

CMP 8.22

Propositions Functionality and Configuration Guide

Version 1.0

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Version Control

Version	Issue Date	Author	Comments
Version 1.0	20 April 2026	MDS	CMP 8.22 Release - Updated the images to reflect the latest branding colours.

Terms Used in this Document

For definitions and explanations of the terms, abbreviations and acronyms used in this document, please see the *CMP Glossary* document.

1.0 About Product Catalogue and Propositions

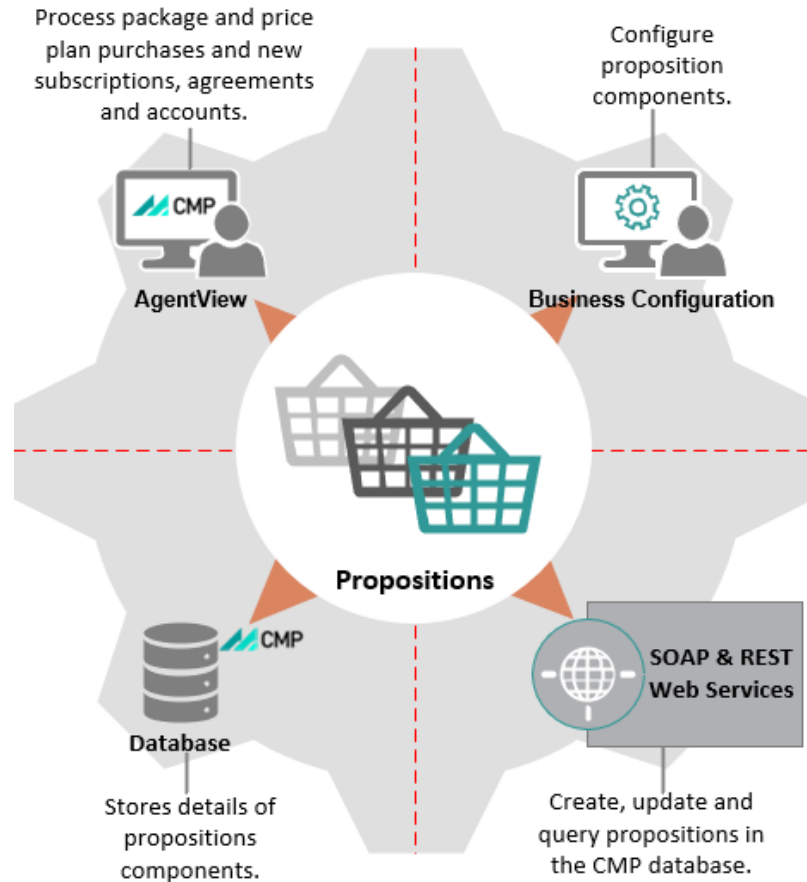
CMP supports the configuration of propositions, which make up an integrated product catalogue that details the products available to subscribers. Typically, propositions are the products offered to customers such as price plans and bolt-on packages.

A price plan combines a tariff, contract and a package under a single price plan code. For example a price plan could offer allowances for voice, text and data, along with international roaming and itemised billing, all for one monthly payment, with a discount if the customer buys the price plan within a certain time period. A bolt-on package might offer additional data or voice minutes or services such as phone insurance.

Propositions can be configured with components at a minimum, maximum and default price, allowing the CMP user to stipulate the price when placing a customer order. The manipulation of pricing is commonly used in business and corporate implementations where prices can be negotiated. CMP security level functionality controls which level of users can amend pricing.

The Product Catalogue accepts queries from third party portals to filter bolt-ons and Value added services (VAS) according to the customers chosen proposition.

Various CMP components play a role in supporting propositions:



CMP components and their role in propositions

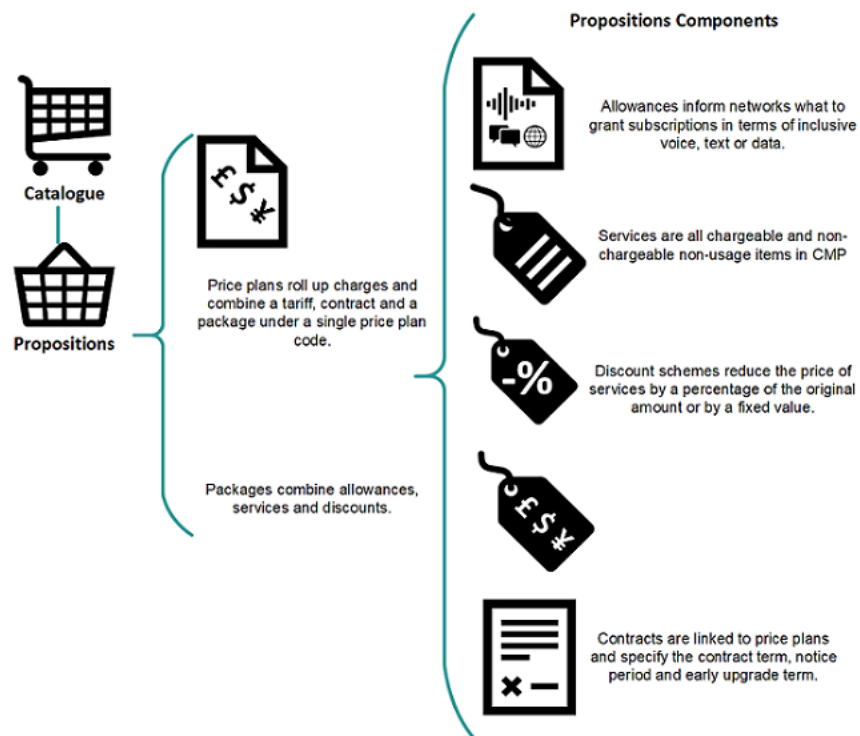
- [Business Configuration](#) - In the Business Configuration module of the Administration Console, you can configure and maintain propositions and their components. Business Configuration web services create and update the proposition details in the CMP database.
- CMP database - The CMP database stores all the details of proposition components.
- [Web services](#) - Web services create and update proposition components in the CMP database. They can also query proposition details in the CMP database and expose those details to applications and self-care apps. Propositions are exposed to customers via AgentView using shared services.
- AgentView - CSAs using AgentView can process the purchase of propositions such as bolt-on packages for subscribers. They can also set up subscribers with price plans and tariffs when creating or updating subscribers and agreements.

2.0 Proposition Components

Propositions in CMP are usually packages or price plans. Typically, it is price plans that are marketed to and purchased by end customers. A price plan relates multiple items together, for example an offer that includes airtime, texts, data and handset insurance. When a price plan is selected, all items are automatically selected when the order is placed. Packages in the form of bolt-ons and top-ups are also items frequently offered to and bought by customers.

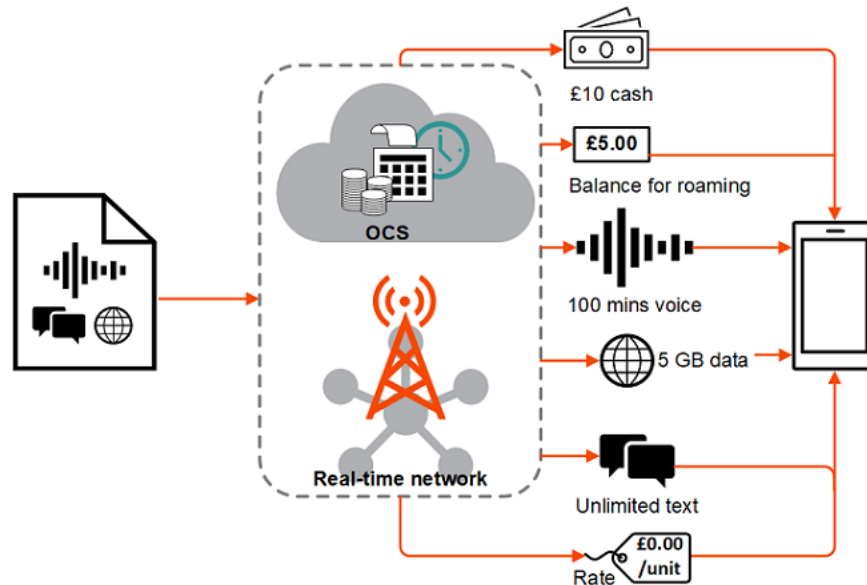
You build propositions by configuring their components and the links and associations between them. In CMP, propositions are built from the following:

- [Allowances](#)
- [Services](#)
- [Discounts](#)
- [Packages](#)
- [Tariffs](#)
- [Price Plans](#)



Propositions are built from components, which can be linked to other components

2.1 Allowances



In the hierarchy of components that make up propositions, allowances are the base level. Allowances inform the real-time network what to grant a subscription in terms of inclusive voice, text, data or cash. To do this, allowances in CMP are linked to equivalent allowances configured in the Online Charging System (OCS).

The different types of allowances are:

- Voice minutes
- Text
- Data
- Cash (Money) - Cash is a special type of allowance used to top up a balance in the OCS. This type of allowance can only be configured on a top up package.

Special types of allowance include the following:

- Rate - the rate plan that is to be assigned to the subscription on connection and tariff change in the OCS.
- Balance - the money balance that is to be assigned to the subscription on connection in the OCS.


Allowances can be for a set amount of the above, for example 50 GB data, or unlimited, for example unlimited texts.

Allowances have the following attributes:

- Recurring - an allowance that repeats or renews periodically, for example 100 voice minutes every month.

- Recurring Frequency - the frequency with which an allowance renews, for example once a month.
- Proratable - the allowance can be proportionally distributed when provisioned onto a postpaid subscriber to align to their billing period.
- Rollover - unused recurring allowances can be carried over into the next time period.
- Shared - the allowance can be shared between subscribers under the same account or agreement.
- Prepaid - the allowance can be part of a prepaid product.

Allowances are used to provision propositions - they set up packages with voice minutes, texts, data and other allowances. They are linked to packages. The packages to which an allowance can link depends on the package classification - base, bolt-on or top-up.

 For more information on packages and types of packages, see "[Packages](#)" on page 9.

Subscribers can:

- **Transfer allowances**

Both recurring and non-recurring allowances can be transferred from one subscription to another, if the subscriptions are both connected. This can take place via a self-care app, for example, using RESTful web services. The transferred allowances are visible for the donor and recipient in AgentView. There is no change to the expiry date of a transferred allowance. Unlimited allowances cannot be transferred.

- **Transform allowances**

Available allowances can be converted to other types of allowance for the same subscription. For example voice can be converted to data. The conversion calculation handled by the calling application, for example a self-care app, which informs CMP. CMP passes the information to the Online Charging System (OCS). The donor and recipient allowances are adjusted by RESTful web services. The transformed allowances are displayed in AgentView.

Recurring and non-recurring allowances can be transformed. The subscription must be connected. Unlimited allowances cannot be transformed.

- **Share allowances**

In Business Configuration, an allowance can be configured as Shareable. When this allowance is allocated to a bolt-on package, the package becomes shareable because a package cannot contain a mix of allowance types. For more information, see "[Shared Packages](#)" on page 11.

2. 1. 1 Allowances and Variable Consumption Rates

A provider may require flexible allowance units, for example for international call minutes to consume minute allowances at a faster rate than domestic call minutes. This allows providers to bring simplified offers to the market, reducing the number of minute offers while reflecting the underlying wholesale price. It allows customers to purchase minutes without needing to understand how they will be used in advance.

When CMP is being used in conjunction with NetEngage as an Online Charging System (OCS), the OCS supports the use of flexible units to represent an allowance such as data or voice for example. An allowance of flexible units allows different rates on unit consumption to be defined on the OCS for different call types. For example, a domestic call may consume 10 units per minute, whereas an international call may consume 25 units per minute. A CMP adaptor allows a flexible units offer defined in the OCS to be linked to a voice or data allowance configured in CMP.

CMP can present these units in any way deemed suitable, such that 100 units can be represented as 100MB or 100 minutes for example. This means that a voice allowance with a unit definition on the OCS can consume seconds at different rates based on the type of call. The end user still sees their balance as voice minutes but the balance will be consumed faster for a 1 minute call to Europe than a 1 minute local call. A balance enquiry returning units from the OCS is rendered in AgentView based on the type of allowance - data or voice. CDRs show both the charged and actual consumption of the service on the OCS, for example charged 10 minutes against the balance, when actual duration was 5 minutes. The Openet CDR provides both the actual usage and the billed usage of the call or session.

2. 2 Services

Services are all chargeable and non-chargeable non-usage items in CMP. Service charges can be expressed either as one-off charges, such as connection fees, or recurring charges, such as insurance or line rental. Services are most often applied against a subscription, although services can also be applied at account level. Only one instance of a service can be active at any one time.

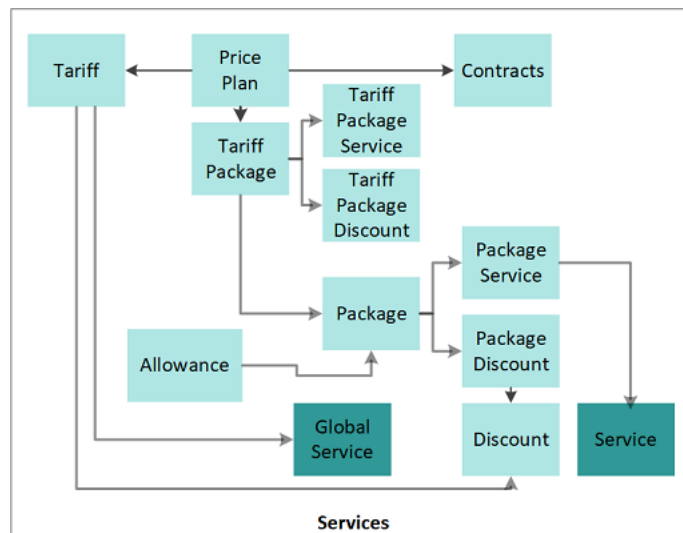
CMP supports the following types of services:

- **Unit** - Calls, text, or units of data used by the customer. A unit service can be used to charge for an international call, for example. This type of service is used for rated usage records received from the OCS so that they can be grouped on the invoice.
- **Sales Ledger** - Used for any ad hoc charges (fees) or credits (goodwill payments) made directly to the customers account; not relevant at subscription level. The user adds the service to the account via a workflow event.
- **Subscription Serial No.** - Used when assigning a customer with a telephone number that is chargeable, such as gold/silver numbers.

- **Invoice Adjustments** - Used to make adjustments against invoices, for example a credit or a charge.
- **Account Service** - Service added at the account level. If the service is an account service, you can specify whether the service is to be quantifiable, which means an agent can specify a quantity for a service when provisioning it onto an account. This allows agents to add multiples of an account service in a single action. This is useful, for example, when enterprise customers want to purchase a number of the same services - such as phone insurance - at a time.
- **Subscription Service** - The most frequently used category; relates to each particular subscription such as line charge, itemised billing, etc.
- **Discount** - Used to offer discounts on services to customers. Services that are discount services can have a parent service. A parent service is any prerequisite service that must be in use for this discount service to be activated. For example, to receive the international calls discount service, there must be some international calls being made. So should no international calls be made in a particular billing period, the discount won't be added.
- **S.O.P** - This is the service type for sales orders.

You can define a service as a global service, which can be added to any tariff, or a service which can only be applied to particular tariffs via a tariff package. A global service is available to all subscribers, at the specified price, regardless of tariff. Use this when you want to charge all subscriptions the same price.

In addition, you can select a package for a customer-specific *build your own* type tariff, and choose whether a service applies to all subscribers or only the principal subscriber.



A service can be a global service or applied to specific packages via a tariff

2.3 Discounts

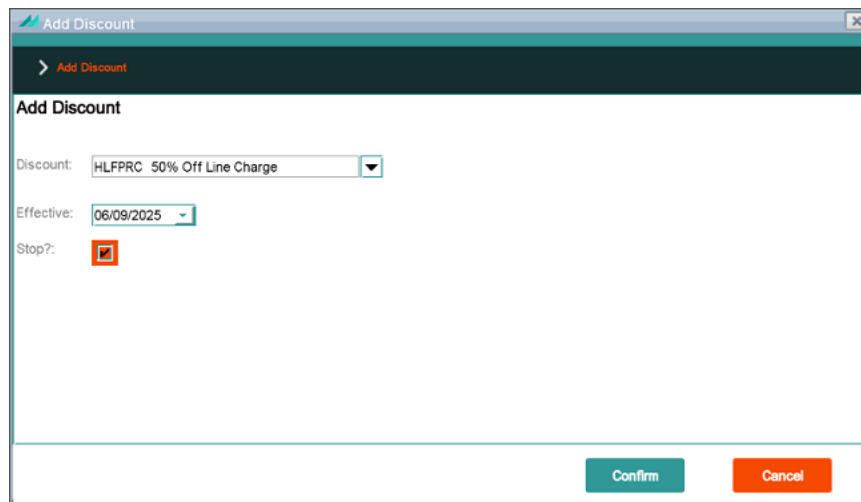
Discount schemes reduce the price of services by a percentage of the original amount or by a fixed value.

Discounts schemes do not alter the price of services, instead a credit is added for the discounted amount.

A negative discount can also be configured - a debit figure is invoiced rather than a credit, which adds a surcharge to the subscriber. This allows a subscriber to be charged extra for a particular service or unit. Negative discounts can be used to encourage additional usage in order to reach a band threshold, which produces a credit amount.

Discounts are typically raised at subscription or account level. When a discount is raised at account level, all the subscriptions linked to the account benefit from the discount, regardless of their tariff. The discount scheme is applied to each attached subscription during invoice production. Setting account-level discounts minimise how many discount schemes need to be created.

Discounts are processed in the order subscription, then account. The **Stop?** flag (applied in AgentView) prevents any further processing of discounts at the current level.



*Accessed via the **Billing >Discounts** lower panel, the **Add Discount** popup has a **Stop** flag that indicates no more discounts further down the sequence after this one will be used.*

Sequence numbers for discounts are also configured in AgentView and along with the **Stop** flag, determine how many discount schemes are checked and processed during invoice production.

A discount can be raised at subscription level only if the subscription is on an appropriate tariff. Only that specific subscription will benefit from that discount. The discount at subscription level can default from the package selected for the subscriber.

Discounts are created with an effective date and an optional expiry date that are used to validate if the discount can be applied. For example, a discount against a monthly-billed service is only given if the discount became effective on or before the beginning of the service's monthly charge.

CMP supports the *Normal* type discount scheme, which allows a flat percentage or fixed value to be applied to the invoice. Discount schemes are linked to services and can also be linked to usage class groups.

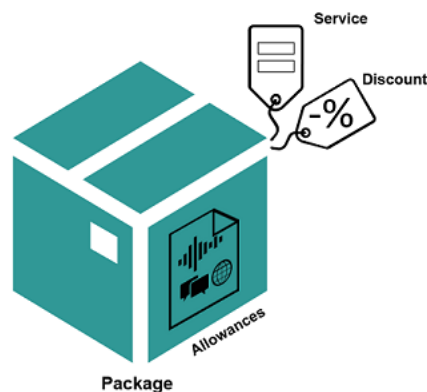
Normal discounts are only available at subscription and account level, they cannot be added at corporate or group level. They can only be added to a subscription that has been configured against the relevant tariff. Normal discounts only apply to services whose category is subscription service. They cannot be configured for account type services.

Normal discounts may be applied automatically through tariff set up, either at initial connection or as part of a tariff transfer.

Discount services are used to reduce the cost of a service. Services include all the non-usage items that customers can be charged for, such as connection fees, line rental, insurance and itemised billing. A discount service can be added to normal discount schemes.

2.4 Packages

A CMP package is a collection of allowances, services and/or discounts that can be added to a subscription. Users can use packages to add essential services and discount offers in a single action, rather than selecting individual services and discounts for each subscriber.



Package Services

The services linked to a package are known as *package services*. Services determine the overall cost. Services can be either rolling (a rolling service is a service whose price can vary over the lifetime of the service). It can be used, for example, to support an

introductory offer for the first three months.) or non-rolling, but not a mixture of both for the same service.

For more information, see ["Services" on page 6](#).

The price of the service can be amended when it is added to a package. This allows the same base building blocks of a package to be reused across many packages with the price being tailored in each. A price can be defined on the service, overridden when linked to a package and overridden again when associated with a tariff, meaning different pricing for all subscriptions with that package on different tariffs (price plans).

For example, line rental service could be £20.00 but as part of the package the service may be charged at £15.00. Consequently, all customers could be paying different rates for the same service. This depends on the tariff the customer is on and whether the customer selected the service as part of a package. If a customer connects using a new package, they automatically receive the service in that package at the default price. When this standard package is added to a tariff, if this particular service is included in the tariff package, the price in the package deal overrides the price charged in the service code, or the tariff service code. For example, the package price of a service could be £15.00 but as part of the tariff package the service could be charged at £10.00. The services that are present within the package on the day a customer is connected are the services the customer automatically receives. Services with a future effective date can be present within the package, with the same service code, replacing a particular service with a new price. This can also be done with a rolling service.

Package Discounts

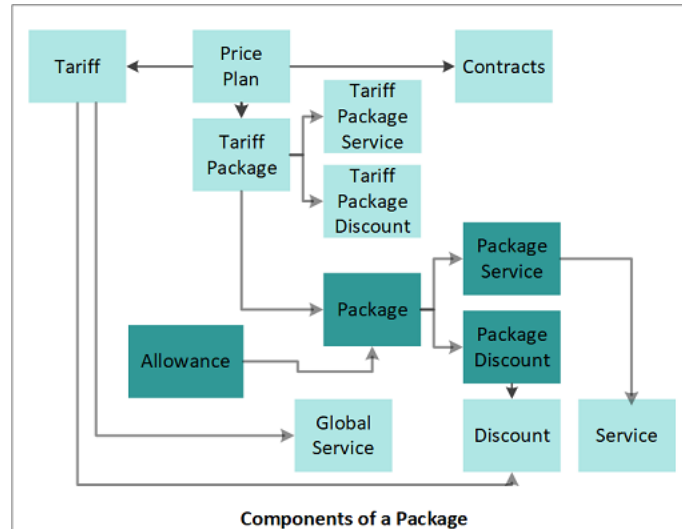
Discounts allow for a credit back on a service within a package. The discounts linked to a package are known as package discounts. Discounts cannot be changed when added to a package.

