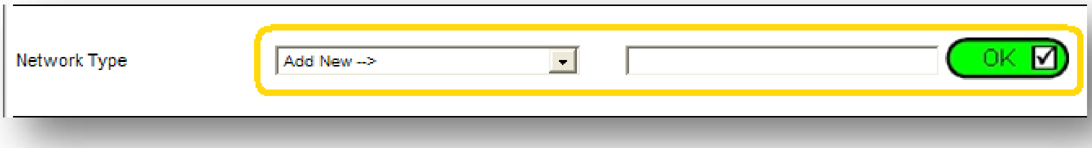
Tariff Plan

- ***The Tariff plan is how you maintain your mobiles, plans and commission/bonus structure. If you were to make changes to the Tariff Plan there should be one or two people that can do this as you can change or delete things if you are not familiar with this part of the system. Please call ClickPOS if you are unsure.***

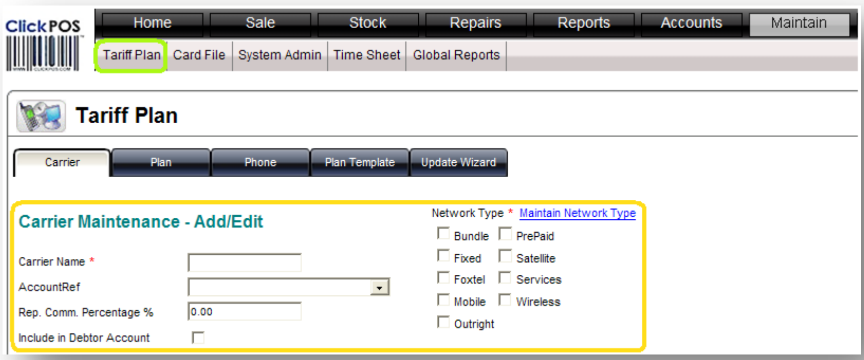
Tariff Plan Overview – Video Tutorial

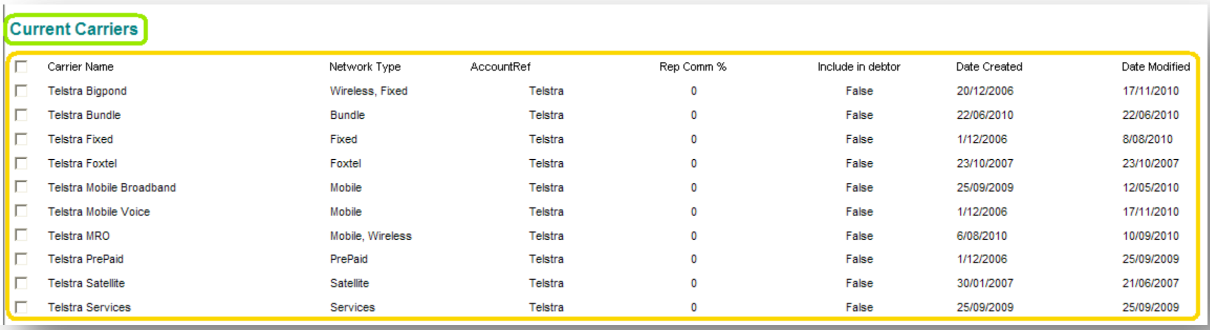
Tariff Plan Maintain Phone – Video Tutorial

1. The Plan Template is made up of Carrier, Plan and Phone tabs. You are required to build and maintain all three tabs, and then join them together in the Plan Template along with the expected revenue. If a new phone is on the market, you need to add the phone in through the Phone Tab, then go to the Plan Template Tab to specify what plans can be sold with handset.
2. Navigate to **"Maintain"**, **"Tariff Plan"** and **"Plan Template"**. The first thing you should do is click **"Maintain Network Type"** hyperlink. Here you can maintain things like the **"Category"**, **"Months"**, **"Network Type"**, **"Plan Type"**, **"Value"**, **"Manufacturer"** and **"Colour"**. These fields will be used for when you make your plans and phone combinations. Type in the Network types and press **"OK"** (E.g. Bigpond, PrePaid and Fixed).



3. Once you have made the **"Network Type"** list you can now start to build the plans. Create a **"Carrier Name"** and **"AccountRef"** (E.g. Telstra) and tick the applicable option in the **"Network Type"** list. The **"AccountRef"** field talks to accounting software so it should be a name that it recognises. After selecting those fields ClickPOS generates a list of Carrier/Plan type combinations that will be listed underneath the **"Current Carriers"** list (E.g. Telstra Bigpond, Telstra Mobile Voice).

