting - About Billing time discounts</p>                                 | <p><i>Billing-time discount is determined at the end of the billing cycle. This allows you to grant discounts based on resources used during a billing cycle</i></p>  |
|  |  | <p>Adjustments &amp; Rebates process is to ensure that the bill invoice is reflective of all the commercially agreed billable events and any bill invoice adjustments agreed between the Service Provider and the customer. (A)</p>   |
|  | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up discounting - About Discounting</p>  | <p><i>An adjustment is a transaction that debits or credits a customer's account by changing the amount due for a bill item. Adjustments can also change non-currency balances in the account. An adjustment can be triggered through a customer complain, credit or rebate.</i></p>  |
|  | <p>BRM Documentation - Managing Payments &amp; A/R - Managing A / R - Configuring adjustments, disputes, and settlements - About adjustments</p> | <p><i>Adjustments can be performed on a variety of levels, as appropriate to the situation. The way that BRM processes adjustments and records the adjustment's balance impact varies slightly from level to level, as follows:</i></p> <ul style="list-style-type: none"> <li>• <i>A/R and individual account level</i></li> <li>• <i>Subscription service level</i></li> <li>• <i>Bill level</i></li> <li>• <i>Item level</i></li> <li>• <i>Event level</i></li> </ul>            |
|  | <p>BRM Documentation - Managing Payments and A/R - Managing Accounts Receivable - How BRM stores AR information</p>                              | <p><i>Adjustment are stored as items, likewise any other events that impact balance. At billing item all those items are picked up by billing process and form the basis of the invoice.</i></p>  |
|  | <p>BRM Documentation - Billing Customers - Calculating taxes - About taxation</p>  | <p>In addition, it ensures that the appropriate taxes, rebates (i.e. missed customer commitments) and credits are applied to the customer's bill invoice(s). (A)</p> <p><i>BRM can calculate taxes for billable events or can use a 3rd party tax software to do tax calculation. You can choose to apply taxes during real-time rating, during pipeline batch rating, during billing, or a combination of the three.</i></p> <p>This process contains the account and customer</p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>BRM<br/>Documentation - Understanding BRM - What is BRM?</p>  | <p>specific pricing, charges, discounting, credits and taxation for services delivered to the customer by the Service Provider. (A)</p> <p><i>In BRM rating calculates how much a customer should be charged for usage, subscription fees, and so forth. Rating determines the charges, stores the charges in bill items, and updates the customer's account balance.</i></p> <p><i>Billable events can be rated in a variety of ways, for instance charge based on time of day; charge for access based on how long a customer is connected in a single session; charge for calls based on the number of calls.</i></p> |
|  | <p>BRM<br/>Documentation - Setting Up Pricing and Rating - Setting up discounting - About discounting</p>  | <p><i>Discounts are used to reduce the charges associated with billable events like usage charges, purchase fees and recurring charges. Discounts are separate, purchasable items.</i></p>   |
|  | <p>BRM<br/>Documentation - Managing Payments and A/R - Managing Accounts Receivable - About Adjustments</p>  | <p><i>An adjustment is a transaction that debits or credits a customer's account by changing the amount due for a bill item. An adjustment can be triggered through a customer complain, credit or rebate.</i></p>   |
|  | <p>BRM<br/>Documentation - Billing Customers - Calculating taxes - About calculating taxes</p>   | <p><i>BRM can calculate taxes for billable events or can use a 3rd party tax software to do tax calculation.</i></p>   |
|  | <p>BRM<br/>Documentation - Setting Up Pricing and Rating - Setting up pipeline rating - Configuring EDR input processing - About the input process</p> | <p>It accepts events that have been collected, translated, correlated, assembled, guided and service rated. (A)</p> <p><i>To process incoming data, BRM convert data into an internal format. These process incoming data can be external files, such as CDRs or messages based on Diameter or MBI protocols for processing AAA requests. BRM also accepts events that are pre-rated, so Pricing was determined by content provide.</i></p> <p>It takes these events and determines the account or customer specific pricing, charges, discounts, and</p>  |





| Business Process Framework Process Element              | Software Vendor Mapping   |  |
|---|---|--|
|   | <p>BRM Documentation - Setting Up Pricing and Rating - Rating implementation and customization - How Rating works - How BRM rates and records usage events</p> <p>BRM Documentation - Managing Payments and A/R - Managing Accounts Receivable - Configuring adjustments, disputes, and settlements - About adjustments</p> <p>BRM Documentation - Understanding BRM - About setting up your services - About charging customers for your services About rating</p> | <p>taxation that should be delivered to the invoice(s) for the customer. (A)</p> <p>When BRM rates and records usage events it</p> <ol style="list-style-type: none"> <li>1. Determines whether the event is pre-rated</li> <li>2. Adjusts available balances to include reservations</li> <li>3. Determines whether the event is discountable</li> <li>4. Determines how much to charge for the event</li> <li>5. Calculates taxation(Alternatively BRM also supports taxation during Billing)</li> <li>6. Applies the event’s balance impact</li> <li>7. Records the event.</li> </ol> <p>It reviews any agreed adjustments agreed in the previous billing period and includes these to the bill invoice. (A)</p> <p>An adjustment is changing the amount due for a bill item which is impacting the customer Balance. Adjustment can be made on, Subscription service, Bill, Item &amp; Event Level.</p> <p>Billing collects existing balance impacts and creates a bill. So any adjustments agreed in the previous billing period are included in the bill invoice.</p> <p>This process can occur in real-time as events are service rated, or can be on a scheduled on a periodic basis at the Service Provider’s discretion.(A)</p> <p>BRM supports both real-time rating and pipeline batch rating to generate balance impacts. Billing collects existing balance impacts and creates a bill.</p> |
| <p><b>1.1.1.10.2 - Create Customer Bill Invoice</b></p> |   | <p><b>Brief Description</b></p> <p>Production of a timely and accurate invoice in accordance with the specific billing cycles and reflective of the final charges for services, together with any adjustments, delivered to the customer by the Service Provider and respective trading partners. (A/M)</p> <p>Covered within the body of the Extended Description.</p>  |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
|--|---|--|
|  | <p>BRM<br/>Documentation - Billing Customers - Setting up Invoices - About Invoices</p> <p>BRM<br/>Documentation - Billing Customers - Setting up invoices - Overview of BRM and BI Publisher invoice generation</p> <p>Oracle BRM Technical Whitepaper, Page 25: Invoicing</p> | <p><b>Extended Description</b></p> <p>The primary purpose of the Create Customer Bill Invoice process is the production of a timely and accurate invoice in accordance with the specific billing cycles and reflective of the final charges for services, together with any adjustments, delivered to the customer by the Service Provider and respective trading partners</p> <p>This process contains the invoicing components of the Service Provider's business. (A)</p> <p><i>BRM is used to generate invoices and provide them to customers. An invoice lists the balance information for a customer's bill.</i></p> <p><i>When billing runs, a bill is produced for every bill unit in an account and invoices are generated for each bill. There are two invoice types provided: detailed and summary.</i></p> <p><i>BRM invoices present a set of data related to service usage, charges, discounts, promotions, taxes, and surcharges.</i></p> <p><i>Refer to BRM Documentation &gt; Billing Customers &gt; Setting Up Invoices &gt; Designing and Generating Invoices &gt; Generating Invoices for more details</i></p> <p>This includes the design and development of the Service Provider's invoicing process. (A/M)</p> <p><i>The Oracle Business Intelligence (BI) Publisher allows the document handling for invoicing to be customized as desired, and supports flexibility in the invoicing process on this basis</i></p> <p>the rendering/formatting of an invoice, the delivery of an electronic copy of an invoice to customers and the processes that verify invoice quality prior to distribution to the customer in electronic form, or to the process responsible for physical invoice production and distribution. (A/M)</p> <p><i>BRM is integrated with Oracle Business Intelligence (BI)Publisher to generate content-rich invoice documents in various formats: PDF, RTF, HTML. Two pre-built sample invoice templates targeted at individual consumers and corporate customers invoice in the communications and media industries respectively are included.</i></p> <p><i>BRM generates invoices—soft or hard copy—and</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>BRM 7.4 Release Description Document<br/>Page 9: Invoicing Enhancements</p> | <p><i>provides them to customer. Invoices can be generated automatically or manually after a bill run. The format of the invoice can be changed using a custom invoice template. Invoices can be stored in HTML or XML formats.</i></p> <p><i>Oracle BI Publisher also enables merging of data from multiple sources into one document thus allowing for data from a CRM system, like promotional marketing messages, to be inserted into the BRM invoices.</i></p> <p><i>The flow of this process can be viewed as an extension of the company's e-business strategy. In this case, the Service Provider would render an invoice electronically, via the Internet for example. Furthermore, this process provides specifications for the formatting of invoices in different ways and to achieve different publishing possibilities, and supports the creation of different invoice formats for different publication media.(A)</i></p> |
|  | <p>Oracle BRM Technical Whitepaper<br/>Page 26: Invoicing</p>                  | <p><i>The Oracle Communications BRM leverages Oracle BI Publisher to provide multiple ways to publish the generated invoices. Invoices can be made available for Electronic Bill Presentment and Payment (EBPP) application in a self-care environment. In addition, invoices can be mailed or sent to external application for printing, or published via email, fax, ftp.</i></p> <p><i>The process is further responsible for splitting and re-arranging invoices for customers (particularly customers with complex account structures) according to agreements made with these customers.(A)</i></p>  |
|  | <p>Oracle BRM Technical Whitepaper<br/>Page 26: Invoicing</p>                  | <p><i>Operators can create multiple bills for each account for the same billing cycle, with each billing level identified as a bill unit. For example, the customer is able to pay for voice service charges separately from their data service charges through two different bills, or a family account may have an invoice account for the parents and a prepaid account for a child. Each bill may include balances from one or more balance groups. The billing date and accounting type can be set independently for each bill unit. This allows the operator to create either a single bill for the entire account or separate bills for one or more services. Each bill unit can be prepaid or postpaid and may be paid using different payment methods.</i></p>  |
|  | <p>BRM 7.4 Release</p>   |  |



| Business Process Framework Process Element             | Software Vendor Mapping   |   |
|--|---|---|
|  | <p>Description Document, Page 9: Invoicing Enhancements</p> <p>Oracle BRM Technical Whitepaper, Page 26: Invoicing</p>  | <p><i>Invoice data for hierarchical accounts are grouped by parent and child, listing services and their respective charges, parent and child account names, and summary of parent and child account charges.</i></p> <p>Additionally these processes store the customer invoice for a period of time to address regulation and/or internal requirements, during which they can be accessed to support any customer or regulator agency inquiries on bill invoices.(A)</p> <p><i>BRM stores invoices in HTML or XML format. Invoices can also be stored in a separate database. This allows providers to store a larger number of invoices; and provides the ability to view, e-mail, and print invoices without affecting the BRM database.</i></p>  |
| <p><b>1.1.1.10.3 – Produce and Distribute Bill</b></p> | <p>Oracle BRM Technical Whitepaper Page 26: Invoicing</p> <p>BRM Documentation - Billing Customers - Setting up invoices - Designing and generating invoices - Generating invoices - Generating Invoices - How invoices are generated</p> | <p><b>Brief Description</b><br/>Physical production and distribution of bills to customers in accordance with the specified billing cycle.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of Produce and Distribute Customer Bill Invoice process is the physical production and distribution of bills to customers in accordance with the specified billing cycles. This process is responsible for all activities associated with ensuring physical bill is delivered to customers. (A)</p> <p><i>Invoices are made available for Electronic Bill Presentment and Payment (EBPP) in a self-care environment, can be mailed or sent to external application for printing, or published via email, fax, ftp.</i></p> <p>The responsibilities of the process include, but are not limited:</p> <ul style="list-style-type: none"> <li>Establishing and managing the physical bill production cycle;(A)</li> </ul> <p><i>There is a daily billing to create an invoice for each account that is billed on that day.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
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|  | <p>BRM Documentation - Billing Customers - Setting Up Invoices - Designing and generating Invoices - Sending invoices to the customers</p> <p>BRM Documentation - Billing Customers - Setting Up Invoices - Designing and generating Invoices - About Invoices - BRM invoice features</p> <p>BRM Documentation - Billing Customers - Setting up and running billing - About bill run management - About Managing billing runs</p> <p>BRM Documentation - Reference - Utilities and scripts - Invoice</p> | <ul style="list-style-type: none"> <li>Establishing the requirements for, and managing the agreed commercial arrangements with, appropriate outsourced suppliers of the production and distribution capabilities;</li> </ul> <p><i>See Note 3: This process is managed by Supply Chain Capability Delivery and it is not part of this initial certification.</i></p> <ul style="list-style-type: none"> <li>Delivery of invoice information to the physical production processes; (A)</li> </ul> <p><i>The physical production process, such as email or printing is guaranteed through integration to third-party applications</i></p> <p><i>You can also make invoices available on your customer self-care Web site for customers to view.</i></p> <ul style="list-style-type: none"> <li>Co-ordinating with promotional processes for any billing insertions to be included with the bill; (A)</li> </ul> <p><i>If you use the BRM-Business Intelligence Publisher Integration framework to generate invoice documents, you can add marketing messages, customer information from a customer relationship management (CRM) system, and messages from accounting department to the invoice.</i></p> <ul style="list-style-type: none"> <li>If internal processes are used, managing availability of paper and envelope volumes to meet the needs of the physical production process;</li> </ul> <p><i>This process is supported by third parties companies or by applications that interact with BRM.</i></p> <ul style="list-style-type: none"> <li>If internal production facilities are used, managing the production runs to create the bills; (M)</li> </ul> <p><i>Managing the production runs to create bills is achieved by:</i></p> <ul style="list-style-type: none"> <li>Reducing the load and duration of billing runs.</li> <li>Billing one or more specified accounts.</li> <li>Fine-tuning bill due dates</li> </ul> <ul style="list-style-type: none"> <li>Quality management of the physical production and distribution processes.(A)</li> </ul> |



| Business Process Framework Process Element | Software Vendor Mapping     |   |
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|  | utilities -<br>pin_inv_send | <p><i>BRM track whether the invoice has been successfully sent to the correct distribution process</i></p> <p>Note that in the above processes for establishing arrangements with outsourced suppliers that the Supply Chain Capability Delivery processes are used as the vehicle for creating the commercial agreements.</p> <p><i><u>See Note 3:</u> The process Supply Chain Capability Delivery is not part of this initial certification.</i></p> |



### 3.1.6 Bill Payments & Receivables Management [1.1.1.11]

| Business Process Framework Process Element        | Software Vendor Mapping                                |  |
|---|--|--|
| 1.1.1.11 - Bill Payments & Receivables Management | Alignment  | Mapping Comment  |
| 1.1.1.11.1 - Manage Customer Billing              | <p>Order to Bill 2.5 Implementation Guide Page 139</p> | <p><b>Brief Description</b><br/>                     Ensure effective management of the customer's billing account as it relates to the products purchased and consumed throughout the appropriate billing cycle.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/>                     The primary purpose of this process pertains to effective management of the customer's billing account as it relates to the products purchased and consumed throughout the appropriate billing cycle.<br/>                     (A/M)</p> <p><i>The process integration for customer management enables the synchronization of customer information between Siebel CRM and Oracle BRM. Customers are created and mastered in Siebel CRM. (M)</i></p> <p><i>The process integration for customer management provides three integration flows:</i></p> <ul style="list-style-type: none"> <li>• <i>The create/sync customer account, which interfaces customers to Oracle BRM (run during the Order Management processing flow). (A)</i></li> <li>• <i>The update customer account integration flow, which updates account profile information (such as address, name, and contact) from Siebel CRM to Oracle BRM. (A)</i></li> <li>• <i>The update account status integration flow (used in conjunction with Collection Management process), which updates the account status from Siebel CRM to Oracle BRM. (A)</i></li> </ul> <p><i>Account information is captured (for Instance by a CSR) at the beginning of the order process. When a customer places an order, the first step of the process</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping                                      |   |
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|  | <p>Order to Bill 2.5 Implementation Guide<br/>Page 77-83</p> | <p><i>is to determine whether the customer is new or existing. If this is an existing customer, the customer record can be found and selected, and the customer order details are captured. If this is a new customer, a new account is created. The billing preferences (bill medium, bill frequency, payment type, billing type, billing contact, bill cycle data, and so on) are also captured. After the account information is captured, the order details are captured. The order is submitted to the back-end systems (see RODOD Solution for Details) for processing.</i></p> <p><i>The process integration for order management provides a web service, that takes an order as input and calls the necessary enterprise billing service to create accounts and their components (such as billing preferences and payment methods) referenced on a new service order or change service order, in BRM. (A)</i></p> <p><i>Once the Account is created or updates in BRM the Process integration creates / updates</i></p> <ul style="list-style-type: none"> <li>• <i>service instances and purchased product and discount instances are created / updated in BRM</i></li> <li>• <i>pricing information such as price or discount overrides, discounts, and one-time and penalty charges</i></li> <li>• <i>service identifiers (for example, phone number for land-based or wireless phone service)</i></li> <li>• <i>Siebel Promotion information for invoice display.</i></li> </ul> <p><i>The service that interfaces the order to the billing system indicates on its return whether the lines were successfully interfaced to billing. (A)</i></p> <p><i>So the Process Integration manages the customer's billing account, the products purchased and billing cycle across Siebel CRM and Oracle BRM. (A)</i></p> <p><b>This process focuses on managing changes to the customer's billing account (for example, customer billing address, etc.) as it relates to the customer's service portfolio, such as ensuring that the correct purchased products are assigned to the customer's billing account for accurate billing. (A/M)</b></p> |