For more information see ["Discounts" on page 8](#).

Allowances

Allowances inform the Online Charging System (OCS) what to grant a subscriber in terms of inclusive voice, text, data or cash.

For more information see ["Allowances" on page 4](#).



Packages can be linked to package services and package discounts

A package can be classified as:

- A *base package* is always part of a price plan and contains essential services and/or discounts needed to fulfil a subscriber's contract, such as their monthly recurring charge and services to drive their base allowances of inclusive minutes, data and/or texts.
- A *bolt-on package* contains additional services, allowances and/or discounts for additional purchases a customer may make.
- A *top-up package*, for additional services for prepaid subscribers only. This is used primarily to add credit to a prepaid balance. The service is simply the charge. It may optionally also include allowances.

Packages can have attributes: recurring or non-recurring, [shareable](#) or not shareable. Once a package is created in Business Configuration it is not possible to change its classification or whether it is recurring or shareable.

Package groups are used to group packages for display purposes, for example in a self-care app.

2.4.1 Shared Packages

You can designate a bolt-on package as a shareable package in Business Configuration. Shared packages can be linked only to account services and can be purchased only at agreement level.


The shared package is charged to the account at which the agreement is logged as an account service. Shared packages cannot be paid for out of a prepaid balance. Shared bolt-on packages have no link to tariffs and therefore are not impacted by a price plan change.

Any subscriber under an agreement structure can purchase a shareable bolt-on package via AgentView or a RESTful web service. At connection time, the shared structure is created and all subscriptions on the agreement are opted-in by default - this is the shared group. Subscriptions can belong to only one shared group at a time and subscriptions cannot move from that shared group once it is created. Shared limits for a subscription can be altered via REST web services.

Shared allowances cannot be transferred or transformed.

2.4.2 Package Rules

The following rules govern how allowances, discounts and services can be associated with packages.

Package Type	Recurring?	Shared?	Valid?	Type of Service Allowed	Type of Discount Allowed	Type of Allowance Allowed
Base	Recurring	Shared	Invalid	N/A	N/A	N/A
Base	Recurring	Non-shared	Valid	<ul style="list-style-type: none"> Rolling & non-rolling No restrictions on number of services Recurring services Category subscription service Only non-global services can be added to the base package 	No restrictions	<ul style="list-style-type: none"> Voice, Text, Data allowed Only one of each allowance is permitted Allowance must be recurring If package is prepaid, prepaid allowances only If package is postpaid, postpaid allowances only
Base	Non-recurring	Shared	Invalid	N/A	N/A	N/A
Base	Non-recurring	Non-shared	Invalid	N/A	N/A	N/A
Bolt-on	Recurring	Shared	Valid	<ul style="list-style-type: none"> Only one account service allowed Non-rolling allowed Recurring allowed Global & non-global services can be added <p> Note¹</p>	Not supported	<ul style="list-style-type: none"> Voice, Text, Data allowed Only one of each allowance is permitted Allowance must be recurring If package is prepaid, prepaid allowances only If package is postpaid, postpaid allowances

¹In the case of a global service, the service price cannot be overwritten and the service cannot be a rolling service.

Package Type	Recurring?	Shared?	Valid?	Type of Service Allowed	Type of Discount Allowed	Type of Allowance Allowed
						only
Bolt-on	Recurring	Non-shared	Valid	<ul style="list-style-type: none"> • Only one service allowed • Rolling & non-rolling allowed • Recurring allowed • Category subscription service • Global & non-global services can be added <p> Note¹</p>	Not supported Note ²	<ul style="list-style-type: none"> • Voice, Text, Data allowed • Only one of each allowance is permitted • Allowance must be recurring • If package is prepaid, prepaid allowances only • If package is postpaid, postpaid allowances only
Bolt-on	Non-recurring	Shared	Valid	<ul style="list-style-type: none"> • Category account service • Daily charge with no pro rata; only one allowed • Global & non-global services can be added <p> Note³</p>	Not supported	<ul style="list-style-type: none"> • Voice, Text, Data allowed • More than one of each allowance is permitted • Non-recurring bolt-ons can apply to prepaid and prepaid subscribers <p> Note⁴</p>

¹In the case of a global service, the service price cannot be overwritten and the service cannot be a rolling service.

²Discounts are not supported because for prepaid purchases the price based on the discount would have to be calculated.

³In the case of a global service, the service price cannot be overwritten and the service cannot be a rolling service.

⁴No limit on the number of non-recurring bolt-ons that can be bought.

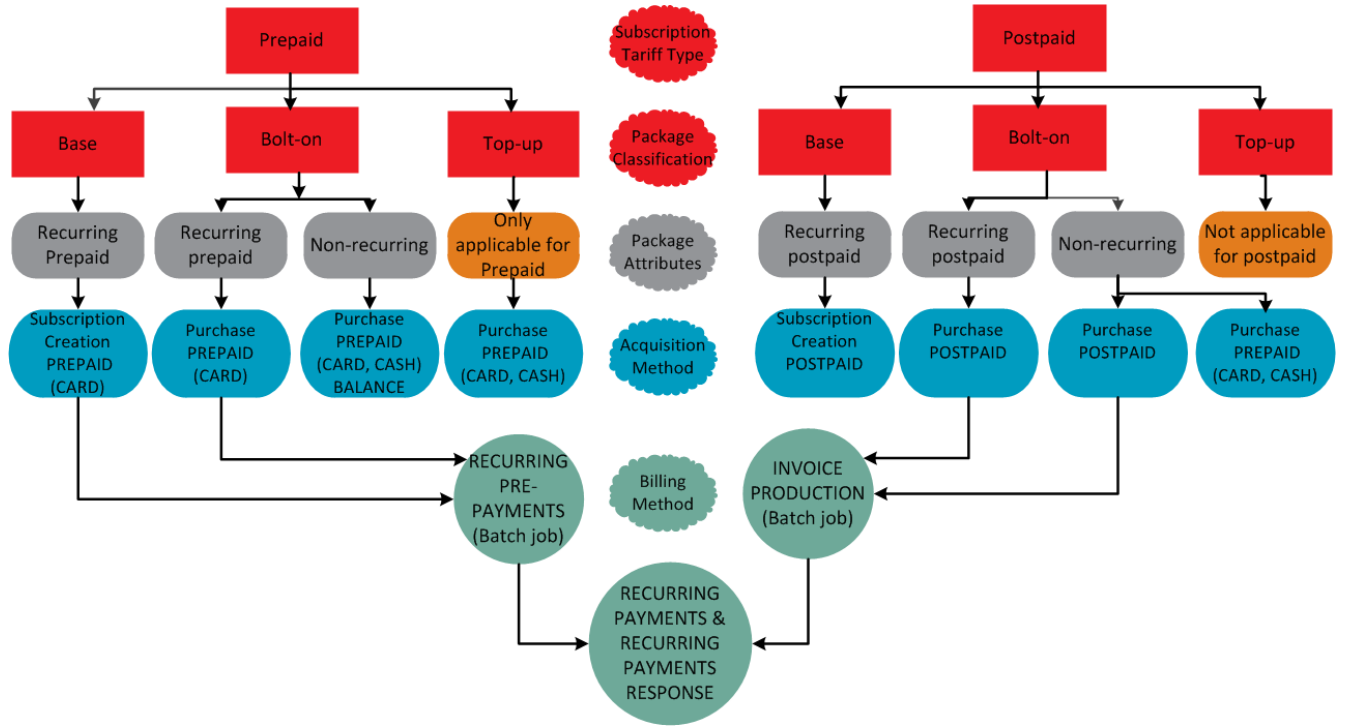
Package Type	Recurring?	Shared?	Valid?	Type of Service Allowed	Type of Discount Allowed	Type of Allowance Allowed
Bolt-on	Non-recurring	Non-shared	Valid	<ul style="list-style-type: none"> Category subscription service Daily charge with no pro rata; only one allowed Global & non-global services can be added <p> Note¹</p>	Not supported	<ul style="list-style-type: none"> Voice, Text, Data allowed More than one of each allowance is permitted Non-recurring bolt-ons can apply to pre-paid and prepaid subscribers
Top-up	Recurring	Shared	Invalid	N/A	Not supported	N/A
Top-up	Recurring	Non-shared	Invalid	N/A	Not supported	N/A
Top-up	Non-recurring	Shared	Invalid	N/A	Not supported	N/A
Top-up Note ²	Non-recurring	Non-shared	Valid	Only one allowed per bill charge	Not supported	<ul style="list-style-type: none"> Must have one Cash allowance Voice, Text, Data allowed Only one of each allowance is permitted Allowance must be non-recurring

2.5 Payments and Packages


The following diagram illustrates how packages are applied to subscriptions:

¹In the case of a global service, the service price cannot be overwritten and the service cannot be a rolling service.

²Only applicable for prepaid customers



Packages and Payments

The following table interprets the diagram:	
Tariff > Package > Attribute	Explanation
Prepaid > Base	<p>A prepaid subscription can have a base package.</p> <p>The package must be Recurring and Prepaid.</p> <p>The package is acquired during subscription creation.</p> <p>This is charged every month by the Recurring Prepayment batch job, which:</p> <ul style="list-style-type: none"> • Creates a debit (pre-pay) transaction. • The transaction, when due, causes a payment to be taken by the Recurring Payment job. <p>The payment can be charged against a card or prepaid balance.</p>
Prepaid > Bolt-on > Recurring	<p>A prepaid subscription can have recurring bolt-on packages; they do not have to run concurrently,</p> <p>The package must be configured as Recurring and Prepaid.</p> <p>The package is acquired via REST web services/AgentView purchase.</p> <p>This is charged by the Recurring Prepayment batch job, which:</p> <ul style="list-style-type: none"> • Creates a debit (pre-pay) transaction. • The transaction, when due, causes a payment to be taken by the Recurring Payment job. The payment can be against a registered card or prepaid balance. <p> Payment is taken when the bolt-on is due for renewal.</p>
Prepaid > Bolt-on > Non-recurring	<p>A prepaid subscription can have non-recurring bolt-on packages.</p> <p>The package must be configured as Non-recurring (the same non-recurring bolt-ons can be used for prepaid and postpaid subscriptions).</p> <p>The package is acquired via REST web services/AgentView purchase.</p> <p>Paid for up front.</p>
Prepaid > Top-up	<p>A top-up applies to prepaid subscriptions only</p> <p>The package is acquired via REST web services/AgentView purchase.</p> <p>Paid for up front with immediate posting of debit (prepaid) transaction and credit (payment).</p>
Postpaid > Base	<p>A postpaid subscription can have a base package.</p> <p>The package must be configured as Recurring and Postpaid.</p> <p>The package is acquired during subscription creation.</p> <p>The package is billed monthly by the Invoice Production batch job.</p>
Postpaid > Bolt-on > Recurring	<p>A postpaid subscription can have recurring bolt-on packages.</p> <p>The package must be configured as Recurring and Postpaid.</p>

The following table interprets the diagram:

Tariff > Package > Attribute	Explanation
	The package is acquired via REST web services/AgentView purchase. The package is billed monthly by the Invoice Production batch job aligned to the billing cycle date.
Postpaid > Bolt-on > Non-recurring > Purchase PREPAID	A post-paid subscription can have non-recurring bolt-on packages (pre-paid). The package must be configured as Non-Recurring (the same non-recurring bolt-ons can be used for pre and post paid subscriptions). This package is acquired via REST web service/AgentView purchase. Paid for up-front with immediate posting of debit (prepaid) transaction and credit (payment).
Postpaid > Top-up	Top-up is not applicable for a postpaid subscription.

2.6 Tariffs

A tariff is always part of a price plan. It is a pricing structure that is applied to units of usage for billing purposes for the subscription service and can have services linked to it for which further charges can also be applied. These available service charges can be one-off charges, such as connection or administration fees, or recurring charges, such as itemised billing, insurance or line rental. Discounts can also be applied to tariffs.

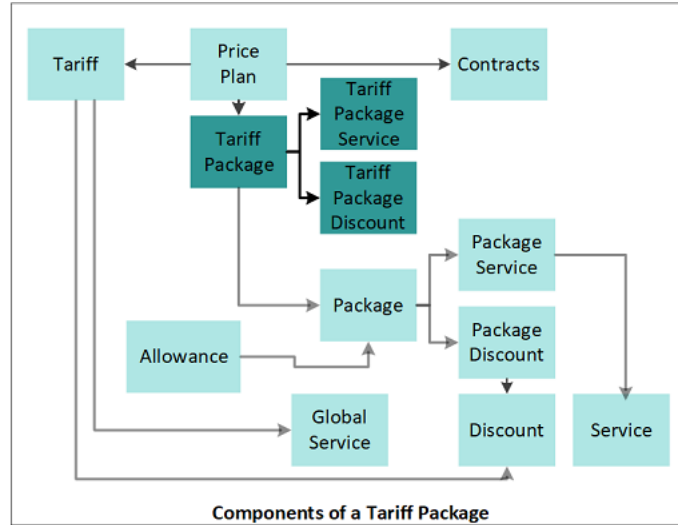
All subscriptions have a tariff. The tariff drives how a subscription is connected to a network prior to usage being consumed. Selecting a tariff, via the network and service code, ensures the subscription is connected to the correct network and service.

Tariffs can have a billing type of prepaid or postpaid. A postpaid tariff must have a full overage **spend cap**¹ defined to help prevent **bill shock**² for customers.

In an online charging implementation, usage event charges and usage-related discounts are driven by the Online Charging System (OCS). The tariff maps to the rate plan on the OCS.

¹A spend cap is a service for customers that applies a limit to how much usage a customer can consume outside of their inclusive allowances or bolt-on extras, preventing spending over a certain amount.

²In telecoms, bill shock is the negative reaction a subscriber can experience if their phone bill has unexpected charges.



Add services and discounts to a tariff via a tariff package

2.6.1 Tariff Links

Discount schemes, packages can be linked to tariffs, and tariffs can be linked to a price plan:

- **Tariff Packages**

A CMP package is a collection of allowances, services and/or discounts that can be added to a subscription. These are used primarily in B2B to provide personalised pricing. Packages created in CMP must be linked to the required tariff to be available for selection when a price plan to which the tariff is linked is chosen. If a package and a tariff are not linked, and the tariff is not linked to the price plan, the package cannot be selected. Services are added to the tariff package from the linked package; the service price can be amended when it is added to a tariff package. The added services are called *tariff package services*. Services that are not in the package cannot be added to the tariff package.

i Note: Shared bolt-on packages cannot be linked to tariffs.

Discounts are added to the tariff package from the linked package; the discount price cannot be amended when it is added to a tariff package. The added discounts are called *tariff package discounts*.

- **Tariff Services**


Services are all chargeable and non-chargeable non-usage items in CMP. Services can be a one-off (connection fee) or recurring (line rental). Only one instance of a service can be active at any one time. Services can be global services, which can be added to any tariff, or a service that can only be applied to particular tariffs via a tariff package.

- **Tariff Discounts**

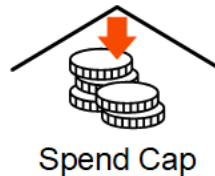
Discount schemes reduce the price of services and call class groups by a percentage of the original amount or by a fixed value. Discount schemes do not alter the price of services or call class groups; instead a credit is added for the discounted amount. You can also configure a negative discount, which adds a surcharge to the subscriber.

- **Tariff Spend Caps**

A spend cap is a service for customers that applies a limit to how much usage or usage and spend a customer can consume outside of their allowances or bolt-on extras, preventing spending over a certain amount. Tariffs with a postpaid billing type must be linked with an overage full spend cap.

 For more information, see "[Spend Caps](#)" below.

2.6.2 Spend Caps



A spend cap is a service for customers that applies a limit to how much usage or usage and spend a customer can consume outside of their allowances or bolt-on extras, preventing spending over a certain amount. This can help avoid overspending and "bill shock". Spend caps can be for:

- Value - applies to monetary/overage. This can be defined in CMP.
- Volume - applies to data usage. This can be defined directly in the OCS.
- Duration - applies to voice/SMS usage. This can be defined directly in the OCS.

There are two types of value spend cap:

- Full - this applies to all usage and is concerned with money overage only.

 A postpaid subscriber must always have full cap.

- Partial - this applies to specific usage with money overage only.

2.7 Contracts

CMP supports contracts at the agreement and subscription level for postpaid subscriptions. Contracts are linked with price plans. Typically, a provider defines a small number of contracts in the CMP database. These can then be associated with multiple different price plans via the Business Configuration console.

The following concepts and settings apply to contracts:


- **Contract Term (Months):** The total length of the contract.
- **Early Upgrade Term (Months):** The period at the start of a contract during which customers are not allowed to change their price plan.
- **Maximum Termination Fee:** Maximum monetary fee that can be applied as a termination fee.
- **Min Period Days Free Termination :** Termination fees are charged if the remaining days on a subscription's contract are greater than the termination fee days value.
- **Minimum Contract Term (Months):** The minimum time period of a contract that must be served. If a customer is outside of this period, they can change their price plan at no charge. If they are under the minimum contract term and outside the early upgrade term, the customer can change their price plan but may be subject to a one-off administration fee.
- **Notice Period (Months):** The period of notice a customer must give before a new price plan change takes effect.
- **Recontracting:** When a price plan for a postpaid subscription is either changed or upgraded within an existing contract term, or the contract term has ended and a new contract started. Any recontracting performed within contract may result in termination fees charged for the remaining charges of the old contract.

Because contracts are linked to price plans, price plan changes are also contract changes and you cannot directly manipulate individual contract data. You link a contract to a price plan when creating that price plan in Business Configuration and when doing so, the following are defaulted from contract:

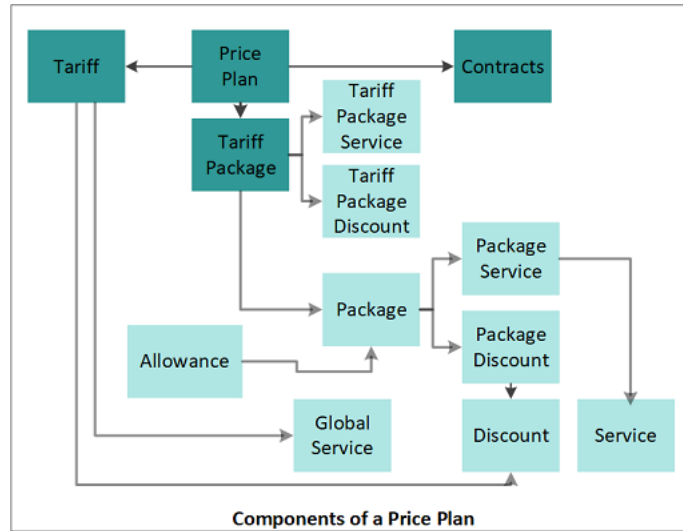
- Contract Term
- Early Upgrade Term
- Notice Period

When a price plan with a contract is linked to an agreement this means:

- A new contract
- All subscriptions on that agreement share the same price plan and contract values regardless of when they join the agreement.
- Subscriptions on agreement contracts are always associated with that contract even after it expires.
- Subscriptions on agreement contracts are not allowed direct manipulation of their price plans; this must be done at agreement level
- Agreement price plan changes can be scheduled immediately or at a future date. You can cancel a future plan change prior to it taking effect.

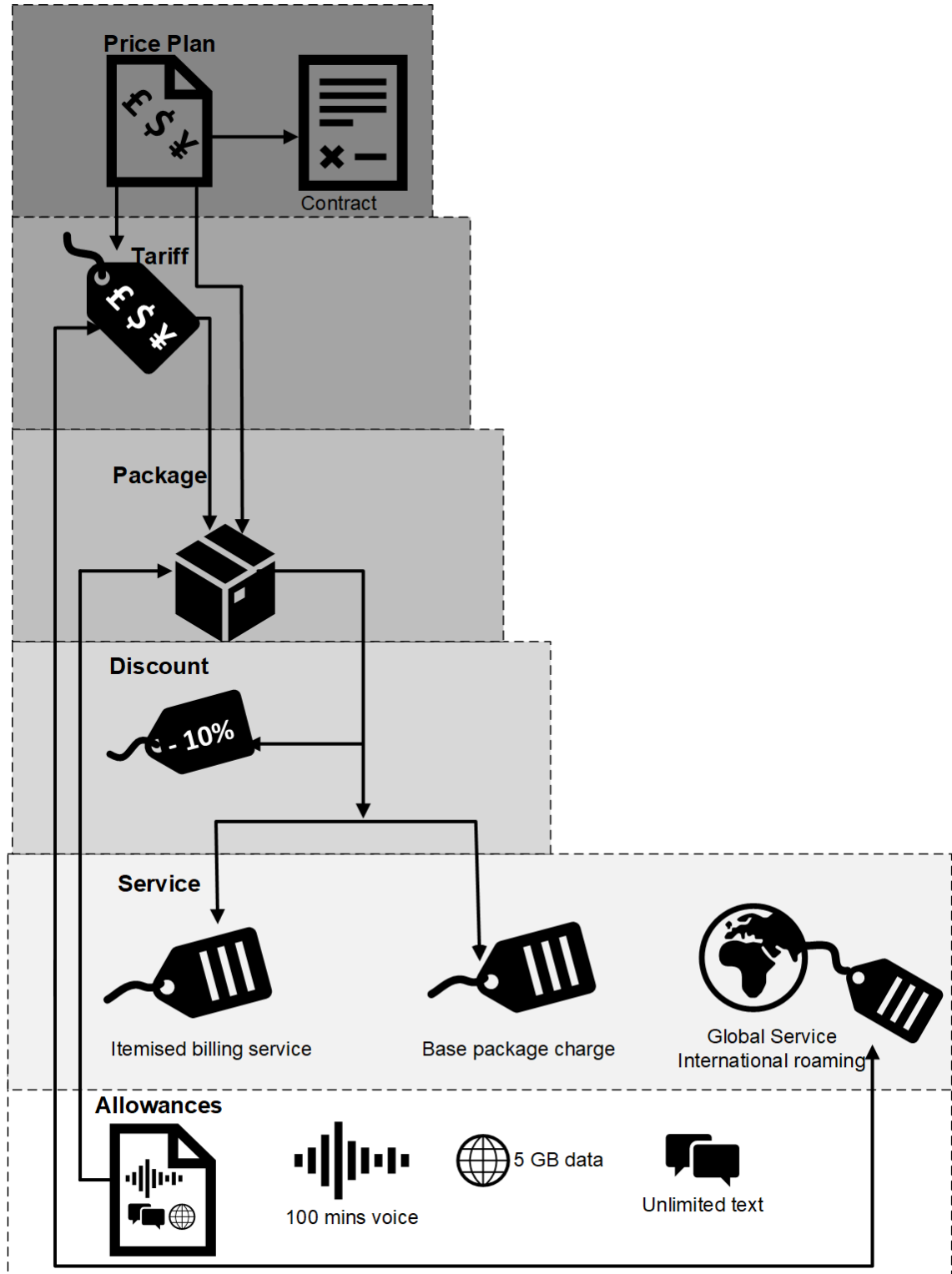
 Terms and conditions also reside in the price plan. However, these are independent of the contract.

