Tiger Prism 2020-R1 User Guide Charging



Charging

Overview

This module allows import, review and adjustment of the telephone call tariffs available on the Prism system.

Landing Page Dashboard

The Charges landing page has several sections relating to tariffs, fixed charges and taxation. The landing page can be returned to by clicking Charging in the navigation menu.

The top row of tiles details the numbers of each tariff element currently defined.



The next part shows the number of defined fixed charges, and how they are split by type





Tox Management

Top 10 Taxes Used By Fixed Charges

Top 10 Taxes Used By Fixed Charges

Top 10 Taxes Used By Tariffs

The last set of items shows defined taxes and displays how they are currently used.

Reference Terms

The following terms related to tariffs are used frequently in this section.

- <u>Carrier</u> A telephony service provider which has provided one or more tariffs.
- <u>Tariff</u> A set of destinations and the rates which should be applied. This, as a whole, determines how a call is charged.
- <u>Charge Band</u> Broadly defines what the charge for a call will be. Each charge band has
 one or more charge periods, each of which has a rate defined against it.
- Charge Period Part or all of a 24 hour day. There should be sufficient charge periods to cover 24 hours for all 7 days of the week for every charge band. For example, a weekday may have Charge Period "Economy" from midnight to 7am, followed by "Standard" until 6pm, then back to "Economy" until midnight.
- Charge Rate The charge rate is the combination of charge period and rate which match the time and day of the week of the call.
- Rate The details of how much to charge, and how to charge, for a call. These can be
 quite complex, and can change part way into a call, for example changing to a lower price
 per minute after the first 60 minutes.
- Numbering Plan An incoming or dialled PSTN number may be shown differently when
 presented as a national call, or with its E164 prefix. The number plan allows the variations
 to be treated and labelled identically.

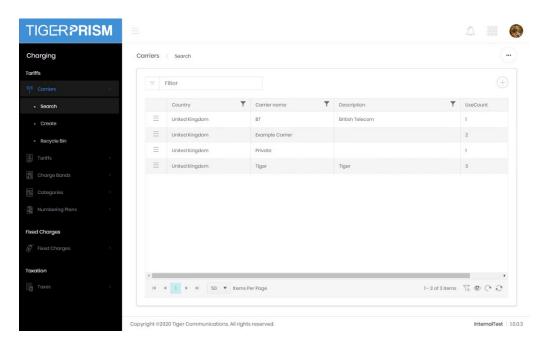
Tariffs

Carriers

The carriers section provides information on the service providers whose tariffs are configured in Prism. A single carrier may have multiple tariffs, or even historical versions of the same tariff if charges have been updated over time.

Search

The search page shows a list of all existing carriers configured in the system. From here you can filter the carriers and select one to view or edit the <u>Detail</u> page. For grid controls see common features.



Create

Creation of a new carrier is simple, as it requires only a name, description and country. If a carrier provides tariffs for more than one country, it will need multiple carrier entries.



Recycle Bin

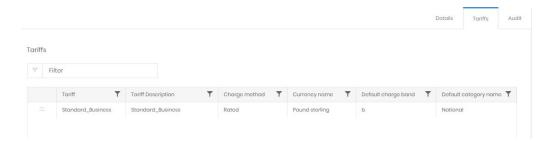
Carriers have a recycle bin. For usage details see Common Features.

Detail Page

The detail page for a carrier displays three tabs of information. The first is the entered details from the carrier's creation, the name, description, and country, as well as the number of times that carrier is assigned against



The second tab shows the individual tariffs imported for the carrier. Detail links from these records go to the tariff record's <u>Detail</u> page.

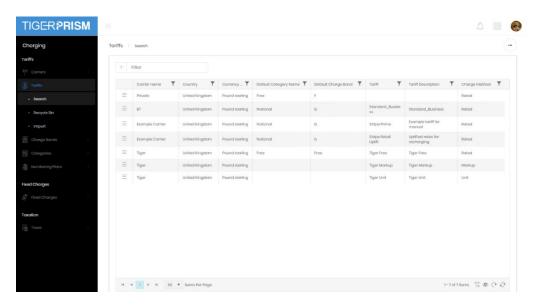


The final tab, Audit, shows the creation and last modified details for the carrier record.

Tariffs

Search

The search page shows a list of all existing tariffs configured in the system. From here you can filter the tariffs and select one to view or edit the <u>Detail</u> page. For grid controls see common features.



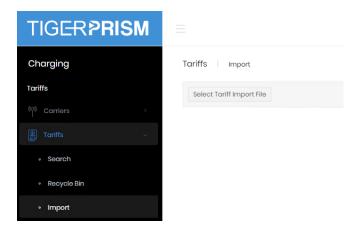
Recycle Bin

Tariffs have a recycle bin. For usage details see Common Features.

Import

Tariffs cannot be created within Prism. Instead the details are imported from a prepared file.

The first step is to select the file containing the tariff information. This will normally have been provided by Tiger, although most often it will also be imported by the team as well. Import files have the extension .INF.



Clicking Select Tariff Import File will open a file browser window to find and select the file. Once a tariff file has been selected the first window in the import wizard will show.

