



**PHOENIX***SOFT*

# **CMS Convergent Billing & Customer Care Solution**

**Product White Paper**

**August 2007**

### Introduction

PhoenixSoft's CMS Convergent Billing and Customer Care solution provides a host of benefits that separate it from the competition:

### Integration

The CMS Billing software is the only system to have integrated call pricing, customer data, accounts receivable, work orders and billing all in one package. This unmatched integration enables the user to record and apply payments to the next month's billing in a timely fashion. As a result, service providers experience better financial control and faster profit.

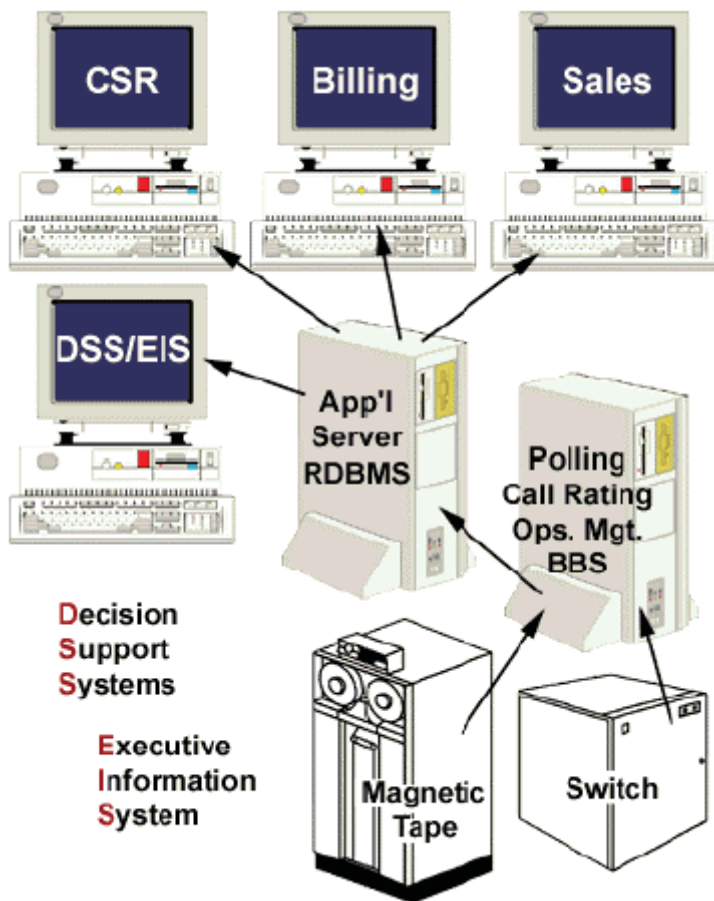


Figure 1. Integration Overview

### Unlimited Users

CMS Billing offers a call accounting solution to small clients with limited budgets as well as large institutions and companies. It is suitable for companies with an unlimited number of telephone numbers, credit cards or authorization codes, and will operate behind virtually any telecommunication system.

### Multiple Applications

The CMS Billing customer base covers a wide range of users including LECS, CLECS, long distance companies, shared tenant businesses, Internet providers and cable television companies. Virtually any provider of incremental services can generate and collect revenues utilizing the CMS Convergent Billing solution.

### Proven Performance

Satisfied customers around the globe will attest to the CMS Billing application's reliability and program excellence. Designed to run on SUN Solaris, Compaq Tru 64 or Windows NT, the CMS Billing solution offers a wide range of redundancy and reliability options.