2.8 Price Plans



A price plan combines a tariff, a package and a connection type

A price plan combines a tariff (connection type), contract and a package under a single price plan code. Price plans are typically the products that are marketed to customers, along with bolt-on packages. For example a price plan could offer allowances for voice, text and data, along with international roaming and itemised billing, all for one monthly payment, with a discount if the customer buys the price plan within a certain time period. A bolt-on might offer additional data or voice minutes or additional services such as phone insurance.



Example showing how a price plan is built from components

A price plan can be applied directly to an individual subscription or an agreement. Price plans can also be attached to a Corporate or Group entity, allowing the list of available

price plans to be restricted for a given customer structure. Service providers can use price plans to offer customers specific discounts/offers when they connect to a particular tariff.

A price plan can be linked to a price plan group, which allows price plans to be categorised.

3.0 Configuring Propositions

You can configure propositions and their components in the Business Configuration Console:

- [Allowances](#)
- [Services](#)
- [Discounts](#)
- [Packages](#)
- [Tariffs](#)
- [Spend Caps](#)
- Contracts - contracts are currently configured directly in the database, but they can be viewed in the Business Configuration and some details can be edited.
- [Price Plans](#)



Detailed step-by-step configuration instructions are provided in the Business Console Online Help.

3.1 Configuring Allowances

When you configure an allowance, CMP auto-generates a unique code for the allowance. You need to provide a meaningful descriptive name, for example 100 Minutes Voice Weekly.

It's important to match the allowance with its equivalent configured in the OCS. From this, many of the allowance's attributes will default, such as:

- If the allowance is unlimited or for a set amount.
- If the allowance is recurring, and if so, its frequency, for example once a month.
- Whether the allowance is prorateable.

You will also need to choose a billing type and whether the allowance can be shared.

3.2 Configuring Services

You can configure the following details for a service:

- **Main**
Main details include the service code and description, the security level of the service and the [service category](#). You can also define a service as a *global service*,

which can be added to any tariff, or a service that can be applied to particular packages via a tariff. In addition, you can select a package for a customer-specific *build your own* type tariff, and choose whether a service applies to all subscribers or only the principal subscriber.

You can also define whether an Account Service is quantifiable or not. That is, whether a quantity can be specified at the time of provisioning onto an account. For a quantifiable service, an agent can optionally enter a quantity at the point of provisioning an Account Service. This allows a number of services to be added in a single operation, for example when a company wants to add a number of digital services to a set of subscriptions but have a single line on the bill for all the services.

- **Billing**

When you configure billing information for a service, you can choose whether a service is listed on an invoice and set its maximum, minimum and default prices. You specify how long the service will run and control how dates appear on the invoice. You can also set whether services can be charged pro rata, and how to handle service charges when a customer terminates an agreement or migrates to another tariff.

- **Network**

Network configuration settings include the workflow events that are automatically created when a service is added or deleted from a customer record. You also specify the service code sequence and the group code, if applicable, as well as whether the service charge depends on a connection, for example a line rental charge.

- **Additional Details**

Additional details include service tax codes and service attributes. Service attributes include sequence numbers, to control the order in which services are displayed on invoices, and attributes such as service classifications.

3.3 Configuring Discounts


Once you have provided a code and meaningful descriptive name for a discount, you can set a timeframe during which the discount will be active.

It's important to link the discount to the services to which it applies. You can also link discounts to usage class groups.

3.4 Configuring Packages

To configure a package, you first need to create a new package, which involves classifying it as a base package, bolt-on or top-up and choosing the appropriate billing type.

You also need to specify whether the package is recurring, and if so, set its frequency. You can make the package shareable, if required.

 Only bolt-on packages can be shared and only account services can be linked to a shared bolt-on package. See "[Shared Packages](#)" on page 11 for more details.

You can set an expiry date for the package. This feature is particularly used with short term promotions. And you can configure the package to automatically raise a workflow event when the package is added, which can send a confirmation communication to the subscriber.

Once you have created the package, you can configure links between the package and allowances, service and discounts. This is how you will provision the package with the items the customer needs

You can also view the package associations, such as the tariffs that have links to the packages.

It is possible to create package groups, to help organise packages, for example for display in an app. Once you have created a package group, you can add packages to it.

3.5 Configuring Tariffs

You can configure the following details for a tariff:

Main

You need to supply a unique code and a meaningful descriptive name for the tariff. The tariff description appears in the invoice, so where a number of networks are used, it's recommended that you include the name of the network in the description.

You must specify the network type, for example a prepaid or postpaid online charging system (OCS) and the billing type - either prepaid or postpaid. If you have specified a postpaid billing type, you also need to select a overage full spend cap.

In addition, you must select the network rating plan associated with the tariff.

Billing Options & Schedule

You can configure the default billing media - for example whether it is paper (hard copy) or digital - as well as when the first and final bills will be sent, along with the as bill frequency.

You can choose which day's pricing will apply to public holiday and also configure usage limits - daily, upper and lower - and the workflow event which is triggered if the daily limit is exceeded, for example a notification via text.

Once a tariff is created, you can configure links to packages and to services, discounts and spend caps. See "[Tariffs](#)" on page 18 for more information.

3.6 Configuring Price Plans


When you configure a price plan you provide a unique code and meaningful description for the price plan and provide a timeframe for when the price plan will be effective.

You need to choose whether the billing type for the price plan is prepaid or postpaid.


You must also link a tariff to the price plan and, if the tariff is linked to packages (tariff packages), you need to select a default base package for the price plan from these. If applicable, you can add the price plan to a price plan group.

You have to select terms and conditions for the price plan. The effective date for the terms and conditions will be defaulted from the set that you choose.

Additionally, you can choose a contract for the price plan. The contract term, notice period and early upgrade term will be devolved to the price plan from the contract details.

 For more information, see "[Contracts](#)" on page 20.

You must configure a connection workflow event that will connect a subscriber to this price plan to the relevant network.

 The workflow event code is always CONNECTION. This is hard-coded. The Connection Type (CONN) uses the workflow event code as part of a Connection workflow event.

If required, you can provide configure explanatory and tooltip text to help Business Configuration or CMP users to understand the price plan.

4.0 Building Propositions

Propositions such as price plans and packages are built from the bottom up of the hierarchy of CMP business components that you configure in the Business Configuration console.

4.1 Example: Building a Price Plan

For example, suppose you want to add a new proposition: A new postpaid price plan costing £15 per month that will be part of your company's *Family 5* product group. Aimed at appealing to different family members and circumstances, Family 5 price plans share the same tariff but offer different allowances and services. This price plan will offer a base package of text, voice and data allowances that will be renewed every month, along with itemised billing and international roaming. If the customer does not use all their allowances, they will be rolled over to the next month. As an incentive to buy, customers get a discount if they purchase the price plan before a certain date. Customers won't be able to share their allowances. This price plan is offered on a 24-month contract.

Just in time for the holidays....

FAMILY FUN PLAN

You get:

- **100 Call Minutes** – stay in touch with home
- **5 GB Data** – never miss your favourite TV
- **Unlimited texts** – friends, family and more

And if you don't use them, we'll roll them over!

PLUS

International Roaming is included – so no nasty surprises in the bill.*

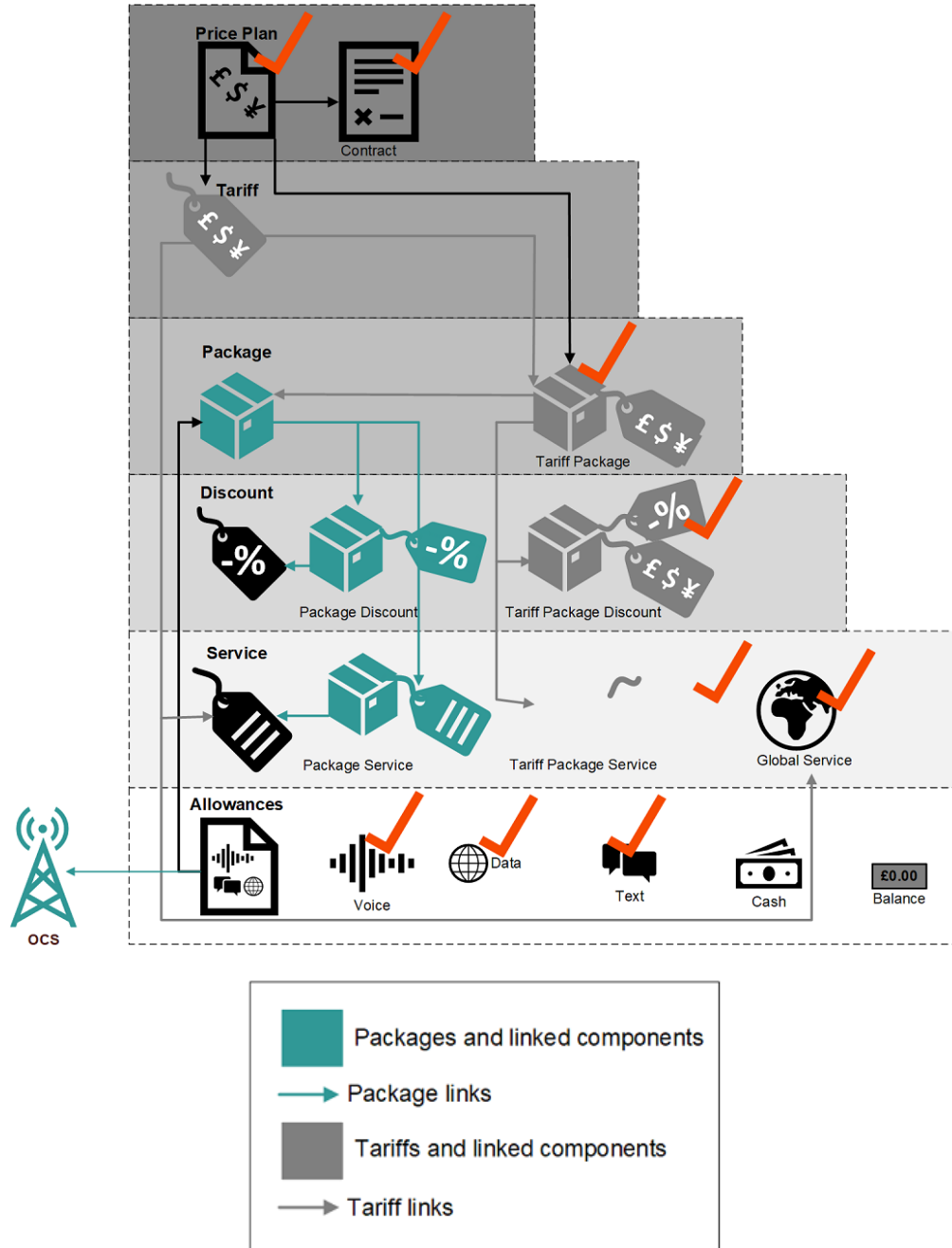
Just **£15** per month on our Family 5 tariff

*Our standard itemised billing is included and ensures we account for every penny we charge!

10% OFF!
If you buy by 01.12.2026

4.1.1 Step 1: Identify the Components

The first step is to identify the components you will need to build the price plan proposition. In the following diagram of the hierarchy of proposition components, the components needed for the price plan are indicated with a checkmark.



To create the new Family Fun price plan, you'll need the following:

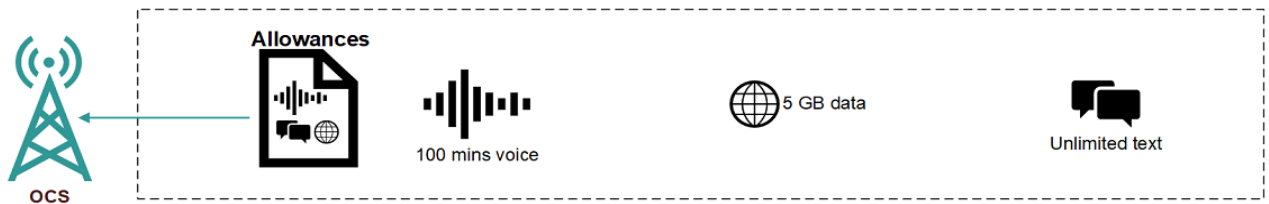
- Allowances - You need allowances to tell the network what to provision the customer with.
- Services - Services are required to drive the allowances and provide non-usage items.
- Discount - The discount offer is a flat rate of 10% if the price plan is purchased by a specific date.

- A base package - You need to configure a monthly recurring base package.
- A tariff.
- Price plan - once all the components are configured, you can configure the price plan.

4. 1. 2 Step 2: Configure Allowances

The first step is to ensure that allowances are available to meet the needs of the new propositions. In this case, allowances for the following are needed:

- 100 minutes voice
- 5 GB data
- unlimited text



Step 2: Ensure allowances are configured for the propositions

The price plan needs recurring allowances for voice, text and data in the amounts you require. The price plan is for postpaid customers, so the allowances must be postpaid or both postpaid and prepaid. Because the allowances are to be renewed every month, they must be configured as recurring allowances. They also need to be enabled to be rolled over to the next month if unused.

In the Business Configuration console, you create the required allowances by linking to an equivalent allowance in the OCS that has the configuration you require. Once you have selected the OCS allowance, the configuration settings are devolved to the CMP allowance and they cannot be changed.

Configuration of the voice allowance should be as follows:

Setting	Value
Allowance Code	This is auto-generated and cannot be altered.
Allowance Description	Postpaid 100 Minutes Voice.
Type	Voice.
OCS Allowance Name	The allowance name in the OCS that is associated with this allowance, in this case it is HOME_VOICE_POSTPAID_100.
Billing Type	Postpaid.
Allowance	In this case, the allowance is for 100 MINS.
Unlimited	This allowance has a limit, so this setting is not selected.
Recurring	This setting is selected.
Recurring Frequency	This is a monthly recurrence, so 1 is set as the frequency and Months is the time period.
Proratable	Not selected.
Rollover	This setting is selected and 1 is entered as the number of times the rollover is permitted.
Shared	Not selected.



For step-by-step instructions to configure allowances in the console, see the Business Configuration online help.

The data allowance configuration settings are as follows:

Setting	Value
Allowance Code	This is auto-generated and cannot be altered.
Allowance Description	Postpaid 5GB Data.
Type	DATA.
OCS Allowance Name	The allowance name in the OCS that is associated with this allowance, in this case it is 5GBDomesticDataDemo.
Billing Type	Postpaid.
Allowance	In this case, the allowance is for 5 GB.
Unlimited	This allowance has a limit, so this setting is not selected.
Recurring	This setting is selected.
Recurring Frequency	This is a monthly recurrence, so 1 is set as the frequency and Months is the time period.
Proratable	Not selected.
Rollover	This setting is selected and 1 is entered as the number of times the rollover is permitted.
Shared	Not selected.

The unlimited text allowance is configured as follows:

Setting	Value
Allowance Code	This is auto-generated and cannot be altered.
Allowance Description	Postpaid Unlimited Texts.
Type	TEXT.
OCS Allowance Name	The allowance name in the OCS that is associated with this allowance, in this case it is SMSUnlimited.
Billing Type	Postpaid.
Allowance	In this case, no value is entered because the allowance is unlimited.
Unlimited	Selected.
Recurring	This setting is selected.
Recurring Frequency	This is a monthly recurrence, so 1 is set as the frequency and Months is the time period.
Proratable	Not selected.
Rollover	This setting is selected and 1 is entered as the number of times the rollover is permitted.
Shared	Not selected.

4. 1. 3 Step 3: Configure Services

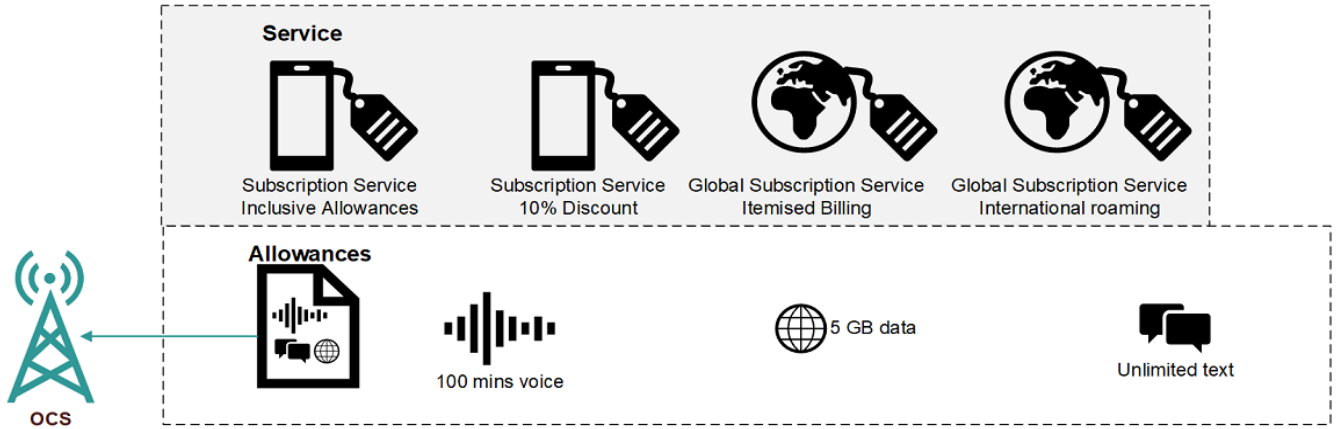
To add the charges for non-usage items to the proposition, services must be configured.

For the Family Fun price plan, you need:

- A service for the regular monthly charge that will provision the set of inclusive allowances. This will be a subscription service. Services are used to add charges to a product, so this is the service that will be priced at £15 to cover the monthly charge of the price plan.
- A discount service for the 10% discount. The service must be configured with the regular monthly charge service as the parent service to allow the discount to be applied to the charge.

These two services must be linked to the base package.

- A subscription service for the international roaming. The company charges the same price for international roaming regardless of tariff, so this is a global service that is already configured. You'll need to locate it and add it to the price plan by linking it to the price plan's tariff as a tariff service.
- A subscription service for the itemised billing. This is a standard service provided by the company to all price plans, so the configuration that applies to the international roaming service applies here too. This is an existing global service that needs to be linked to the tariff.



Step 2: Configure services to accommodate charges for the non-usage items

In the Business Configuration Console, configuration for the recurring monthly charge service is as follows:

Setting	Value
Main	
Service Code	An unique alphanumeric code for the service.
Service Description	A brief meaningful descriptive name for the service of up to 30 characters. This appears on the invoice next to relevant charges so ensure that spelling and grammar are correct.
Long Description	A longer description for the service that can be viewed by other CMP users, so it needs to be meaningful. It does not appear on invoices.
Service Category	The type of service - in this case Subscription.
Global Service	Unselected = No = The service is only relevant to a particular tariff and is not available to all subscribers.
Apply To	The service applies to All Subscribers and not to the principal subscriber only.
Billing	
Recurring charge?	Selected = Yes = the service will be charged on the frequency set in Period Covered .
Suppress from Invoice	Unselected = No = the service appears on the customer's invoice.
Price Min	The minimum price allowed for the service being created. This allows agents to override the default price.
Price Max	The maximum price allowed for the service being created. This allows agents to override the default price.
Price Default	The default price for the service. In this case the default is £10. You will override the default when you link the service to the base package.
Default Nominal Code	<p>A Nominal Code is required so that each time a customer is charged for this service it can be accounted for in the ledger. The Nominal Ledger Code is made up of two parts. The first part is the cost centre of the service, and differs from tariff to tariff. The second part is the Object Code, and relates to the type of service being charged for.</p> <p>The nominal ledger code is always displayed in the following format:</p> <ul style="list-style-type: none"> • Character 1 - blank • Characters 2-13 - Business Unit • Character 14 - decimal point • Characters 15-20 - Object Account (Non-Key) • Character 21 - decimal point • Character 22-29 - Subsidiary
Period Covered	For recurring charges, the frequency of occurrence. For example, if the charge (default) of £10 is a monthly charge then the number of months covered is 1.
Billing Offset	The number of billing periods the customer pays in advance to offset the service charges. No billing offset is required in this case.
Exclude until billed up to date	Whether active services on the subscription or account are to be excluded until the <i>billed up to date</i> . This means that services billed in advance are suppressed from future billing until the agreement's Old Next Expected Invoice Date (ONEID) reaches the date to which the service was previously billed. For example, this enables a ser-

Setting	Value
	vice charge to cover a full 12 month period and no further charge is made until those 12 months are over. In this case the checkbox is unselected.
Credit on Termination?	Unselected = No = the pro-rata calculation does not take place and the customer does not receive arrears for the amount paid in advance.
Itemised Bill?	Selected = Yes = customer receives an itemised bill.
Prorate at Start?	Often, a customer's first or final invoice is not for a full calendar month. The Pro-rata fields indicate whether the first and last bills should charge for this service on a pro-rata basis.
Prorate at End?	Unselected = No = charge the customer a full payment for the month for the service regardless of dates.
Bill Future on Termination?	Applies where the service has NOT been charged for in advance. In this case you want to send a final invoice to the customer, charging them for any days they have been connected to the service that have not yet been paid for. This is not required for services charged for in advance.
Dates Required?	The type of dates to appear on the customer's invoice for the service: <ul style="list-style-type: none"> • Both Dates Required
Dates on Next Line	Where dates appear on an invoice in relation to the charge for the service. Dates can be displayed next to the charge or beneath the charge on the next line. Unselected = No = dates appear on the same line, next to the charge.
Price Consolidation Service	Applies to subscription services only. The price consolidation service code. This enables the chosen service to become part of one consolidated service, which is several subscription services grouped together to appear on the subscription invoice as one service with one price against it. In this case, no services are consolidated so this field is left blank.
Discount Consolidation Service	Applies to subscription services only. The discount consolidation service code. This enables the chosen service to become part of one consolidated service, which is several discounted subscription services grouped together to appear on the subscription invoice as one service with one discount against it. This does not apply in this case, so the field is left blank.
Network Information	
Adding WorkFlow Event Type	For subscription services only. The workflow event type and code to be automatically created at subscription level each time the service is added to a customer record. In this case, leave blank.
Deleting Workflow Event Type	For subscription services only. The workflow event type and code to be automatically created at subscription level each time the service is deleted from a customer record. In this case, leave blank.