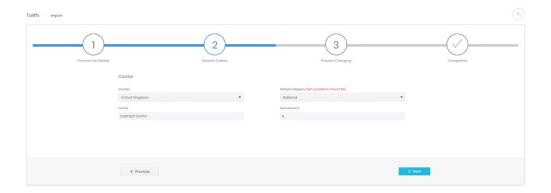
Preview File Details

This shows mainly details about the file but has a space for a description to be added.



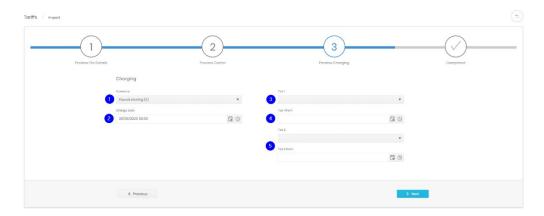
Preview Carrier

This step shows information from within the file. If the Carrier does not exist within Prism already it will be created as part of the tariff import. The country can be changed at this stage, as can the default <u>category</u> for calls. The default category and charge band are used for calls which cannot be matched fully to the dial codes contained in the tariff file.



Preview Charging

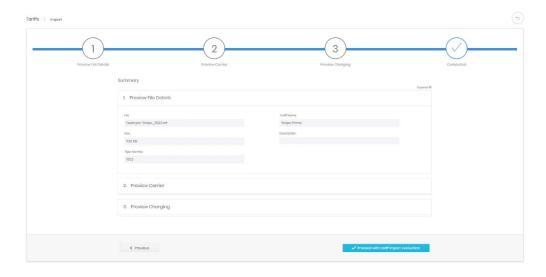
Step 3 contains some important information which is not supplied in the tariff file.



- 1. Currency Select the correct currency for the tariff. This will default to the system's currency.
- 2. Charge start This field is the tariff's activation date and time, and defaults to midnight on the day of the import. If the rates need to be applied to calls prior to this date the charge start needs to be pushed further back. If the rates are due to activate after the date of import then the Charge start can be set in the future.
- 3. Tax 1 The first tax applied to calls can be selected here. Taxation is detailed in its own section.
- 4. Tax 1 from The date on which tax 1 became, or becomes, valid for calls on the tariff.
- 5. Tax 2 selection and start date In case a concurrent tax rate is also valid (eg state and local US tax).

Completed

The initial tariff information is now entered.



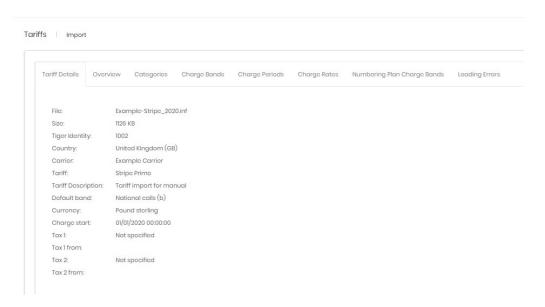
The next step is to move into the actual import of the charging structure. This step can take a few minutes



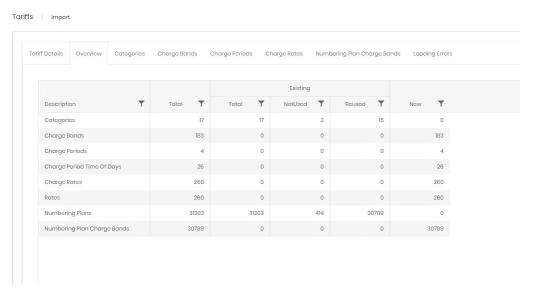
Tariff Evaluation

Following the tariff loading a summary with eight tabs is displayed. Each of these tabs contains substantial information about an aspect of the tariff structure.

Tariff Details. Shows a summary of the information entered in the first steps of the import wizard.

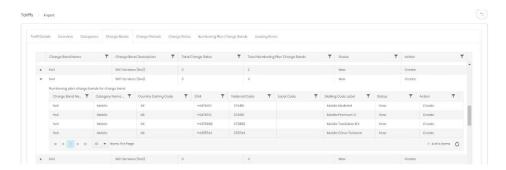


Overview. Shows a table detailing the various records which are affected by the import. Each of these is covered in its own section.

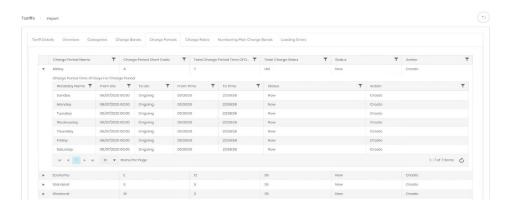


Categories. Shows the call categories on the system already, plus any which will be created by the import. Each category is shown along with the count of charge bands that will be applied.

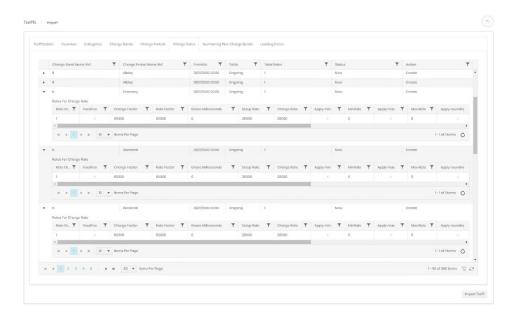
Charge Bands. Shows the <u>charge bands</u> which will be used for this tariff and how they fit into the <u>numbering plans</u> for the system. An arrow to the left of each charge band expands a sub table detailing the numbering plans which will be created.