### Product Overview

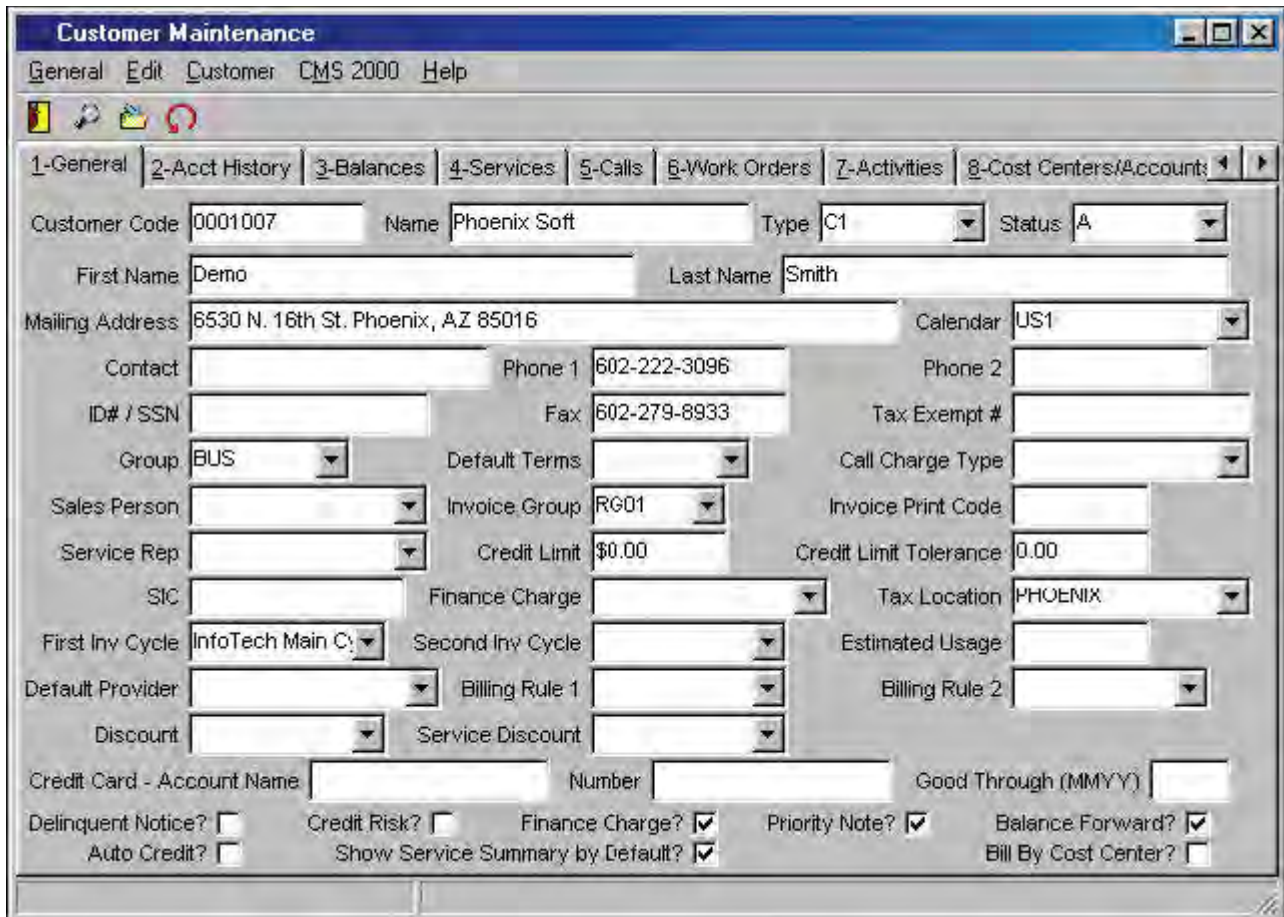
PhoenixSoft's CMS Billing application offers a comprehensive client/server based convergent billing solution. CMS is the most comprehensive and flexible software available today in the telecommunication industry, regardless of price. No other telecommunications billing system can deliver the power, speed, and versatility. The CMS Billing system modules include call rating and tariffing, customer care, provisioning, accounts receivable and work order/trouble ticket processing. In addition, the application provides export capability to your general ledger and financial packages.

### Software Architecture

The CMS Billing software is designed for ease of use and runs on both Windows NT and UNIX. The easy-to-use application interface maintains the required level of reliability and performance. The client GUI application runs in any Windows '95 or NT environment. The database server runs under Windows NT, Solaris or Compaq Tru 64 Unix. The software is both vertically and horizontally compatible with the newest client server computers and operating systems such as Solaris, Compaq Tru 64 UNIX and Windows NT.