| Business Process Framework Process Element          | Software Vendor Mapping  |  |
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|   | <p>Order to Bill 2.5 Implementation Guide<br/>Page 139</p>                                 | <p>Customers often update account information (for example, a name or address) (M). When the account status is updated in Siebel CRM, the changes are communicated to Oracle BRM through the customer management process integration. (A)</p>  |
|   | <p>Order to Bill 2.5 Implementation Guide<br/>Page 80</p>                                  | <p>Updates of service instances, purchased product and discount instances in the billing system are part of the order interface to billing.<br/>The integration supports ADD, DELETE, UPDATE, SUSPEND, RESUME, MOVE-ADD, and MOVE-DELETE actions. It supports communicating updates to the service identifier, billing account, billing profile, and price changes on existing service. (A)</p>  |
|   | <p>Order to Bill 2.5 Implementation Guide<br/>Page 178</p>                                 | <p>When Processing an Order the UCB Solution ensures that purchased products are assigned correctly to the customer’s billing account for accurate billing. When there is an issue (for Instance BRM does not acknowledge the change) the Process Integration creates an Order Fallout Event which results in a Service Request (Trouble Ticket) in Siebel CRM. (A)</p>  |
| <p><b>1.1.1.11.2 - Manage Customer Payments</b></p> | <p>Oracle BRM Technical White Paper<br/>Page 27</p> <p>Agent Assisted Billing Care 2.5</p> | <p><b>Brief Description</b></p> <p>Collect payments made by the customer and reconcile the payments to the invoices.</p> <p>Covered within the body of the Extended Description.</p> <p><b>Extended Description</b></p> <p>The purpose of the Manage Customer Payments process is to collect payments made by the customer and reconcile the payments to the invoices. (A)</p> <p>In The Oracle Unified CRM and BRM solution, Oracle Communications Billing and Revenue Management (BRM) solution processes payments and payment terms, manages aged receivables, and provides dunning as well as reversals and write offs. BRM flexibly supports multiple payment methods including invoice, credit card, direct debit, voucher top-up, etc. Each account may have multiple payment methods if multiple balances and bills are generated for the account.</p> <p>The BRM application allows allocation of single payment over multiple open bill items.</p> <p>Payments may be entered into the system via integration with a payment gateway (A) or the Payment Process integration between Siebel CRM</p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Implementation Guide<br/>Page 61</p>  | <p>and Oracle BRM. (M)</p> <p>The Siebel CRM to Oracle BRM Payment Process integration supports the following integration scenarios:</p> <ul style="list-style-type: none"> <li>• Create a Payment to capture a payment in Siebel CRM either for an account at the billing profile level or at the invoice level and post the payment in Oracle BRM.</li> <li>• Query List of Payments to view the history of payments in Siebel CRM at both the billing profile level and invoice level by retrieving those records from Oracle BRM.</li> <li>• Search Payment to search for payment records in Oracle BRM to display in Siebel CRM for an account at the billing profile level or at the invoice level</li> </ul> <p>The capture payment feature is used for one-time payments. Siebel CRM captures the payment information and submits it to BRM for processing. BRM processes the payment and returns a confirmation to Siebel CRM, which the customer can keep for records.</p> |
|  | <p>Oracle Payments Datasheet<br/>Page 2: Reduce Costs with Streamlined Processes</p> | <p>The actual payment handling is done by Oracle Payments which offers end-to-end electronic payment processing that includes validation, aggregation, formatting and secure transmission of payments to financial institutions and payment systems. (A)</p> <p>This process is meant to match these payments with the services/invoices delivered to this customer. (A)</p>   |
|  | <p>Oracle BRM Technical White Paper<br/>Page 26</p>                                  | <p>To match Payments BRM offers a flexible Accounts Receivables (A/R) system which allows for two ways of accounting: open item accounting and balance forward accounting.</p> <p>Open item accounting reflects charges from a single period only. For Instance Business customers can indicate which specific line items they want to pay. With this type of accounting, A/R is maintained at each bill level. Any payments and adjustments have to be made against that specific bill. A subscriber is billed only for charges from the bill items in the current bill. If the customer does not pay that bill, the next bill does not include unpaid charges from the previous bill.</p>  |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  |  | <p><i>Balance forward accounting is similar to a credit card account and is the preferred way for automatic payments types and most consumer subscriptions. An ongoing statement reflects the current balance based on past credits and debits. With this accounting type, all previous A/R transactions are moved to the latest bill. All payments and adjustments are performed against the latest bill only. A subscriber bill includes all the charges that a customer owes, including those from previous billing cycles. If a customer does not pay a bill, the next bill includes the charges from the previous bill.</i></p> |
|  | <p>Oracle Payments Datasheet Page 2: Reduce Costs with Streamlined Processes</p>                                     | <p><i>In addition these processes are responsible for establishing, managing and, if required, operating the various payment processes that the Service Provider chooses to establish. (A/M)</i></p> <p><i>Oracle Payments offers a rich library of payment formats that support a variety of payment files and messages. They include EFT disbursements, printed checks, ACH debits, bills receivable remittances, credit card authorizations and settlements. These formats are created as templates in Oracle XML Publisher and can be easily created or modified. (A/M)</i></p>  |
|  | <p>Oracle Payments Datasheet Page 3: Reduce Costs with Streamlined Processes</p>                                     | <p><i>In payment processing, it is critical to ensure that payment messages and files sent to third-party payment systems and financial institutions are valid as well as correctly formatted. Oracle Payments provides an extensive library of payment validations in a flexible framework that allows you to add rules as appropriate. (A)</i></p> <p><i>These processes can include credit/debit/EFT payments using various channels, either directly or through third parties, and cash or cheque payments, either directly or through third parties. (A)</i></p>  |
|  | <p>BRM 7.4 Documentation - Managing Payments and A/R - Managing Payments- About payments - About payment methods</p> | <p><i>By default, BRM supports the following payment methods, how customers can do payments:</i></p> <ul style="list-style-type: none"> <li>• <i>Cash, check, and postal order payment methods</i></li> <li>• <i>Credit card payment method</i></li> <li>• <i>Direct debit payment method</i></li> <li>• <i>Invoice payment method</i></li> <li>• <i>Prepaid payment method</i></li> <li>• <i>Non-paying (subordinate) payment method</i></li> <li>• <i>Undefined payment method</i></li> <li>• <i>Voucher payment method</i></li> <li>• <i>Wire transfer payment method (A)</i></li> </ul>  |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
|  | <p>Oracle Payments Datasheet<br/>Page 2: Reduce Costs with Streamlined Processes</p>                           | <p><i>For Payment handling Oracle Payments offers a rich library of payment formats that support a variety of payment files and messages. They include EFT disbursements, printed checks, ACH debits, bills receivable remittances, credit card authorizations and settlements. (A)</i></p>  |
|  | <p>Oracle Payments Datasheet<br/>Page 2: Choose Flexible Payment Options</p>                                   | <p><i>Oracle Payments supports out-of-the-box integration with leading third party processor model payment systems including: Citibank, Paymentech, First Data Merchant Services (North and South Platforms), and Concord EFS.</i></p>   |
|  | <p>Oracle Payments Datasheet<br/>Page 2: Reduce Costs with Streamlined Processes</p>                           | <p><i>Payment processors and gateways can integrate with Oracle Payments using its public APIs for credit cards, purchase cards and EFT.</i></p>   |
|  |  | <p><b>In all the above cases these processes are responsible for the processes interacting with the customers and/or the third parties. (A/M)</b></p>  |
|  | <p>BRM 7.4 Documentation - Managing Payments and A/R - Managing Payments - About payments - About payments</p> | <p><i>There are three types of payment processing in BRM: automated BRM-initiated, externally initiated and manually initiated payment (for instance by the Siebel CRM to Oracle BRM Payment Process integration).</i></p> <p><i>Automated BRM-initiated payment processing is triggered by BRM and requires no action from customers. Payments processed in this way are those for which a customer is automatically charged, such as credit card and direct debit payments. (A)</i></p> <p><i>To begin processing such payments, BRM sends a customer's payment information to Oracle Payments or an online payment processor.</i></p> <p><i>Externally initiated payments, such as cash or check payments, are triggered by an action from a financial institution. They are usually in response to an invoice that was sent to the customer.</i></p> <p><i>Typically, after such payments are received from a customer, they are sent to a bank. The bank then initiates the payment processing by sending you a list of payments that have been received and deposited. If the bank sends the payment information through a directly integrated third-party service (payment gateway), BRM automatically allocates the payments and updates</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 61</p>  | <p><i>the customer's account balance. If the payment information is not sent through a payment gateway, you use Payment Tool to allocate the payment and update the account.</i></p> <p><i>Payments may also be entered manually for instance via Payment Process integration between Siebel CRM and Oracle BRM. (M)</i></p> <p><b>The processes are also responsible for establishing back-end bank accounts for receipt of the customer payments and for the transfer of funds collected by third parties. (A)</b></p>   |
|  | <p>Oracle Payments Datasheet Page 2: Reduce Costs with Streamlined Processes</p>   | <p><i>Oracle Payments supports a variety of payment messages including bills receivable remittances for both customer payments and for the transfer of funds collected by third parties.</i></p> <p><b>These processes are responsible for reconciling the money received into the bank accounts against the payments expected in the invoices. (A)</b></p> <p><i>To processing payments against Invoices BRM uses a with Payment Batch Tool.</i></p>  |
|  | <p>BRM 7.4 Documentation - Managing Payments and A/R - Managing Payments - Handling payments - Managing externally initiated payments - Allocating payments to bills and items</p> | <p><i>BRM allocates a payment to a specific bill or to individual charges (items) on a bill. A payment batch can contain either bill-level allocations or item-level allocations. You must choose the allocation level before you create a new payment batch. (A)</i></p> <p><i>If you enter a bill number and a payment amount when creating a batch and the payment amount matches the bill amount, the bill is closed automatically when the payment is submitted. If the payment amount does not equal the amount due for the bill, your business policies should handle the underpayment or overpayment. (A)</i></p> <ul style="list-style-type: none"> <li><i>For example, an account has an unpaid bill of \$30 and the customer pays \$35. If the CSR records the payment and indicates the bill number in the payment batch, the bill is closed automatically and the overpayment is allocated to another open bill or recorded at the account level, according to your business policies.</i></li> </ul> |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | <p>Oracle BRM Technical White Paper<br/>Page 26: Financial Management</p> <p>BRM Technical White Paper<br/>Page 30: General Ledger Accounting</p> | <p>Additionally these processes inform the Financial Management on all those payments for updating the ledger. (A)</p> <p>The Oracle Communications BRM solution allows the management of Accounts Receivables (A/R) and the General Ledger (G/L) System.</p> <p>The BRM solution supports traditional general ledger accounting through the use of a general ledger (G/L) interface. G/L account codes are assigned to balance impacts through a configuration file or the BRM UI. As balance impacts occur, the corresponding G/L accounts are affected. The solution supports flexible charge and credit allocation that allows a single charge or credit to be split among G/L account codes. G/L account codes can be assigned to both rated and pre-rated events. Summaries of G/L account impacts can be viewed via standard reports or be exported into external G/L systems. (A)</p> <p>The solution also offers a process Integration for integration of BRM and Oracle E-Business Suite for Revenue Accounting. The process integration for revenue management moves General Ledger (GL) data from BRM to the Oracle E-Business Suite, enabling customers to use Oracle E-Business Suite General Ledger (Oracle GL) as an accounting engine on top of the Oracle BRM application. (A)</p> |
|  | <p>Revenue Accounting 2.5 Implementation Guide<br/>Page 7: Revenue Management Overview</p>  | <p>These processes are responsible for establishing the requirements for, and managing any commercial arrangements agreed with, third party suppliers. (A/M)<br/>Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements. See Note 3.</p> <p>BRM revenue sharing and settlements capabilities provide a convergent platform for settlements between business entities. The settlement and remittance functionality allows providers to share revenue with and pay royalties to third-party partners, which may include other service/network providers or content providers. BRM supports multiple business models such as revenue sharing, wholesale, and resale.<br/>Revenue Sharing and Settlements capabilities provide the following core functionalities:</p> <ul style="list-style-type: none"> <li>Ability to integrate the third-party systems with the BRM Content Manager for the</li> </ul>  |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
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|  | <p>Oracle BRM Technical White Paper<br/>Page 28 / 29</p>                                     | <p><i>authentication and authorization of services.</i></p> <ul style="list-style-type: none"> <li>• <i>Ability to flexibly define and charge the customers for third party products such as content and commerce services.</i></li> <li>• <i>Ability to settle the revenue with partners for various business models such as wholesale, resale, and revenue sharing. In addition, it is also possible to use this manager to generate commission statements to dealers or sales agents to compensate for services sold.</i></li> <li>• <i>Ability to delay revenue sharing with a partner until after the partner service is billed to the customer or after the payment has been made by the customer.</i></li> <li>• <i>It is also possible to do bi-directional settlements such as a partner paying a service provider a rental fee to connect to their network while, simultaneously, the service provider shares revenues for the partner’s services that have been provided to the service provider’s subscribers.</i></li> </ul> <p><i>To establish and manage Oracle Partner Relationship Management (PRM) is used. It manages the process from registering partners to revenue settlements with partners. (A/M)</i></p> <p><i>To the extent that processing of any payments is undertaken internally, i.e. cheque processing, these processes are responsible for managing the operation and quality of the internal processing. (A)</i></p> |
|  | <p>Oracle BRM PRM Whitepaper<br/>Page 6</p>  | <p><i>Oracle Payments offers a rich library of payment formats that support a variety of payment files and messages, including internal processing. They also include among other printed checks.</i></p>   |
|  | <p>Oracle Payments Datasheet<br/>Page 2: Reduce Costs with Streamlined Processes</p>         | <p><i>To manage operation and quality Oracle Payments provides a dashboard, allowing payment administrators to manage every aspect of the process across multiple organizations from a single page. The dashboards provide an overview of the payment process status. They instantaneously notify in case of actions needed to progress or correct the payment process. It Provides a get complete visibility of a payment as it moves through the financial supply chain.</i></p>  |
|  | <p>Oracle Payments Datasheet<br/>Page 1: Improve Visibility and Agility with Centralized</p> |   |



| Business Process Framework Process Element                 | Software Vendor Mapping  |  |
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|  | <p>Payments</p><br><p>BRM 7.4<br/>Documentation - Managing Payments and A/R - Managing Payments - Handling payments - Handling atypical payments</p><br><p>BRM<br/>Documentation · Managing Payments and A/R · Managing Payments · Collecting overdue balances - Understanding Collections Manager - About collections</p> | <p>Where payments do not match invoices, this process is responsible for informing the Manage Debt Management processes of any underpayments, and the Bill Inquiry Handling processes for any overpayments. Underpayments and overpayments are handled appropriately by these separate processes. (A)</p><br><p><i>When customers pay more or less than they owe, BRM can allocate payments. For example, if a customer pays too little, you can specify which items on the bill to apply the payment to. You can also allocate a payment to a specific bill when there are multiple unpaid bills for an account.</i></p><br><p><i>For overpayments, BRM pays all items and generate a credit balance.</i></p><br><p><i>For underpayments, choose which bills or items to allocate the payment to.</i></p><br><p><i>BRM Collections module identifying accounts that have overdue balances, determining whether those accounts meet predefined criteria for action, and then taking those actions.</i></p> |
| <p><b>1.1.1.11.3 - Manage Customer Debt Collection</b></p> | <p>Agent Assisted Billing Care 2.5 Implementation Guide<br/>Page 111: Process Integration for Collections</p>  | <p><b>Brief Description</b><br/>Collect past due payments from the customer.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/>The purpose of the Manage Customer Debt Collection process is to collect past due payments from the customer. This process monitors the amount due from the customer, i.e. check whether the payments are made on time, and implements necessary activities and policies to recover amounts overdue. (A/M)</p> <p><i>Collections management is a process to collect money from subscribers after the grace period provided to pay the dues is over. If payment is not made after the grace period, service providers may choose to remind the subscribers at first with a letter or a phone call. Once these contact instruments fail, service providers may decide to take actions such as</i></p>   |