Setting	Value
Service Code Sequence	CMP automatically assigns a sequence code to the service. This can be used for external reporting.
Service Group	Services can be grouped together on an invoice, for example NETWRK or DEFAULT, rather than the invoice being a long list of services. In this case, the Subscriptions group is selected.
Connection Dependent	Whether a subscription needs to be connected in order for the service to be chargeable, for example, a line charge. Selected = Yes = connection is required.
Additional Details	
Text Code Effective Date	The date from which this service is taxable. If it is a date in the future, the service will not be taxable until that date.
Tax Code	The tax code that applies to the service.
Tax rate	The rate at which tax is charged for the service. This is derived from the selected tax code.
Active?	Indicates whether the service is active and available to new subscribers. You can deactivate a service in the future without affecting subscribers already connected to this service. Select Yes .
Explanation	Explanatory text to help future CMP users understand the service.

Services > Edit Service

Service Code: *

Service Description: *

Long Description:

Service Category: *

Global Service?:

Apply To: *

Billing Information:

Recurring charge?:

Suppress from Invoice?:

Price: Min Max

The discount service configuration settings are similar to the above with some exceptions, as follows:

Setting	Value
Main	
Service Category	The type of service - Discount, in this case.
Parent Service	<p>This field is available only if Service Category = Discount.</p> <p>Any prerequisite services that must be in use for this service to be activated . For example, to receive the international calls discount service, there must be some international calls being made. So should no international calls be made in a particular billing period, the discount won't be added.</p> <p>In this case, the parent service is Family Inclusive Allowances service.</p>
Billing	
Settings are the same as for the monthly recurring charge service.	
Network Information	
Adding WorkFlow Event Type	Not applicable in this case.
Deleting Workflow Event Type	Not applicable in this case.
Service Group	Services can be grouped together on an invoice, for example NETWRK or DEFAULT, rather than the invoice being a long list of services. In this case, the Other Charges and Credits group is selected.
Connection Dependent	<p>Whether a subscription needs to be connected in order for the service to be chargeable, for example, a line charge.</p> <p>Unselected = No = connection is not required.</p>
Additional Details	
Settings are the same as for the monthly recurring charge service.	

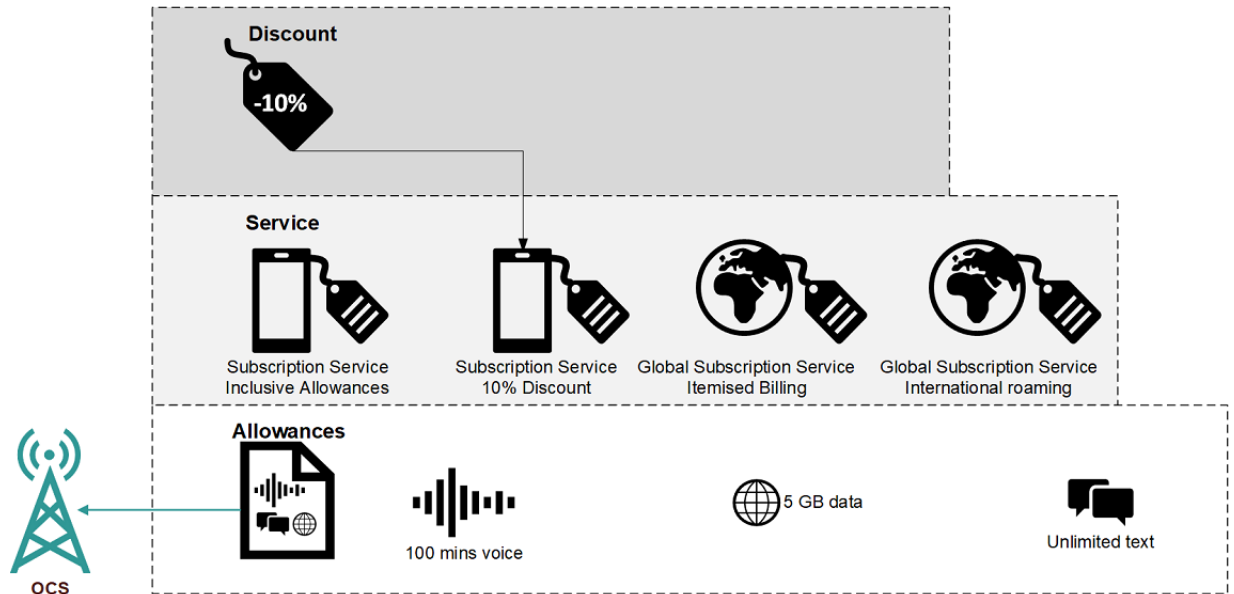
The configuration settings for the international roaming service are similar to the monthly recurring charge setting, with the following exceptions:

Setting	Value
Main	
Global Service	Selected = Yes = the service is available to all subscribers regardless of tariff.
Billing	
Settings are the same as for the monthly recurring charge service.	
Network Information	
Connection Dependent	<p>Whether a subscription needs to be connected in order for the service to be chargeable, for example, a line charge.</p> <p>Unselected = No = no connection is required.</p>
Additional Details	
Settings are the same as for the monthly recurring charge service.	

4. 1. 4 Step 4: Configure Discounts

The next step is to configure the discount scheme and the discount service. You will need a normal discount that is configured as a percentage. Because the discount has a time limit, you will need to configure an end date for the discount. The discount will also need to be linked to the base package. You can set an end date when you link the discount.

In this case, you need a 10% discount on the cost of the price plan (£15), which is the cost of the monthly recurring service. (All other services in the package are priced at £0.00).



Step 4: Configure any required discounts

The configuration settings for the discount scheme are as follows:

Setting	Value
Discount Scheme Code	6-character unique alphanumeric code for the discount scheme.
Discount Scheme Description	Family 5 discount.
Effective Date	The date from which the discount becomes effective.
End Date	The date on which the discount expires. Although you are offering a discount only until 1 December 2021, you leave this field blank. You can enter an end date when you link the discount to the base package, and this will allow you more flexibility in reusing the discount scheme more.
Active?	Indicates whether the discount scheme is active and available to new subscribers. Select Yes .
Explanation	Explanatory text to help future CMP users understand the discount scheme.
Services Linked to this Discount Scheme	
Service	The Family Inclusive Allowances (FAMINC) service.

In the Business Configuration console, the discount scheme settings look like this:

Discounts > Edit Discount Scheme

Discount Scheme Code: FAM10

Discount Scheme Description: Family 5 Discount *

Discount Type: Normal

Effective Date: 13-Jul-2022

End Date:

Active?:

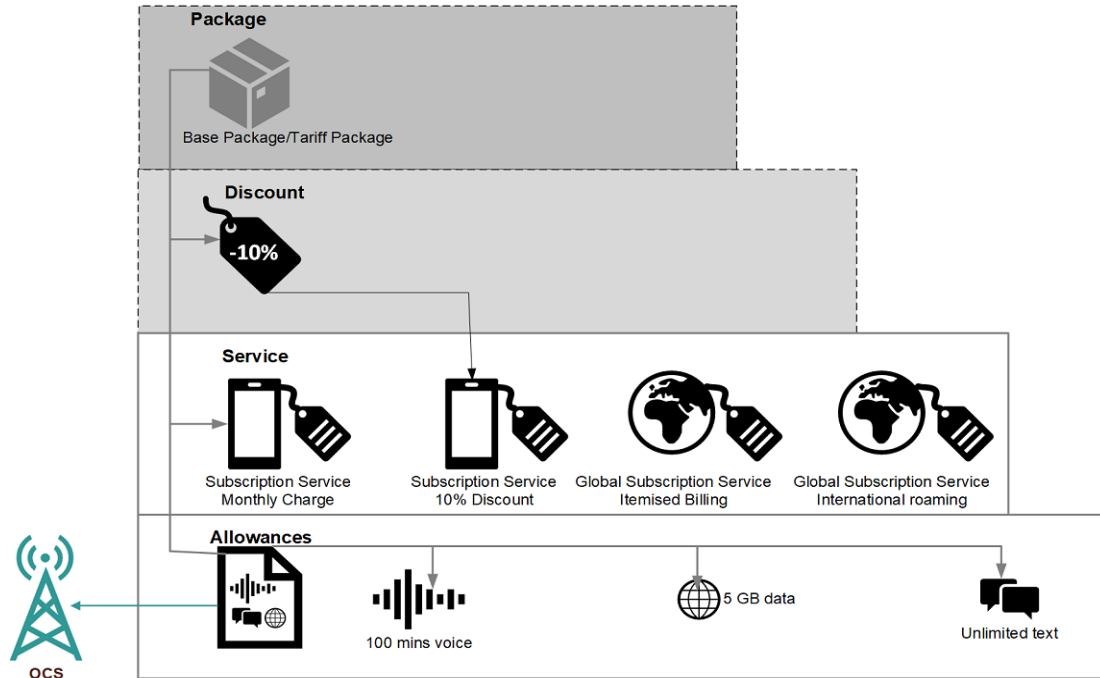
Explanation:

* Required fields

Save **Cancel**

4. 1. 5 Step 5: Configure the Base Package

The allowances, services and discounts are all configured. Now you need to roll their charges up in a base package.



Base package components

You need to configure a monthly recurring base package that will have allowances, subscription services and discount linked to it. Because packages roll up charges, and price plan prices are derived from the total charges of their linked packages, the base package is where you will need to take care to configure the prices of the services so that they add up to the required price plan price, which is £15.00 in this case.

The configuration settings for the package are as follows:

Setting	Value
Package Code	6-character unique alphanumeric code for the package.
Package Description	A description name for the package - Family Fun Base Package, in this case.
Long Description	A longer description for the service that can be viewed by other CMP users, so it needs to be meaningful.
Classification	This package is a Base package.
Billing Type	Postpaid.
Recurring	Checkbox selected = Yes .
Duration	The recurring time period - 1 month, in this case.
Shared?	This checkbox is inactive - base packages cannot be shared.
End Date	The date on which the package expires. You can leave this field blank.
Active?	Indicates whether the package is active and available to new subscribers. Select Yes .
Explanation	Explanatory text to help future CMP users understand the discount scheme.

In Business Configuration, the package settings appear as follows:

Packages > Edit Package

Package Code: FAMFUN

Package Description: *

Long Description:

Classification: Base Bolt-On Top-Up

Billing Type: Prepaid Postpaid Both

Recurring?:

Duration: * *

Shared?:

End Date:

Security Level: *

Active?:

Event:

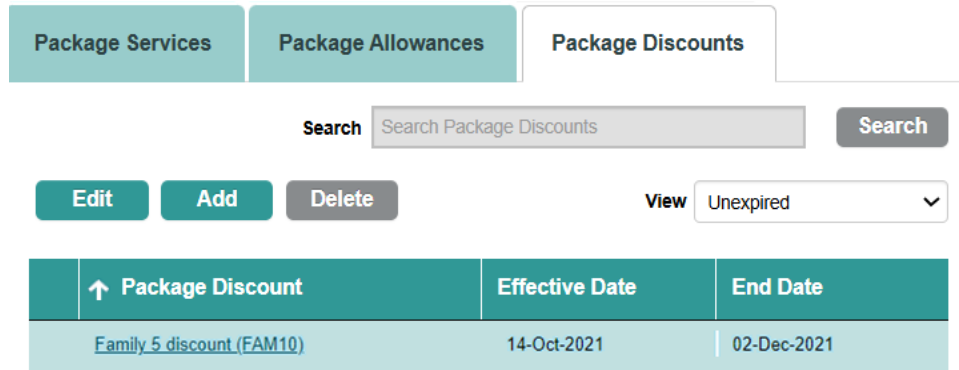
Explanation Text:

Once you have created the base package, you can configure the links:

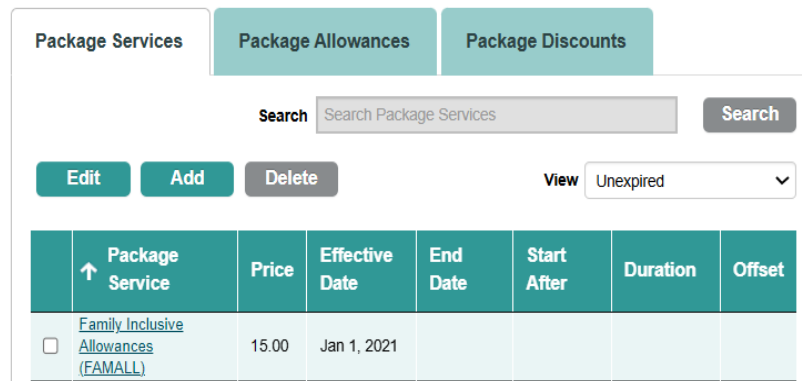
- To inform the OCS what to provide to the customer, you must link the allowances that you configured for the following:
 - Postpaid 100 minutes voice
 - Postpaid 5 GB data
 - Postpaid unlimited texts

Package Services		Package Allowances			Package Discounts		
Link Allowances							
Allowance	Type	Amount	Recurring	Duration	Proratable	Rolled Over	Shared
Postpaid Minutes Voice	Voice	100 Min 0 Sec	true	1 Month	Yes	No	No
Postpaid Unlimited Texts	Text	Unlimited	true	1 Month	Yes	No	No
Postpaid 5GB Data	Data	5GB	true	1 Month	Yes	No	No

- The discount scheme must be linked with an end date of 2 December 2021, because the discount incentive is only for purchases made up to 1 December.



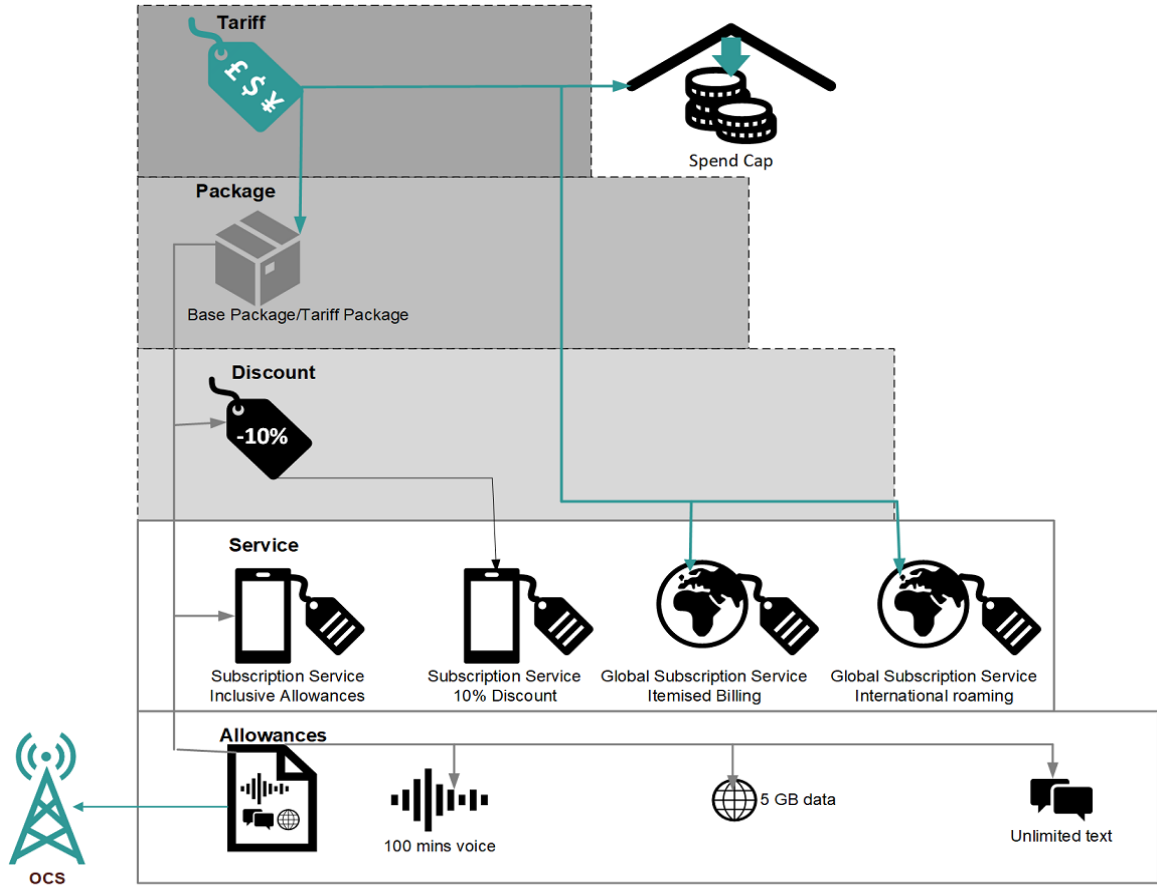
- To add charges to the package (and eventually the price plan) the service with the charge for the allowances must be linked, the Family inclusive Allowances service. When this service is linked, you need to override the default price and make the price £15.00.



4. 1. 6 Step 6: Configure the Tariff

All price plans have a tariff. In this case, the same tariff as the other Family 5 products must be linked to the price plan - the Family Tariff, in this case. The tariff must also have the following linked to it:

- The base package you configured - this now becomes a tariff package and the services and discount are known as tariff package services and tariff package discount.
- The global service for international roaming - if it isn't configured already, you will need to link this global service to the tariff.
- The global service for itemised billing - if it isn't configured already, you will need to link this global service to the tariff.



KEY:



Configure a tariff so that it links to the packages and services you want to provide in your price plan

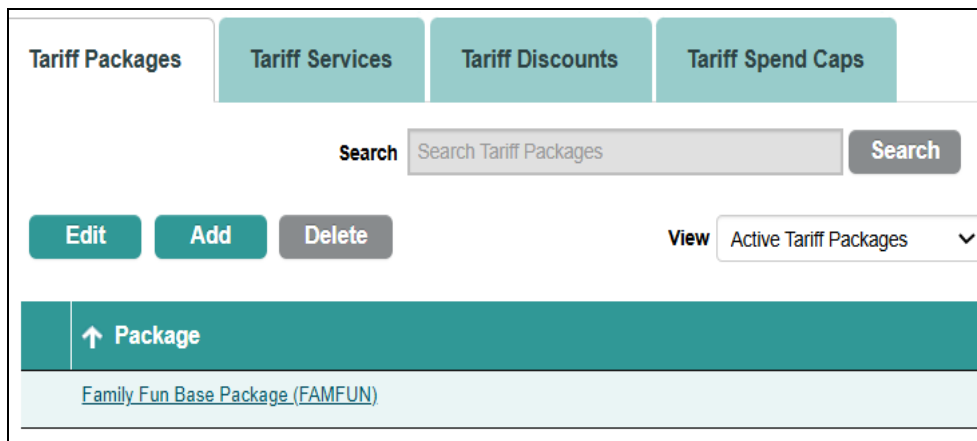
The tariff for the price plan is an existing tariff used for all price plans in the Family 5 product group - the Family Tariff. Its configuration settings are as follows:

Name	Description
Tariff Code	An unique alphanumeric code for the tariff.
Tariff Description	A brief descriptive name for the tariff.
Network Type	The type of network with which the tariff is associated, for example standard network, pay as you go OCS, post paid OCS or hybrid. In this case, it is post paid OCS.
Billing Type	The type of billing for the tariff - Postpaid .
Spend Cap	For a tariff with a PostPaid billing type, you must select a full spend cap.
OCS Rating Plan	The network rating plan associated with the tariff.
Billing Options & Schedule	
Name	Description
Billing Media	This is the network billing type - that is, the description and code of the default billing media type for the selected network, for example whether it is paper (hard copy) or digital. In this case the billing media is Online Billing (ONLINE) .
Produce first bill _ days after connection	You can delay the period between a customer connecting to the service, and the first invoice going out. If a customer is connected within days of the billing cycle, you may not want to invoice the customer so soon. Setting a delay in this field - for example 5 days - ensures a <i>delayed</i> period when an invoice will not be issued. Leaving this field blank denotes that the first invoice is produced on the bill cycle or next expected invoice date, whichever is sooner.
Produce final bill _ days after termination	Setting a delay on the termination invoice after a customer terminates their contract allows for all the calls to come in from the network, including roaming calls and any cyclical payments to be received by the customer. For example, if you enter 30 in this field, CMP does not send a final invoice until the customer has been disconnected for 30 days. The invoice is issued in the next billing cycle after the 30 day period. Leaving this field blank denotes that the subscriber's final invoice will be produced on bill cycle or next expected invoice date, whichever is sooner.
Ensure a minimum of _ days between initial bill and first regular bill	The number of days between the first and subsequent regular invoices. This prevents two invoices being sent out in close succession.
Ensure a minimum of _ days between last regular bill and final bill	A delay between the last regular invoice and the final invoice. This works the same as the first / normal invoice and ensures there is suitable delay between the two.
Ongoing Bill Frequency	The frequency at which invoices are issued. Enter a number in the textbox and select a period (months or days) from the drop-down. To issue monthly invoices, enter 1 in the text box, and select Months in the drop-down.
Active?	Indicates whether the tariff is active and available to new subscribers. You can deactivate a tariff in the future without affecting subscribers already connected to this tariff. Selected = Yes (active) .
Explanation Text	The explanation field is for information that might be needed for future reference by a user (it is not customer facing information).