With ODBC, you can use any of the following databases to match your business needs and to better utilize the database skill sets you may have already developed within your organization:

- Oracle
- SQL server (Shipped as Standard)



*Figure 2. Customer Maintenance Screen*

**Hardware Architecture**

The CMS Billing systems use industry standard, industrial grade network servers. This architecture allows for any advances in hardware (hot swappable power supplies and hard drives, RAID mirroring, dual CPU boards, etc.) to be seamlessly integrated into new and existing systems.

**Switch Compatibility**

The CMS Billing software is compatible with any switch that provides CDR (call record detail) data, whether owned and operated by you, your LEC, long distance provider, or any other provider. In the event that unique integration is required, PhoenixSoft will write and provide a complete interface to suit individual requirements.

**Customer Support**

Software support includes technical assistance for the CMS Convergent Billing and Customer Care product. All customer support is direct through PhoenixSoft's worldwide support team.

**Call Management**

**Switch Polling**

Switch polling is an innovative system of retrieving CDR data from one or many switches. The CMS Billing application has the capacity to poll continually, on demand, or in increments you select and setup. It can compress and check for data integrity, hold for future processing, or send data directly to the pricing module. If desired, CMS can have a report ready for you every morning that outlines what was done for audit accuracy. Utilizing our advanced polling utilities eliminates the need for additional, expensive polling hardware at your office or main processing location.

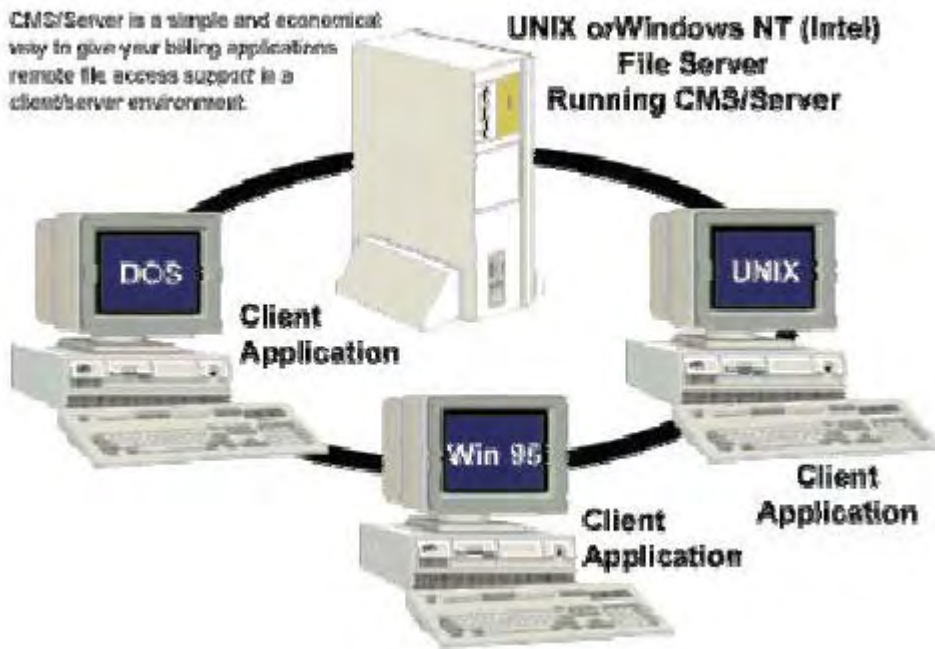


Figure 3. System Architecture

- Calculates all telecommunications taxes via vertex tables
- Supports multiple SMDR formats and can be processed either on-line or through batch processing polled files
- Interfaces with LEC or OCC 9-track magnetic tape which allows automatic tracking of long distance calls made over central office
- Allows manual editing of call records for easy input of credit card, third party, or collect calls if necessary
- Provides necessary reports to allow accurate analysis of trunk utilization, calls by NPA/NXX, usage by lata and bands, calls by customer/extension or account code, hotel/motel room checkout invoices, etc.
- Report generator to allow ad-hoc analysis reporting
- Allows multi-media output for billing such as paper, mag-tape, floppy disc or microfiche
- Interfaces with Billing, Accounts Receivable, General Ledger, Work Order Processing

### Call Rating

The CMS Billing system offers an unlimited capacity for call rating and the number of call rating tables you can have or use. While the CMS system includes a complete set of the most commonly published and used rate tables, it also offers the flexibility for designing customized rate tables or increasing/decreasing any existing table by either a percentage or a price. In addition, the software provides for automatic updating of rate tables.