Charge Periods. Shows a summary of the charge periods defined by the tariff. An arrow to the left of each row expands a sub table breaking down the days and times that each period covers. The charge periods should cover all hours of every day of the week.

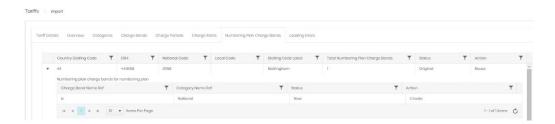


Charge Rates. The charge rate is determined by the number dialled and the time of day (and week). Hence each Charge Band/Charge Period combination has a charge rate, although these may be shared. The image below shows the three charge rates applicable to charge band 'b' – national rate for the tariff.



The rates under charge rates are shown in milliseconds and millipence. For more detail see the tariff detail page.

Numbering Plan Charge Bands. These entries show variants to dialled numbers based on the output CDR information. For example, calls made to a national UK number from within the UK may be dialled with the international '+44' prefix, or with the national '0'. This allows the system to handle all alternatives from a single rate set. An arrow to the left of the row expands details of the Charge Band used for the number plan.



Loading Errors. The final tab shows any anomalies or errors detected during analysis of the import file. These may not be enough to prevent the installation of the tariff.



If you want to go ahead after reviewing the import preview, then click the Import Tariff button in the bottom right corner. After Prism has processed the import you should see a success message.



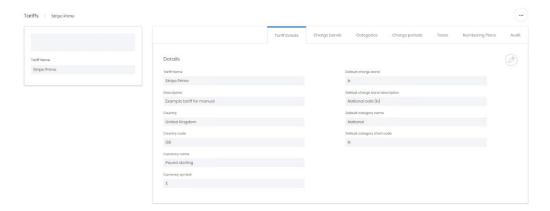
Tariff imported successfully

Detail Page

The detail page for a tariff has a set of tabs which allow review and access to the various aspects.

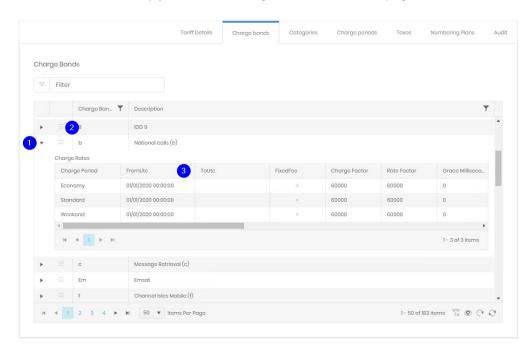
Tariff details

The first tab shows basic information about the tariff; name, description, currency, defaults charging information.



Charge Bands

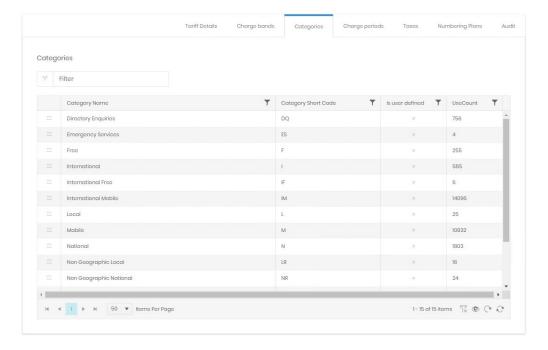
The charge bands tab lists all charge bands used in the tariff, the arrow to the left of each row (1) allows expansion of charge rate and period information relating to each band; while the detail button next to it (2) links to the <u>charge band's</u> own <u>detail page</u>.



Each charge period has a from and a to UTC shown (3). As tariffs are updated the prior values are retained to ensure that older calls are costed correctly, and to show a historical trail of previous versions.

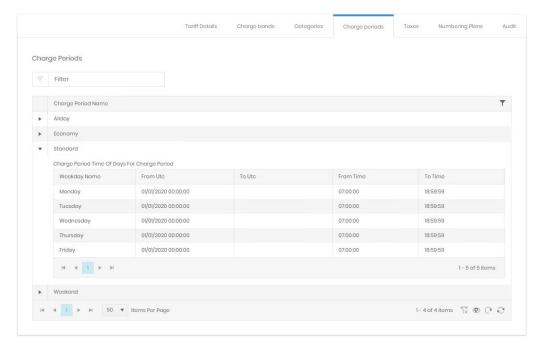
Categories

Dialled numbers are grouped into categories based on their destination type. The categories tab lists all those in use, along with how many times they are used in the system. Both the category name and short code are used in reports and analytics. The detail icon on the left of each row will open the detail page for the category. For grid controls see Common Features.



Charge Periods

Charge periods help to define which rate should be used, based on the time of day and day of the week. This tab shows the periods defined for the current tariff. Clicking the arrow to the left of each row expands the detail for each period. For grid controls see Common Features.



There is a from and to UTC value for each detail row. As tariffs are updated carriers may vary the timing of their own periods. The prior values are retained to ensure that older calls are costed correctly, and to show a historical trail of previous versions.