| Business Process Framework Process Element | Software Vendor Mapping    |  |
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|  | <p>Management Overview</p> | <p><i>inactivating the service.</i></p> <p><i>The Oracle Unified CRM and BRM solution provides a process integration for collections management provides synchronization of collection actions based on specified collection scenarios between Oracle Billing and Revenue Management (BRM) and Siebel Customer Relationship Management (CRM) and administration of these collection actions and credit alerts.</i></p> <p><i>Oracle BRM is responsible for generating collection actions and Siebel CRM is responsible for performing these actions. But in some cases, Oracle BRM performs these actions.</i></p> <p><i>The collections management business process covers the entire collections life cycle across Oracle BRM and Siebel CRM. The business administrator defines a collection scenario and associates the scenario with a sequence of actions that need to be performed. The collections daily batch process identifies bill units that require some action to be taken. This batch also triggers an action notification event that synchronizes the notification event in the form of a credit alert on the Siebel CRM side.</i></p> <p><b>The responsibilities of this process include, but are not limited to:</b></p> <ul style="list-style-type: none"> <li>• Identifying invoices which are overdue for payment; (A)</li> <li>• Initiating and managing follow-up with customers having overdue amounts; (A/M)</li> <li>• Arranging and monitoring payment plans to allow customers to pay overdue amounts in instalments; (A/M)</li> <li>• Initiating debt recovery activities in accordance with appropriate commercial practice and policies; (A/M)</li> <li>• Managing the aged customer debt portfolio; (A/M)</li> <li>• Establishing and managing customer debt profiles to assist in managing debt recovery and debt risk on a customer, product or customer group basis; (A/M)</li> <li>• Establishing and managing commercial arrangements with third parties for the recover of aged debt, and/or for the write-off and selling of parts of the debt portfolio to third parties (A/M)</li> </ul> <p><b>Note that these processes may initiate a direct</b></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
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|  | <p>BRM 7.4<br/>Documentation - Managing Payments and A/R - Managing Payments - Collecting overdue balances - Understanding Collections Manager - About collections</p> | <p>enquiry to the customer and attempt to manage the initial recovery through the Bill Inquiry Handling processes. (A/M) These processes use policies established by the Support Bill Payments &amp; Receivable Management process to direct any escalation of the recovery processes being employed. (A)</p> <p><i>In BRM Collections includes identifying accounts that have overdue balances, determining whether those accounts meet predefined criteria for action, and then taking those actions.</i></p> <p><i>Every business defines its own processes, but collections generally involves a series of increasingly serious steps taken against the customer:</i></p> <ul style="list-style-type: none"> <li>• <i>There is usually a minimum amount due that qualifies for collections. Very small amounts may not be worth the effort required to collect them.</i></li> <li>• <i>In most cases, businesses allow a grace period after payment is due. If payment is received within the grace period, no action is taken.</i></li> <li>• <i>After the grace period ends, a first action such as a reminder on an invoice, a dunning letter, or a phone call takes place. A late fee may also be assessed.</i></li> <li>• <i>If no payment is received as the result of the first collections action, additional steps can be taken. These actions range from additional letters or phone calls to stopping service to referring the case to a collections agency.</i></li> <li>• <i>An account is removed from collections when the overdue amount and any late fees are paid or when the debt is written off.</i></li> </ul> <p><i>There is a great deal of variation in collections policies. For example, businesses define different criteria for entry into collections, different sequences of actions, different time periods before the debt is written off, and so on.</i></p> <p><i>Policies may also vary within a business. For example, some businesses adopt more aggressive policies against accounts with low credit scores and follow a less aggressive course for accounts with high credit scores. Similarly, accounts that have never been in collections before may receive more favourable treatment.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Siebel Communications Guide<br/>Page 177</p>                            | <p>Once BRM identifies that a customer is in Collections, a Credit Alert is generated through the Process Integration. Based on the credit alerts Siebel CRM can initiate interactions with the customer including:</p> <ul style="list-style-type: none"> <li>• Generates <b>activities</b> associated with a credit alert. Also allows you to add activities based on a credit alert.</li> <li>• Displays customer billing information relevant to resolve a credit alert.</li> <li>• Send <b>payments</b> to BRM in response to a credit alert.</li> <li>• Request <b>Account Adjustments</b> BRM for a customer account when a credit alert is in error.</li> <li>• Negotiate a <b>Payment Arrangements</b> with the Customer in response to a credit alert.</li> <li>• <b>Attach external documents</b> to a credit alert.</li> </ul> <p>Based on the customer interaction the agent can set the status of a collection action.<br/>This Process integration flow synchronizes the status of a collection action from Siebel CRM to Oracle BRM, so the status of the given collection action is updated in BRM.</p> |
|  | <p>Agent Assisted Billing Care 2.5 - Implementation Guide<br/>Page 110</p> | <p>In addition, Siebel Communications provides the capability to change the credit score in Financial Profiles in Siebel Communications. These credit scores are checked for instance when Customer want to buy Services.</p> <p>The CSRs use Credit Management functionality to manage and monitor customer credit issues. They are responsible for reviewing with the customer all account information and credit issues, as well as answering billing inquiries, suggesting payment arrangement plans, and making account adjustments.</p>  |
|  | <p>Siebel Communications Guide<br/>Page 177</p>                            | <p>Customer service supervisors use Credit Management functionality to determine if a CSR is allowed to request credit adjustments on a customer's account, set up payment arrangement plans, and maintain billing profiles.</p> <p><b>Note that where third party arrangements need to</b></p>  |



| Business Process Framework Process Element | Software Vendor Mapping                 |  |
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|  | <p>Oracle BRM PRM Whitepaper Page 6</p> | <p>be put in place, these processes are responsible for establishing the requirements for, and managing any commercial arrangements agreed with, third party suppliers. (A/M)</p> <p><i>In the Oracle Solution third parties are managed using Oracle Partner Relationship Management (PRM), which the partner management process from registering partners to revenue settlements with partners. It lets CSP's work collaboratively with the partners to develop agreements and plans to meet strategic goals.</i></p> <p><i>If Collection Activities are performed through 3<sup>rd</sup> party suppliers, these 3<sup>rd</sup> party suppliers can either get Activities from Siebel or 3<sup>rd</sup> party employees can perform the activities using Siebel CRM.</i></p> <p>The Supply Chain Capability Delivery process is used to deliver the commercial agreements. <a href="#">See Note 3.</a></p> |



3.1.7 Bill Inquiry Handling [1.1.1.12]

| Business Process Framework Process Element                     | Software Vendor Mapping  |   |
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| 1.1.1.12 - Bill Inquiry Handling                               | Alignment  | Mapping Comment   |
| <p><b>1.1.1.12.1 - Create Customer Bill Inquiry Report</b></p> | <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 15</p> <p>Siebel Communications Guide Page 126</p> <p>Siebel Communications Guide Page 127</p> <p>Siebel Communications</p> | <p><b>Brief Description</b><br/>                     Create a new customer bill inquiry report.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/>                     The objective of the Create Customer Bill Inquiry Report process is to create a new customer bill inquiry report (A/M), modify existing customer bill inquiry reports (A/M), and request cancellation of existing customer bill inquiry reports. (A/M)</p> <p><i>In the Oracle Unified CRM and Billing Solution Bill Inquiry Reports Siebel are handled using Account Balance Adjustment.</i></p> <p><i>Oracle Unified CRM and Billing Solution provides a process Integration between Siebel CRM and BRM for billing management. It enables a Customer Service Representative (CSR) to retrieve account balances, invoices, and unbilled data at a header, summary, and detail level. The process Integration also enables a CSR to adjust and pay invoices.</i></p> <p><i>Siebel provides a Billing Portal to address Billing related inquiries and activities. The Billing Portal view summarizes the billing information that agents would most likely need to review while talking to a customer.</i></p> <p><i>The Adjustments tab of the Siebel Billing Profile screen provides an overview of the adjustment history information for the customer account. From here Adjustments Request can be created, modified or cancelled.</i></p> <p>A new customer bill inquiry report may be created as a result of specific customer initiated bill inquiry or complaint notifications. (A/M)</p> <p><i>Siebel provides a Billing Portal to address all Billing related inquiries and activities. These inquiries and</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping   |   |
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|  | <p>Guide<br/>Page 126</p> <p>Siebel Communications Guide<br/>Page 163</p> <p>Agent Assisted Billing Care 2.5 Implementation Guide<br/>Page 85/86</p> <p>Siebel Communications Guide;<br/>Page 228</p> <p>Agent Assisted</p> | <p><i>activities may include:</i></p> <ul style="list-style-type: none"> <li>- Review the account status, such as the balance, delinquency information, and pending financial transactions (credit and debit) that have not yet been applied to the balance</li> <li>- View the most recent invoices of a customer and drill down to access detailed information about an invoice.</li> <li>- View the history of payments and adjustments.</li> <li>- Access the usage history of different services that the customer has so that unexpected hikes can be explained to the customer.</li> </ul> <p><i>If the Customer is unhappy with the result of a bill inquiry an Adjustment Request can be created directly from the Siebel Billing Portal.</i></p> <p><i>Siebel manages complaint notifications as Service Request which can also result in an Adjustment Request.</i></p> <p><i>The Billing Portal is typically used by CSR's. The capabilities described above can also be exposed to a customer portal.</i></p> <p><b>If the customer bill inquiry report is created (M), the Create Customer Bill Inquiry Report processes are responsible for converting the received information into a form suitable for the Bill Inquiry Handling processes, and for requesting additional information if required. (A)</b></p> <p><i>To create a Bill Inquiry Reports (Account Balance Adjustment) in Siebel a CSR first identifies the bill, and then the disputed items on the bill.</i></p> <p><i>The Siebel to BRM Process Integration Support Adjustments on multiple Levels:</i></p> <ul style="list-style-type: none"> <li>• Account Balance Level</li> <li>• Invoice Level</li> <li>• Item Charge Level</li> <li>• Event Detail Level</li> <li>• Unbilled Event Level</li> <li>• Unbilled NonCurrency Event Level</li> </ul> |



| Business Process Framework Process Element                   | Software Vendor Mapping   |  |
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|  | <p>Billing Care 2.5 Implementation Guide Page 85/86</p> <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 90/91 Page 8</p> | <p><i>The adjustment request can include the following details: Account #, Invoice #, Request ID, Requested Date, Adjustment Amount Requested, Adjustment Type ( for example, credit, debit), Reason for Request, Comments, Status, Amount Approved, Approval Code and/or Date Approved. When Submitting an Adjustment Request this Request is processed for Approval within the CSP Organisation.</i></p> <p><i>To convert the Customer Bill Inquiry Report in form suitable for the Bill Inquiry Handling processes the UVB Solution provided an OOTB Web Service (CommunicationsAccountBalanceAdjustmentEBS) which uses a common object model (Enterprise business objects)to convert data.</i></p>   |
| <p><b>1.1.1.12.2 Assess Customer Bill Inquiry Report</b></p> | <p>Siebel Communications Guide Page 149/150</p> <p>Siebel Communications Guide Page 128</p>   | <p><b>Brief Description</b></p> <p>Assess the bill inquiry report to determine the nature of the inquiry, and to determine whether the inquiry has arisen due to circumstances originating in other process areas.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Assess Customer Bill Inquiry Report processes is to assess the bill inquiry report to determine the nature of the inquiry, and to determine whether the inquiry has arisen due to circumstances originating in other process areas. (A/M)</p> <p><i>The Oracle Unified CRM and Billing Solution use a Workflow Process to assess the bill inquiry report. This includes interaction with Backoffice Systems either manually or automatically.</i></p> <p>The responsibilities of these processes include, but are not limited to:</p> <ul style="list-style-type: none"> <li>- Verifying whether the information supplied by the customer is correct; and (A/M)</li> </ul> <p><i>To verifying whether the information supplied by the customer is correct, the Oracle Unified CRM and Billing Solution provides a Process to Access Billing Information. This Process is triggered by the CSR. The Information is populated in Siebel CRM through the standard integration with Oracle BRM.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping   |   |
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|  | <p>Siebel Communications Guide<br/>Page 235/236</p>                       | <p>- Performing assessment and investigation based on the customer provided information to determine whether the circumstances leading to the bill inquiry is linked to the underlying services, or other processes. (A/M)</p> <p><i>When Submitting an Adjustment Request in Siebel, Siebel starts a Workflow process for gathering information and seeking for Approval, dependent on the nature of the Adjustment Request.</i></p>   |
|  | <p>Siebel Workflow Guide<br/>Page 15</p>                                  | <p><i>Siebel Workflow is a customizable business application that allows you to define, manage, and enforce your business processes, thereby establishing process automation Siebel applications. Siebel Workflow orchestrates the various Siebel process automation technologies. A workflow process graphically sequences a series of automation steps that support a business process, and it specifies inputs and outputs for individual steps and for the workflow process as a whole. Complex workflow processes can include multiple subprocesses.</i></p> |
|  | <p>Siebel Communications Guide<br/>Page 235/236<br/><br/>Page 149/150</p> | <p><i>The adjustment approval can be fully automated or have manual process steps if required based on the assessment and/or policy. Typically the assessment and investigation of the request requires interaction with Backoffice Systems (underlying services, or other processes), either manually or automatically. The back-office system then sends the outcome of the customer request back to Siebel.</i></p>  |
|  | <p>Siebel Communications Guide<br/>Page 235/236</p>                       | <p>The Assess Customer Bill Inquiry Report processes will make the results of the investigation available to other processes. (A)</p> <p><i>The Approval (Assess Customer Bill Inquiry Report) Process makes the result available to other processes. In the Oracle Unified CRM and Billing Solution it's the Process that interfaces the Adjustment for processing in BRM (in case it's a valid Adjustment Request)</i></p>  |
|  | <p>Siebel Communications</p>  | <p>The Assess Customer Bill Inquiry Report processes will update the customer bill inquiry report, as required during the assessment, and when the root cause has been identified. (A)</p>  |





| Business Process Framework Process Element                             | Software Vendor Mapping  |  |
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|  | <p>Guide<br/>Page 235/236</p> <p>Siebel<br/>Communications<br/>Guide<br/>Page 149/150 &amp;<br/>142/143</p>  | <p><i>Based on the result of the assessment and investigation the Adjustment Request is approved or disapproved based on the root cause has been identified . On Approval the Adjustment request is for instance updated with the approved adjustment amount or percentage and the status.</i></p> <p><b>The Assess Customer Bill Inquiry Report processes will notify the Track &amp; Manage Bill Inquiry Resolution processes when the investigation and assessment is complete.</b> (A)</p> <p><i>When the assessment is completed the Adjustment Request is ready for processing. The Track &amp; Manage Bill Inquiry Resolution processes is monitoring this processing.</i></p>  |
| <p><b>1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment.</b></p> | <p>Agent Assisted<br/>Billing Care 2.5<br/>Implementation<br/>Guide<br/>Page 85/86</p> <p>Agent Assisted<br/>Billing Care 2.5<br/>Implementation<br/>Guide<br/>Page 87</p> | <p><b>Brief Description</b><br/>Adjust the customer’s bill invoice based on detailed assessment and/or policy.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/><b>The purpose of the Authorize Customer Bill Invoice Adjustment processes is to adjust the customer’s bill invoice based on detailed assessment and/or policy.</b> (A/M)</p> <p><i>The Oracle Unified CRM and Billing Solution provides an invoice adjustment feature which enables a Customer Service Representative (CSR) to make adjustments at three levels in the invoice; header, item and event. When a customer calls to dispute an item or multiple items on a bill, CSRs first identifies the bill, and then find the disputed items on the bill (in addition to invoice adjustments, a CSR can use this integration feature to make unbilled/service usage adjustments at the Event (CDR) level).</i></p> <p><i>Each dispute is manually logged as an ‘Adjustment Request’ by the CSR, and once captured is submitted for approval. The adjustment approval can be fully automated or have manual process steps if required based on the assessment and/or policy, and if approved, is automatically created in the Billing system and is reflected in the customers’ next bill. If the adjustment is not approved, the adjustment request is updated with the reason for denial.</i></p> <p><b>The responsibilities of this process include, but are not limited to:</b></p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Siebel Communications Guide Page 141</p>                            | <ul style="list-style-type: none"> <li>- Determination of whether policy allows for automated adjustment of the customer bill invoice, and approving any resultant adjustments; (A/M)</li> </ul> <p><i>On requesting an adjustment to an invoice or invoice line items the solution will determine whether the adjustment can be auto-approved based on policy thresholds, or if further management authorisation will be required.</i></p>  |
|  | <p>Siebel Communications Guide Page 149</p>                            | <ul style="list-style-type: none"> <li>- Undertaking more detailed analysis and investigation to determine whether a bill adjustment is acceptable, including gaining appropriate management authority to make the adjustment; and (A/M)</li> </ul> <p><i>Typically, the account adjustments approvals based on policy are determined in the back office, either manually or through an automated system. The back-office system then sends the outcome of the request to Siebel Communications. End users can view the request outcome as well as view the history of adjustment requests.</i></p>  |
|  | <p>Siebel Communications Guide Page 150/151</p>                        | <ul style="list-style-type: none"> <li>- Recording the results of the adjustment if approved into the records relating to the customer's bill invoice. (A/M)</li> </ul> <p><i>Once a requested adjustment has been captured and the outcome of the request has been processed and returned, the customer can accept or reject the outcome terms.</i></p>   |
|  | <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 91-93</p> | <p><i>Once the customer accepts the terms of the adjustment, this request is submitted from Siebel via fully automated integration to BRM to Execute the Adjustment against the Bill Item in BRM. The Adjustment is reflected in the customers' next bill. On successful adjustment execution the Adjustment Request is updated accordingly in Siebel CRM through the Process Integration.</i></p> <ul style="list-style-type: none"> <li>- These processes rely on the availability of appropriate adjustment policies, which are created within the Support Bill Inquiry Handling processes, for the timely resolution of minor billing disputes.</li> </ul> <p><i><a href="#">See Note 3:</a> Noted; the Support Bill Inquiry Handling process is not part of this initial certification.</i></p> |