### Call Rating Features

- Automatically polls and processes multiple locations
- Distance pricing based on vertical and horizontal coordinates
- DDD, IDD, WATS, OCC tariffed rates or user-defined
- Discounts or mark-ups allowed based on billing ID, (telephone number, authorizations codes, or credit cards) as well as volume discounts by customer
- Time-of-day, day-of-week sensitive pricing
- Calls rated in user-defined increments (as small as one second)
- Trunk dependent pricing such as FX or WATS services
- Ability to define pricing on specific phone numbers such as 1-900, 1-976 or interzone calling

### Flexible Call Pricing

Call pricing can be done at any time, real time, on demand, or all at once from switching equipment data, a local operating company tape or a long distance carrier tape. You can price different tapes different ways, different services at different rates or different extensions at different rates. Individual customers or specific extensions can be singled out for a special price, either higher or lower, and by a percentage or custom factor. Additionally, the CMS software provides for credit card calling, third party and collect call tapes.

### LEC (Local Exchange Carrier)

The CMS Billing solution provides interfaces for reading large Local exchange carrier data tapes regardless of location or Local Operating Company. Data can be priced in batch form or real-time depending on needs.

### Authorization Codes, Calling Cards and Account PIN Codes

The CMS Billing software provides for authorization codes, calling cards and account PIN code use. To ensure accurate billing for accounting firms, legal firms, company employees, student resale, or shared tenant service users, authorization



*Figure 4. Report Writer*

codes are recommended to ensure accurate billing. Code numbers or calling cards may be assigned automatically or one at a time as you desire. The system prevents misuse, lowers cost through effective tracking, maintains limits and has the capacity to allocate costs to your customers and their clients.

**Traffic Engineering**

The CMS traffic engineering capacity offers an opportunity to monitor efficient trunk utilization to evaluate calling patterns, plan optimization of configurations and create "what-if" scenarios.

**Standard Call Reports and Report Writer**

The CMS Billing system includes more than 100 predefined reports. In addition, the CMS report writer offers the flexibility of defining any parameters for your specific situation from any module. It allows you to design special call reports, identify customers who paid, compare costs, billings and profit margins, and provides any other data you may need.

**Billing and Receivables**

**Billing**

The CMS software offers a complete billing system that produces easy to read telephone bills for your company and its customers. The billing system integrates with accounts receivable and other modules to maintain payments received and current balances.

**Account Data Base**

You can maintain a completely integrated customer database, which enables system there is no need to re-enter information

anywhere else a second time. The customer data screen holds an abundance of information including memos on the account, customer or extension.

**Service Charges**

The CMS software allows you to define any number of features and services you may provide for your customers and whether to charge on a one-time and/or recurring basis. Proration of services for customers who connect and disconnect mid-cycle are easily accounted for with the CMS Billing system. Elements such as a basic monthly service, taxes, call waiting, subscriber line change, voice mail, copier services, facsimile usage and other services, as outlined by you, are specified, provided and billed accurately.