Name	Description
Usage Pricing	
Name	Description
Maximum Network Price	The maximum price for the whole call. This is a safeguard to prevent over-charging for calls, where the network price has been taken. The default wholesale network price might be unreasonably high. This protects the price that is charged to subscribers. If the price for the call is below the maximum network price, the network price is charged onto the subscriber. If the price for the call is above the maximum, the call goes into an unallocated call list for further investigation.
Public Holiday Pricing Day	Use this field for days where the pricing table may be different, for example, different pricing structure for calls made on Xmas day. Leave this field blank unless told otherwise.
Daily Usage Limit	A daily usage limit assessed on each individual day's calls, rather than all unbilled calls for the whole month. Enter an amount in this field (in £). Exceeding this amount on any day triggers the creation of a subscription-level workflow event. If assessing daily usage limits is not required, leave this field blank.
Event if Daily Limit Exceeded	The description and code for the workflow event that is created when the daily usage limit is exceeded. Note: You must have set up this event in Workflow Events.
Lower Usage Limit	Default usage limits per month (in £) for new subscriptions that connect using this tariff. Default usage limits can apply depending on the account type the customer is allocated, or a combination of account type and tariff. When none of these are set up, CMP uses the default limits set here.
Upper Usage Limit	

You must ensure that the following links are configured for the tariff:

- A link to the Family Fun base package that you configured to provide allowances, services and discounts:



- Links to the global subscription services for itemised billing and international roam-

ing:

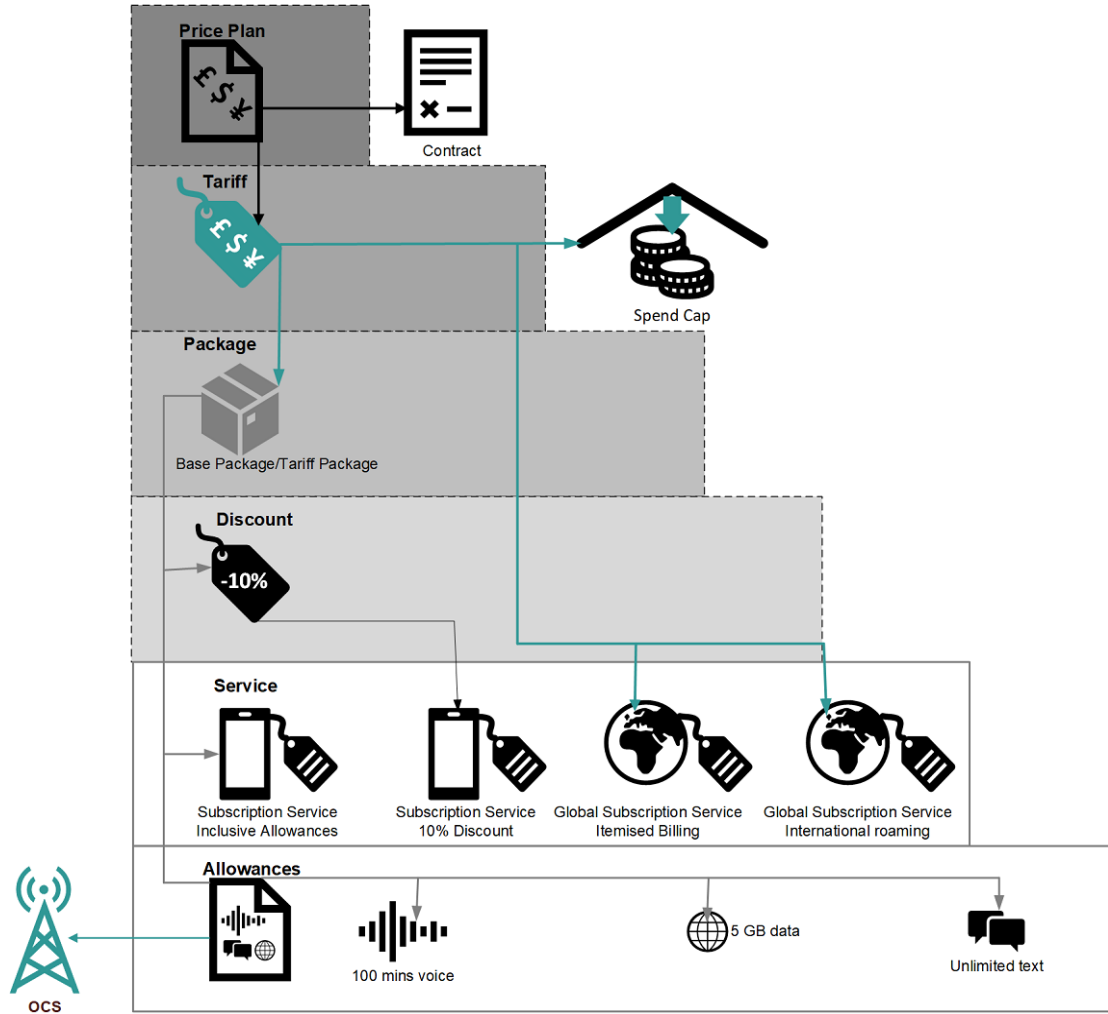
Tariff Packages		Tariff Services		Tariff Discounts		Tariff Spend Caps	
		Search		Search Tariff Services		Search	
Edit		Add		Delete		View Unexpired	
	↑ Tariff Services	Price	Period	Effective Date	End Date	Start After	Duration
<input type="checkbox"/>	International Roaming (SROAM)	0.00	0 Months				
<input type="checkbox"/>	Itemised Billing (ITEMB)	0.00					

You should also check that a suitable spend cap is linked to the tariff because all base packages require a full overage cap to prevent bill shock for customers:

Tariff Packages		Tariff Services		Tariff Discounts		Tariff Spend Caps	
		Search		Search Spend Caps		Search	
Edit		Add		Delete		View Active Spend Caps	
	↑ Spend Cap	Type	Cap Amount	Default?			
	Postpaid Cash Overage (POSTPC)	All Usage	10.00	Yes			

4. 1. 7 Step 7: Configure the Price Plan

Now that all the components are configured, you can create the new Family Fun price plan.



KEY:



Family Fun price plan component hierarchy

The Family Fun price plan needs to be a postpaid price plan with the Family Tariff and the Family Fun base package. It also should belong to the Family price plan group and be linked to the standard 24 month contract for the company and the standard set of terms and conditions.

The configuration settings for the price plan are as follows:

Name	Description
Price Plan Code	An alphanumeric code for the price plan.
Price Plan Description	A brief descriptive name for the price plan, Family Fun price plan, in this case.
Long Description	A longer description/explanation of the price plan.
Effective Date	The date from which the price plan becomes available for provisioning to subscribers.
End Date	The date the price plan expires. In this case, the end date has been left blank.
Billing Type	The billing type for the price plan = Postpaid .
Tariff	The description and code for the tariff - Family Tariff, in this case.
Package	The description and code for a tariff package. This is the Family Fun base package that you configured.
Price Plan Group	The description and code of the group to which the price plan belongs - Family, in this case.
Terms & Conditions	The description and code for the group of terms and conditions that applies to the price plan. This price plan used the standard terms and conditions.
TCG Effective Date	The date from which the terms and conditions are effective. This field is auto-populated and the information comes from the selected terms and conditions.
Contract	The contract to associate with the price plan. This price plan uses the standard 24 month contract configured for the company.
Term on Contract (Months)	The length of the contract in months. This is auto-populated when you select a contract.
Early Upgrade Term (Months)	The time period in months at the start of a contract during which the customer is not allowed to change price plan. This is auto-populated when you select a contract.
Notice Period (Months)	The period of notice in months that the customer must give before a change of price plan can take effect. This is auto-populated when you select a contract.
Corporate Only?	Indicates whether a price plan is available only to subscriptions linked to a corporate hierarchy. This is left unselected for this price plan.
Connection Event Type ¹	This is auto-populated as the Connection (CONN) event type.
Connection Event Code	The event description and event code to place on a subscription at connection.
Ranking	You can enter a numerical ranking for a price plan or leave it blank.
Active	Whether the price plan is available to new subscribers. Selected = Yes .
Explanation	Any additional explanatory text required for the price plan. The explanation field is for information that might be needed for future reference by a user (it is not customer facing information).

¹The Connection Type (CONN) uses the workflow event code part of a Connection workflow event. This code is set up using standard Workflow Event configuration but you must then link it to the Network Type via Configuring Connection Workflow Events within Customer Management. You also need to ensure that you specify the Connection Event Type in Application Parameter Configuration within System Parameters

Name	Description
Tooltip Text	Tooltip text that is displayed when a CMP user hovers their mouse over the price plan name.

In Business Configuration, the price plan settings appear as follows:

4. 1. 8 Step 8: Test the Price Plan

To check that the price plan has been configured correctly in AgentView, test whether you can:

- Add the price plan, for example:

Plan/Tariff Change

Enquiry Source:

Plan Type:

Contract Term (Months):

Terms & Conditions:

Price Plan:

Tariff

Base Package:

Campaign:

Recontract

As of Date:

BTPLAN	: BT Plan New	: 15.00
CM5GB	: CM 5GB Base	: 199.00
FAMFUN	: Family Fun Plan	: 3.00
GABB1	: GABB medium package	: 0.00
GABBP1	: GABB Family mid package	: 0.00
IOT10G	: IOT10GB	: 0.00
IOT5GB	: IOT5GB	: 5.00
PLAN1S	: Small 5G Plan	: 7.50

Buttons: Cancel, Previous, Next, Finish

- Confirm that the correct effective allowances are available.
- View the configured services.
- Apply the discount, for example:

Add Discount

Discount:

Effective:

Stop?:

FAM10	: Family 5 discount
HLFPRC	: 50% Off Line Charge
PROD1	: 2% Line Charge,10% Intl Calls

Buttons: Confirm, Cancel

For more information on propositions in AgentView, see "[Propositions in AgentView](#)" on [page 54](#).

5.0 Propositions Web Services

Creating, configuring and managing propositions is handled by a number of RESTful web services:

- For information on web services for configuring propositions in the Business Configuration console, see the [Business Configuration RESTful API](#) .
- For information of web services for creating and managing propositions in the database and applications (e.g. self-service apps), see the following:
 - [CMP RESTful API Guide](#)

6.0 Propositions in AgentView

AgentView is where Customer Service Agents (CSAs) handle the purchase, provision and management of products for customers. CSAs can:

- [View allowances and allowance caps.](#)
- [View, add, change, delete and expire services.](#)
- [View, add, change and delete discounts.](#)
- [Process package purchases for bolt-ons and top-ups.](#)
- [Assign, view and change a tariff.](#)
- [View, delete, add and change spend caps.](#)
- [Assign, add, view, revert, delete and cancel price plans.](#)
- [View, add and change contracts.](#)

The topics that follow describe AgentView functionality. Step-by-step instructions on how to perform these tasks are provided by the AgentView online help.

6.1 Allowances in AgentView

In AgentView, you can:

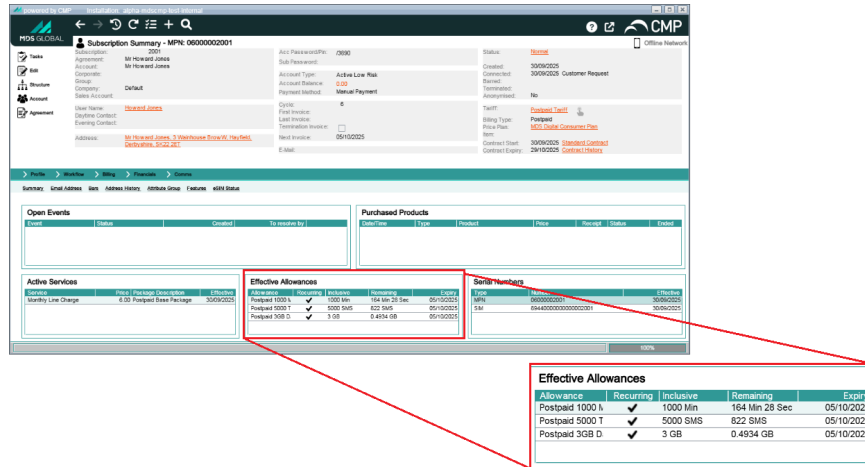
- [View allowances.](#)
- [View transferred or transferred or transformed allowances.](#)
- [View allowance spend caps.](#)

6.1.1 View Allowances

You can view the allowances for a subscription in the **Subscription Summary** screen in two locations:

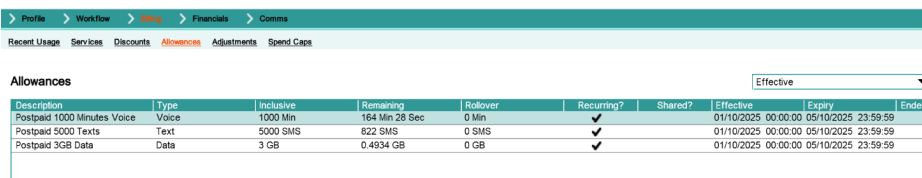
- In the **Profile > Summary** lower panel, the **Effective Allowances** pane lists the effective allowances for the subscription under the following column headings:

Column	Description
Allowance	The name of the allowance.
Recurring	If checked, the allowance is a recurring allowance and is renewed every month, for example.
Inclusive	The amount of the allowance - for example 100 Voice minutes, 500 texts, 1GB of data.
Remaining	How much of the allowance remains to be consumed.
Expiry	The expiry date of the allowance for this allocation. If this is a recurring allowance, this is the end of the recurring period. If this is a one-off, it is the expiry date.



- In the **Billing > Allowances** lower panel, you can choose to view **All** or **Effective** allowances using the drop-down on the top right. The allowances for the subscription are listed under the following column headings:

Column	Description
Description	The name of the allowance.
Type	The type of the allowance - e.g. Voice, Text, Data or Cash.
Inclusive	The amount of the allowance - for example 100 Voice minutes, 500 texts, 1GB of data.
Remaining	How much of the allowance remains to be consumed.
Rollover	How much of the allowance was rolled over from the previous period(s).
Recurring?	If checked, the allowance is a recurring allowance and is renewed every month, for example.
Shared?	Whether the allowance is shared between subscriptions. Checked = shared.
Effective	The date on which the allowance became effective.
Expiry	The expiry date of the allowance.
Ended	If checked, the allowance is marked to be ended at the end of the billing period.



6. 1. 2 View Transferred or Transformed Allowances

Both recurring and non-recurring allowances can be transferred from one subscription to another, if the subscriptions are both connected. This can take place via a selfcare app, for example, using RESTful web services. The transferred allowances are visible for the donor and recipient in the **Subscription Summary Billing > Adjustments** screen in AgentView. There is no change to the expiry date of a transferred allowance.

[Profile](#) > [Workflow](#) > [Billing](#) > [Financials](#) > [Comms](#)
[Recent Usage](#) [Services](#) [Discounts](#) [Allowances](#) [Adjustments](#) [Spend Caps](#)

Adjustments All

Channel	Type	Date/Time	From	Amount	To	Amount	Status	Status
App	Transform	24/03/2021 17:24:28	Postpaid 6000 Minutes /Voice	100 Min	1GB Youtube Data	0.1 GB	Complete	Complete
App	Transform	24/03/2021 17:23:36	1GB Youtube Data	0.1 GB	Postpaid 6000 Minutes /Voice	100 Min	Complete	Complete
App	Transform	24/03/2021 17:18:58	Postpaid 6000 Minutes /Voice	100 Min	Postpaid 1GB Data	0.1 GB	Complete	Complete
App	Transform	24/03/2021 17:18:38	Postpaid 6000 Minutes /Voice	1747626 Min	Postpaid 1GB Data	0 GB	Error	Error
App	Transform	24/03/2021 17:17:57	Postpaid 1GB Data	0.1 GB	Postpaid 6000 Minutes /Voice	100 Min	Complete	Complete

Available allowances can be converted to other types of allowance for the same subscription. For example voice can be converted to data. The conversion calculation handled by the calling application, for example a self-care app, which informs CMP. CMP passes the information to the online charging system (OCS). The donor and recipient allowances are adjusted by RESTful web services. The transformed allowances are also displayed in AgentView in the **Subscription Summary Billing > Adjustments** screen.

6. 1. 3 View Allowance Caps

Spend caps on allowances can be set in the OCS (online charging system) and consumption and the remaining balance of allowances can be viewed in AgentView. You can view the details for allowance spend caps as follows:

1. Access the relevant **Subscription Summary** screen.
2. In the lower panel **Effective Allowances** mini-panel, right-click an allowance and select **Caps** in the shortcut menu.

The **Allowance Caps** window displays the caps information for that allowance:

Column	Description
Allowance	The description of the allowance to which the cap applies.
Allowance Cap	The description of the allowance cap.
Cap Amount	The amount of the cap.
Remaining	The amount of the cap remaining (the balance).

6. 2 Services in AgentView

In AgentView you can:

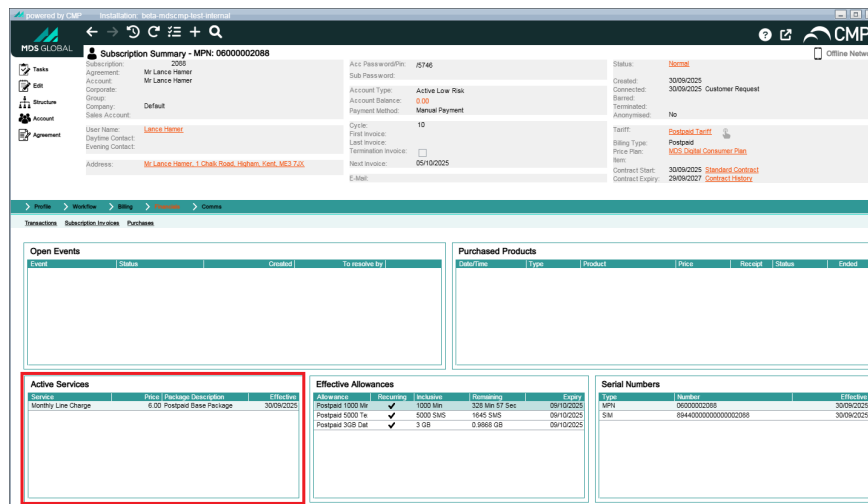
- [View active services](#)
- [View services](#)
- [View shared services](#)
- [Add a service to a subscription](#)
- [Add a service to an account](#)
- [Change services](#)

- [Expire services](#)
- [Delete services](#)

6. 2. 1 View Active Services

You can view the active services for an account or subscription in the relevant **Summary** screen lower panel in the **Active Services** pane. Active services are listed under the following column headings:

Column	Description
Service	The descriptive name of the service.
Price	The price of the service.
Package Description	The description name of the package to which the service is linked.
Effective	The date in which the service became effective.



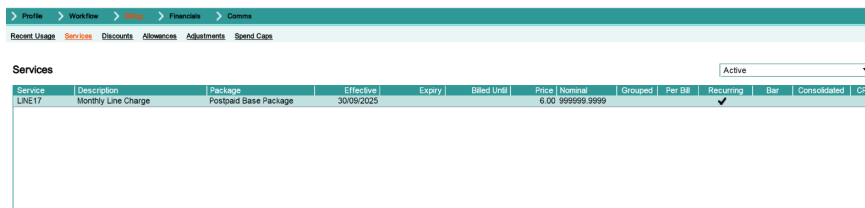
View active services in the Summary screen lower panel in the Active Services pane

6. 2. 2 View Services

In the **Subscription Summary** or **Account Summary** screens, you can also view services in the **Billing > Services** lower panel. Use the drop-down in the upper right corner to toggle between **All** and **Active** services.

The services are listed under the following column headings:

Setting	Value
Service	The CMP code for the service.
Description	The descriptive name for the service.
Package	The package to which the service is linked.
Effective	The date from which the service became effective.
Expiry	The date on which the package expires, if applicable.
Billed Until	Many services are rolling services in that they have a start date but no finish date. If an end of service date is appropriate, it is displayed here.
Price	The monthly price of the service.
Nominal	Nominal code (a ledger code)for financial reporting. Grouped services usually retain separate nominal codes for financial analysis.
Grouped	A collection of services that have been collected together to appear on the invoice as one service, e.g. a Gold level service. Multiple Services (special offers, seasonal discounts etc.) have been grouped together to appear under one heading on the invoice rather than appearing as individual Services.
Per Bill	The number of payments to be charged at once.
Recurring	A checkmark indicates that the service is renewed or repeated rather than a one-off.
Bar	A checkmark indicates this service is barred.
Consolidated	This column appears in the Subscription Summary screen. Whether and the level at which the service is consolidated.
CPI	A checkmark indicates a consumer price increase has been applied to this service.
Quantity	This column appears in the Account Summary screen. If the service is quantifiable; the quantity of the service.