| Business Process Framework Process Element                                   | Software Vendor Mapping  |  |
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|  | <p>BRM Documentation · System Administration Guide - Monitoring and maintaining your BRM system - About monitoring BRM</p> <p>BRM Documentation · BRM Reports Guide - Wireless reports</p> | <p>The resolution processes may require investigation of the billing processes themselves to determine whether the disputed bills are the result of quality errors within the Service Provider processes. (A/M)</p> <p>The Oracle BRM solution provides a set of Reports and Utilities to determine whether the disputed bills are the result of quality errors within the Service Provider processes. A potential starting point for the investigation are KPI's that are monitored by BRM.</p> <p>Additional information are provided by:</p> <ul style="list-style-type: none"> <li>• Diagnostic Data Handler to get application diagnostic data.</li> <li>• QoS statistics</li> <li>• HTTP and SNMP system monitoring for getting instrumentation data from probes and configuration values</li> <li>• Log files to get status and error messages.</li> </ul> <p>BRM also provides Service Specific Reports, for instance a GPRS Error Summary report, that provide information like Accounts &amp; Session with Errors, Error Duration etc.</p> |
| <p><b>1.1.1.12.4 Track &amp; Manage Customer Bill Inquiry Resolution</b></p> | <p>Siebel Workflow Guide<br/>Page 15</p>   | <p><b>Brief Description</b><br/>Track &amp; Manage Customer Bill Inquiry Resolution.</p> <p>Covered within the body of the Extended Description.</p> <p><b>Extended Description</b><br/>The objective of the Track &amp; Manage Customer Bill Inquiry Resolution processes is to efficiently assign, coordinate and track specific customer bill inquiry analysis, bill adjustments (A) and ensuring that appropriate credits and/or other agreed adjustments are made available to the adjustments processes activities (A/M), and escalate any open customer bill inquiry reports in jeopardy. (A)</p> <p>To track and manage Customer Bill Inquiry Resolution Siebel Workflow is used in the USB Solution.</p> <p>Siebel Workflow is a customizable business application that allows you to define, manage, and enforce your business processes, thereby establishing</p>   |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Siebel Workflow Guide<br/>Page 17<br/>Siebel Assignment Manager Administration Guide<br/>Page 25-27</p> <p>Siebel Communications Guide<br/>Page 235/236</p> | <p><i>process automation Siebel applications. Siebel Workflow orchestrates the various Siebel process automation technologies. A workflow process graphically sequences a series of automation steps that support a business process, and it specifies inputs and outputs for individual steps and for the workflow process as a whole. Complex workflow processes can include multiple subprocesses. In the Adjustment context Siebel Workflow verifies if the information supplied by the customer is correct and performs an assessment and investigation based on the customer provided information to determine whether the circumstances. Siebel Workflow can combine automated and Manual Process steps dependent on the nature of the Adjustment Request.</i></p> <p><b>Responsibilities of these processes include, but are not limited to:</b></p> <ul style="list-style-type: none"> <li>- Scheduling, assigning and coordinating analysis and specific customer bill inquiry/complaint adjustment activities; (A)</li> </ul> <p><i>To schedule, assign and coordinate analysis and activities, Siebel uses it's assignment Manager is used manages the status of the Adjustment request across the entire lifecycle. To assign the request efficiently, Siebel uses its Assignment Manager. The Assignment is done based on skill, workload, and availability. Assignment Manager also Supports ownership transition within a business process.</i></p> <ul style="list-style-type: none"> <li>- Modifying the customer bill inquiry/complaint report status;</li> </ul> <p><i>When Submitting an Adjustment Request in Siebel, Siebel starts a Workflow process for gathering information and seeking for Approval.</i></p> <p><i>Siebel Workflow is managing the status of the Adjustment Request.</i></p> <p><i>The Status is for instance updated when a the Adjustment Request was approved or the Request was submitted to BRM to execute the adjustment.</i></p> <p><i>In the Billing Portal an agent can view the currents state and history of adjustments request..</i></p> <ul style="list-style-type: none"> <li>- Canceling a customer bill inquiry report when the specific request was related to a false billing event;</li> </ul> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
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|  | <p>Siebel Communications Guide Page 132</p> <p>Siebel Communications Guide Page 235/236</p> <p>Siebel Communications Guide Page 149/150</p> <p>Siebel Workflow</p> | <p>and (A)</p> <p><i>When Submitting an Adjustment Request in Siebel, Siebel starts a Workflow process for gathering information and seeking for Approval.</i></p> <p><i>Siebel Workflow is managing the status of the Adjustment Request.</i></p> <p><i>If resulting the Adjustment request analysis, the request is seen as not valid - for instance due to a false billing event – the request is disapproved</i></p> <p><i>In the Billing Portal an Agent can view the request outcome as well as view the history of adjustment requests.</i></p> <p><i>After consulting with the customer, end Agent can record the customer’s decision to accept or reject the outcome terms.</i></p> <p>- Monitoring the jeopardy status of open customer bill inquiry reports, and escalating customer bill inquiry reports as necessary. (A)</p> <p><i>Siebel Workflow is managing and monitoring the status of the Adjustment Request.</i></p> <p><i>If a request is in jeopardy or requires escalation Siebel can perform various actions including:</i></p> <ul style="list-style-type: none"> <li>- Assign/escalate the adjustment request to a user or Group</li> <li>- Send Notifications (email, page, or fax)</li> <li>- Trigger a Siebel Operations</li> <li>- Send or receive data from an external system through Integration Messages.</li> </ul> <p>Note that some specific product and/or service components may be owned and managed by suppliers/partners. In these cases the Track &amp; Manage Customer Bill Inquiry Resolution process is responsible for initiating requests, through - S/P Settlements &amp; Payments Management for resolution by the supplier/partner of the specific bill inquiries/complaints. (A)</p> <p><i>If specific product and/or service components are owned and managed by suppliers/partners, Siebel Assignment Manager will assign the request</i></p> |



| Business Process Framework Process Element            | Software Vendor Mapping   |   |
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|   | <p>Guide<br/>Page 100</p><br><p>Siebel Workflow Guide<br/>Page 100</p> <p>Siebel Assignment Manager Administration Guide<br/>Page 43/44, 39</p><br><p>Siebel Workflow Guide<br/>Page 15</p> <p>Siebel Communications Guide<br/>Page 149</p> | <p><i>accordingly and for instance send Notifications (email, page, or fax) or Integration Messages to the by suppliers/partners.</i></p> <p><i>Siebel uses Assignment rules to identify which partner the request has to be routed to.</i></p> <p><i>Assignment Manger also supports delegated Assignments</i></p> <p><b>These processes will co-ordinate all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence. (A)</b></p> <p><i>Siebel manages the status of the Adjustment request across the entire lifecycle.</i></p> <p><i>A Siebel Workflow is a sequence of automation steps that support a business process. A workflow process can be simple or complex; complex workflow process can include multiple subprocesses. Workflow also routes / assigns works and automates the escalation of events and notification; for instance in case timeline are not met.</i></p> <p><b>The Track &amp; Manage Bill Inquiry Resolution processes will also inform the Close Customer Bill Inquiry Report processes by modifying the customer bill inquiry report status to cleared when the specific customer bill inquiry/complaint issues have been resolved. (A)</b></p> <p><i>Siebel manages the status of the Adjustment request across the entire lifecycle.</i></p> <p><i>Typically, the account adjustments and payment arrangement plans are determined in the back office, either manually or through a system. The back-office system then sends the outcome of the request to Siebel Communications. End users can view the request outcome as well as view the history of adjustment requests.</i></p> |
| <p><b>1.1.1.12.5 Report Customer Bill Inquiry</b></p> |   | <p><b>Brief Description</b><br/>Report on the customer’s bill inquiry.</p> <p><b>Extended Description</b><br/><b>The objective of the Report Customer Bill Inquiry processes is to monitor the status of customer bill</b></p>  |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | <p>Siebel Communications Guide<br/>Page 225</p> <p>Siebel Workflow Guide<br/>Page 100</p> | <p>inquiry reports, provide notifications of any changes and provide management reports. (A)</p> <p>These processes are responsible for continuously monitoring the status of customer bill inquiry reports and managing notifications to other processes and to other parties, including customers, registered to receive notifications of any status changes. (A)</p> <p><i>Siebel manages the status of the Adjustment request across the entire lifecycle. Siebel provides a Workflow (SWIAdjustmentStatusUpdate) that allows downstream Systems to updates the status, substatus, and description of an adjustment record. In the Oracle Agent Assisted Billing Care Process Integration this is implemented across Siebel CRM and BRM. The Workflow can also be triggered from other downstream systems using a Webservice Call.</i></p> <p><i>When the status and/or description of an (Adjustments) Object is changed Siebel can start a workflow process that can perform various actions including:</i></p> <ul style="list-style-type: none"> <li>- Send Notifications (email, page, or fax)</li> <li>- Trigger a Siebel Operations</li> <li>- Send or receive data from an external system through Integration Messages.</li> <li>- Assigns the request to a user or Group</li> <li>- Navigate a user to a specific view through a user interact step or a call to Siebel Task UI.</li> <li>- Request the Siebel Server Request Broker to run a server process.</li> </ul> <p>Notification lists are managed and maintained by the Support Bill Inquiry Handling processes. <a href="#">See Note 3</a>: Noted; the Support Bill Inquiry Handling process is not part of this initial certification.</p> <p>These processes record, analyze and assess the customer bill inquiry report status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Bill Inquiry Handling processes. These specialized summaries could be specific reports required by specific audiences and/or customers. (A/M)</p> |



| Business Process Framework Process Element                  | Software Vendor Mapping   |   |
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|   | <p>BRM Documentation - BRM Reports Guide - BRM base reports - Miscellaneous Adjustments reports</p> <p>Siebel Reporting Guide Page 21</p> <p>Siebel Communications Guide Page 163</p> | <p><i>The UCB Solution ships with Adjustments Summary and Adjustments Detail reports. These Reports retrieve Data from BRM. The Reports are implemented with Oracle Business Intelligence (BI) Publisher. Oracle BI Publisher provides the capabilities to manage report scheduling, report users, and Enterprise reporting and distribution of "pixel-perfect" reports.</i></p> <p><i>In Addition Siebel ship with preconfigured reports and layout templates that are used to generate, schedule, and view reports. These Reports are build on Oracle Business Intelligence Technology.</i></p> <p><b>These processes also report any identified constraints that can affect customer billing quality standards to other processes. These constraints may include specific resource (billing application and/or database, for example) failures, etc. (A/M)</b></p> <p><i>If constrains are identified or reported, Siebel can create a Service Request or Trouble ticket, originated from the Adjustments Request.</i></p> <p><i>Service requests and trouble tickets are records that are used to manage problems with equipment, Services, Resources or general requests for service.</i></p> <p><i>The resolution of the constrain is managed using the Service requests and trouble tickets.</i></p> |
| <p><b>1.1.1.12.6 Close Customer Bill Inquiry Report</b></p> | <p>Siebel</p>   | <p><b>Brief Description</b><br/> <b>Close a customer bill inquiry report when the bill inquiry/complaint has been resolved.</b></p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/> <b>The objective of the Close Customer Bill Inquiry Report processes is to close a customer bill inquiry report when the bill inquiry/complaint has been resolved. (A)</b></p> <p><b>These processes monitor the status of all open customer bill inquiry reports, and recognize that a customer bill inquiry report is ready to be closed when the status is changed to cleared. (A)</b></p> <p><i>Siebel manages the status of the Adjustment request across the entire lifecycle. Typically, the account adjustments and payment arrangement plans are</i></p>  |





| Business Process Framework Process Element | Software Vendor Mapping                      |  |
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|  | <p>Communications Guide<br/>Page 149/150</p> | <p><i>determined in the back office, either manually or through a system. The back-office system then sends the outcome of the request to Siebel Communications.</i></p> <p><i>An Agent can view the request outcome as well as view the history of adjustment requests. After consulting with the customer, end Agent can record the customer's decision to accept or reject the outcome terms.</i></p> |



3.1.8 Charging [1.1.1.13]

| Business Process Framework Process Element | Software Vendor Mapping  |   |
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| 1.1.1.13 - Charging                        | Alignment  | Mapping Comment   |
| <p>1.1.1.13.1 - Perform Rating</p>         | <p>Oracle BRM Technical Whitepaper, P19 - Rating &amp; Discounting</p> <p>BRM Documentation - Understanding BRM - Introducing BRM - About charging customers for your services</p> <p>BRM Documentation - Setting up Pricing &amp; Rating - Setting up rateable usage metrics (RUMs)</p> <p>BRM Documentation - Setting Up Pricing and Rating - About creating a price list? - About Price Lists</p> | <p><b>Brief Description</b><br/>                     Calculating the value of the service/product, before, during or after the rendering of the service. (A)</p> <p><i>The Oracle Billing and Revenue Management solution provides integrated support for both transactional real-time and real-time batch event processing.</i></p> <p><i>Covered within the body of the Extended Description</i></p> <p>Process responsible for calculating the value of the service/product, before, during or after the rendering of the service, based on parameters of the request (type, quantity, etc.), parameters of the customer/subscriber (tariffs, price plans, accumulated usage, contracts, etc.) and other parameters (time-of-day, taxes, etc.). The same request maybe rated differently for different subscribers based on their purchased offers or service agreements. (A)</p> <p><i>Rating is the process of measuring customer activity, determining how much to charge for it, and adding the charge to the customer’s account balance.</i></p> <p><i>A billable events is a record in the BRM database of a customer or administrative action. To rate a billable event, BRM does the following:</i></p> <ol style="list-style-type: none"> <li><i>Measures the event.</i></li> <li><i>Applies a charge to the resulting measurement.</i></li> <li><i>Adds the charge to the customer’s account balance</i></li> </ol> <p><i>You can rate an event based on any data captured in the event. For example, you can measure and rate how long a session is or measure and rate the number of bytes downloaded. The event data that you use to rate an event is called the rateable usage metric, or RUM. Common RUMs are:</i></p> <ul style="list-style-type: none"> <li><i>Duration. You rate based on how long a usage event was.</i></li> <li><i>Occurrence. You rate based on how many events</i></li> </ul> |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up pipeline rating - How Pipeline Manager uses BRM data - How Pipeline Manager identifies accounts</p>                             | <p><i>occurred, independent of their duration.</i></p> <p><i>Price lists are created to define how much to charge for your services. A price list consists of several components: Plans, Deals, Products. Products are used to package and organize the rates that define how much to charge for the service. Products might include different type of rates:</i></p> <ul style="list-style-type: none"> <li>• <i>A one-time account setup fee</i></li> <li>• <i>A monthly account subscription fee</i></li> <li>• <i>An hourly usage fee.</i></li> </ul> <p><i>Once price lists and its components are defined then they are automatically applied.</i></p> <p><i>When usage events are rated, there is no information in the original CDR (Call Detailed Record) that specifies which BRM account was responsible for the event. Pipeline Manager identifies the account to rate the event and to apply discounts.</i></p> <p><b>Advice of charge/rate provides, in real-time, an estimate or value of the charge or rate for a specific usage or service request. The advice is usually based upon performing a full rating process for the request. Advice of charge can be provided pre-, during or post event. (A)</b></p> |
|  | <p>BRM Documentation · Service Integration Components · Telco Services · Prepaid AAA overview – How BRM processes prepaid AAA requests - How BRM authorizes users to access pre paid services</p> | <p><i>BRM handles advice of charges pre, during or post the event.</i></p> <p><i>BRM authorize users to access cost controlled services, the network will invoke a specific opcod via standard protocol (diameter, radius, etc) and get the advice of charge back as response. The request can be amount based or quantity based.</i></p>  |
|  | <p>BRM Documentation · Service Integration Components · Telco Services · Services – PrePaid AAA Overview – How BRM reauthorizes prepaid services</p>  | <p><i>BRM can also accept units and return monetary amount reserved as part of reauthorization. This is the case of advice of charge during the call.</i></p>  |
|  | <p>BRM</p>  | <p><i>Advice of charge is after the event when returns the</i></p>   |



| Business Process Framework Process Element            | Software Vendor Mapping  |  |
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|   | <p>Documentation · Service Integration Components · Telco Services · Services – PrePaid AAA Overview –How BRM manage pre-paid sessions - How BRM end pre paid sessions</p>   | <p><i>total amount charged for the service</i></p> <p><i>BRM relies on network elements (NE) to deliver Advice of Charges to the end user; BRM will convert advice of charge into for instance into diameter protocol to trigger a notification message to the Customer.</i></p> <p><i>BRM supports diameter protocol as well as several industry standards protocols.</i></p>   |
| <p><b>1.1.1.13.2 – Apply Rate Level Discounts</b></p> | <p>Oracle BRM Technical Whitepaper, P19 - Rating &amp; Discounting</p> <p>BRM Documentation - Setting Up Pricing and Rating - Setting up discounting - About discounting</p> | <p><b>Brief Description</b></p> <p><b>Applies discounts to product prices.</b> (A)</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><i>Discounting is the process of calculating the appropriate credits for an event based on a wide-range of parameters associated with subscriber, event, and service attributes as defined in the Product Catalog.</i></p> <p><b>Extended Description</b></p> <p><b>This process applies discounts to product prices at an individual product level. A discount may be expressed as a monetary amount or percentage, and modifies a price for a product. When a discount is expressed as a percentage, the discounting process determines the discount calculated in relation to the price for the product</b> (A)</p> <p><i>You use discounts to reduce the charges associated with billable events and to grant or consume non-monetary resources such as free minutes or frequent flier miles. You can discount usage charges, purchase fees, and recurring charges.</i></p> <p><i>You can discount events rated in real time and by pipeline batch rating.</i></p> <p><i>Discounts are separate, purchasable items similar to</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping |   |
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|  |                         | <p><i>products. You bundle discounts with products in deals that customers purchase.</i></p> <p><i>For example, you can offer a deal called GSM Plus that includes basic GSM telephony with 300 free peak and 500 free off-peak minutes for a \$60 setup fee, a \$40 monthly fee, and usage charges. The deal already includes one discount—the free minutes—but you can add an additional promotional discount to the deal that reduces the charges even more:</i></p> <ul style="list-style-type: none"> <li>• <i>50% off the monthly fee for the first 6 months</i></li> <li>• <i>Waiver of the setup fee (a 100% discount, in effect)</i></li> <li>• <i>25% off for usage over 750 minutes</i></li> </ul> <p><i>This deal now includes discounts on events rated in real time (the monthly and setup fees) and events rated in batch by the Pipeline Manager (the free minutes and the 25% usage discount). The discounts cover usage charges, recurring charges (the monthly fee), and purchase charges (the setup fee).</i></p> <p><i>When you provide free resources such as free minutes, discounts and products can work together:</i></p> <ul style="list-style-type: none"> <li>• <i>You use products to grant the free resources. When you define the product, you use cycle events to grant the free resources. For example, you can define the product to grant 100 free minutes each week or 500 minutes on a one-time basis.</i></li> <li>• <i>You use discounts to determine how free resources are consumed. Charges are applied by rating before events are discounted, so in the case of free minutes, the discount credits the amount charged for the free minutes used and reduces the balance of free minutes.</i></li> </ul> <p><i>Not all discounts necessarily grant, consume, or discount resources. For example:</i></p> <ul style="list-style-type: none"> <li>• <i>When an account shares free minutes with other accounts, you can use one discount to simply record the balance of available minutes in the sharing account. A second discount uses the recorded balance to consume free minutes for the account that made the call.</i></li> <li>• <i>When you set up billing-time discounts, you can use a discount to update a counter balance; for example, a balance that tracks total usage. You use a second discount to apply a percentage off based on the total usage balance.</i></li> </ul> |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | <p>BRM<br/>Documentation - Billing Customers - Setting up invoices - Designing and generating invoices - Designing invoice templates - Using XSLT invoice templates</p> | <p>The discount may be displayed as a separate entry on the bill or may be combined with the rate for the product to only show as one entry. (A)</p> <p>BRM allows for variety of invoice presentment options, regardless of desired option, the approach is to take XML file that contains “raw” invoice data and generate desired output using XSLT transformation. Using such transformations it is possible to specify if discount amount is to be presented on the rendered invoice or maybe combined with the rate, as an example</p>  |
|  | <p>BRM<br/>Documentation - Managing Customer Accounts - Customer Center Help - Working with products, deals, discounts, and services - Managing Discounts</p>           | <p>Discounts may be a one-time event or may have some duration (days, months, life of product, etc.). (A/M)</p> <p>Among attributes to be specified for the discount objects there are for example: start and end dates, discount quantity allowed, discount priority, whether to continue discounting if the discount is canceled or inactivated.</p> <p>Once the discounts are defined they are applied automatically.</p> <p>Discounts may apply to a specific customer or be generally available based on selection of products (for example - bundles). (A/M)</p>   |
|  | <p>BRM<br/>Documentation - Setting Up Pricing and Rating - Pricing Center Help - Creating Discounts - Defining Discounts</p>  | <p>Discount objects are purchasable items similar to products. You include them in deals along with products.</p> <p>BRM supports subscription discounts and system discounts.</p> <p><b>Subscription discounts</b> applies only to the account that purchases the discount. The discount can apply to recurring fees, such as usage or cycle forward fees, or to one-time fees, such as purchase fees. For example, you can grant 50% off the monthly subscription fee for the first six months of usage.</p> <p><b>System discounts</b> applies to all accounts in your system. For example, a discount on all items purchased during a holiday period is a system discount.</p> <p>Once the discounts are defined they are applied automatically.</p> <p>Discounting structures may involve tiers, tapers<sup>9</sup>, or thresholds. (A/M)</p> |