**Deposits**

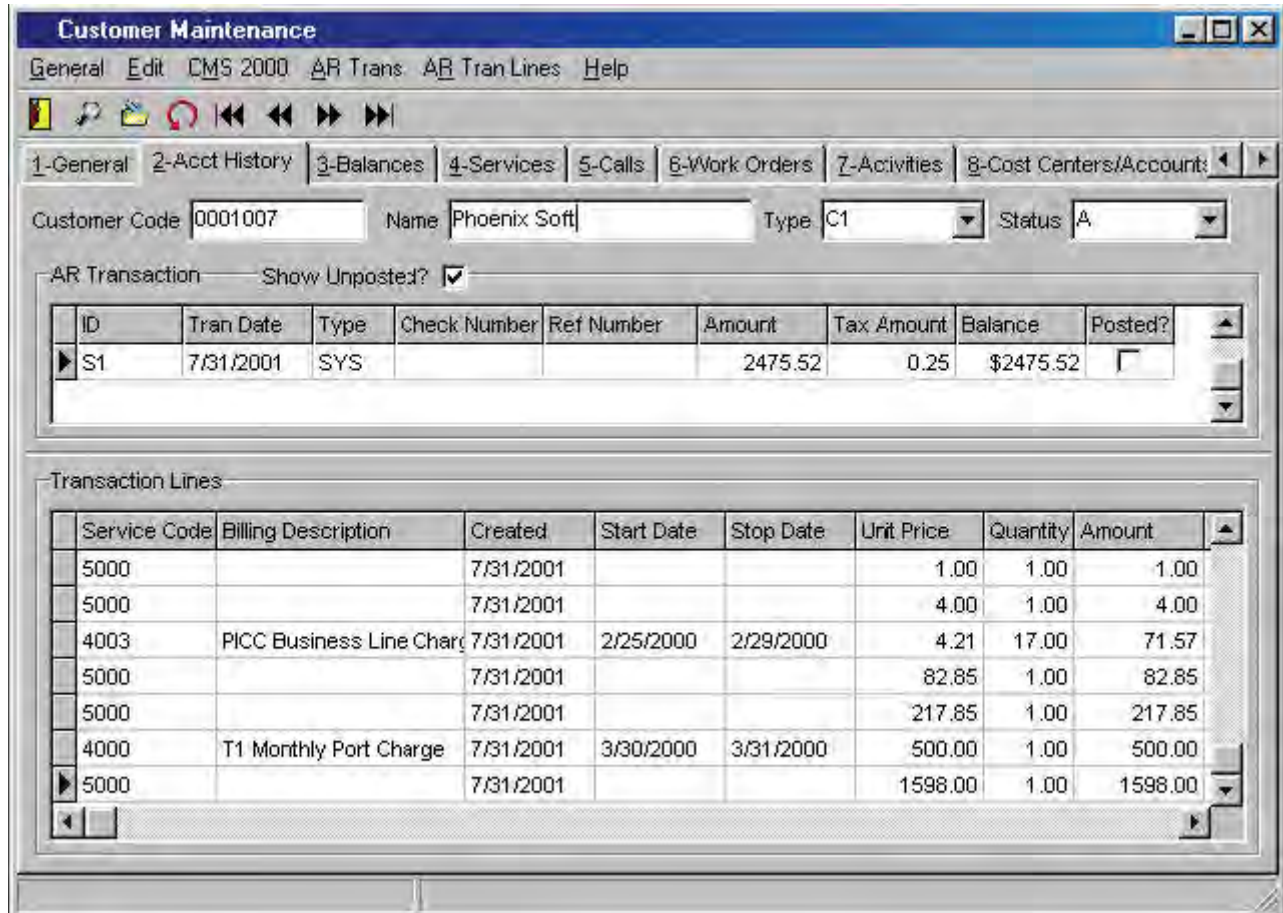
The CMS Billing application tracks deposits by service code. This capability allows application of deposits by service instead of by customer.

**Taxes**

The CMS Billing provides for all federal, state and local taxes, updated manually or through a service such as Vertex.

**Accounts Receivable**

Most call accounting software does not provide the ability for you to record payments, maintain ongoing balances and re-bill monthly. The CMS software is the first complete system to satisfy this need in a rapidly changing and growing telecommunications environment.



*Figure 5. Account History Screen*

**Payment Processing**

Payment processing may be accomplished in a single or batch entry form. Individual payments received may be keyed in quickly and efficiently or from a tape or disk media sent to you by a bank or lock box service. Accounts are automatically reconciled and ready for next billing.

**Credit and Collections Management**

Credit and collections management inputs and tracks payments, schedules, billing and payment history, prints late notices and letters, and advises when to interrupt or disconnect service. The faster you collect, the greater your opportunity of creating a financially successful business.

**Customer Service**

Customer service files are available as a single or multi-user system to initiate service, answer customer questions, and resolve problems with a small or large telecom staff. There is no need to fumble through piles of paper work, as everything is

quickly available to the staff on one terminal with Hot Key access to all modules. In addition, the CMS Billing system provides for historical reporting of customer communications. Customer service personnel have the ability to document actions and commitments in customer file, each time an inquiry is made.