Billing > Services panel in the Subscription Summary screen

6. 2. 3 View Shared Services

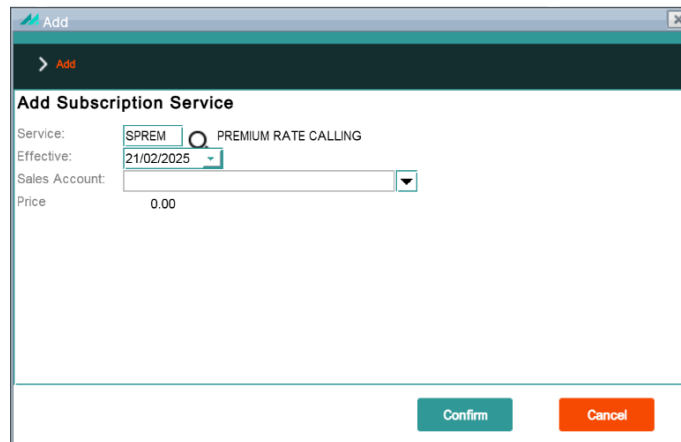
You can purchase shared packages at account level. Shared services could be account services or services from shared packages. Shared services are listed in the **Agreement Summary** screen in the **Billing > Shared** services lower panel under the following column headings:

Setting	Value
Service	The CMP code for the service.
Description	The descriptive name for the service.
Package	The package to which the service is linked.
Effective	The date from which the service became effective.
Expiry	The date on which the package expires, if applicable.
Billed Until	Many services are rolling services in that they have a start date but no finish date. If an end of service date is appropriate, it is displayed here.
Price	The monthly price of the service.
Nominal	Nominal code (a ledger code)for financial reporting. Grouped services usually retain separate nominal codes for financial analysis.
Recurring	A checkmark indicates that the service is renewed or repeated rather than a one-off.

6. 2. 4 Add a Service to a Subscription

In the relevant **Subscription Summary** screen you can add a subscription service by accessing the **Add Subscription Service** wizard by either:

- In the **Summary > Profile** lower panel, right-clicking in the **Active Services** pane and selecting **Add**.
- In the **Billing > Services** lower pane, right-clicking and selecting **Add**.



You choose a service, effective date and sales account in the **Add** page of the wizard and then confirm your selection. The **Service** drop-down displays only subscription services.

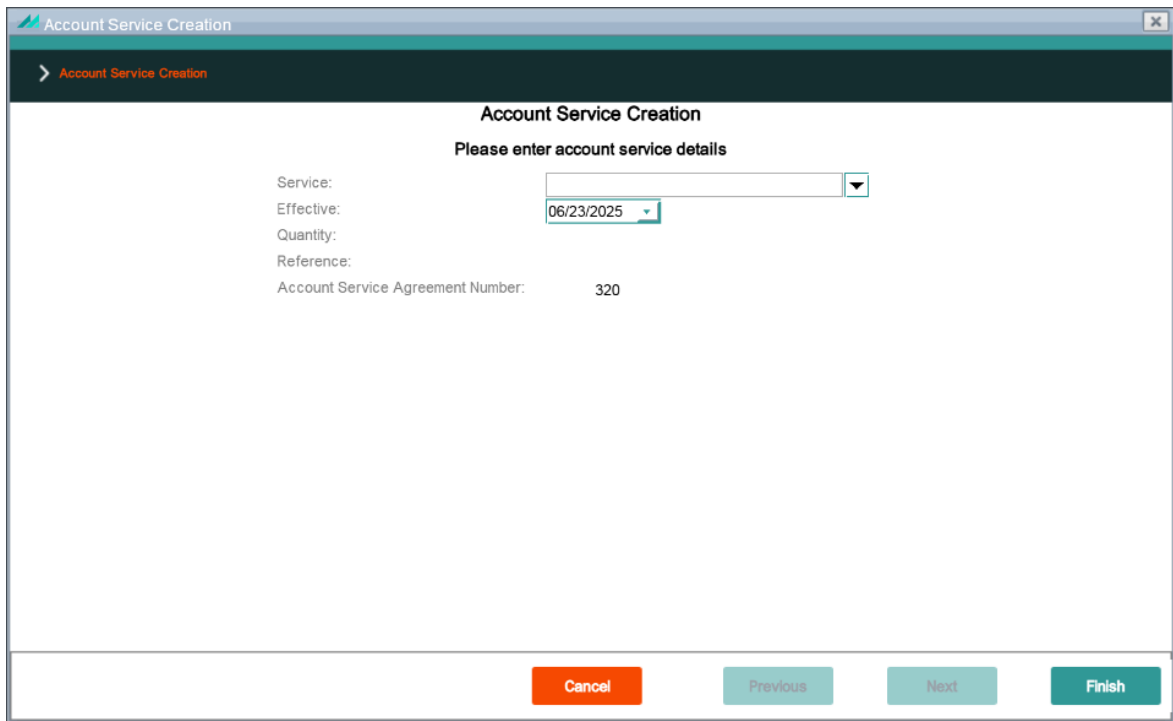
For detailed step-by-step instructions, see the AgentView application help.

6. 2. 5 Add an Account Service

You access the **Account Service Creation** wizard in the **Account Summary** screen. In **Billing > Services**, right-click and select **Add**.

The wizard has the following elements:

Element	Description
Service	Select a service from the drop-down list. Only account services are listed.
Effective	In the date picker, select date from which the service became effective.
Quantity	This text box becomes active if the selected service is quantifiable; enter a quantity for the service.
Reference	The reference for the service.
Account Service Agreement Number	The agreement number associated with the account to which the service will be provisioned.



6. 2. 6 Change a Service

Access a service record in the relevant **Account** or **Subscription Summary** screen in any of the following:

- In the **Summary > Profile** lower panel in the **Active Services** pane.
- In the **Billing > Services** lower panel.

Right-click the service record and select **Change** to launch the **Service Details** popup. You can edit service details here.

Service Details
✕

Subscription Service - Monthly Line Charge

<p>Service: LINE17 Monthly Line Charge</p> <p>Long Description:</p> <p>Package: PBASE1 Postpaid Base Package</p> <p>Effective: 07/05/2025</p> <p>Expiry:</p> <p>Price: <input type="text" value="6.00"/></p> <p>Nominal: <input type="text" value="999999.9999"/> <input type="text" value="?????"/></p> <p>Price No of Months: 1</p> <p>or Days: 0</p> <p>Sales Account: <input type="text"/></p> <p>Commission Scheme:</p> <p>Commission Calc:</p> <p>Price Consolidation Service:</p> <p>Discount Consolidation Service:</p>	<p>Exclude until Billed up to date?: <input type="checkbox"/></p> <p>Bill in Advance: 1</p> <p>Adding Event:</p> <p>Network Confirmed: <input checked="" type="checkbox"/></p> <p>Migrated: <input type="checkbox"/></p> <p>Invoice this Service: <input checked="" type="checkbox"/></p> <p>Recurring Charge: <input checked="" type="checkbox"/></p> <p>Per Bill: <input type="checkbox"/></p> <p>Billed Until:</p> <p>Bar: <input type="checkbox"/></p> <p>Refresh Service: <input type="checkbox"/></p>
--	---

The popup has the following elements:

Setting	Value
Service	The CMP code and descriptive name for the service.
Long Description	Explanatory descriptive text about the service.
Package	The package to which the service is linked.
Effective	The date from which the service became effective.
Expiry	The date on which the package expires, if applicable.
Price	The price of the service.
Nominal	Nominal code (a ledger code) for financial reporting. Grouped services usually retain separate nominal codes for financial analysis.
Price No of months	If applicable, how many months of service the service price covers.
Or Days	If applicable, how many days of service the service price covers.
Sales Account	The salesperson responsible for the service change.
Commission Scheme	This field is not used.
Commission Calculated	This field is not used.
Price Consolidation Service	If applicable, the code and description of the price consolidation service.
Discount Consolidation Service	If applicable, the code and description of the discount consolidation service.
Exclude until Billed up to date?	If this check box is selected, any services billed in advance are suppressed from further billing until the next applicable invoice date.
Bill in Advance	The number of payments to be charged at once.
Adding event	The workflow event that created the service.
Network confirmed	Select this box to indicate if the service is confirmed by the network.
Migrated	This field is no longer used.
Invoice this service	Select this check box to indicate that the service is invoiced.
Recurring Charge	A checkmark indicates that the service is renewed or repeated rather than a one-off.
Billed Until	Many services are rolling services in that they have a start date but no finish date. If an end of service date is appropriate, it is displayed here.
Bar	A checkmark indicates this service is barred.
Refresh Service	Select this checkbox to refresh the service.

6.2.7 Expire a Service

You can expire a service by editing the service details. You can only do this for a service that was added to the account or subscription outside of a package. You need to expire the package to expire a package service.

Access the details for a service record following the instructions in ["Change a Service" on page 60](#).

6.2.8 Delete a Service

Access a service record in the relevant **Account** or **Subscription Summary** screen in any of the following:

- In the **Summary > Profile** lower panel in the **Active Services** pane.
- In the **Billing > Services** lower panel.

Right-click a service record and select **Delete**, then confirm your choice.

If the service has been billed (a date is displayed under the Billed Until column) it is not possible to delete it and the service should instead be expired. You cannot delete a package service.

6.3 Discounts in AgentView

In AgentView you can:

- [View discounts](#)
- [View effective discounts](#)
- [Add discounts](#)
- [Change discounts](#)
- [Delete discounts](#)
- [View and manage discount services](#)

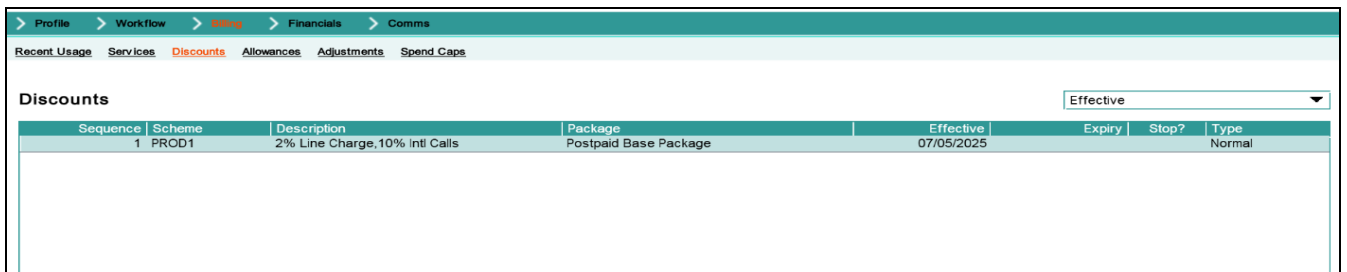
6.3.1 View Discounts

You can view discounts in the **Discounts** lower panel, accessed at in the **Subscription**, **Account**, or **Agreement Summary** screen by selecting **Billing > Discounts**.

The panel shows the list of all discounts appropriate to the subscription, account, or agreement. You can filter the view using the drop-down in the upper right corner to show only those discounts that are currently effective.

Information for each discount is displayed under the following column headings:

Column	Description
Sequence	Indicates the sequence in which discounts are used. The sequence number determines the order in which discounts are applied during invoice production. The lowest numbered sequence is effective first.
Scheme	The unique CMP code for the discount scheme.
Description	The descriptive name for the discount scheme.
Package	The packages associated with the discount. A package is a collection of services and discounts that are collated together and offered in combination to facilitate the application of services to a subscription.
Effective	The date from which the discount scheme is effective.
Expiry	The date on which the discount scheme expires. This can happen when one discount supersedes another.
Stop?	When the check box is selected, the next sequential discount after this one will not be used. If this check box is unselected, the next discount in the sequence following this one can be used.
Type	Details the discount type: (Normal).

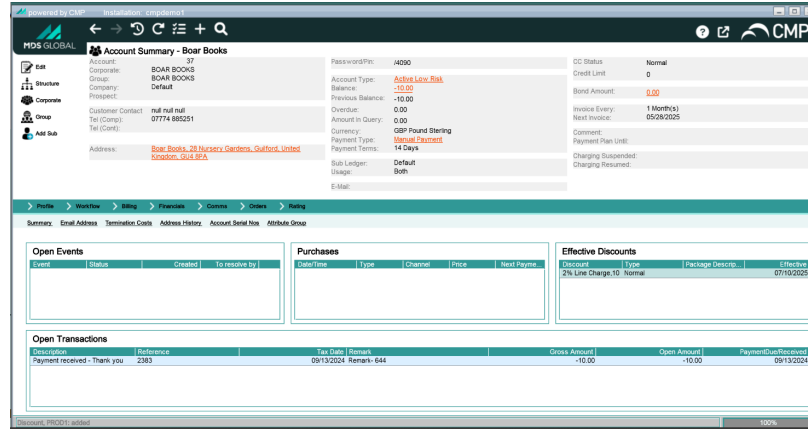


Billing > Discounts Panel

6.3.2 View Effective Discounts for an Account

You can also view the effective discounts for an account in the **Account Summary** screen. The **Profile > Summary** lower panel contains an **Effective Discounts** pane with the following columns:

Column	Description
Discount	The descriptive name for the discount
Type	The type of discount, e.g. Normal
Package Description	The descriptive name of the package with which the discount is associated
Effective	The date from which the discount scheme is effective



Account Summary Effective Discounts pane

6.3.3 Add a Discount

Discounts are added in the **Add Discount** pop-up, which can be accessed in both the **Discounts** lower panel or the **Effective Discounts** pane. In either location, select **Add** in the shortcut menu to launch the pop-up, which has the following fields:

Field	Description
Discount	Select a discount scheme from the drop-down list.
Effective	Input the date from which the discount applies directly or click to display date-picker from which the date can be selected. When done so it automatically populates the field display. It is not possible to apply the discount retrospectively and the date entered must be either today, or a future date.
Stop?	When discounts are applied at multiple hierarchy levels, select the checkbox to stop the next sequential discount being used. If unselected, the next discount in the sequence can be added on top of this discount when the invoice is calculated.

Add Discount pop-up

6.3.4 Change a Discount

Discounts are changed in the **Change** pop-up, which can be accessed in both the **Discounts** lower panel or the **Effective Discounts** pane. In either location, right-click the relevant discount and select **Add** in the shortcut menu to launch the pop-up, which has the following fields:

Field	Description
Allocation	A unique reference number for the discount scheme created.
Sequence	Indicates the sequence in which the records are used. The lowest numbered sequence is effective first. The sequence number determines the order in which discounts are applied during invoice production.
Package	The package with which the discount scheme is associated.
Scheme	The descriptive name for the discount scheme.
Type	The discount type, e.g. Normal.
Effective	The effective date of the discount scheme.
Expiry	Details the date on which the discount scheme expires. This can happen when one discount supersedes another.
Calculation Frequency	The number of months over which a discount scheme is calculated.
Calculation Type	This details whether calculations are performed over individual call classes or over call class groups.
Invoice Volume Service:	Service attached to the invoice volume discount that has been added. Invoice Volume discounts are currently not supported.
Invoice Volume Event Type:	Specific type associated with the workflow event raised to indicate that an invoice volume discount has been added. Invoice Volume discounts are currently not supported.
Invoice Volume Event Code:	Unique code for the workflow event raised to indicate that an invoice volume discount has been added. Invoice Volume discounts are currently not supported.

Expiry dates can be added or altered using this panel. All other content is read-only.

*Change discount expiry dates in the **Change** pop-up*

6.3.5 Delete a Discount

Discounts can be deleted in the **Effective Discounts** pane or the **Discount** lower panel via the **Delete** right-click menu option, provided that the discount is not part of a package.

Effective Discounts			
Discount	Type	Package Description	Effective
50% Off Line Charge	Normal		02/16/2026

- Change
- Delete
- Services
- Favourite Numbers
- Cross-Products
- Invoice Volumes
- Add

*This discount is not associated with a package code, so the **Delete** option is active.*

Discounts							Effective
Sequence	Scheme	Description	Package	Effective	Expiry	Stop?	Type
10	HLFPRC	50% Off Line Charge		02/16/2026			Normal

- Change
- Delete
- Services
- Favourite Numbers
- Cross-Products
- Invoice Volumes
- Usage Class Groups
- Add

*This discount is part of a package, so the **Delete** option is inactive.*

6.3.6 View and Manage Discount Services

The Discount **Services** pop-up displays details of the discountable services in the discount scheme.

MDS Services

> Services

Services

Service	Description	Effective	Percentage	Fixed Amount
LINECH	Monthly Line Charge	23/05/2025	2.0	

Cancel

The Discount **Services** pop-up is accessed in the **Subscription, Account, or Agreement Summary** screen via the **Billing > Discounts** lower panel.

The pop-up displays information for each discountable service in the following:

Column	Description
Service	The CMP code for the service.
Description	The descriptive name for the service.
Effective	The date from which the service becomes effective.
Band Type	When set to Bands CMP performs the discount calculations for each individual band; when set to Total , it performs the discount calculations across the total number of bands in the scheme.
Based on Value	The discount can be based on either the service provider's Retail Value or Billed Value . It can also be based on the Supplier Value .
Based on Volume	When this check box is selected, the discount is based on Volume rather than Value .

Use the right-click menu options to **Add**, **Change** or **Delete** a discount service.

6.4 Packages in AgentView

In AgentView, customers can purchase three kinds of packages:

- [Base packages](#)
- [Bolt-on packages](#)
- [Top-up packages](#)

Customers can also can also request receipts for purchases, which can be viewed in AgentView.

6.4.1 Base Packages

A base package contains essential services and/or discounts needed to fulfil a subscriber's contract, such as their monthly recurring charge and services to drive their base allowances of minutes, data and/or texts.

6.4.1.1 Selecting a Base Package

Base packages are part of price plans and are selected when a subscriber is created and maintained. For example, in the **Subscription Creation** wizard, you select the price plan for a new subscriber. The tariff and base package linked to the price plan are displayed in the fields below the price plan.

Subscription Creation

Select Marketing & Pricing

Enquiry Source:

Campaign:

Plan Type:

Contract Term (Months):

Terms & Conditions:

Price Plan:

Tariff:

Base Package:

Process Date:

Sales Account:

6.4.1.2 Changing a Base Package

If a customer wants to change their base package, they need access the **Subscription Management** wizard from the connection status hyperlink on the subscription, from where they will choose another price plan and associated base package.

Subscription Management

Plan/Tariff Change

Enquiry Source:

Plan Type:

Contract Term (Months):

Terms & Conditions:

Price Plan:

Tariff:

Base Package:

Campaign:

Recontract:

As of Date:

6. 4. 2 Bolt-on Packages

A bolt-on package is an addition to a subscriber's main plan or product. It contains additional services and/or discounts for additional purchases a customer may make.

In CMP allowances can be configured as shareable. When these allowances are assigned to a bolt-on package, the package becomes shareable and is known as a shared package.

6.4.2.1 Purchasing a Bolt-on Package

Bolt-on purchases take place in the **Purchase a Product** pop-up. Access **Purchase a Product** via the **Purchase a Bolt-on** right-click option in the **Subscription Summary** screen in either:

- The **Purchases** pane in the **Profile > Summary** lower panel.
- The **Financials > Purchases** lower panel.

When a bolt-on package is being purchased, the fields in the **Purchase a Product** pop-up are as follows:

Name	Description
Type	Filter the list of products by selected a type from the list: ALL, VOICE, TEXT or DATA.
Recurring	Select this checkbox to display only those products that can be added as recurring purchases.
Effective On	Use the date picker to select the date from which the product becomes available to the Subscription.
Payment	Select a suitable payment option: Existing Card - if the account has a registered credit or debit card, this option is active and selected and the card number and expiry date are displayed in a drop-down. New Card - Use a credit or debit card that is not on record for the customer Add to Bill - add the cost of the purchase to the customer's next invoice From Prepaid Balance - this option is active if the customer has credit in their prepaid balance.
Receipt	For certain payment types, e.g. Card, the customer can request a receipt. Select this check box for a receipt.
CMP displays the products available for purchase. Shared packages are not listed because they can be purchased only at Agreement level. The products are listed in a table with the following column headings:	
Description	The descriptive name of the product. e.g. 100 GB Roaming Data Bolt-On.
Voice	For a bolt-on with Voice, the units of Voice available (usually Minutes).
Text	For a bolt-on with Text (SMS) , the number of messages available.
Data	For a bolt-on with Data, the amount of data available, e.g. GB, MB.
Price	The price of the product.

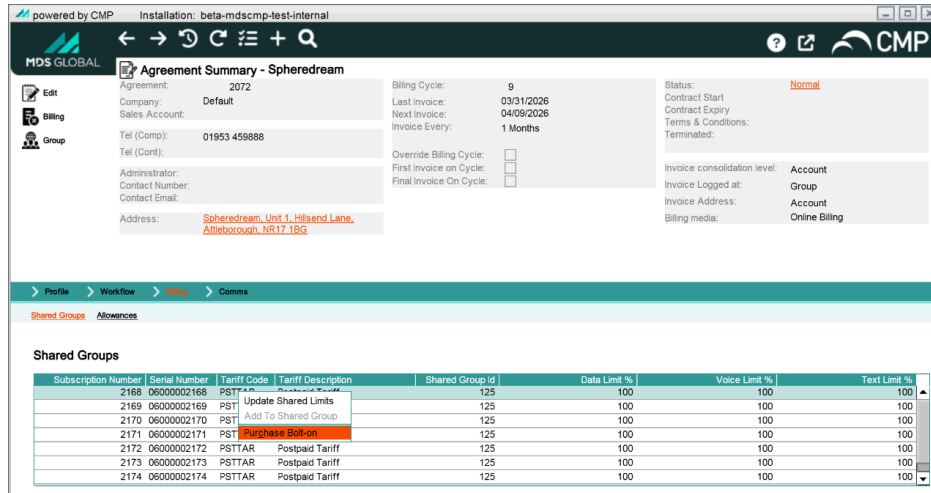
6.4.2.2 Purchasing a Shared Package

Customers can purchase shared bolt-on packages only for agreements. Shared packages cannot be purchased with prepaid balance. A shared package is charged to the account at which the agreement is logged as an account service, and thus only account services are defined for shared bolt-on packages. All subscriptions attached to the agreement can share the package allowances and these subscriptions form the shared structure known as the shared group.