Taxes

The taxes tab shows currently applied (and previous) taxes to tariffs. The import allowed up to 2 taxes to be applied, but you can also change these at any time here.



Clicking the edit button allows you to alter the from or to date of a tax (1). This affects the calls that will have that tax applied.

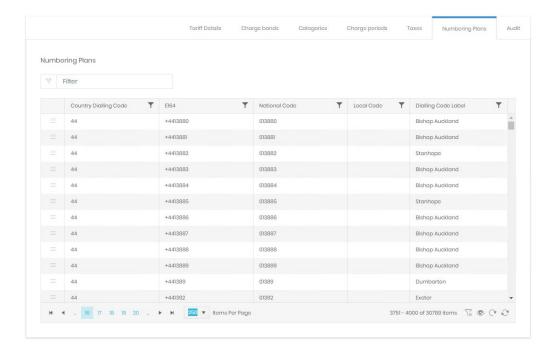


A new tax can also be added by clicking the add tax button (2), only one 'Tax 1' and one 'Tax 2' can be in effect at any time. Dates for from and to can be set into the future, in preparation for scheduled changes to taxation. An existing tax can be deleted altogether (3). Once changes have been made, click save (4), or click cancel (5) to return to the detail page.

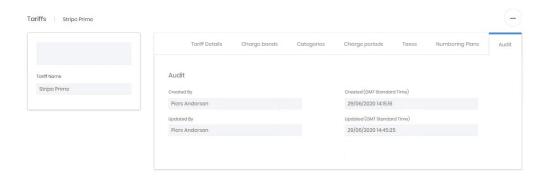
The taxes themselves are defined in the Charging \ Taxation section.

Numbering Plans

These entries show variants to dialled numbers based on the output CDR information. For example, calls made to a national UK number from within the UK may be dialled with the international '+44' prefix, or with the national '0'. This allows the system to handle all alternatives from a single rate set. The detail button on the left of each row will open the detail page for the specific Numbering Plan. For grid controls see Common Features.



The final tab, Audit, shows information on tariff creation and modification dates.

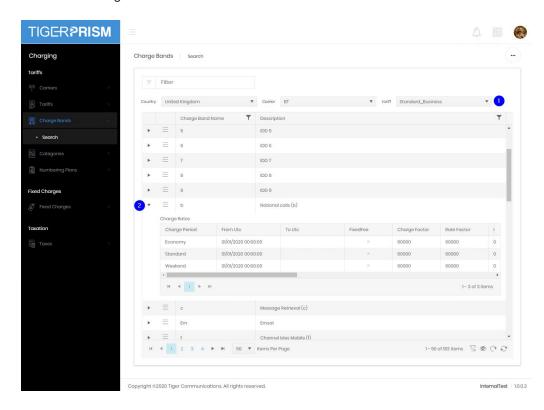


Charge Bands

A charge band broadly defines what the charges for a call will be. Each charge band is unique to a tariff, and will have one or more charge periods, each of which has a rate defined against it. A charge band might provide the charging information for a single dialled number, or for hundreds of them (e.g. national rate).

Search

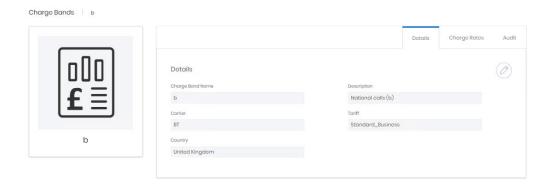
The search screen shows all charge bands defined within Prism, across all tariffs, but not at the same time. For grid controls see Common Features.



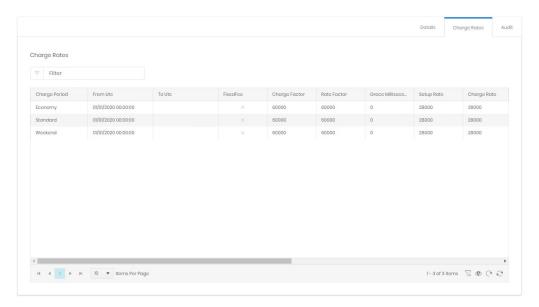
In addition to the standard grid controls are three dropdown filters (1). These allow selection by country, carrier, and tariff but only a single tariff's charge bands will be displayed at one time. The arrow to the left of each row (2) expands the charge rate detail for the band.

Detail Page

Each charge band has a detail page with three tabs. The first shows the properties of the band, showing the country, carrier and tariff it applies to. The edit button allows the name and description to be changed.



The second tab contains the charge rate details for the band. Charge rates are a combination of a charge period and a rate. For grid controls see Common Features.



Whilst the charge rates cannot be edited here, this page will show the history of charge rates if they have been updated by subsequent tariff imports. The from and to UTC fields will show when the charge periods were active.