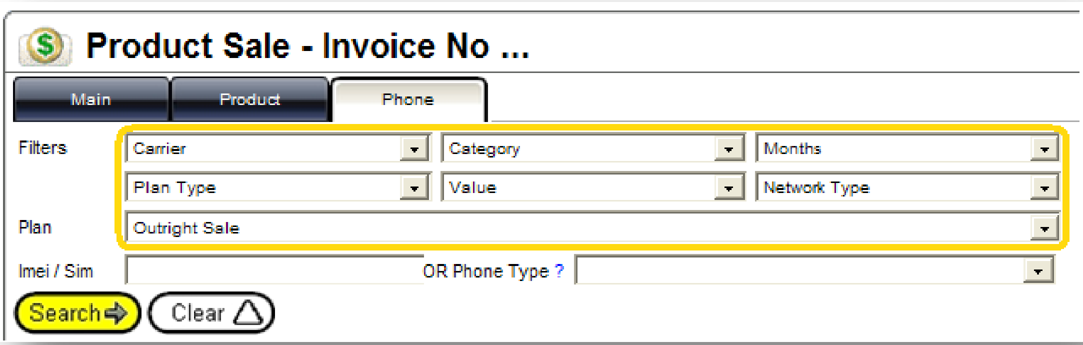




Current Carriers

Carrier Name	Network Type	AccountRef	Rep Comm %	Include in debtor	Date Created	Date Modified
Telstra Bigpond	Wireless, Fixed	Telstra	0	False	20/12/2006	17/11/2010
Telstra Bundle	Bundle	Telstra	0	False	22/06/2010	22/06/2010
Telstra Fixed	Fixed	Telstra	0	False	1/12/2006	8/08/2010
Telstra Foxtel	Foxtel	Telstra	0	False	23/10/2007	23/10/2007
Telstra Mobile Broadband	Mobile	Telstra	0	False	25/09/2009	12/05/2010
Telstra Mobile Voice	Mobile	Telstra	0	False	1/12/2006	17/11/2010
Telstra MRO	Mobile, Wireless	Telstra	0	False	6/08/2010	10/09/2010
Telstra PrePaid	PrePaid	Telstra	0	False	1/12/2006	25/09/2009
Telstra Satellite	Satellite	Telstra	0	False	30/01/2007	21/06/2007
Telstra Services	Services	Telstra	0	False	25/09/2009	25/09/2009

4. The next thing to do is to build the references for the plans such as months, value of plans and Category of plans. Some of these plan references will act as filters when selling out plans in the system. Below you can see the fields you need to use to help filter the plan types.