| Business Process Framework Process Element      | Software Vendor Mapping  |  |
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|   | BRM Documentation · Setting Up Pricing and Rating · Setting up discounting About setting up discounts - Defining the threshold balance impacts | <p><i>The amount of discount applied can be based on any amount of usage, the total amount of usage, or portions of the usage. You define the usage levels by setting their threshold values in discount steps.</i></p> <p><i>The system can apply the discount based on the amount that qualified for a given step which is called tapered discount or discount entire amount called tiered discount.</i></p> <p><i>Once the discounts are defined they are applied automatically.</i></p>  |
| 1.1.1.13.3 – Aggregate Items For Charging       | BRM Documentation - Setting Up Pricing and Rating - Setting up discounting - About Billing time discounts                                      | <p><b>Brief Description</b></p> <p>Manages the accumulation of items that may be used in the selection of a price or in calculation of a rate/discount. (A)</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>Aggregate Items For Charging is the process that accumulates contributing items, which can be quantities, revenues, or both. Aggregation can occur over time or can be initiated to gather a "snapshot" of the items at a point in time. The aggregated items may be used in Perform Rating or Apply Rate Level Discounts to determine the applicable price or discount and may further be used as a quantity in the calculation of a rate or discount.(A)</p> <p><b>An aggregation counter</b> is non-currency account balance used by discounting to track subscribers' total usage charges or units used (such as minutes or bytes) for the cycle. Aggregation counters are incremented when subscribers use their services. A discount (typically a billing-time discount) is then applied based on the aggregated balance. <b>Billing-time discounts</b> require an aggregation counter that tracks the aggregated amount for which the discount is granted. For example, to grant 20% off all usage charges for the month, usage amounts are added to the aggregation counter. When billing is run, the discount is based on the amount in the aggregation counter.</p> |
| 1.1.1.13.4 – Manage Customer Charging Hierarchy |  | <p><b>Brief Description</b></p> <p>Managing the charging relationships among subscribers.</p>  |



| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - Creating and managing hierarchical account groups - About hierarchical account groups</p> | <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p><b>Customer hierarchies are commonly used for corporate customers, family plans or other type of affinity groups. (M)</b></p> <p><i>A hierarchical account group is a set of accounts organized according to their positions in relation to each other. The relationships among accounts in a hierarchical group are similar to parent-child relationships. A hierarchical group is headed by a parent account with child accounts beneath it. At each level above the bottom of the hierarchy, the child accounts themselves can be parent accounts.</i></p> <p><i>An account's position in a hierarchy does not necessarily indicate whether it pays its own bills. Any account, either a parent or child, can have a paying bill unit or a nonpaying bill unit.</i></p> <p><i>Examples for Account hierarchies include for instance corporate customers, family plans.</i></p> <p><b>This process manages the charging relationships among subscribers, e.g. sharing, inheriting or restricting balances, price plans and discounts. (A)</b></p> |
|  | <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - Managing resource sharing groups - About resource sharing groups</p>                      | <p><i>To manage charging relationships among subscribers Oracle BRM uses the concept of resource sharing groups. A resource sharing group consists of an owner and one or more members who share resources. A resource sharing group can be one of the following types:</i></p> <ul style="list-style-type: none"> <li>• <i>Discount sharing group. In a discount sharing group, the owner shares its discounts or (discounts) resources with the members</i></li> <li>• <i>Charge sharing group. In a charge sharing group, the owner assumes charges that are incurred by the members.</i></li> </ul>  |
|  | <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable -</p>   | <p><i>Each member of a discount sharing or charge sharing group has an ordered balance group. Ordered balance groups are created when members first join resource sharing groups and are updated each time members join new resource sharing groups or leave resource sharing groups.</i></p>  |





| Business Process Framework Process Element | Software Vendor Mapping   |  |
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|  | Managing resource sharing groups<br>About ordered balance groups  | <p><i>An ordered balance group contains links to the groups that the member has joined, listed in order by rank. The ordered list determines the sequence in which the group's resource balances are impacted by the member-generated events.</i></p>  |
|  | BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - Managing resource sharing groups - How discounts and charges are applied | <p><b>Thereby assuring that a charge is added to or subtracted from the correct (sub-)account balance.</b><br/>(A)</p> <p><i>An account can purchase discounts, share discounts, and have charges that are sponsored. For events generated by a member service, the shared discounts are used before the sponsored charges are applied to the owning balance group. This way, sponsored charges are applied after usage charges have been discounted. To control the sequence in which shared discounts and charges are applied for member-generated events, BRM maintains an ordered balance group for each member.</i></p> |



### 3.1.9 Manage Billing Events [1.1.1.14]

| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
| 1.1.1.14 – Manage Billing Events           | Alignment  | Mapping Comment  |
| 1.1.1.14.1 – Enrich billing events         | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up pipeline rating - About Pipeline Rating - How and EDR is processed in a pipeline</p> <p>BRM documentation - Setting up Prices and Rating - Rating Implementation and Customization - How rating works - How BRM rates and records usage events</p> | <p><b>Brief Description</b><br/>                     Enrich billing event records with additional data.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b><br/>                     The Enrich Billing Events processes will augment the billing event records by adding data to the records from sources such as customer, product or other reference data. (A)</p> <p><i>A billable event is an event you charge a customer for such as internet connection or an IP phone call. BRM Tracks events and bills users for that.</i></p> <p><i>The enrichment process take place during pipeline rating where data is added to an Event Data Record (EDR) or data is normalized (A). For example telephone numbers are normalized to be represented in a consistent format, special account attributes are added such as customer segment, multiple phone numbers are mapped to a single phone number so customers can be billed for all their phones on one bill.</i></p> <p><i>Enrichment process run typically before rating modules.</i></p> <p><i>Refer to “How an EDR is processed in a pipeline” and “About enrichment modules” for more details on enrichment functionalities</i></p> <p>A billing event may be assigned a price without consideration of specific product or customer information. The assigned price may be used to enrich the billing event record. (A)</p> <p><i>BRM supports the concept of pre-rated events where the price is already assigned to the event before it is sent to BRM</i></p> |
| 1.1.1.14.2 – Guide Billing Events          |  | <p><b>Brief Description</b><br/>                     Ensures that the event records used in the billing</p>  |



| Business Process Framework Process Element        | Software Vendor Mapping  |  |
|---|--|--|
|   | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up pipeline rating - How Pipeline Manager uses BRM data</p> | <p>processes are related to the correct customer billing account and subscribed products.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The Guide Billing Events processes ensure that the event records used in the billing process relate to the correct customer billing account and products. A specific event record may be related to multiple customer billing accounts and subscribed products. Distribution of billing event records to other processes may also occur. (A)</p> <p><i>In the original CDR, there is no information that specifies the BRM account responsible for the event. Pipeline Manager needs to know the account to rate the event and to apply discounts. To find the account, in the EDR find the phone number identified as the calling number and in the data retrieved from BRM, the pointer which identifies the account.</i></p> <p><i>Pipeline Manager needs to get data from the BRM database to rate each account. For example, to get the rate plan owned by an account, to get historical data; for example, if a customer changes a phone number, the old number to rate calls made using it. It also supplies additional data needed for rating or for creating a valid event. For example, Pipeline Manager supplies the G/L ID for the event.</i></p> <p><i>Refer to “How pipeline manager uses BRM data” for more details.</i></p> |
| <p><b>1.1.1.14.3 – Mediate Billing Events</b></p> |  | <p><b>Brief Description</b></p> <p>Edits and reformats data for recipient applications. (A/M)</p> <p><i>Format data definition is set up once the first time and then automatically managed for editing/ processing in operation.</i></p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The Mediate Billing Events process edits and reformats the data record to meet the needs of a recipient application. (A)</p>  |



| Business Process Framework Process Element               | Software Vendor Mapping   |   |
|--|---|---|
|  | <p>BRM Documentation - Setting Up Pricing and Rating - Setting up pipeline rating - About Pipeline Rating - How an EDR is processed in a pipeline</p>             | <p><i>The Mediate Billing Events process is supported by the Pipeline Manager.</i></p> <p><i>The Pipeline Manager reads CDRs and start processing them by identifying each type of record in the file, normalizing data and translating it into the internal EDR format.</i></p> <p><i>EDRs are then pre processed by:</i></p> <ol style="list-style-type: none"> <li><i>1. Handling Duplicated EDRs</i></li> <li><i>2. Assembling EDRs</i></li> <li><i>3. Discarding and Skipping EDRs</i></li> <li><i>4. Generating multiple TAP3 files</i></li> </ol> <p><i>Refer to “Configuring EDR pre-processing” available under BRM Documentation &gt; Setting Up Pricing and Rating &gt; Setting up pipeline rating for more details</i></p> <p><i>Additionally, extended support on Mediate Billing Events process is provided by Oracle Network Mediation which is not part of the assessed solution.</i></p>   |
| <p><b>1.1.1.14.4 – Report Billing Events Records</b></p> | <p>BRM Documentation - BRM Reports Guide - BRM base reports BRM 7.4 Release Description Document, P7 - BRM Integration with Oracle BI Publisher for Reporting</p> | <p><b>Brief Description</b></p> <p><b>Generate reports on billing event records based on requests from other processes. (A/M)</b></p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p><b>The purpose of the Report Billing Event Record processes is to generate reports on billing event records based on requests from other processes. These processes produce reports that may identify abnormalities, which may be caused by fraudulent activity or related to customer complaints. Investigation of problems related to these event records is also part of this process.</b></p> <p><b>These processes also support other processes such as customer review of billing events (pre-billing and post-billing)</b></p> <p><i>Oracle Business Intelligence Publisher, is used to enable reporting for the BRM application. A number of pre-defined BI Publisher report templates are included with the BRM application.</i></p> <p><i>In addition, Oracle BI Publisher allows for customers to easily extend and build report templates specific to their business needs. Users can develop these templates in familiar desktop tools like MS Word, MS Excel or Adobe Acrobat, that significantly reduces the time and cost to develop and maintain reports.</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping |  |
|--|-------------------------|--|
|  |                         |  |



**3.1.10 Manage Balances [1.1.1.15]**

| Business Process Framework Process Element           | Software Vendor Mapping   |  |
|--|---|--|
| 1.1.1.15 - Manage Balances                           | Alignment   | Mapping Comment  |
| <p><b>1.1.1.15.1 - Manage Balance Containers</b></p> | <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - Managing resource sharing groups Creating and modifying multiple ordered balance groups simultaneously</p> <p>BRM Documentation · Understanding BRM – Glossary - balance group</p> <p>Oracle BRM Technical Whitepaper Page 20: Multiple Balances Support</p> <p>BRM Documentation ·</p> | <p><b>Brief Description</b></p> <p>Hold and maintain the different balances that a customer and/or a subscriber may have.</p> <p>Covered within the body of the Extended Description.</p> <p><b>Extended Description</b><br/>                     This process manages the balance containers assigned to a customer and/or subscriber (A) and is used to keep track of usage events, providing input for decision making processes (such as service or product authorization) by means of the balance policies. (A)</p> <p>In the Oracle UCB Solution, Oracle BRM is in charge of Managing Balance Containers. In Oracle BRM Balance Containers are called Balance Groups.</p> <p>Balance Groups are typically created automatically through an Order, but can also be created manually.</p> <p>In the Balance Management process BRM uses Balance Groups to track what customers owe or are credited with for one or more services (A)</p> <p>A balance group is a collection of Sub-balances scoped to either the customer and/or Subscriber account or a service. (A)</p> <p>In the Balance Management Process a Sub-Balance is tracking a specific resource in BRM. A Usage Event is either consuming from a Resource (e.g. Free Minutes) or contribute to a Resource (e.g. # of SMS). (A)</p> <p>BRM Balance Management is built on a set of</p> |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>Setting Up Pricing and Rating - Setting up price list data - About tracking resources in account sub-balances</p> <p>BRM Technical Whitepaper Page20/21: Balance Validity and Sub-Balances</p> <p>BRM Documentation · Understanding BRM – Glossary - credit limit</p> <p>BRM Documentation · Service Integration Components · Telco Services · Prepaid AAA Overview - Using light-weight authorization - About traffic-light status</p> <p>BRM Documentation · Setting Up Pricing and Rating - Setting up price list data - About tracking resources in account sub-balances</p> <p>BRM Documentation · Service Integration</p> | <p>Balance policies that control how the balances may be aggregated and/or consumed, and when a Balance should expire. (A)</p> <p>These Balance policies provide input for decision making processes, for Instance credit limits are used for service or product authorization. (A)</p> <p>The containers include monetary and non-monetary balances (or shared) (A) and are used as prepaid balances (enabling realtime service or product authorization) (A), postpaid balances (in conjunction with an Account-Receivables [AR] application) (A). Examples of non-monetary balances and allowances are: free minutes, WAP-only quota, etc.</p> <p>A balance group contains a collection of balances for various resources such as currency, minutes, bytes or “frequent flyer miles”. (A)</p> <p>Resources in a Balance can be consumed in a Pre-Paid or Post Paid fashion. For Pre-Paid the customer’s current account balance is used for the authorization of prepaid usage. (A)</p> <p>or Postpaid, when BRM A/R bills an account, it tracks and stores the total balance due from all billable events in a billing cycle. (A)</p> |



| Business Process Framework Process Element         | Software Vendor Mapping  |  |
|--|--|--|
|  | <p>Components · Telco Services · Prepaid AAA Overview - Understanding prepaid AAA - About authorizing prepaid usage</p> <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - About accounts receivable - About A/R database objects</p> <p>Oracle BRM Technical Whitepaper Page 20: Multiple Balances Support</p> | <p>Supporting multiple Balances the Balance Management Process enables prepaid/postpaid convergence within one account, where a subscriber may own both prepaid and postpaid services within one account and track the balances separately. (A)</p>  |
| <p><b>1.1.1.15.2 - Manage Balance Policies</b></p> | <p>Oracle BRM Technical Whitepaper Page 20/21: Balance Validity and Sub-Balances</p> <p>BRM Documentation · Setting Up Pricing</p>   | <p><b>Brief Description</b></p> <p>Executing policies per balance or balance type.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>Balance policies are rules that describe how balance affecting events are to be handled. This is done by comparing the value of each event against criteria such as the following: (A)</p> <p><i>BRM Balance Management is built on a set of Balance policies that control how the balances may be aggregated and/or consumed, and when a Balance should expire. The policies include validity periods, Credit Limits, Balance Rollover and resource consumption rules. Details are described below: (A)</i></p> <p>- a minimum allowable balance limit (e.g. balance must remain above zero), (A)</p> <p><i>The minimum allowable balance limit is set in BRM as Credit Limit. A Credit Limit can be set as zero so the balance will always remain above zero. Depended on the nature of the balance limit, the Credit Limits can be any positive or negative</i></p> |