The fields most commonly used in the rate definitions are:

- Fixed Fee. The call has a single fixed charge, rather than a per minute or per second rate.
- Charge Factor. Milliseconds per unit of charge. For example, 60000 (60 seconds) would indicate that the charge rate applies to each 60 seconds of call time.
- Rate Factor. Millisecond measured duration between charge units. For example, 60000 (60 seconds) would indicate that the total price for the call increments in 1 minute units, while 1000 (1 second) would be "per second" billing.
- Setup Rate. Millipence value added to the price of the call immediately on connection. This is in addition to any charge accruing from the duration of the call.
- Charge Rate. Millipence value indicating the charge accruing for a single Charge Factor duration.
- Apply Min. Whether or not there is a minimum charge for a connected call. Commonly used instead of a setup charge, but both can apply.
- Min Rate. The minimum duration-based charge for the call. The total charge will only increase once the duration of the call causes the charge to increase beyond this value.

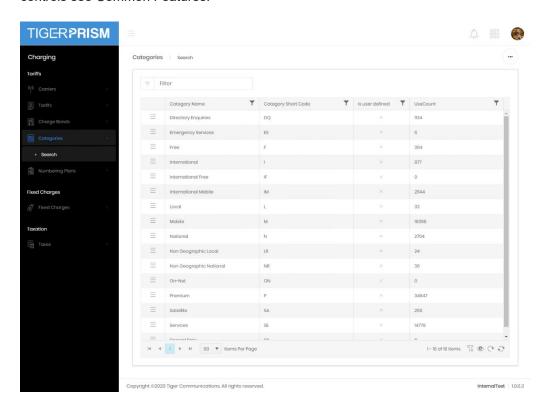
The audit tab shows creation and last modification date and user details.

Categories

Dialled numbers are grouped into categories based on their destination type.

Search

The categories tab lists all those in use, along with how many times they are used in the system. Both the category name and short code are used in reports and analytics. For grid controls see Common Features.



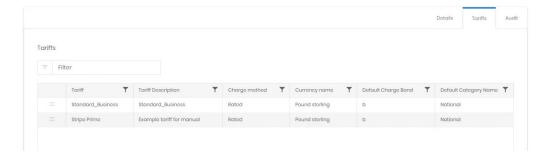
There are a set of categories which a re predefined on Prism (showing in the picture above with Is user defined as x). User defined categories can be created by tariff imports. The button on the left of each row directly opens the detail page for the category.

Detail Page

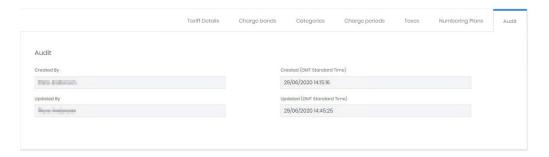
The category detail page shows three tabs. The first shows the basic information for the record.



The tariffs tab shows all imported tariffs which use the category. The button on the left of each row directly opens the detail page for the tariff.



The audit tab shows creation and last modification date and user details.

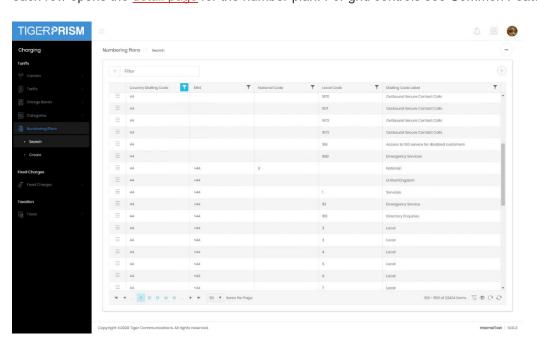


Numbering Plans

A numbering plan contains all variations of a single dialling code. An individual code may be shown differently when presented as a national call, or with its E164 prefix. The number plan allows the variations to be treated identically.

Search

Each number plan shows the country for which it is valid, the E164 prefix for numbers, the national prefix (if any), and the local prefix (if any) and the label. This label is shown as the source or destination for PSTN calls in analytics, exports, and reports. The button on the left of each row opens the detail page for the number plan. For grid controls see Common Features.



Create

Most numbering plans are created by tariff imports but individual plans can be created for specific numbers. The most specific number match will be used to label the call source or destination.

In the example below an entry for the Tiger main office number range is being created. Although +441425 (Ringwood, UK) is E164 code for the tariff created numbering plan, this new one is more specific and so will be used in reporting.



Detail Page

The numbering plan detail page provides no more information than the search grid, but does allow the Dialling Code Label to be edited.



Both import created and user created Numbering plans can be deleted with the correct rights, there is no recycle option however, so care should be taken.

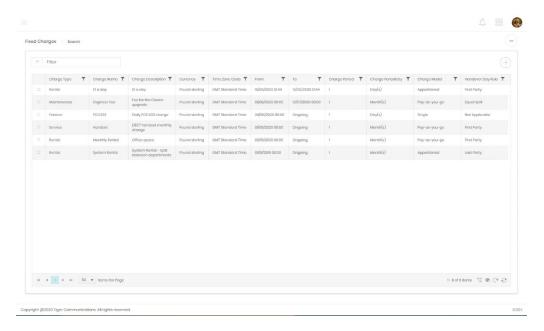
Fixed Charges

Overview

Fixed charges allow Prism to apply single or recurring costs to cover a variety of charging and recharging options for systems. They can be assigned at the enterprise level to organizations and at the topology level to endpoints, number groups, channels, channel groups, and CDR sources. How to assign then is covered in the Enterprise and Network manual sections.