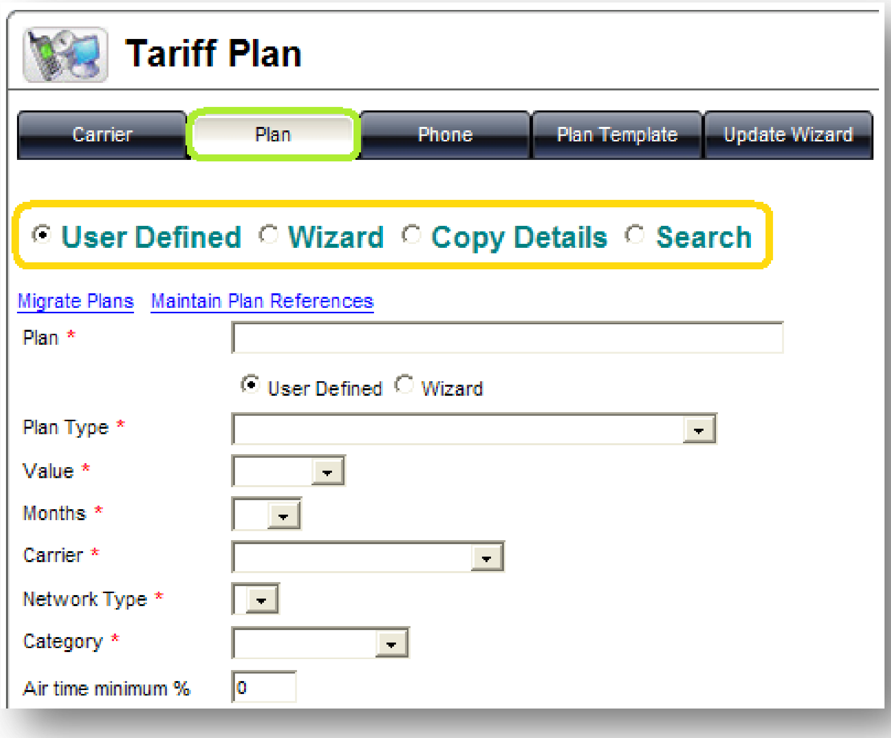


5. The next step is to make the plans using the **"Plan"** tab. In this tab there will be four fields that you can utilise such as **"User Defined"**, **"Wizard"**, **"Copy Details"** and **"Search"**.
   - **"User Defined" –** You can type your own plan names in and choose the corresponding fields it falls under, such as plan type, value, carrier etc. This will also only create one plan at a time.
   - **"Wizard" –** This will let you choose multiple fields at the same time to create plans by ticking the desired checkboxes. This is also a good way of making bulk plan types.

     E.g. **Carrier Name** = Telstra, **Plan Type** = Consumer Member Plan, **Value** = $10, **Months** = 12, **Category** = NEW.

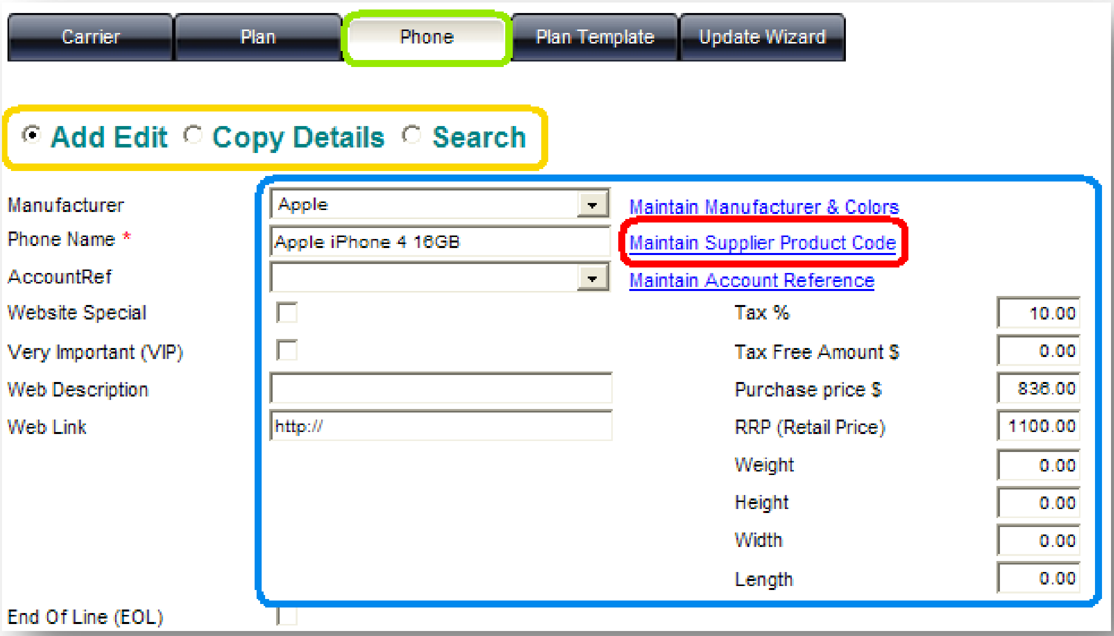
     This will generate the following plan: Telstra Consumer Member Plan $10 over 12 months.

     The system will also generate its own naming structure for these plans which you can change if desired. Once the plans have been generated you can click on the plan name hyperlink and click the **"User Defined"** option under the **"Plan"** name to change the name.
   - **"Copy Details"** – If a new plan comes out that is replacing an existing plan and the commission and bonuses are the same as the new plan you can copy the attributes from one plan to another.
   - **"Search"** – Here you can search to see if a plan exists already.