The shared group is created when the package is connected (not when it is purchased). Subscriptions can belong to only one shared group and they cannot move from the group once it is created.

The account service ends when the package ends, although the shared group does not expire. Shared allowances cannot be ended as unshared allowances can.

Shared bolt-on purchases take place in the **Purchase a Product** pop-up. Access **Purchase a Product** via the **Purchase Bolt-on** right-click option in the **Billing > Shared Groups** panel in the **Agreement Summary** screen.



To buy a shared package access Purchase a Product via the Agreement Summary screen Purchases Products pane

When a shared package is being purchased, the Purchase a Product pop-up has the following fields:

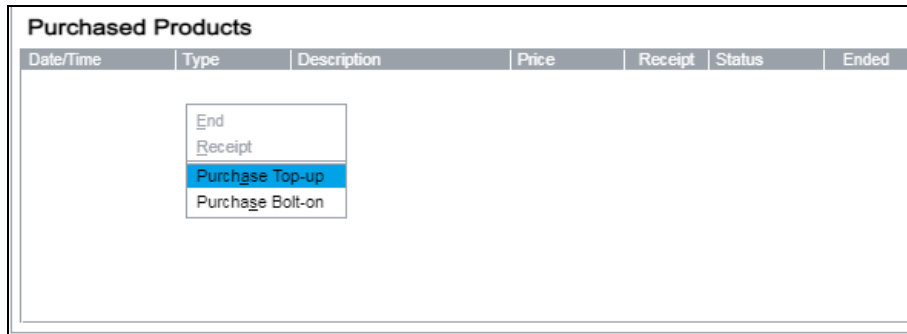
Name	Description
Type	Filter the list of products by selected a type from the list: ALL, VOICE, TEXT or DATA.
Recurring	Select this checkbox to display only those products that can be added as recurring purchases.
Effective On	Use the date picker to select the date from which the product becomes available to the Subscription.
Payment	Select a suitable payment option: Existing Card - if the account has a registered credit or debit card, this option is active and selected and the card number and expiry date are displayed in a drop-down. New Card - Use a credit or debit card that is not on record for the customer. Add to Bill - add the cost of the purchase to the customer's next invoice. From Prepaid Balance - this option is inactive.
Receipt	For certain payment types, e.g. Card, the customer can request a receipt. Select this check box for a receipt.
CMP displays available shareable products. The products are listed in a table with the following column headings:	
Description	The descriptive name of the product. e.g. 100 GB Roaming Data Bolt-On.
Voice	For a bolt-on with Voice, the units of Voice available (usually Minutes).
Text	For a bolt-on with Text (SMS) , the number of messages available.
Data	For a bolt-on with Data, the amount of data available, e.g. GB, MB.
Price	The price of the product.

6. 4. 3 Top-up Packages

A top-up package is for additional services for prepaid subscribers only. Typically, top-ups are used to purchase credit for a prepaid balance.

Top-up purchases take place in the **Purchase a Product** popup. Access **Purchase a Product** via the **Purchase Top-up** right-click option in the **Subscription Summary** screen in either:

- The **Purchases** pane in the **Profile > Summary** lower panel:



- The **Financials > Purchases** lower panel.

When a top-up package is being purchased, the fields in the **Purchase a Product** pop-up are as follows:

Name	Description
Type	Inactive - all top-up packages are displayed.
Recurring	Inactive - top-up packages are not recurring.
Effective On	Inactive.
Payment	Select a suitable payment option: Existing Card - if the account has a registered credit or debit card, this option is active and selected and the card number and expiry date are displayed in a drop-down. New Card - Use a credit or debit card that is not on record for the customer. Add to Bill - inactive. From Prepaid Balance - this option is active if the customer has credit in their prepaid balance.
Receipt	For certain payment types, e.g. Card, the customer can request a receipt. Select this check box for a receipt.
CMP displays the top-up products available for purchase. The products are listed in a table with the following column headings:	
Description	The descriptive name of the product. e.g Top-up. £10 Cash
Voice	For a top-up with Voice, the units of Voice available (usually Minutes).
Text	For a top-up with Text (SMS) , the number of messages available.
Data	For a top-up with Data, the amount of data available, e.g. GB, MB.
Price	The price of the product.

6.5 Tariffs in AgentView

In AgentView you can:

- [Assign a tariff as part of assigning a price package](#)
- [View a tariff history](#)
- [View a tariff](#)
- [Change a tariff](#)

6.5.1 Assign a Tariff

When you select a price plan for a customer (at either agreement or subscriber level), the tariff that is linked to the price plan is assigned at the same time. You cannot alter the linked tariff at this stage.

Price plans are assigned when you create a new subscriber.

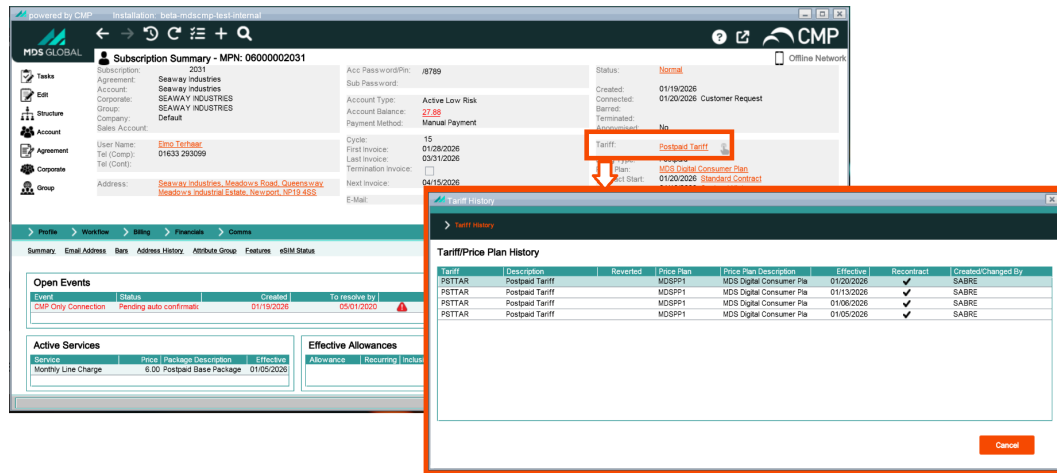
The screenshot shows a web application window titled "Subscription Creation". Inside, there is a section titled "Select Marketing & Pricing" with several dropdown menus. The fields are: Enquiry Source, Campaign, Plan Type, Contract Term (Months), Terms & Conditions, Price Plan (BUSBB1 Business Broadband Plan 1), Tariff (BUSBB Business Broadband Tariff), Base Package (BUSBB Broadband 80/20 Package), Process Date (04/15/2026 11:23:20), and Sales Account. A red arrow points to the "Tariff" field. At the bottom, there are four buttons: "Cancel" (orange), "Previous" (light blue), "Next" (teal), and "Finish" (light blue).

The linked tariff is defaulted from the price plan when you assign it and cannot be altered at this point.

6.5.2 View Tariff History and Tariff Details

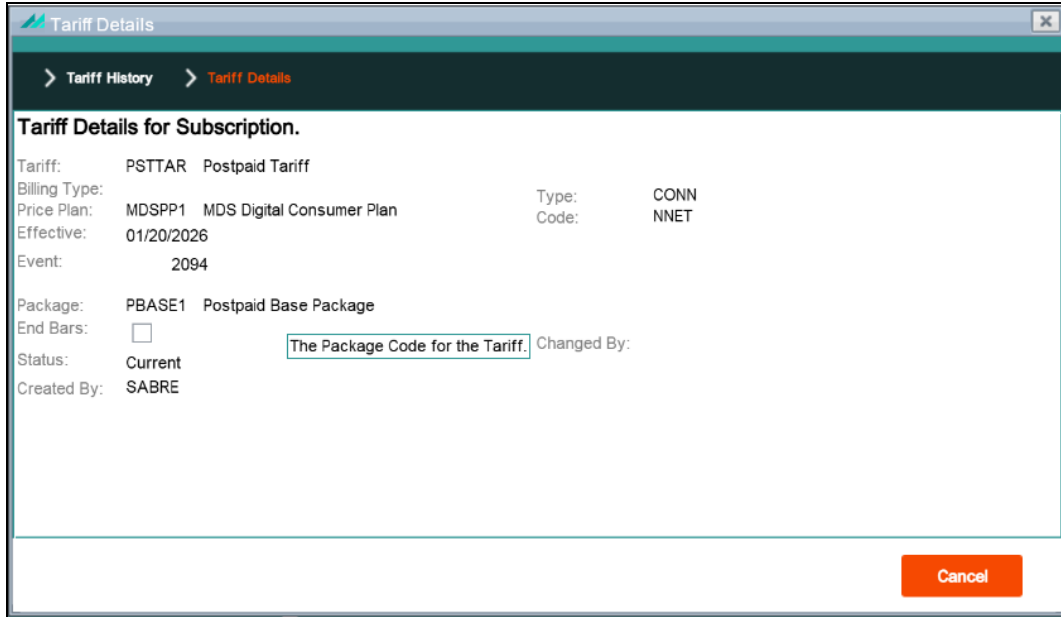
To view a tariff history, click the tariff name link in the upper panel of the **Subscription Summary** screen. The **Tariff History** pop-up lists the current and previous tariffs under the following columns:

Name	Description
Tariff	The CMP code for the tariff.
Description	The descriptive name for the tariff.
Reverted	If there is a checkmark in this column, the price plan associated with the tariff has been reverted.
Price Plan	The CMP code for the price plan associated with this tariff.
Price Plan Description	The descriptive name for the price plan associated with this tariff.
Effective	The date from which the price plan/tariff is effective.
Created/Changed By	The CMP entity (salesperson or process) responsible for adding or changing the price plan/tariff.



Launch **Tariff History** via the tariff name link in the relevant **Summary** screen

To view the details for a specific tariff, right-click it in the Tariff History pop-up and select **View** in the shortcut menu. The Tariff Details pop-up displays the details for that tariff:



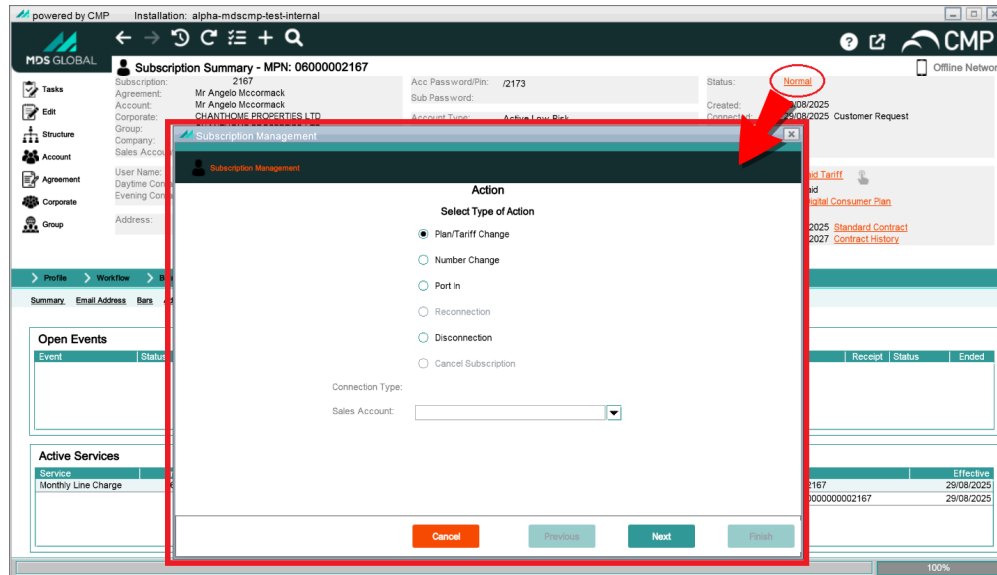
The **Tariff Details** pop-up has the following fields:

Name	Description
Tariff	The CMP code and descriptive name for the tariff.
Billing Type	The type and code for the billing, for example Postpaid, Pay as you Go, Prepaid.
Price Plan	The CMP code and descriptive name for the price plan associated with the tariff.
Effective	The date from which the Tariff/Price Plan became effective.
Event	The workflow event number associated with the process to add or change the displayed tariff.
Type	The CMP code for the event type associated with the process to add or change the displayed tariff.
Code	The CMP code for the event code associated with the process to add or change the displayed tariff.
Package	The CMP code and descriptive name for the base package that defaults from the tariff. This can be changed.
End Bars	This checkbox is selected if bars will be ended if the tariff is changed.
Status	Status of the Tariff Details (e.g. Current).
Changed By	The User ID of the person/process who created the record.
Created By	The User ID of the person/process who last updated the record.

6. 5. 3 Change a Tariff

You can change a tariff by changing the price plan for the subscription. In the subscription **Summary** screen, you can access the **Subscription Creation/Upgrade** wizard via the **Status** link in the upper panel. Choose to upgrade a price plan/tariff and then select the price plan associated with the tariff you want to change to.

You may need to expire existing services and discounts. This will be handled in the wizard.



6.6 Spend Caps in AgentView

In AgentView you can:

- [View spend caps](#)
- [View spend cap history](#)
- [Add a spend cap](#)
- [Delete a spend cap](#)
- [Change a spend cap](#)

6.6.1 View Spend Caps

Spend caps for a subscription are displayed in the **Subscription Summary** screen in the **Billing >Spend Caps** lower panel under the following columns:

Name	Description
Cap Code	The CMP code for the spend cap.
Description	The descriptive name for the spend cap.
Cap Enabled	If there is a checkmark in this column, the cap is currently enforced on the subscription.
Cap Activity Pending	Any actions that are pending on the spend cap.
Cap Amount	The monetary amount of the spend cap.
Cap Remaining	The monetary amount of the cap that remains unused.

Spend Caps					
Cap Code	Description	Cap Enabled	Cap Activity Pending	Cap Amount	Remaining
PSTCAP	Postpaid Cap	✓		25.00	25.00

View spend cap details in **Billing >Spend Caps** in the **Subscription Summary** screen

6. 6. 2 View Spend Cap History

You can view the history for a spend cap in the **Subscription Summary** screen in the **Billing >Spend Caps** lower panel. Right-click a listed spend cap and select **History** in the shortcut menu to launch the **Subscription Spend Cap History** popup. The pop-up lists the activities for spend cap under the following columns:

Name	Description
Activity Date Time	The date and time that the activity for the spend cap took place.
Activity	The activity that took place, for example Enable, Change.
Event Number	The ID number of the workflow event associated with the activity.
Cap Status	The status of the spend cap for that activity, for example Complete, Failure, Pending.
Cap Amount	The monetary amount of the spend cap at the time the activity took place (cap amounts can be changed).

Subscription Spend Cap History					
Subscription Spend Cap History					
PSTCAP					
Activity Date Time	Activity		Event Number	Cap Status	Cap Amount
01/05/2026 18:01:10	Enable		3399	Success	25.00

Cancel

6. 6. 3 Add a Spend Cap

Spend caps are added at subscription level in the **Subscription Summary** screen in the **Billing >Spend Caps** lower panel. Right-click in the pane and select the **Add** shortcut menu option to launch the **Change** pop-up with the **Maintain Subscription Spend Cap** screen, where you can choose a spend cap and enter a monetary amount for it:

Change	
Change	
Maintain Subscription Spend Cap	
Spend Cap:	<input type="text"/> ▼
Cap Amount:	<input type="text" value="0.00"/>
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

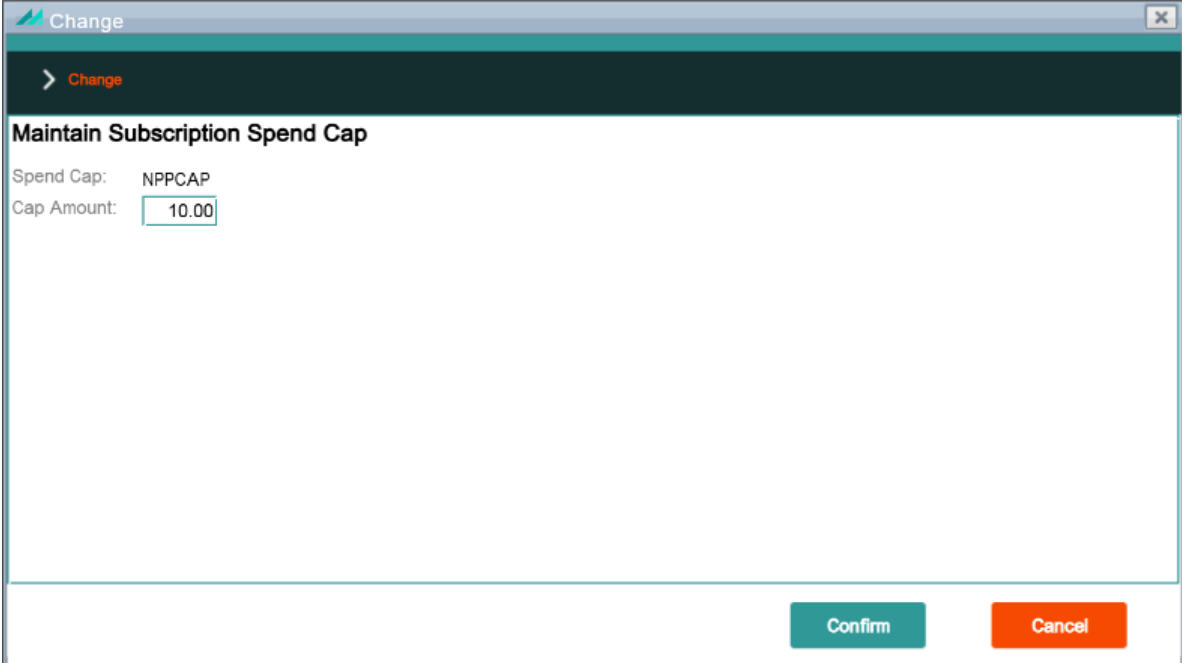
*Add spend caps to a subscription in **Maintain Subscription Spend Cap***

6.6.4 Delete a Spend Cap

Spend caps are deleted at subscription level in the **Subscription Summary** screen in the **Billing >Spend Caps** lower panel. Right-click a listed spend cap and select **Delete** in the shortcut menu.

6.6.5 Change a Spend Cap

You can change the monetary amount of a spend cap in the **Subscription Summary** screen in the **Billing >Spend Caps** lower panel. Right-click a listed spend cap and select **Change** in the shortcut menu. This launches the Change pop-up with the Maintain Subscription Spend Cap screen, in which you can adjust the amount of the cap.



The screenshot shows a 'Change' pop-up window with a title bar containing the MDS logo and the word 'Change'. Below the title bar is a dark header with a right-pointing arrow and the word 'Change'. The main content area is titled 'Maintain Subscription Spend Cap' and contains two labels: 'Spend Cap:' with the value 'NPPCAP' and 'Cap Amount:' with a text input field containing '10.00'. At the bottom right of the window are two buttons: 'Confirm' (teal) and 'Cancel' (orange).

*You can change the monetary amount of a spends cap in the **Change > Maintain Subscription Spend Cap** pop-up.*

6.7 Price Plans in AgentView

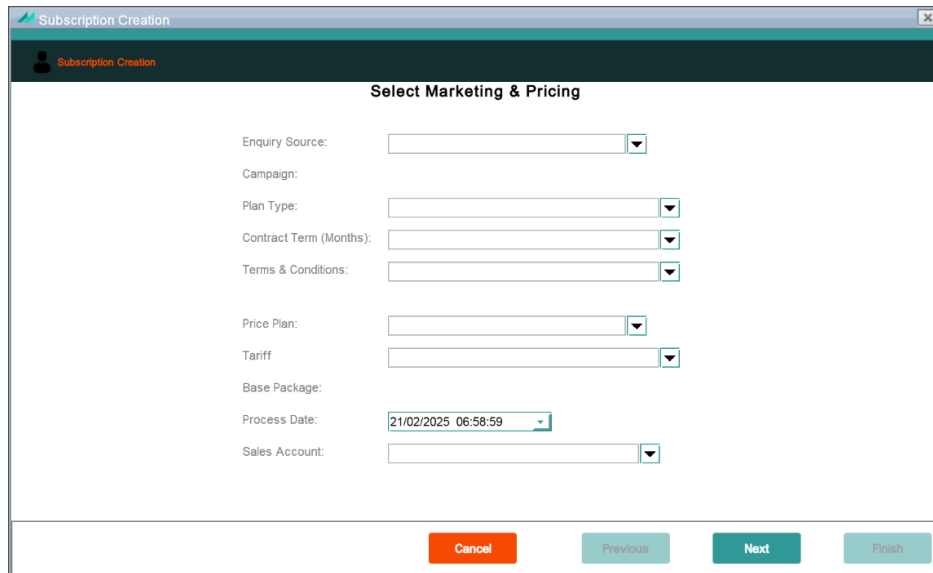
In AgentView you can:

- [Assign a price plan to a subscription](#)
- [Add a price plan to an agreement, group or corporate](#)
- [View price plan history for a subscription](#)

- [Change a price plan for a subscription](#)
- [Revert a price plan change](#)
- [Delete a price plan for a group or corporate](#)
- [Cancel a price plan for an agreement](#)

6. 7. 1 Assign a Price Plan to a Subscription

When you create a subscription, you select a price plan for the subscription in the **Subscription Creation** wizard:



The screenshot shows a window titled "Subscription Creation" with a sub-header "Subscription Creation". The main heading is "Select Marketing & Pricing". The form contains the following fields:

- Enquiry Source: [Dropdown]
- Campaign: [Dropdown]
- Plan Type: [Dropdown]
- Contract Term (Months): [Dropdown]
- Terms & Conditions: [Dropdown]
- Price Plan: [Dropdown]
- Tariff: [Dropdown]
- Base Package: [Dropdown]
- Process Date: [Date/Time Picker] (21/02/2025 06:58:59)
- Sales Account: [Dropdown]

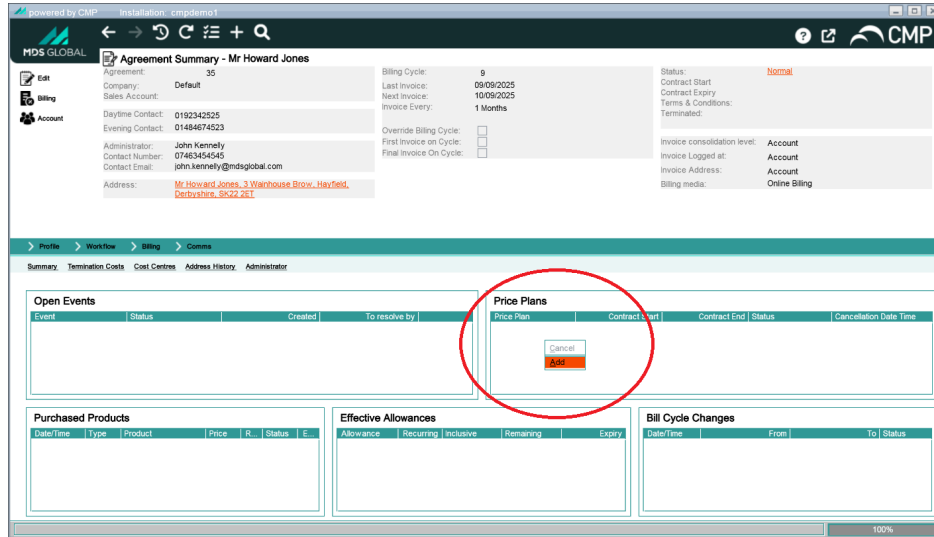
At the bottom, there are four buttons: "Cancel" (orange), "Previous" (light blue), "Next" (dark blue), and "Finish" (light blue).