**Directory**

The CMS Billing system provides an easy to use on-line look-up directory of your customers or employees accessed by name, telephone number or account.

**Inventory**

An inventory module enables you to keep track of any features and functions for each extension or service you provide. It also tracks equipment inventory whether you rent, lease or sell), and posts charges for single event or recurring charges.

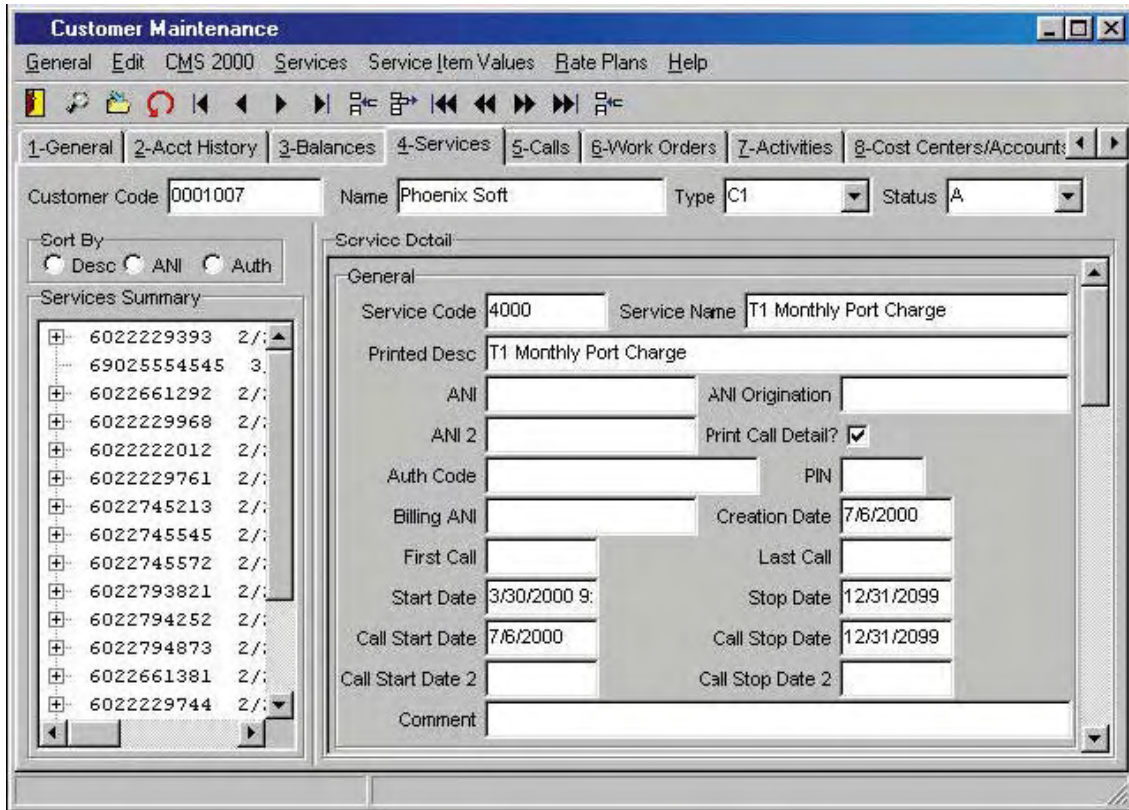


Figure 6. Service IDs

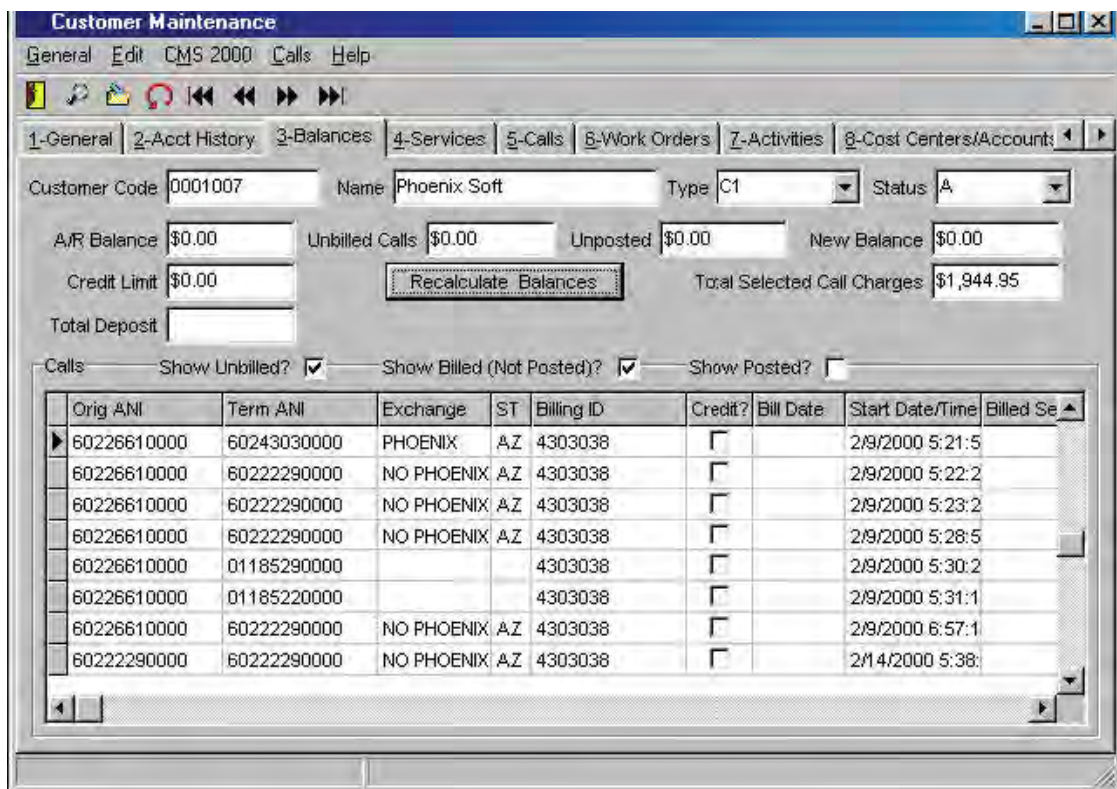


Figure 7. Billing IDs

**Work Order / Trouble Ticket**

The Work Order/Trouble Ticket module is an efficient means of scheduling work and keeping track of installation, equipment and labor costs. It also enables you to track problem resolution within a structured, detailed reporting environment. This system includes data sensitive trouble reports as well as information on technician rates and performance. The Work Order Module integrates with the Billing Module to post chargeable items and to bill customers for work performed.

**Provisioning**

This feature allows you to automatically notify LECs, CLECs, Long distance carriers or internal departments of adds, changes or deletions of services assigned to customers.

**Billing and Accounts Receivable Features**

- User-defined invoice format
- Provides customer invoicing based on a monthly or user-defined cycle
- Bills for recurring and one-time charges such as monthly service, equipment and installation charges
- Automatic proration of billing/service charges for customers whose service starts or stops mid-cycle

- Tax calculations are based on tax codes assigned to individual billing services
- Tracks deposits by service and customer
- Unlimited number of billing codes which allows billing for service, equipment and miscellaneous other services (i.e. fax, telex, voice mail, etc.)
- Tracks equipment and service inventories
- Supports multiple billing locations
- Adjustments and payment processing supports either open item or balance forward accounting methods
- Automatically applies finance charges to delinquent customers
- Delinquency letter generation
- Provides accounting reports (bank deposits, aged accounts receivable, revenue summaries, delinquent accounts, customers over credit limits, etc.)
- Allows multi-media output for billing reports such as paper, magnetic tape, floppy disc or microfiche
- On-line retrieval of customer account history
- Interfaces with Call Processing, Accounts Receivable, Accounts Payable, General Ledger