Search

The search page shows all configured fixed charges, whether they are currently assigned or not, active or not. The button on the left of each row directly opens the <u>detail page</u> for that fixed charge. For grid controls see Common Features.

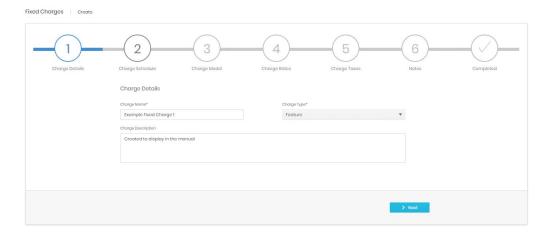


Create

Fixed charge creation is a process with 7 stages.

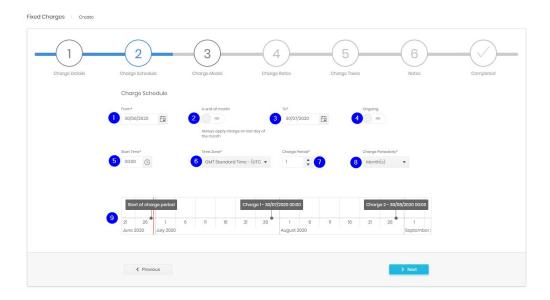
Charge details

The first stage is to name and describe the new charge



Charge Schedule

The second stage determines when the charges should start and end, and how frequently the charge should be applied through that period. There are a number of options on this page.



- 1. The From date for this charge. Prior to this date no charges will be applied to the object to which the charge is assigned.
- 2. Is end of month is a contextual control. If the date selected in (1) is not the last day of the month it will not appear. If enabled the charge will always apply on the last day of the calendar month (28th, 29th, 30th, or 31st as appropriate). If the charge periodicity is not months it will not appear.
- 3. The To date ends the fixed charge. Regardless of assignment, no further charges will apply to objects after this date.
- 4. If Ongoing is enabled the fixed charge has no To date and will continue until unassigned from objects.
- 5. Start Time governs the time of day that the charge is applied.
- 6. How many units of the charge periodicity (8) pass between charges.
- 7. Along with the charge period (7) determines how frequently charges are applied. Options are days, weeks, months and years.
- 8. This is a graphical representation of the next charge application dates as a check that the settings are working as expected.

Charge Model

The charge model governs how a charge is made if the object assigned the charge changes hands within the charge period. For example, a phone is swapped from one department to another halfway through the month.

There are four models available, using a monthly charge assigned to a phone as an example

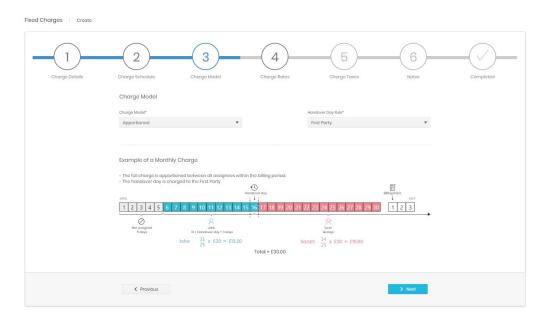
- Single The full charge is levied to the owner at the time and date of the billing point.
- Apportioned the full monthly charge is applied to owners based on the proportion of the charge period that they own the phone. This means that the full charge is applied even if the object is not owned by anyone for a part of the period.
- Pay-as-you-go the monthly charge is calculated to a daily rate and applied for the days
 that each party owns the object. This means that the full charge will not be made is the
 phone is not owned for part of the month.

Accumulative – The full monthly charge is applied to all owners of the phone.

For apportioned and pay-as-you-go there is often a day on which more than one party owns the phone. The Handover Day Rule determines how this is charged out.

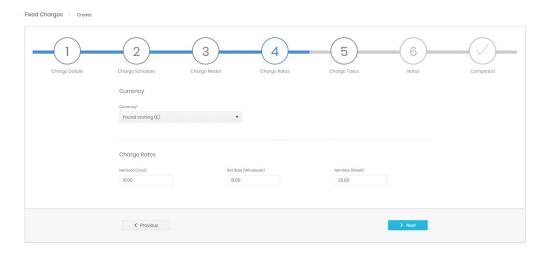
- First Party The first owner has the full charge for the handover day
- Last Party The last owner has the full charge for the handover day
- Equal Split The handover day's charge is split between all owners.

The page has a graphical representation of exactly how an example charge would be split with the currently selected options.



Charge Rates

In the fourth tab you can set the currency and costs for the charge. Each fixed charge has three values, Net cost, Net wholesale, and Net retail. Which of these is displayed depends on the report.



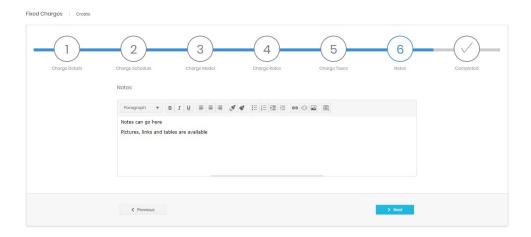
Charge Taxes

Up to two taxes can be selected to apply to a fixed charge. Taxes are defined in Charging $\$ Taxation.