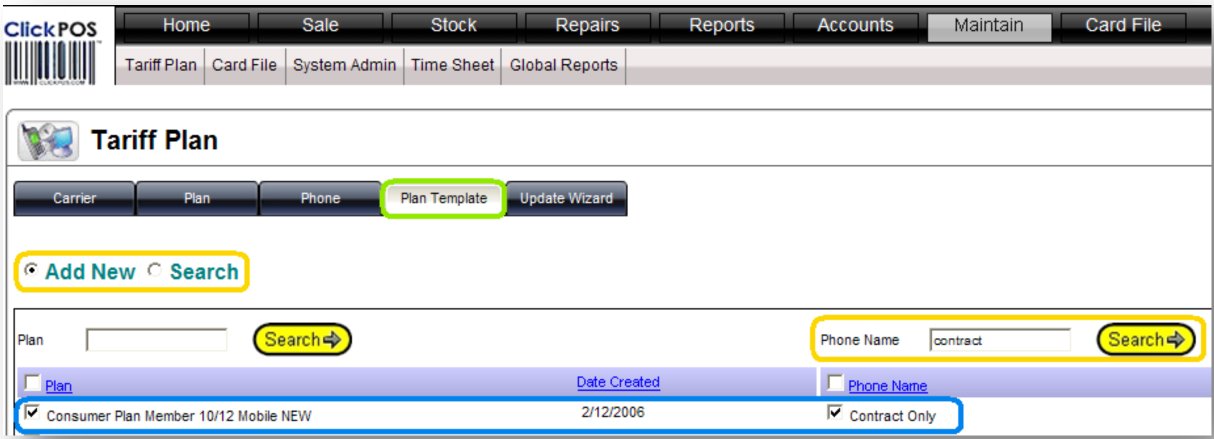


6. Once all of your plans have been generated you can now populate the phones. Navigate to **"Phone"**, and **"Add Edit"**.
   - **"Manufacturer"** – Select the maker of the phone. You can add or delete these through the hyperlink beside this field.
   - **"Phone Name"** – Enter in the phone name as you would like it to be displayed in the system.
   - **"AccountRef"** – Again this is for syncing with accounting software (E.g. Telstra).
   - **"Website Special"** – Phone will be listed on the website as a special.
   - **"Very Important (VIP)"** –
   - **"Web Description"** – How it is described on the website.
   - **"Web Link"** – Put in a direct link to manufacturer or applicable website (E.g. www.gsmarena.com).
   - **"End Of Line (EOL)"** – Choose this if the product line has ended.
   - Also enter in the applicable pricing.

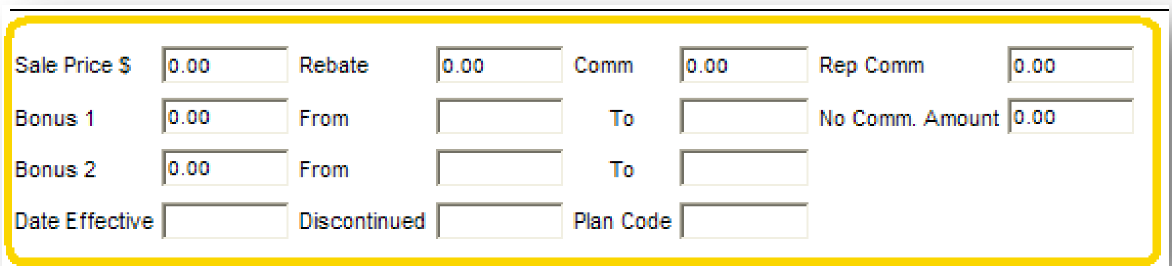
   The main details you need to add are Manufacturer, Phone Name, Purchase Price and RRP. Once the plan is generated, click on the **"Maintain Supplier Product Code"** hyperlink to enter the supplier product code.



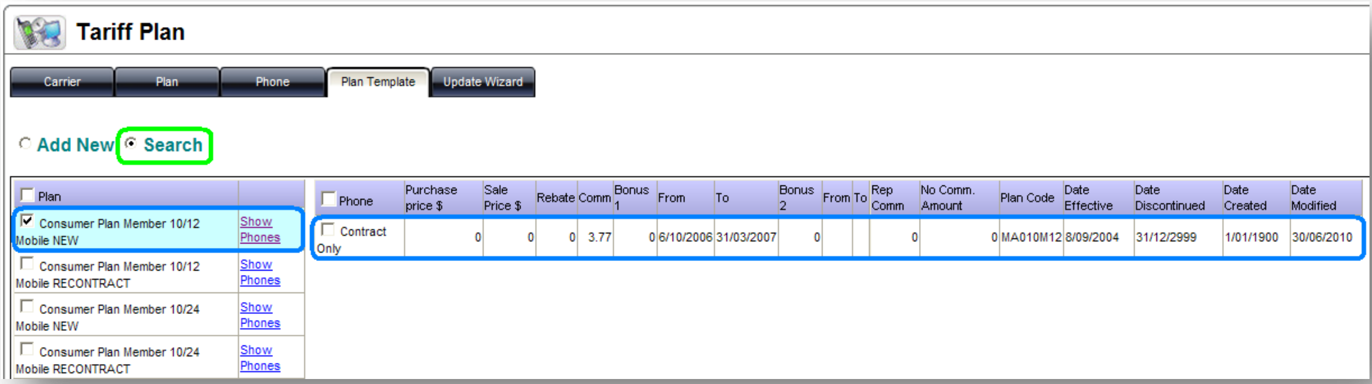
7. The next step is to combine the plans and phones together with the **"Plan Template"** tab. Tick all of the checkboxes that relate to the plan you are wishing to add and press **"Search"**. This will now display the desired plan/plans. The plan/plans will be listed on the left hand side of the screen and you now have to match them up with at least one of the **"Phone Name"** products. If a plan includes a phone you should select the appropriate phones in the list under **"Phone Name"** and link them to the plan/plans on the left list. In this case it is a plan without a phone so you need to choose "Contract Only" and press **"OK"**. **"Contract Only"** needs to be added in the phone list before you can add it.