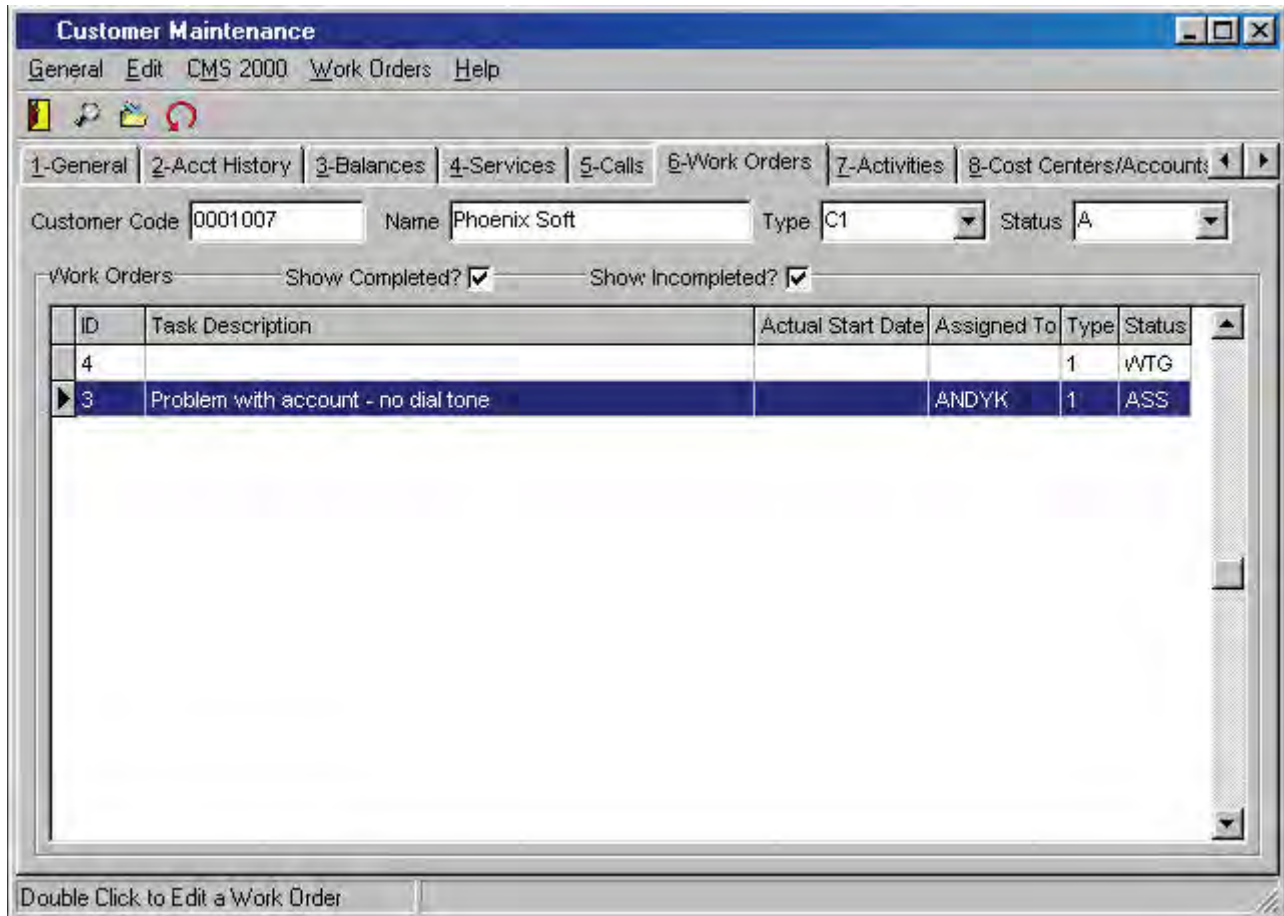


Figure 8. Work Order Tracking

***Why PhoenixSoft ?***

Since 1985, PhoenixSoft has been a leading software developer providing innovative switching, billing and voice application solutions. We bring our 20-year track record and extensive call management expertise to each network deployment. We're able to address the full spectrum of requirements ~ from integrating enhanced services within an existing network configuration, to an end-to-end communications network solution. Headquartered in Phoenix, Arizona, PhoenixSoft designs telephony solutions specifically to help service providers of all sizes integrate low-cost, yet feature-rich solutions that easily integrate within a variety of network configurations.

For further information or a demonstration of the CMS Convergent Billing and Customer Care solution, please contact PhoenixSoft at (602)788-6100 or email [pamick@phoenix-soft.com](mailto:pamick@phoenix-soft.com).