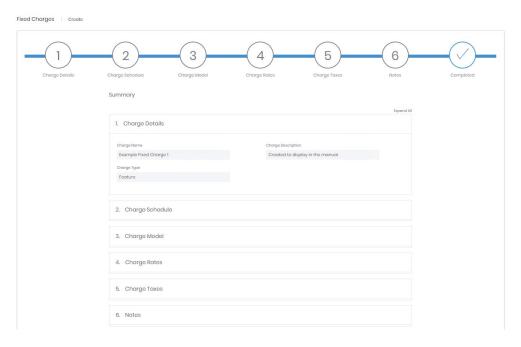
Notes

A field is available for detailed notes about the Charge.



Summary

A summary of all entered information is shown before the Charge is created.

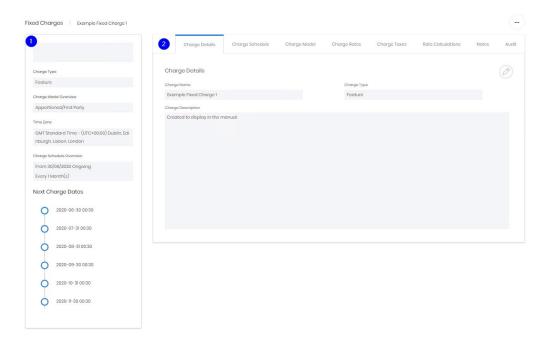


After the submit button is pressed the charge is created and the detail page for the new charge is opened.

Detail Page

The detail page has two main sections.

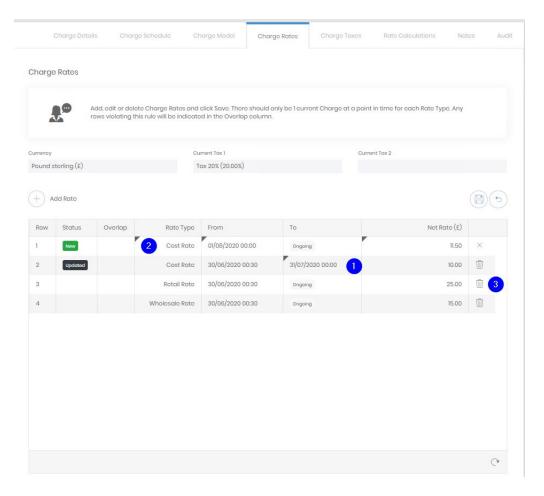
The first part (1) is a summary overview of the fixed charge, showing the charge model and schedule, along with the dates of the next few charges.



The second part is a set of tabs, most of which summarise the information gathered in the creation wizard and allow that to be edited. There are two tabs which differ from their creation wizard equivalents, and one new tab.

Charge Rates

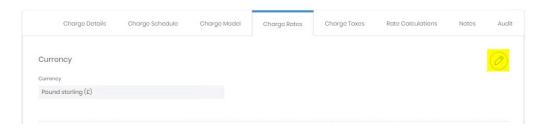
Once a fixed charge is created it may, over time, require the charges to be increased or decreased. The charge rates tab displays the rates, and a from and to date for each one. Initially the dates will match the ones entered in the charge schedule stage of creation, with one row per charge rate entered. However, these rows can be edited. You can simply adjust the net rate or, to maintain a record of the changes over time, you can set a to date on the current row and create a new one for the rate type. The dates involved must not overlap, but the changeover can be set in the future, allowing preparation for planned changes.



In this example the cost is due to increase on the 1st August 2020. The old Cost Rate row has had a 'to' date of the 31st July 2020 set (1) and a new Cost Rate row has been added (2) with the 1st August as its 'from' date.

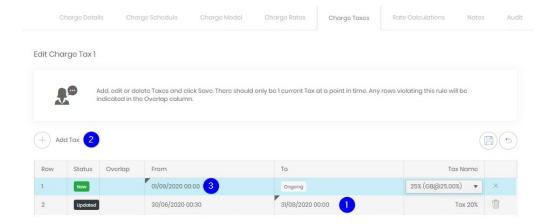
Also note that rows which are no longer required can be deleted here (3).

The fixed charge's currency can also be edited from the Charge Rates tab.



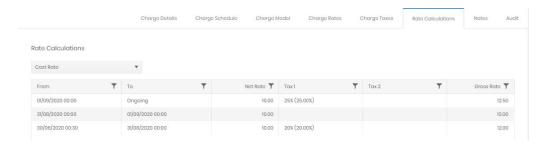
Charge Taxes

The taxes applied to the fixed charge (if any) can be edited here. In the same way as for charge rates either the existing tax selection can be changed, or the historical record can be preserved by adding a 'from' date to the existing row (1) and creating a new entry (2) with the new tax starting from the next date (3).



Rate Calculations

This tab's grid shows all combinations of rates and taxes, based on the from and to dates defined for each. This means that the actual rate used at any point in time can be determined easily. For grid controls see Common Features.

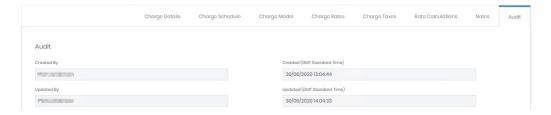


Notes

This tab allows viewing and editing of the any notes applied against the charge at creation or since.

Audit

The Audit tab displays creation and last updated information.