6. 7. 2 Add a Price Plan to an Agreement, Group or Corporate

A price plan can be applied directly to an agreement. Price plans can also be attached to a corporate or group entity, allowing the list of available price plans to be restricted for a given customer structure. Service providers can use price plans to offer customers specific discounts/offers when they connect to a particular tariff. Therefore, price plans are available to select against a particular corporate or group when either working with existing subscriptions, or adding new subscriptions in the corporate or group customer structure

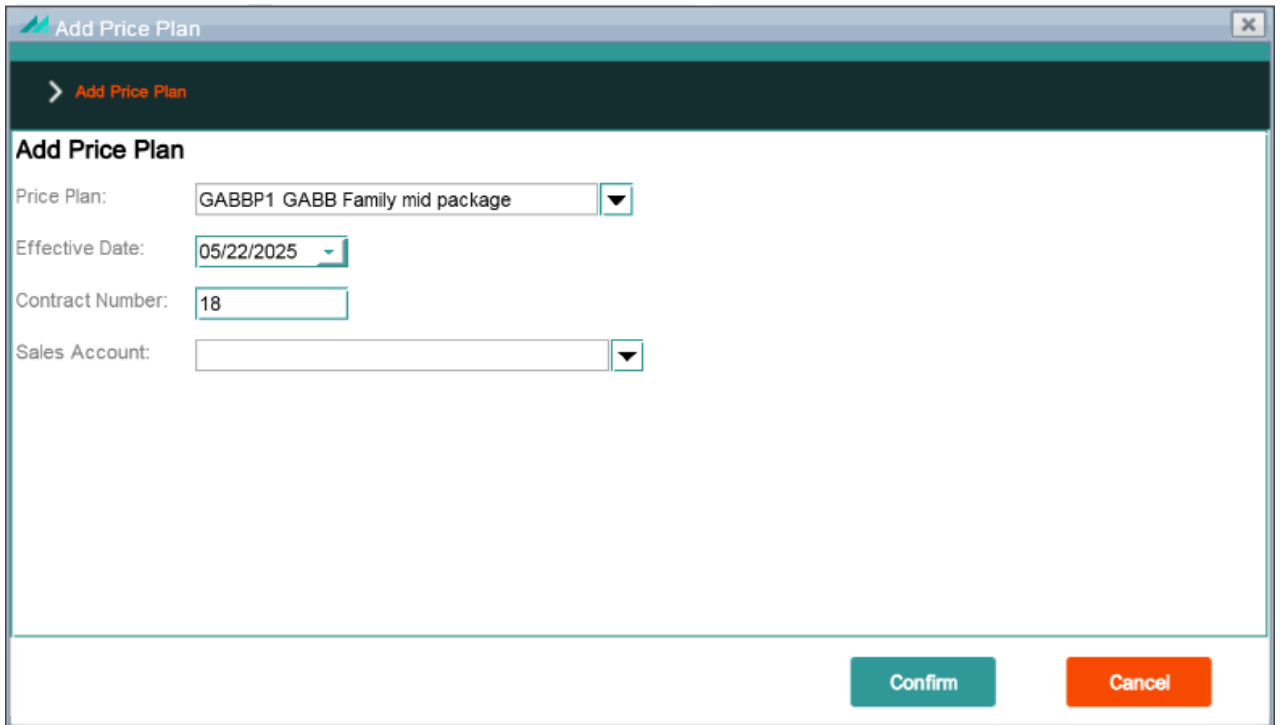
When you add a price plan to an agreement, CMP checks whether any future price plans are pending (these are price plans with a future effective date and no cancellation date). In this case, AgentView does not allow you to add another price plan. This also applies if the current price plan is active for the agreement and it is still in the early upgrade term of the contract.

You add a price plan to an agreement in the **Agreement Summary** screen. In the **Profile >Summary** lower panel, right-click in the **Price Plans** pane and click the **Add** shortcut menu option.



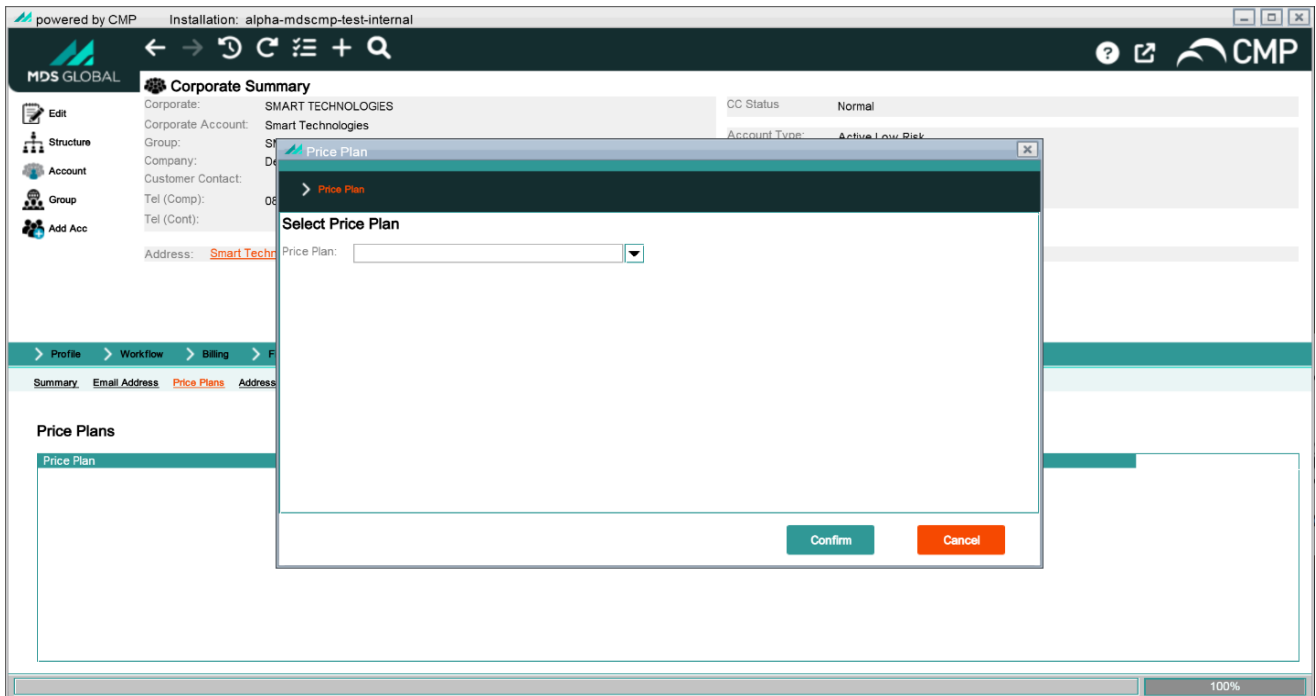
Use the **Add** shortcut menu option in the **Price Plans** pane to launch the **Add Price Plan** pop-up.

In the **Add Price Plan** popup, you can select a price plan to add to the agreement.



The Add Price Plan pop-up

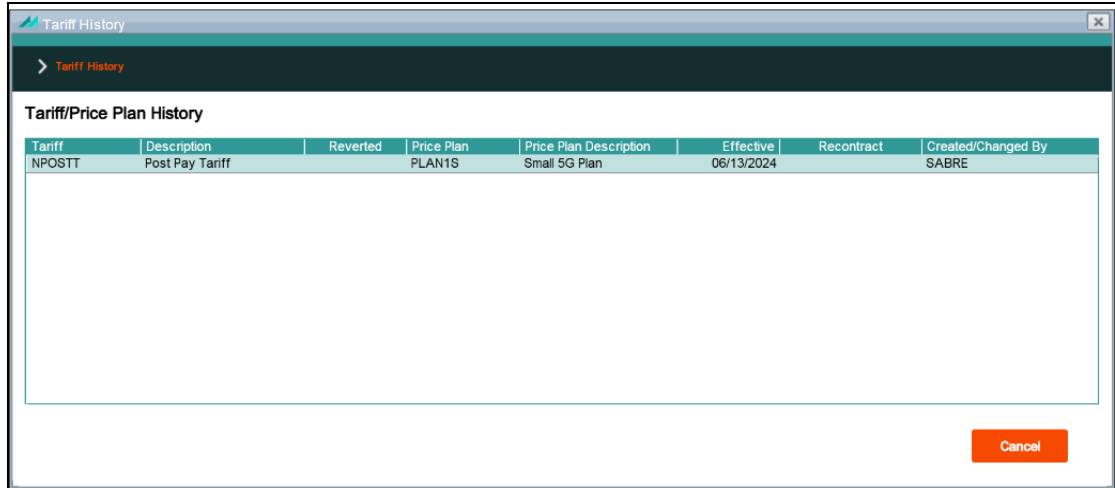
You assign a price plan to a group or corporate in the **Profile > Price Plans** lower panel in the **Group** or **Corporate Summary** screen. Right-click in the panel and select **Add** in the shortcut menu to launch the **Price Plans** pop-up.



6. 7. 3 View Price Plan History

To view a price plan history, click the price plan name link in the upper panel of the **Subscription Summary** screen. The **Tariff/Price PlanHistory** pop-up lists the current and previous price plans under the following columns:

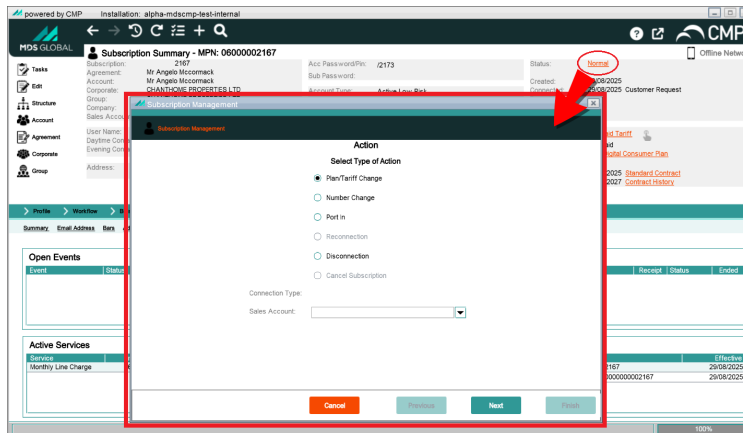
Name	Description
Tariff	The CMP code for the tariff.
Description	The descriptive name for the tariff.
Reverted	If there is a checkmark in this column, the price plan associated with the tariff has been reverted.
Price Plan	The CMP code for the price plan associated with this tariff.
Price Plan Description	The descriptive name for the price plan associated with this tariff.
Effective	The date from which the price plan/tariff is effective.
Recontract	If there is a checkmark in this column, the price plan has been recontracted.
Created/Changed By	The CMP entity (agent or process) responsible for adding or changing the price plan/tariff.



Access the price plan history via the **Price Plan** name link in the **Subscription Summary** screen

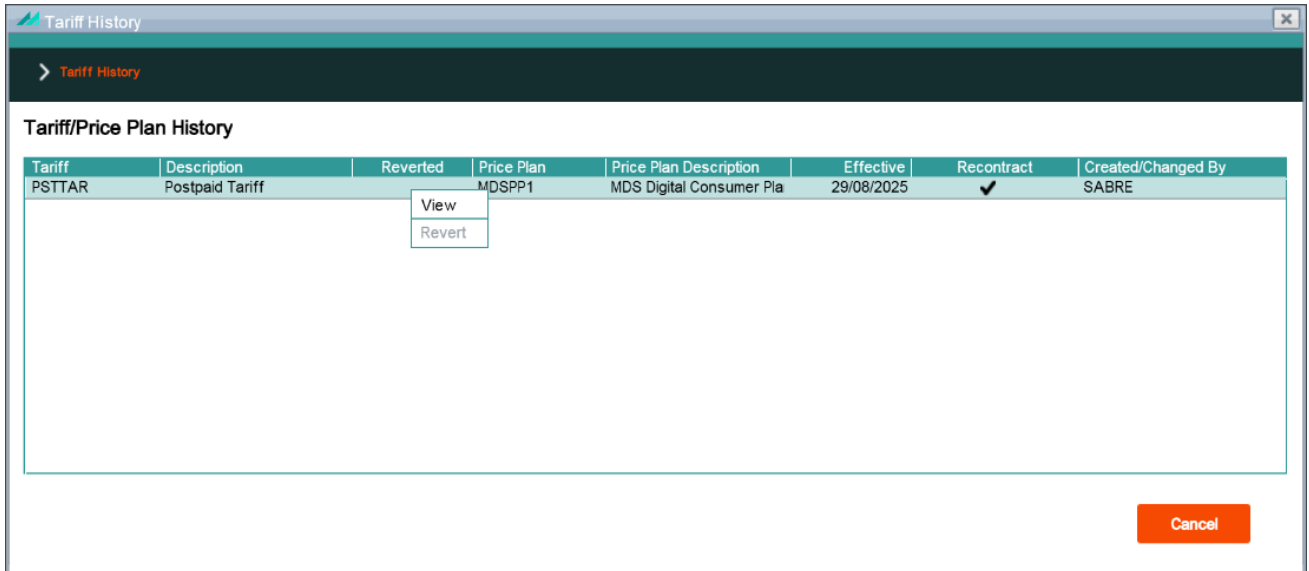
6. 7. 4 Change a Price Plan for a Subscription

You can change/upgrade a price plan for a subscriber in the **Subscription Creation/Upgrade** wizard, which you launch via the status link in the upper panel of the **Subscription Summary** screen.



6. 7. 5 Revert a price plan change

You can revert price plan and/or tariff changes, for example when a customer changes their mind during a cooling-off period. This option is available via the **Tariff History** panel:



*Right-click a price plan in **Tariff/Price Plan History** to access the **Revert** option*

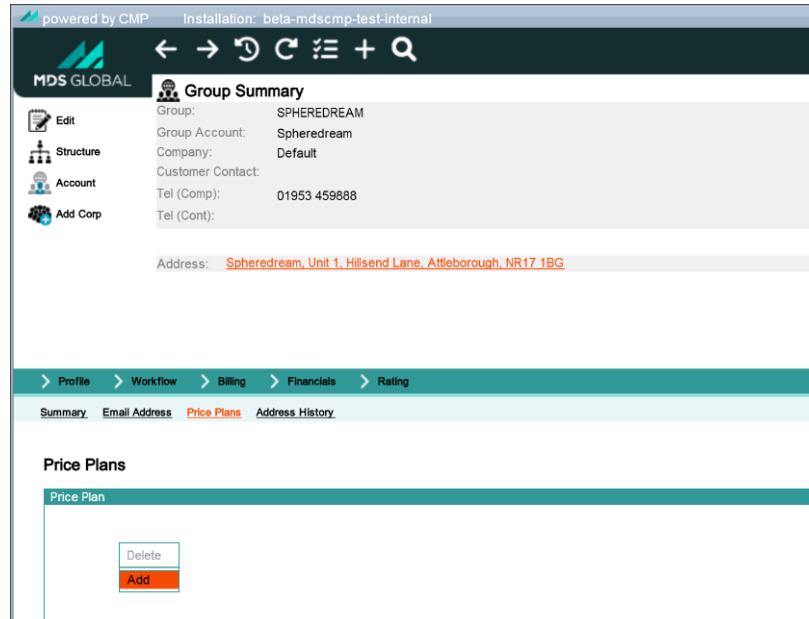
There is no limit to the number of times a customer can revert to their previous price plan. However you cannot revert a reversion. This means that if a customer changes their mind about an upgrade and reverts to their original price plan, then they change their mind again and decide that they do want the upgrade, you need to process the upgrade again as you would any upgrade. Changing to a new tariff means a new contract. If the customer reverts, they return to their original contract.

The revert functionality is not available in the following situations:

- The subscription is not connected
- The subscription is disconnected
- The subscription is terminated
- The subscription is prepaid
- A tariff change already pending
- The subscription is on an agreement price plan

6. 7. 6 Delete a Price Plan for a Group or Corporate

To delete a price plan for a group or corporate, access the relevant Summary screen. Go to the **Profile > Price Plans** lower panel, right-click the price plan to delete and select **Delete** in the shortcut menu.



Delete price plans at group and corporate level in the **Profile > Price Plans** lower panel

6. 7. 7 Cancel a Price Plan for an Agreement

You cancel a price plan for an agreement in the Agreement Summary screen. In the Profile > Summary lower panel, right-click the agreement to cancel in the Price Plans pane and select Cancel in the shortcut menu:



6. 8 Contracts in AgentView

In AgentView you can:

- [View contract details](#)
- [Add or change a contract](#)

6. 8. 1 View Contract Details

Contract details are available in the upper panel of the Subscription Summary screen, which displays:

- The contract start date
- The contract expiry date
- A link to the contract history

Subscription Summary - MPN: 07000001001

Subscription: 1001
 Agreement: Mr Howard Jones
 Account: Mr Howard Jones
 Corporate: Default
 Group: Default
 Company: Default
 Sales Account: Default

User Name: [Howard Jones](#)
 Daytime Contact:
 Evening Contact:

Address: [Mr Howard Jones, 3 Wainhouse Brow, Hayfield, Derbyshire, SK22 2ET](#)

Acc Password/Pin: /3890
 Sub Password:
 Account Type: Active Low Risk
 Account Balance: 10.32
 Payment Method: Manual Payment

Cycle: 6
 First Invoice: 01/28/2026
 Last Invoice: 03/31/2026
 Termination Invoice:
 Next Invoice: 04/06/2026

E-Mail:
 Status: Normal
 Created: 01/19/2026
 Connected: 01/20/2026 Customer Request
 Barred:
 Terminated:
 Anonymised: No

Tariff: Post Pay Tariff
 Billing Type: Postpaid
 Price Plan: [Medium 5G Plan](#)
 Contract Start: 01/20/2026 [Standard Contract](#)
 Contract Expiry: 02/19/2026 [Contract History](#)

Open Events

Event	Status	Created	To resolve by
Adding Usage Cap	Unresolved/Open	01/20/2026	01/20/2026
Normal Connection NetE	Unresolved/Open	01/20/2026	01/20/2026
Add to shared group	Unresolved/Open	01/20/2026	01/20/2026
OCS Normal connection	Pending auto confirmation	01/19/2026	05/01/2020

Active Services

Service	Price	Package Description	Effective
Monthly Service Charge	10.00	Medium 5G Base Packag	01/05/2026

Effective Allowances

Allowance	Recurring	Inclusive	Remaining	Expiry
Postpaid 500 M	✓	500 Min	0 Min	
Postpaid 2GB I	✓	2 GB	0 GB	
Postpaid 1000	✓	1000 SMS	0 SMS	

Serial Numbers

Type	Number	Effective
MPN	07000001001	01/20/2026
SIM	894400000000000001001	01/20/2026

*View contract details in the upper panel of the **Subscription Summary** screen*

6. 8. 2 Add or Change a Contract

In general, contracts are assigned to price plans and default from the price plan when it is selected for a subscriber and cannot be altered. However, if your deployment of CMP is configured to do so, it is possible to change or enter a contract number when setting up a new subscription. You do this in the **Contract** field when entering the **Connection Details** in the **Subscription Creation** wizard:

The screenshot shows a 'Subscription Creation' window with a 'Connection Details' section. The fields are as follows:

User:	<input type="text"/>	Lower Usage Limit:	0.00
Email Address:	<input type="text"/>	Upper Usage Limit:	0.00
Cost Centre:	<input type="text"/>	Filter Selection:	<input type="text"/> Ovr
Line No:	<input type="text"/>		<input type="checkbox"/>
Connection Type:	<input type="text" value="NNET"/> <input type="text" value="CMP Only Connection"/>	Contract Number:	<input type="text" value="35"/>
Connection Reason:	<input type="text"/>	Contract Start Date:	<input type="text" value="04/15/2026"/>
Process Date:	<input type="text" value="04/15/2026 15:24:25"/>	Term of Contract:	12
		Terms/Conditions:	STD Standard Contract
		Create Additional Sub?:	<input checked="" type="checkbox"/>

At the bottom of the window are four buttons: Cancel (orange), Previous (teal), Next (teal), and Finish (light teal).

Alter or enter a contract number when setting up a new subscription

 This option may not be available in your deployment of CMP.