8. You can at this stage enter in the supplier commission and rebates however it is advised when doing multiple plans and phone combinations to do this after the plans have been added. This guide will cover how to do this in section 10.



9. Once all of the plans have been matched up with at least one of the **“Phone Name”** products, navigate back to the **“Plan Template”** tab and click on **“Search”**. Use the checkboxes available to search for the newly added plans and then press **“Search”**. The plans will now be displayed on the left side of the screen. Click on the **“Show Phones”** hyperlink to see what plans/phones are attached to the plan as well as the expected revenue.



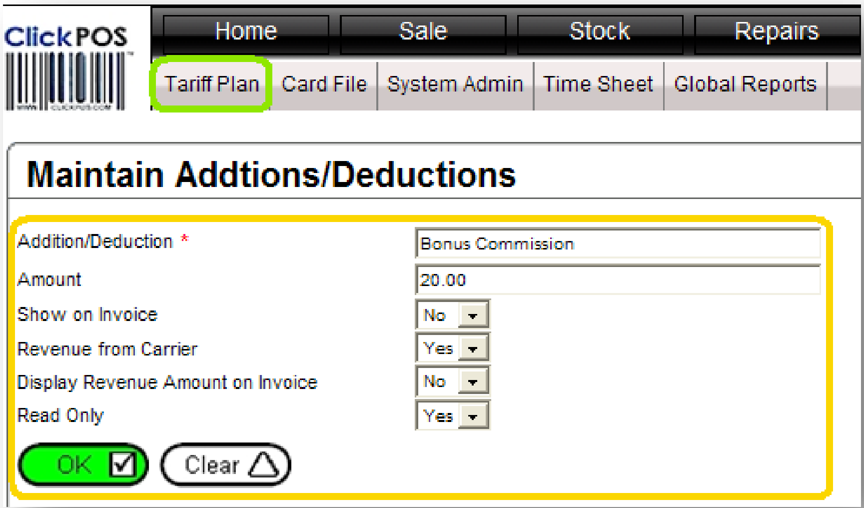
10. You can now tick the plan you want to attach the Commission and Bonus to. If you are adding Bonuses you need to put in a date range for it otherwise it won’t take effect. You can tick multiple plans that have the same payment properties if you need to (E.g. If a plan upgrades before the 90 day Comms Due period it gets a default payment amount no matter what the value of the plan is).

Additions and Deductions

- ***The Additions and Deductions are used when selling out a Phone Plan, where you may include any additional revenue from Carrier or add services to an invoice.***

Maintain Additions and Deductions – Video Tutorial

1. Navigate to **“Maintain”**, **“Tariff Plan”** and **“Additions & Deductions”**. Here you can maintain additional services you wish to add to a Phone Sale such as a Bonus.



2. Under **“Addition/Deduction”** you name the product you would like to add. Under **“Amount”** you can add the amount of revenue/GP you would like to add to the sale (This can also be a negative amount).
   - **“Show on Invoice” –** You can choose whether to have product appear on the Invoice.
   - **“Revenue from Carrier”** – Select **“Yes”** if you would expect to get this amount back from your Carrier.

- **"Display Revenue Amount on Invoice"** – Choose **"Yes"** if you would like the amount to show on the Invoice.
- **"Read Only"** – Select **"Yes"** if you would like the amount to not be able to be changed during the sale.

3. Once you have added the Addition/Deduction of your choice you can add this to the sale by clicking on the "Services" tab and choosing the product from the drop down options.