Recycle Bin

Fixed charges have a recycle bin. For usage details see Common Features.

Assignment

Once defined, Fixed charges are assigned to records within the record's own configuration.

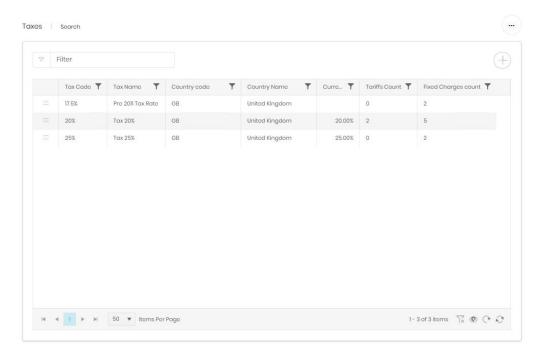
Taxation

Overview

The taxation module allows taxes to be set for each country. Once configured these tax records can be applied to tariffs or fixed charges.

Search

The search page shows a list of all existing taxes configured in the system. From here they can be filtered and selected to view or edit the <u>Detail</u> page. For grid controls see common features.



Create

Tax records are simple enough that a multistep wizard is not required. Each tax has a name (1) and a code (2), which can be freely defined, a country (and time zone) in which it applies (3), and the dates from and to which it is active (4). If the to date is left blank the tax is ongoing. Finally, the tax rate (5) is defined.



Detail Page

The detail page for a tax shows three areas.

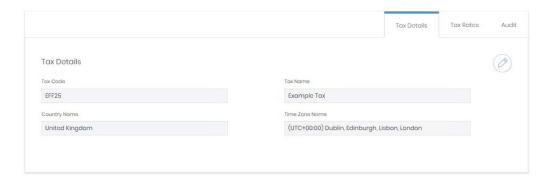
1. The first shows the tax's name and tax rate that is currently applied.



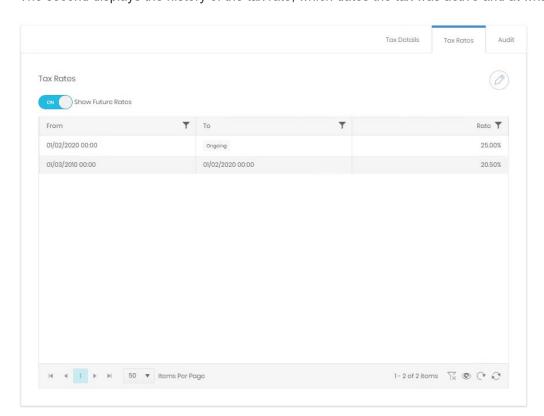
- 2. The second, Tax Details, shows country and historical rate details about the tariff, as well as an audit log of creation and modification.
- 3. The last section, Tax Usage, shows items which have the selected tax record applied to them.

Tax details

There are three tabs in this section

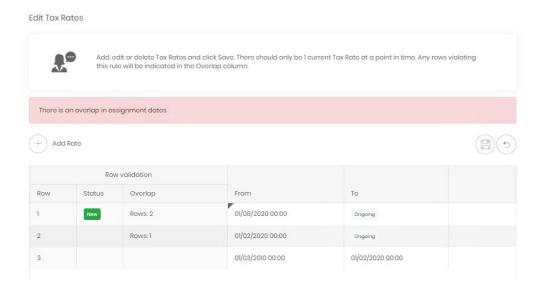


The first shows the remaining details set when the tax was created country, time zone. These can be edited if necessary.



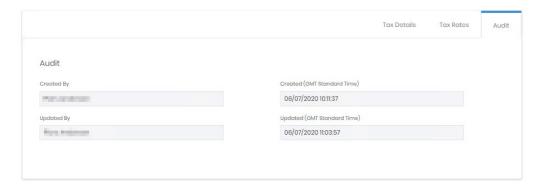
The second displays the history of the tax rate, which dates the tax was active and at what rate.

The edit function here allows the from and to dates of existing entries to be adjusted, and creation of new rows. The from date of these can be set in the future, allowing preparation for tax changes ahead of time. If this is done, then and end date must also be set for the current tax rate, otherwise it would result in two ongoing rates which is not allowed. Overlaps are highlighted.



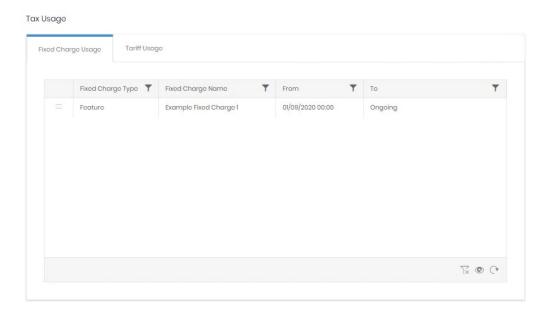
The 'Show Future Rates' slider determines whether these rates are shown in the grid or not.

The audit tab shows details of creation and modification of the tax record.



Tax Usage

The usage section shows a tab each for Fixed Charges and Tariffs. These tabs show a list of all the items that have been assigned, (for past, present or future use) the tax record.



Recycle Bin

Taxes have a recycle bin. For usage details see Common Features.

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