| Business Process Framework Process Element | Software Vendor Mapping   |  |
|--|---|--|
|  | <p>and Rating - About creating a price list<br/>- Tracking resources by service</p>   | <p>number. (A)<br/><b>- balance expiration dates.</b> (A)</p>  |
|  | <p>BRM Documentation · Setting Up Pricing and Rating - Setting up price list data - Specifying the order in which resource sub-balances are consumed</p>                                  | <p><i>In BRM all Balances have a validity period (including start and expiration date). Typically customers have multiple Balances. The order in which balances are consumed, (according to the validity start time and end time) is specified in the resource consumption rules.</i></p> <p><b>- balance thresholds actions and notifications and</b> (A/M)</p> <p><i>For balance thresholds actions and notifications BRM provides balance monitoring. (A/M)</i></p>   |
|  | <p>About balance monitoring BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable · Monitoring balances for groups of accounts - About balance monitoring</p>      | <p>The Balance Monitoring feature monitors currency balances for a specified group of accounts and services, and provides notification when a balance exceeds a predefined threshold.</p> <p><i>Service providers use balance monitoring for Credit Limit Monitoring and to reduce the risk of debt exposure from nonpaying customers.</i></p> <p><i>Customers use balance monitoring to monitor spending habits by defining the account and service balances they want to include in their balance monitor.</i></p> |
|  | <p>Oracle BRM Technical Whitepaper Page 21: Balance Monitoring<br/><br/>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable · Monitoring balances for groups</p> | <p><i>When a credit limit or threshold is reached, BRM generates a notification event, containing information about the affected account and the reason for the breach. (A)</i></p> <p><b>- roll-over &amp; cyclic policies.</b> (A)</p>   |



| Business Process Framework Process Element    | Software Vendor Mapping  |   |
|---|--|---|
|   | of accounts -<br>Configuring balance monitoring -<br>Updating monitor balances and sending credit limit or threshold breach notifications<br><br>BRM<br>Documentation ·<br>Setting Up Pricing and Rating - Setting up price list data -<br>About rollovers | <p><i>For roll-over &amp; cyclic policies BRM validates whether a sub-balance can be rolled over by checking the rollover governance rules such as the amount to roll over, the maximum rollover amount allowed, the maximum number of cycles to roll over, and so on.</i></p>  |
| <b>1.1.1.15.3 - Manage Balance Operations</b> | BRM<br>Documentation ·<br>Understanding BRM<br>BRM<br>Documentation ·<br>Understanding BRM – Glossary -<br>balance impact<br><br>BRM<br>Documentation ·<br>Service Integration Components ·<br>Telco Services ·<br>Resource                                | <p><b>Brief Description</b></p> <p>Allow different operations to be performed on the managed balance.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>Balance operations processes the charged events, using balance policies and then guides the results towards the relevant balance containers. (A)</p> <p>Operations include :</p> <p><i>Any (chargeable) event results a balance impact to a specific type of resource. In the BRM Balance Management Process the Balance is tracking these resources.</i></p> <p>- Reserving amounts from any balance for any session, and crediting unused reservations back into the balance, when a session is released. (A)</p> <p><i>In the BRM Balance Management Process every Balance is tracking a specific resource. Resource are Management is done by the BRM Resource Reservation Manager and includes:</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping   |   |
|--|---|---|
|  | Reservation Manager - Reserving resources for concurrent network sessions - About Resource Reservation Manager  | <ul style="list-style-type: none"> <li>• <i>Creating resource reservation for any Resource in a Balance</i></li> <li>• <i>Setting an expiration time for the reservation request</i></li> <li>• <i>Extending a resource reservation amount</i></li> <li>• <i>Extending a resource reservation expiration time</i></li> <li>• <i>Releasing a partially used reservation</i></li> <li>• <i>Releasing an unused reservation (A)</i></li> </ul>   |
|  | BRM Documentation · Service Integration Components · Telco Services · Resource Reservation Manager - Reserving resources for concurrent network sessions - Associating a session with a reservation | <p><i>Resource Manager is also associating a session with a reservation (A)</i></p> <p><b>- Updating balances by applying charges to the balance and credit/debit adjustments. (A)</b></p> <p><i>Any (chargeable) event results a balance impact to a specific type of resource, for Instance a monetary rate (e.g. one dollar per hour) applies a balance impact to a currency resources; a rate of one hour of Internet access applies a balance impact to the IP Hours resource. (A)</i></p> |
|  | BRM Documentation · Understanding BRM Documentation · Understanding BRM – Glossary - balance impact   | <p><i>The Balances Process is tracking these Resources (impacted by the chargeable event).</i></p> <p><i>Events include any events associated to a service as well as events that are not generated for any service, for example, bill-level adjustment and dispute, payment, payment incentive, and payment fee events. (A)</i></p>  |
|  | BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - About accounts receivable About the default balance group of a bill unit   |   |



| Business Process Framework Process Element                        | Software Vendor Mapping   |  |
|---|---|--|
|   | <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - About accounts receivable - About adjustments</p> <p>Agent Assisted Billing Care 2.5 Implementation Guide Page 11 &amp; 20</p> <p>BRM Documentation · Managing Payments and A/R · Managing Accounts Receivable - Transferring amounts between items - Transferring resources between balance groups</p> | <p><i>In the Adjustment Process either credit or debit Adjustments are made. Depending on the level of the adjustment (account, subscription, bill, item, event, etc.), the adjustment can be for currency resources, non-currency resources, or both. The Balances Process is tracking these Resources (which are adjusted).(A)</i></p> <p><b>- Balance queries.</b> (A/M)</p> <p><i>Oracle Unified CRM and Billing Solution provides a process Integration between Siebel CRM and BRM for billing management. It enables a Customer Service Representative (CSR) a real-time view of account and customer balance summaries, balance groups, and balance details for monetary and nonmonetary balances. The Balance Query also provides additional details like credit limits, and validity dates.</i></p> <p><b>- Transferring amounts from one balance to another.</b> (M)</p> <p><i>With BRM Balance operations processes resources are transferred from one balance group to another balance group. By default, a balance transfer debits the source balance and credits the target balance with the transferred amount.</i></p> |
| <p><b>1.1.1.15.4 - Authorize Transaction Based on Balance</b></p> |   | <p><b>Brief Description</b></p> <p>Manages authorization of service/ product requests based on available balances (monetary or non-monetary) and policies.</p>   |



| Business Process Framework Process Element | Software Vendor Mapping   |   |
|--|---|---|
|  | <p>BRM Documentation · Service Integration Components · Telco Services · Resource Reservation Manager - Reserving resources for concurrent network sessions - About Resource Reservation Manager</p> <p>Oracle BRM Technical White Paper Page 17</p> <p>BRM Documentation · Service Integration Components · Telco Services · Resource Reservation Manager - Reserving resources for concurrent network sessions -About Resource Reservation Manager</p> <p>BRM Documentation · Service Integration</p> | <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>1. This process may include balance reservation and must be performed online. (A)</p> <p>2. Subsequent balance updates are not required to be done in real-time. (A)</p> <p><i>In the BRM Balance Management Process a Balance is tracking a specific resource.</i></p> <p><i>The BRM Resource Reservation Manager is performing reservation of a resource in a Balance. Resource reservation are online (e.g. for Pre-Paid).</i></p> <p>In this context a service is provided by the network, e.g. voice call. (A)</p> <p>Product is digital content delivered via the network, e.g. content such as music, games, etc. (A)</p> <p><i>The process supports multiple (prepaid) services concurrently and charges the usage against a single account balance. For example, it allows customers to make a phone call while downloading an MP3 file.</i></p> <p><i>The BRM Resource Reservation Manager is used for</i></p> |



| Business Process Framework Process Element | Software Vendor Mapping   |   |
|--|---|---|
|  | Components ·<br>Content Manager -<br>Understanding<br>Content Manager | <i>processes managing network Services as well as content Services.</i> |



## 3.2 Service Management & Operations [1.1.2]

### 3.2.1 Service Management & Operations Support & Readiness [1.1.2.1]

| Business Process Framework Process Element                               | Software Vendor Mapping  |  |
|--|--|--|
| 1.1.2.1 - SM&O Support & Readiness                                       | Alignment  | Mapping Comment  |
| <p><b>1.1.2.1.5 - Support Service &amp; Specific Instance Rating</b></p> | <p>BRM<br/>Documentation · Setting Up Pricing and Rating - About creating a price list - About billable events</p> <p>BRM<br/>Documentation • BRM Reports Guide - BRM base reports - Other reports - Price List report</p> <p>BRM<br/>Documentation • Setting Up Pricing and Rating - Using the XML pricing interface to create a price list</p> <p>BRM<br/>Documentation · Setting Up Pricing</p> | <p><b>Brief Description</b></p> <p>Ensure that rating and tariff information is maintained for each service class, for use by Service &amp; Specific Instance Rating.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Support Service &amp; Specific Instance Rating processes ensure that rating and tariff information is maintained for each service class, for use by Service &amp; Specific Instance Rating (A/M)</p> <p><i>Oracle BRM uses price list to ensure, that rating and tariff information is maintained. A Price list defines which events you want to charge for. These events are called billable events. (A)</i></p> <p><i>In the Service &amp; Specific Instance Rating process BRM uses the price list information to determine how much to charge a customer for a billable even. (A)</i></p> <p><i>Pricelist can be created and administered using the BRM Pricing Center or imported/modified using XML Interface for instance when receiving Pricelist Information from external Product Master like Oracle Product Hub for Comms (See RODOD Solution Conformance Report for details).</i></p> <p>They are also responsible for the processing of this information related to administration of the services. (M)</p> |



| Business Process Framework Process Element | Software Vendor Mapping  |  |
|--|--|--|
|  | and Rating -<br>About creating a price list - About using Pricing Center | <p><i>For the administrative processing of Service &amp; Specific Instance Rating information, BRM uses the Pricing Center, which includes among others:</i></p> <ul style="list-style-type: none"> <li>• <i>Creation and modification of products and Pricelist (M)</i></li> <li>• <i>Definition of rate plans for services based on valid time periods, event quantities, and rate priorities. (M)</i></li> <li>• <i>Set credit limits and discounts. (M)</i></li> </ul> |





3.2.2 Service Guiding & Mediation [1.1.2.5]

| Business Process Framework Process Element       | Software Vendor Mapping   |   |
|--|---|---|
| 1.1.2.5 - Service Guiding & Mediation            | Alignment   | Mapping Comment   |
| <p>1.1.2.5.1 - Mediate Service Usage Records</p> | <p>BRM Documentation · Setting Up Pricing and Rating · Setting up pipeline rating - About pipeline rating - How an EDR is processed in a pipeline</p> | <p><b>Brief Description</b></p> <p>Validate, normalize, convert and correlate usage records collected from the resource layer.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Mediate Service Usage Records process is to validate, normalize, convert and correlate usage records collected. It also removes any duplicate usage records that have already been processed. (A)</p> <p>When BRM receives a Call Detail Records (CDR) it identifies each type of record in the file (for example, header records, event records, and trailer records), normalizes data and converts it into the internal used event data record (EDR) format. (A)</p> <p>The process then prepares the Event data records (EDR) for rating, including:</p> <ul style="list-style-type: none"> <li>• Check for Duplicates and discards duplicate EDRs. (A)</li> <li>• Assembles calls that have been split into multiple records. (A)</li> <li>• Validate EDR and rejects EDRs with errors. (A)</li> </ul> |
| <p>1.1.2.5.3 - Report Service Usage Records</p>  |   | <p><b>Brief Description</b></p> <p>Generate reports on usage records based on requests from other processes.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Report Service Usage Record processes is to generate reports on service usage records based on requests from other processes. These processes produce reports that may identify abnormalities, which may be caused by fraudulent</p>   |



| Business Process Framework Process Element             | Software Vendor Mapping   |   |
|--|---|---|
|  | <p>BRM Documentation · BRM Reports Guide - BRM base reports &amp; Wireless reports</p> <p>BRM Documentation · Understanding BRM – Glossary - aggregation</p> <p>Oracle Communications Data Model Reference Page 9-102</p> | <p><b>activity or related to customer complaints.</b> (A/M)</p> <p><i>Oracle BRM provides a set of Standard Reports to report usage, based on Oracle Business Intelligence Platform. (A/M)</i></p> <p><i>If abnormalities have been identified BRM can summarize data for compiled statistics about usage records using aggregations. (A)</i></p> <p><i>In additional the Oracle Communications Data Model (OCDM) offers a SID certified Intelligent Data Warehouse package that is tightly integrated with the business intelligence platform. With pre-built data mining, Oracle Online Analytical Processing (Oracle OLAP) and dimensional models, Oracle Communications Data Model provides you with industry-specific metrics and insights including an Invoice Customer Type Cube (p9-102) to report Service Usage. (A/M)</i></p> |
| <p><b>1.1.2.5.4 - Guide Resource Usage Records</b></p> | <p>BRM Documentation · Setting Up Pricing and Rating · Setting up pipeline rating - About pipeline rating - How an EDR is processed in a pipeline</p>   | <p><b>Brief Description</b></p> <p><b>Relates the usage record to the appropriate service.</b></p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p><b>The Guide Resource Usage Records process converts/relates the record to the appropriate service.</b> (A)</p> <p><i>BRM provides an Enrichment module that adds data that the rating modules needs to the Event data record (EDR). (A)</i></p> <p><i>Enrichment modules module assigns the Event data record (EDR) to a service . An event data record (EDR) is the normalized format of a Usage Records. (A)</i></p> <p><b>In many cases, this process is performed by a resource such as a network element.</b> (A)</p> <p><i>If the usage record is already assigned to a service</i></p>                              |



| Business Process Framework Process Element | Software Vendor Mapping |                                     |
|--|-------------------------|-------------------------------------|
|  |                         | BRM can skip this process step. (A) |



### 3.3 Supplier/Partner Relationship Management [1.1.4]

#### 3.3.1 Supplier/Partner Settlements & Payments [1.1.4.5]

| Business Process Framework Process Element      | Software Vendor Mapping  |  |
|---|--|--|
| 1.1.4.5 - S/P Settlements & Payments Management | Alignment  | Mapping Comment  |
| 1.1.4.5.1 - Manage Account                      | <p>Oracle BRM PRM Whitepaper Page 6</p> <p>Oracle BRM PRM Whitepaper Page 8</p> <p>Oracle BRM PRM Whitepaper Page 12</p> <p>Oracle BRM PRM Whitepaper Page 8</p> <p>Oracle BRM PRM Whitepaper Page 9<br/>Page 15<br/>Page 10<br/>Page 12<br/>Page 14</p> | <p><b>Brief Description</b></p> <p>Manage Account processes administer the internal record of usage of supplier/partner's services in support of invoice reconciliation and reciprocal usage settlement. (A/M)</p> <p><i>The Oracle Unified CRM and BRM solution provides a complete solution for suppliers/partners Settlement &amp; Payments Management.</i></p> <p><i>Using Siebel Partner Relationship Management (PRM) suppliers/partners are acquired, registered and partner contracts are managed. (A/M)</i></p> <p><i>Oracle Billing and Revenue Management manages the supplier/partner account creation as well as the supplier/partner service offerings and agreed revenue sharing rules between supplier/partner and the enterprise. (A/M)</i></p> <p><i>BRM is capable of calculating the price for each usage record in parallel using multiple tariff models. So when rating a supplier/partner's service BRM calculates to price for the customer as well as the price the operator has to pay to / receives from the supplier/partner, dependent on the commercial settlement agreement with the supplier/partner. (A)</i></p> <p><i>BRM manages a partner account balances as well A/R and G/L information. BRM manages on or multiple accounts per partner with one or multiple balances per partner account. (A)</i></p> <p><i>BRM enables Complex Business Models with any Number of suppliers/partners in the Value Chain, for instance</i></p> <ul style="list-style-type: none"> <li>• Wholesale (A)</li> <li>• Interconnect (A)</li> <li>• Roaming (A)</li> <li>• Partner Content Services (A)</li> </ul> |



| Business Process Framework Process Element             | Software Vendor Mapping   |   |
|--|---|---|
|  |   | <p><b>Extended Description</b><br/>                     N/A</p> <p><input type="checkbox"/></p>   |
| <p><b>1.1.4.5.2 - Receive &amp; Assess Invoice</b></p> | <p>BRM Documentation · Understanding BRM – Glossary - aggregation</p> <p>BRM Documentation · Setting Up Pricing and Rating · Setting up pipeline rating · Setting up roaming · Rating interconnect events - Rating interconnect events - About aggregation scenarios for roaming</p> <p>BRM Documentation · Setting Up Pricing and Rating · Setting up pipeline rating · Setting up roaming · Rating interconnect events - Rating interconnect events - How settlements are applied to account balances</p> <p>Oracle BRM PRM Whitepaper Page 6: Oracle Partner Relationship Management</p> | <p><b>Brief Description</b></p> <p>Receive &amp; Assess Invoice processes compare invoices against usage records and offsets, and manage the interactions between the supplier/partner and the enterprise to confirm usage records and resolve account differences. (A/M)</p> <p><i>To summarize data for compiled statistics about usage records BRM uses aggregations. (A)</i></p> <p><i>When receiving an invoice from a partner the aggregated charges for the partner are used to compare with the charges in the invoice sent by partner. (A/M)</i></p> <p><i>When loading aggregated settlement information and billing supplier/partner accounts, the amount due is the difference between what you owe your partners and what they owe you. (A)</i></p> <p>Siebel PRM manages collaborative business processes with partners / suppliers and the interaction to supports settlements between business entities like confirmation usage records and resolving account differences. (A/M)</p> <p><b>Extended Description</b></p> |



| Business Process Framework Process Element                      | Software Vendor Mapping  |  |
|---|--|--|
|   |  | N/A  |
| <p><b>1.1.4.5.3 - Negotiate &amp; Approve Invoice</b></p>       | <p>Oracle BRM PRM Whitepaper Page 6:Oracle Partner Relationship Management</p> <p>Siebel Partner Relationship Management Administration Guide Page 18/19</p> <p>Siebel Communications Guide Page 128/129 &amp; 141</p> | <p><b>Brief Description</b></p> <p>Negotiate &amp; Approve Invoice processes manage the interactions between the supplier/partner and the enterprise, in relation to enquiries about the billing account, handling disputes and any subsequent negotiations. (A/M)</p> <p><i>Siebel PRM manages collaborative business processes with partners / suppliers (A/M)</i></p> <p><i>and extends the Siebel CRM Application to manage Partner and Suppliers in the Siebel Applications, for instance using Siebel Service. (A/M)</i></p> <p><i>In Siebel a Partner or Suppliers is an Account of role Partner, not a different entity. So Siebel can handle enquiries/disputes the same way it does for customer Accounts.</i></p> <p><i>In Siebel Service Partner Managers can access Billing Information of the supplier/partner as well as create, track and negotiate disputes. Siebel CRM manages disputes using Adjustment requests. (A/M)</i></p> <p><b>Extended Description</b></p> <p>N/A</p> |
| <p><b>1.1.4.5.4 - Issue Settlement Notice &amp; Payment</b></p> |  | <p><b>Brief Description</b></p> <p>Issue Settlement Notice &amp; Payment processes apply where suppliers / partners are end to revenue sharing, where the enterprise initiates the settlement cycle</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>Issue Settlement Notice &amp; Payment processes apply where suppliers / partners are entitled to revenue</p>  |



| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p>Oracle BRM PRM Whitepaper Page 13</p> <p>BRM Documentation · Programmer's Guide · Customizing BRM server components - Using event notification - About event notification</p> <p>Oracle BRM PRM Whitepaper Page 15</p> <p>Oracle BRM PRM Whitepaper Page 15</p> | <p>sharing, where the enterprise initiates the settlement cycle. (A/M)</p> <p><i>BRMs Settlement process settles and reconciles with suppliers / partners and generates the appropriate General Ledger transactions. (A)</i></p> <p><i>BRM provides event notifications to notice suppliers / partners of settlements. (A)</i></p> <p><i>With Oracle BRM, a service provider can model simple to complex business agreement terms and accordingly settle with suppliers / partners. (M)</i></p> <p><i>In BRM Settlement terms can include fixed recurring fees due to the partner per billing period, and can also include terms to dynamically share revenues on the basis of subscriber purchases/usage of the services offered in conjunction with the supplier / partner. (A/M)</i></p> |



3.3.2 Supplier/Partner Interface Management [1.1.4.6]

| Business Process Framework Process Element                                 | Software Vendor Mapping  |   |
|--|--|---|
| 1.1.4.6 - S/P Interface Management   | Alignment  | Mapping Comment   |
| <p>1.1.4.6.3 - Mediate &amp; Orchestrate Supplier/Partner Interactions</p> | <p><a href="#">Oracle Fusion Middleware User's Guide for Oracle B2B</a></p> <p>1 - Introduction to Oracle B2B</p><br><p><a href="#">Oracle Fusion Middleware User's Guide for Oracle B2B</a></p> <p>1.2 -Protocols Supported in Oracle B2B</p> | <p><b>Brief Description</b></p> <p>Ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its suppliers/partners.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><b>Extended Description</b></p> <p>The purpose of the Mediate &amp; Orchestrate Supplier/Partner Interactions is to ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its suppliers/partners.</p> <p>(A)</p> <p><i>The Oracle UCB Solution uses Oracle Fusion Middleware (FMW) to Mediate &amp; Orchestrate interaction with Supplier/Partner as well as within the enterprise (see Application Integration Architecture in the introduction).</i></p> <p><i>FMW provides a B2B Component that is designed to Mediate &amp; Orchestrate interaction and enables the secure and reliable exchange of business documents between an enterprise and its suppliers/partners. Oracle B2B supports business-to-business document standards, security, transport and messaging.</i></p> <p>Increasingly transactions with external parties (e.g. suppliers using RosettaNet or ebXML standards) will need to conform to message and data formats defined by third parties or third party organizations. (A)</p> <p><i>Oracle B2B provides OOTB support for a wide number of standard message exchange protocol including amongst others RosettaNet or ebXML. The full list is available here: <a href="#">E10229-06</a></i></p> <p>Based on the specific transaction type and involved external party, this conformance will require the identification of the necessary data formats to be sent externally, and conversion of externally</p> |





| Business Process Framework Process Element | Software Vendor Mapping  |   |
|--|--|---|
|  | <p><a href="#">Oracle Fusion Middleware User's Guide for Oracle B2B</a><br/>6 - Creating and Deploying Trading Partner Agreements</p> <p><a href="#">Oracle Fusion Middleware User's Guide for Oracle B2B</a><br/>6.2 - Creating an Agreement</p> <p><a href="#">Oracle Fusion Middleware User's Guide for Oracle B2B</a><br/>1.5 - How Does Oracle B2B Fit into a SOA Implementation<br/>1.6 - Sending a Purchase Order: An Example of a SOA Implementation</p> | <p>received messages into the required internal enterprise formats. (A)</p> <p><i>In Oracle B2B uses agreements to identify the necessary data formats to be sent externally, and the conversion of externally received messages.</i></p> <p><i>A trading partner agreement defines the terms that enable two trading partners, the initiator and the responder, to exchange business documents. It identifies the trading partners, trading partner identifiers, document definitions, and channels (=Exchange Protocols, e.g. RosettaNet or ebXML). (A)</i></p> <p><i>To convert externally received messages into the required internal enterprise formats, the agreement defines the translation of internal to external formats and vice versa. (A)</i></p> <p>In addition, interactions with external parties may require that messages and transactions need to be undertaken with defined and agreed orchestration for message exchange. (A)</p> <p><i>Oracle B2B uses Composites to orchestrate message exchange. A (BPEL) process is orchestrating the individual messages and transactions.</i></p> <p>The actual agreement between the parties to use specific interaction standards is part of the Support S/P Interface Management and Manage Supplier/Partner Engagement L3s.</p> <p><i>See Note 3: Noted; the Support S/P Interface Management and Manage Supplier/Partner Engagement processes are not part of this initial certification.</i></p> |

### 3.4 Assessment Notes

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Generic notes that have been referenced within the assessment document have been provided here:

**Note 1:** *This part of the Business Process Framework process description does not represent a direct process requirement, however this text has been provided as further information to contextualize the overall support for the level 3 process in question.*

**Note 2:** *This part of the Business Process Framework process description refers to another L3 process area so is not part of the scope of this specific L3 process. This text has been provided as further explanation regarding how this maps to the related L3 process area.*

**Note 3:** *This part of the Business Process Framework process description refers to another Business Process Framework process that is not covered by the scope of this certification.*



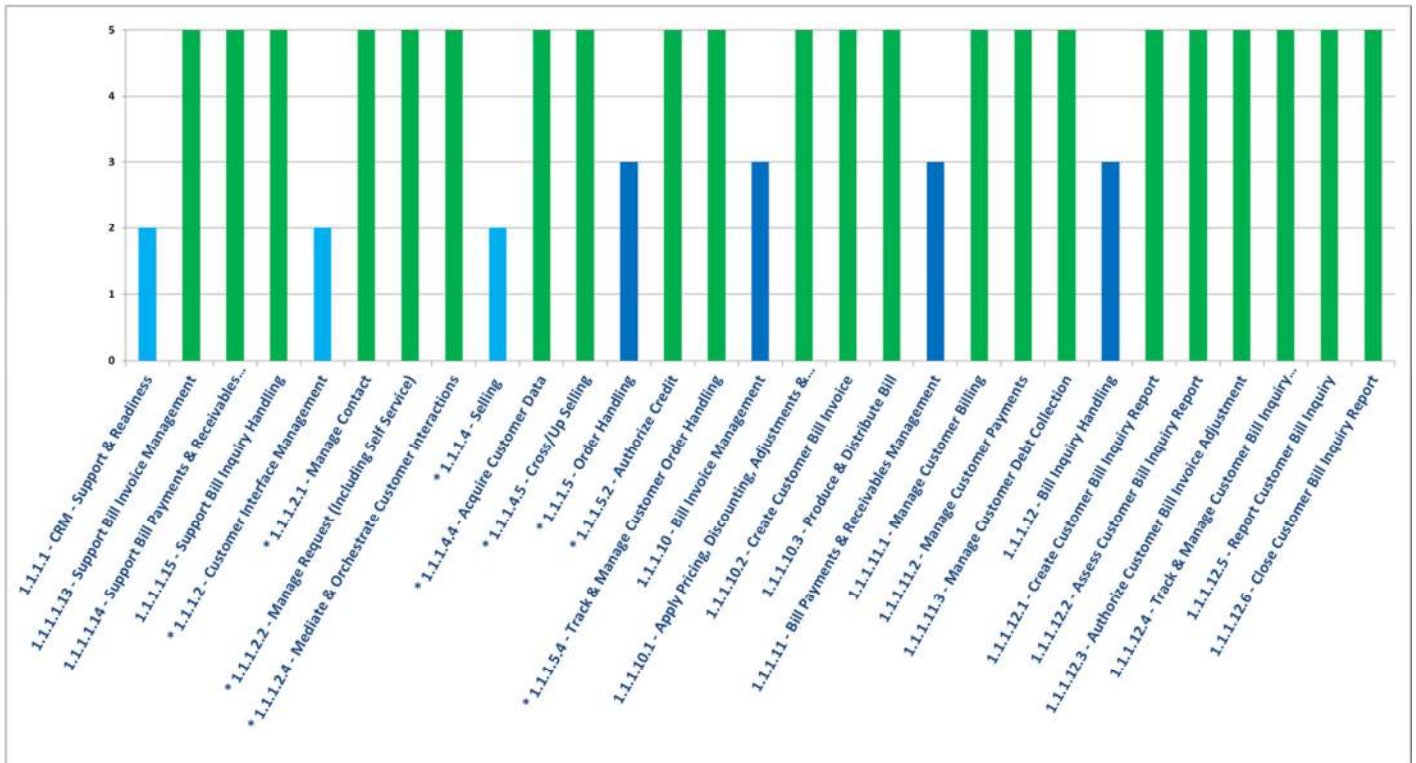
## 4 Process Conformance

The following graphs present the Conformance Scores granted to the Level 2 & Level 3 processes submitted in scope for the Conformance Certification Assessment.

### 4.1 Business Process Framework – Process Conformance Summary

|                                  |
|----------------------------------|
| 0 - Not in Scope                 |
| 1 - Not used                     |
| 2 - Level 2 Partially Conformant |
| 3 - Level 2 Fully Conformant     |
| 4 - Level 3 Partially Conformant |
| 5 - Level 3 Fully Conformant     |

**Oracle Unified CRM & BRM Solution  
Business Process Framework R9.0 Conformance Result [1/2]  
Level 2 & Level 3 Processes**



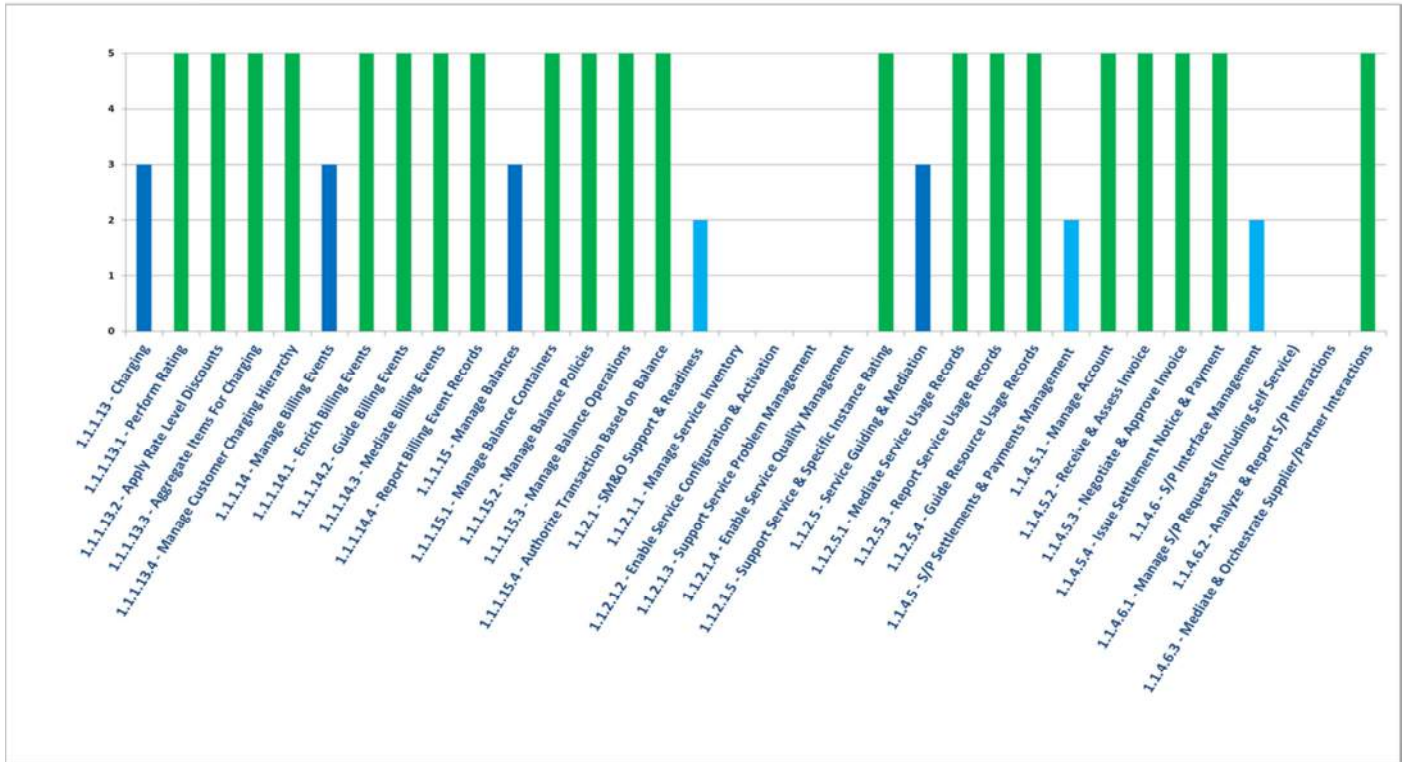
\* These processes were assessed as part of the Oracle RODOD Solution Conformance Assessment.

**Figure 4.1 Oracle Unified CRM & BRM Solution – Conformance Result Summary [1/2]**



**Oracle Unified CRM & BRM Solution  
Business Process Framework R9.0 Conformance Result [2/2]  
Level 2 & Level 3 Processes**

|                                  |
|----------------------------------|
| 0 - Not in Scope                 |
| 1 - Not used                     |
| 2 - Level 2 Partially Conformant |
| 3 - Level 2 Fully Conformant     |
| 4 - Level 3 Partially Conformant |
| 5 - Level 3 Fully Conformant     |



\* These processes were assessed as part of the Oracle RODOD Solution Conformance Assessment.

Figure 4.2 Oracle Unified CRM & BRM Solution – Conformance Result Summary [2/2]



## 4.2 Business Process Framework – Process Conformance Detailed

The following table gives a more detailed presentation of the Conformance Scores granted to the Level 2 & Level 3 processes submitted in scope for the Conformance Certification Assessment.

Table 4.1 Oracle Unified CRM & BRM Solution – Detailed Conformance Result

| eTOM process element   | Conformance Score  | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)  |
|--|--|--|
| <p><b>Within Level 1:</b></p> <p><b>1.1.1 - Customer Relationship Management</b></p> | <p><i>N/A</i></p> <p><i>(Level 1 Processes are not assessed)</i></p> | <p>The following Level 2 process elements were submitted in scope for this Level 1 process:</p> <p><b>1.1.1.1 – CRM Support &amp; Readiness</b></p> <p><b>*1.1.1.2 – Customer Interface Management</b></p> <p><b>*1.1.1.4 – Selling</b></p> <p><b>*1.1.1.5 – Order Handling</b></p> <p><b>1.1.1.10 - Bill Invoice Management</b></p> <p><b>1.1.1.11 - Bill Payments &amp; Receivables Management</b></p> <p><b>1.1.1.12 - Bill Inquiry Handling</b></p> <p><b>1.1.1.13 – Charging</b></p> <p><b>1.1.1.14 - Manage Billing Events</b></p> <p><b>1.1.1.15 - Manage Balances</b></p> <p><b>* These processes were assessed via the RODOD Solution Assessment. For further details see the Assessment Results at:</b><br/> <a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a></p> |
| <p><b>Within Level 2:</b></p> <p><b>1.1.1.1 CRM – Support &amp; Readiness</b></p>    | <p><b>Partially Conformant</b></p> <p><b>(2)</b></p>                 | <p><b>Partially Conformant</b></p> <p>The following Level 3 process were assessed for conformance:</p> <p><b>1.1.1.1.13 - Support Bill Invoice Management</b></p> <p><b>1.1.1.1.14 - Support Bill Payments &amp; Receivables Management</b></p> <p><b>1.1.1.1.15 - Support Bill Inquiry Handling</b></p> <p>These processes represent 3 of 14 processes defined for this Level 2 process. Not all contained Level 3 process elements are in scope for the assessment. Note that the support provided can involve manual action facilitated by the automated support. See the Process Mapping descriptions in Chapter 3 for further details.</p>  |
| <p><b>1.1.1.1.13 - Support Bill Invoice Management</b></p>                           | <p><b>Scope Fully Conformant</b></p> <p><b>(5)</b></p>               | <p><b>Conformant</b></p> <p>Note that the support provided can involve manual action facilitated by the automated support. See the Process Mapping descriptions in Chapter 3 for further details.</p>  |



| eTOM process element   | Conformance Score                               | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|--|---|---|
| <b>1.1.1.1.14 - Support Bill Payments &amp; Receivables Management</b>   | <b>Scope Fully Conformant</b><br><b>(5)</b>     | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.1.15 - Support Bill Inquiry Handling</b>  | <b>Scope Fully Conformant</b><br><b>(5)</b>     | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>Within Level 2:</b><br><b>1.1.1.2 Customer Interface Management</b><br><i>[ FROM RODOD Solution Conformance Assessment]</i> | <b>Scope Partially Conformant</b><br><b>(2)</b> | <b>Partially Conformant</b><br>The following Level 3 process were assessed for conformance:<br><b>1.1.1.2.1 - Manage Contact</b><br><b>1.1.1.2.2 - Manage Request (Including Self Service)</b><br><b>1.1.1.2.4 - Mediate &amp; Orchestrate Customer Interactions</b><br>These processes represent 3 of 4 processes defined for this Level 2 process.<br>Not all contained Level 3 process elements are in scope for the assessment. |
| <b>1.1.1.2.1 - Manage Contact</b>  | <b>Scope Fully Conformant</b><br><b>(5)</b>     | <b>Conformant</b><br>The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br>For further details, please see the ORACLE RODOD Conformance Certification Results at:<br><a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a>   |
| <b>1.1.1.2.2 - Manage Request (Including Self Service)</b>   | <b>Scope Fully Conformant</b><br><b>(5)</b>     | <b>Conformant</b><br>The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br>For further details, please see the ORACLE RODOD Conformance Certification Results at:<br><a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a>   |
| <b>1.1.1.2.4 - Mediate &amp; Orchestrate Customer Interactions</b>   | <b>Scope Fully Conformant</b><br><b>(5)</b>     | <b>Conformant</b><br>The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br>For further details, please see the ORACLE RODOD Conformance Certification Results at:<br><a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a>   |



| eTOM process element  | Conformance Score  | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)  |
|---|--|--|
| <p><b>Within Level 2:</b><br/> <b>1.1.1.4 Selling</b><br/>                     [ FROM RODOD Solution Conformance Assessment]</p>        | <p><b>Scope Partially Conformant</b><br/><br/>                     (2)</p> | <p><b>Partially Conformant</b><br/>                     The following Level 3 process were assessed for conformance:<br/> <b>1.1.1.4.4 - Acquire Customer Data</b><br/> <b>1.1.1.4.5 - Cross/Up Selling</b><br/>                     These processes represent 2 of 7 processes defined for this Level 2 process.<br/>                     Not all contained Level 3 process elements are in scope for the assessment.</p>                     |
| <p><b>1.1.1.4.4 - Acquire Customer Data</b></p>   | <p><b>Scope Fully Conformant</b><br/><br/>                     (5)</p>     | <p><b>Conformant</b><br/>                     The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br/>                     For further details, please see the ORACLE RODOD Conformance Certification Results at:<br/> <a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a></p> |
| <p><b>1.1.1.4.5 - Cross/Up Selling</b></p>  | <p><b>Scope Fully Conformant</b><br/><br/>                     (5)</p>     | <p><b>Conformant</b><br/>                     The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br/>                     For further details, please see the ORACLE RODOD Conformance Certification Results at:<br/> <a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a></p> |
| <p><b>Within Level 2:</b><br/> <b>1.1.1.5 Order Handling</b><br/>                     [ FROM RODOD Solution Conformance Assessment]</p> | <p><b>Scope Partially Conformant</b><br/><br/>                     (2)</p> | <p><b>Partially Conformant</b><br/>                     The following Level 3 process were assessed for conformance:<br/> <b>1.1.1.5.2 - Authorize Credit</b><br/> <b>1.1.1.5.4 - Track &amp; Manage Customer Order Handling</b><br/>                     These processes represent 2 of 7 processes defined for this Level 2 process.<br/>                     All contained Level 3 process elements are in scope for the assessment.</p>    |
| <p><b>1.1.1.5.2 - Authorize Credit</b></p>  | <p><b>Scope Fully Conformant</b><br/><br/>                     (5)</p>     | <p><b>Conformant</b><br/>                     The Conformance Level granted is based on the conformance result granted in the ORACLE RODOD Solution Conformance Assessment:<br/>                     For further details, please see the ORACLE RODOD Conformance Certification Results at:<br/> <a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a></p> |
| <p><b>1.1.1.5.4 - Track &amp; Manage Customer</b></p>   | <p><b>Scope Fully Conformant</b></p>                                       | <p><b>Conformant</b><br/>                     The Conformance Level granted is based on the conformance result granted in</p>  |



| eTOM process element   | Conformance Score                     | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|--|---------------------------------------|---|
| <b>Order Handling</b>  | (5)                                   | the ORACLE RODOD Solution Conformance Assessment:<br>For further details, please see the ORACLE RODOD Conformance Certification Results at:<br><a href="http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html">http://www.tmforum.org/ORACLERapidOfferDesign/10674/home.html</a>  |
| <b>Within Level 2:<br/>1.1.1.10 - Bill Invoice Management</b>                    | <b>Scope Fully Conformant<br/>(3)</b> | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.1.10.1 - Apply Pricing, Discounting, Adjustments &amp; Rebates</b><br><b>1.1.1.10.2 - Create Customer Bill Invoice</b><br><b>1.1.1.10.3 - Produce &amp; Distribute Bill</b><br>These processes represent the full set of 3 processes defined for this Level 2 process.<br>All contained Level 3 process elements are in scope for the assessment.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>Note that some aspects can involve interaction with external applications<br>See the Process Mapping descriptions in Chapter 3 for further details. |
| <b>1.1.1.10.1 - Apply Pricing, Discounting, Adjustments &amp; Rebates</b>        | <b>Scope Fully Conformant<br/>(5)</b> | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.10.2 - Create Customer Bill Invoice</b>                                 | <b>Scope Fully Conformant<br/>(5)</b> | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>Note that some aspects can involve interaction with external applications (e.g. for printing invoices).<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.10.3 - Produce &amp; Distribute Bill</b>                                | <b>Scope Fully Conformant<br/>(5)</b> | <b>Conformant</b><br>Note that some aspects can involve interaction with external applications (e.g. for non-electronic bill distribution).<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>Within Level 2:<br/>1.1.1.11 - Bill Payments &amp; Receivables Management</b> | <b>Scope Fully Conformant<br/>(3)</b> | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.1.11.1 - Manage Customer Billing</b><br><b>1.1.1.11.2 - Manage Customer Payments</b>   |





| eTOM process element   | Conformance Score                 | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)  |
|--|-----------------------------------|--|
|  |                                   | <p><b>1.1.1.11.3 - Manage Customer Debt Collection</b></p> <p>These processes represent the full set of 3 processes defined for this Level 2 process.</p> <p>All contained Level 3 process elements are in scope for the assessment.</p> <p>Note that the support provided can involve manual action facilitated by the automated support.</p> <p>See the Process Mapping descriptions in Chapter 3 for further details.</p>   |
| <b>1.1.1.11.1 - Manage Customer Billing</b>                                  | <b>Scope Fully Conformant (5)</b> | <p><b>Conformant</b></p> <p>Note that the support provided can involve manual action facilitated by the automated support.</p> <p>See the Process Mapping descriptions in Chapter 3 for further details.</p>   |
| <b>1.1.1.11.2 - Manage Customer Payments</b>                                 | <b>Scope Fully Conformant (5)</b> | <p><b>Conformant</b></p> <p>Note that the support provided can involve manual action facilitated by the automated support.</p> <p>See the Process Mapping descriptions in Chapter 3 for further details.</p>   |
| <b>1.1.1.11.3 - Manage Customer Debt Collection</b>                          | <b>Scope Fully Conformant (5)</b> | <p><b>Conformant</b></p> <p>Note that the support provided can involve manual action facilitated by the automated support.</p> <p>See the Process Mapping descriptions in Chapter 3 for further details.</p>   |
| <p><b>Within Level 2:</b></p> <p><b>1.1.1.12 - Bill Inquiry Handling</b></p> | <b>Scope Fully Conformant (3)</b> | <p><b>Conformant</b></p> <p><b>The following Level 3 process were assessed for conformance:</b></p> <p><b>1.1.1.12.1 - Create Customer Bill Inquiry Report</b></p> <p><b>1.1.1.12.2 - Assess Customer Bill Inquiry Report</b></p> <p><b>1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment</b></p> <p><b>1.1.1.12.4 - Track &amp; Manage Customer Bill Inquiry Resolution</b></p> <p><b>1.1.1.12.5 - Report Customer Bill Inquiry</b></p> <p><b>1.1.1.12.6 - Close Customer Bill Inquiry Report</b></p> <p>These processes represent the full set of 6 processes defined for this Level 2 process.</p> <p>All contained Level 3 process elements are in scope for the assessment.</p> <p>Note that the support provided can involve manual action facilitated by the automated support.</p> <p>See the Process Mapping descriptions in Chapter 3 for further details.</p> |
| <b>1.1.1.12.1 - Create</b>   | <b>Scope Fully</b>                | <b>Conformant</b>  |



| eTOM process element  | Conformance Score                    | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|---|--------------------------------------|---|
| <b>Customer Bill Inquiry Report</b>                                     | <b>Conformant</b><br>(5)             | Note that the support provided can involve manual action facilitated by the automated support.<br><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.12.2 - Assess Customer Bill Inquiry Report</b>                 | <b>Scope Fully Conformant</b><br>(5) | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment</b>          | <b>Scope Fully Conformant</b><br>(5) | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.12.4 - Track &amp; Manage Customer Bill Inquiry Resolution</b> | <b>Scope Fully Conformant</b><br>(5) | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.12.5 - Report Customer Bill Inquiry</b>                        | <b>Scope Fully Conformant</b><br>(5) | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.12.6 - Close Customer Bill Inquiry Report</b>                  | <b>Scope Fully Conformant</b><br>(5) | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>Within Level 2:<br/>1.1.1.13 - Charging</b>                          | <b>Scope Fully Conformant</b><br>(3) | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.1.13.1 - Perform Rating</b><br><b>1.1.1.13.2 - Apply Rate Level Discounts</b><br><b>1.1.1.13.3 - Aggregate Items For Charging</b><br><b>1.1.1.13.4 - Manage Customer Charging Hierarchy</b><br><br>These processes represent the full set of 4 processes defined for this Level 2 process.<br><br>Note that the support provided can involve manual action facilitated by the automated support.<br><br>Note that some aspects can involve interaction with external applications.<br><br>See the Process Mapping descriptions in Chapter 3 for further details. |



| eTOM process element  | Conformance Score                           | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)  |
|---|---|--|
| <b>1.1.1.13.1 - Perform Rating</b>                                | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>Note that some aspects can involve interaction with external applications (e.g. for advice of charge).<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.13.2 - Apply Rate Level Discounts</b>                    | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.13.3 - Aggregate Items For Charging</b>                  | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.13.4 - Manage Customer Charging Hierarchy</b>            | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>Within Level 2:</b><br><b>1.1.1.14 - Manage Billing Events</b> | <b>Scope Fully Conformant</b><br><b>(3)</b> | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.1.14.1 - Enrich Billing Events</b><br><b>1.1.1.14.2 - Guide Billing Events</b><br><b>1.1.1.14.3 - Mediate Billing Events</b><br><b>1.1.1.14.4 - Report Billing Event Records</b><br>These processes represent the full set of 4 processes defined for this Level 2 process.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details. |
| <b>1.1.1.14.1 - Enrich Billing Events</b>                         | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.14.2 - Guide Billing Events</b>                          | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.14.3 - Mediate Billing Events</b>                        | <b>Scope Fully Conformant</b><br><b>(5)</b> | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.  |



| eTOM process element   | Conformance Score                       | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)  |
|--|---|--|
|  |   | See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>1.1.1.14.4 - Report Billing Event Records</b>                       | <b>Scope Fully Conformant (5)</b>       | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>Within Level 2:<br/>1.1.1.15 - Manage Balances</b>                  | <b>Scope Fully Conformant (3)</b>       | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.1.15.1 - Manage Balance Containers</b><br><b>1.1.1.15.2 - Manage Balance Policies</b><br><b>1.1.1.15.3 - Manage Balance Operations</b><br><b>1.1.1.15.4 - Authorize Transaction Based on Balance</b><br>These processes represent the full set of 4 processes defined for this Level 2 process.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details. |
| <b>1.1.1.15.1 - Manage Balance Containers</b>                          | <b>Scope Fully Conformant (5)</b>       | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.15.2 - Manage Balance Policies</b>                            | <b>Scope Fully Conformant (5)</b>       | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.15.3 - Manage Balance Operations</b>                          | <b>Scope Fully Conformant (5)</b>       | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>1.1.1.15.4 - Authorize Transaction Based on Balance</b>             | <b>Scope Fully Conformant (5)</b>       | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.  |
| <b>Within Level 1:<br/>1.1.2 - Service Management &amp; Operations</b> | <b>N/A<br/><br/>(Level 1 Processes)</b> | <b>The following Level 2 process elements were submitted in scope for this Level 1 process:</b><br><b>1.1.2.1 - SM&amp;O Support &amp; Readiness</b>   |



| eTOM process element  | Conformance Score                         | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|---|---|---|
|   | <i>are not assessed)</i>                  | <b>1.1.2.5 - Service Guiding &amp; Mediation</b>  |
| <b>Within Level 2:<br/>1.1.2.1 - SM&amp;O Support &amp; Readiness</b> | <b>Scope Partially Conformant<br/>(2)</b> | <b>Partially Conformant</b><br>The following Level 3 process were assessed for conformance:<br><b>1.1.2.1.5 - Support Service &amp; Specific Instance Rating</b><br>This process represents 1 of 5 processes defined for this Level 2 process.<br>Not all contained Level 3 process elements are in scope for the assessment.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.                 |
| <b>1.1.2.1.1 - Manage Service Inventory</b>                           | N/A                                       | This process was not assessed.  |
| <b>1.1.2.1.2 - Enable Service Configuration &amp; Activation</b>      | N/A                                       | This process was not assessed.  |
| <b>1.1.2.1.3 - Support Service Problem Management</b>                 | N/A                                       | This process was not assessed.  |
| <b>1.1.2.1.4 - Enable Service Quality Management</b>                  | N/A                                       | This process was not assessed.  |
| <b>1.1.2.1.5 - Support Service &amp; Specific Instance Rating</b>     | <b>Scope Fully Conformant<br/>(5)</b>     | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| <b>Within Level 2:<br/>1.1.2.5 - Service Guiding &amp; Mediation</b>  | <b>Scope Fully Conformant<br/>(3)</b>     | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.2.5.1 - Mediate Service Usage Records</b><br><b>1.1.2.5.3 - Report Service Usage Records</b><br><b>1.1.2.5.4 - Guide Resource Usage Records</b><br>These processes represent the full set of 3 processes defined for this Level 2 process.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details. |



| eTOM process element  | Conformance Score                           | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|---|---|---|
| 1.1.2.5.1 - Mediate Service Usage Records                           | Scope Fully Conformant<br>(5)               | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| 1.1.2.5.3 - Report Service Usage Records                            | Scope Fully Conformant<br>(5)               | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| 1.1.2.5.4 - Guide Resource Usage Records                            | Scope Fully Conformant<br>(5)               | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| Within Level 1:<br>1.1.4 - Supplier/Partner Relationship Management | N/A<br>(Level 1 Processes are not assessed) | <b>The following Level 2 process elements were submitted in scope for this Level 1 process:</b><br>1.1.4.5 - S/P Settlements & Payments Management<br>1.1.4.6 - S/P Interface Management  |
| Within Level 2:<br>1.1.4.5 - S/P Settlements & Payments Management  | Scope Fully Conformant<br>(2)               | <b>Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br>1.1.4.5.1 - Manage Account<br>1.1.4.5.2 - Receive & Assess Invoice<br>1.1.4.5.3 - Negotiate & Approve Invoice<br>1.1.4.5.4 - Issue Settlement Notice & Payment<br>These processes represent the full set of 4 processes defined for this Level 2 process.<br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details. |
| 1.1.4.5.1 - Manage Account  | Scope Fully Conformant<br>(5)               | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| 1.1.4.5.2 - Receive & Assess Invoice                                | Scope Fully Conformant<br>(5)               | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |



| eTOM process element  | Conformance Score                 | Comment<br>(See the Process Mapping descriptions in Chapter 3 for further details.)   |
|---|-----------------------------------|---|
| 1.1.4.5.3 - Negotiate & Approve Invoice                         | Scope Fully Conformant<br>(5)     | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| 1.1.4.5.4 - Issue Settlement Notice & Payment                   | Scope Fully Conformant<br>(5)     | <b>Conformant</b><br>Note that the support provided can involve manual action facilitated by the automated support.<br>See the Process Mapping descriptions in Chapter 3 for further details.   |
| Within Level 2:<br>1.1.4.6 - S/P Interface Management           | Scope Partially Conformant<br>(2) | <b>Partially Conformant</b><br><b>The following Level 3 process were assessed for conformance:</b><br><b>1.1.4.6.3 - Mediate &amp; Orchestrate Supplier/Partner Interactions</b><br>This process represents 1 of 3 processes defined for this Level 2 process.<br>Not all contained Level 3 process elements are in scope for the assessment.<br>See the Process Mapping descriptions in Chapter 3 for further details. |
| 1.1.4.6.1 - Manage S/P Requests (Including Self Service)        | N/A                               | This process was not assessed.  |
| 1.1.4.6.2 - Analyze & Report S/P Interactions                   | N/A                               | This process was not assessed.  |
| 1.1.4.6.3 - Mediate & Orchestrate Supplier/Partner Interactions | Scope Fully Conformant<br>(5)     | <b>Conformant</b><br>See the Process Mapping descriptions in Chapter 3 for further details.   |