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Refer to the Troubleshooting & Support section of this manual for complete support and contact information.
## Document History

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<td>Minor terminology fixes and formatting to improve readability.</td>
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About this Manual

Goals
This manual describes the role and function of the GW_Trio module in the GenWatch3 solution.

Who Should Read This Manual?
This manual is written for the intended audience of mid-level computer network users and novice to mid-level PC users.

How This Manual Is Organized
This manual is organized as follows:

- **Overview**: Provides an overview of the GW_Trio module.
- **Navigation**: Describes the basic navigation features of the GW_Trio module.
- **Customers**: Describes the Customer and associated windows.
- **Quotes & Orders**: Describes the Quotes and Orders windows.
- **Debits**: Describes the Debits window.
- **Credits**: Describes the Credits window.
- **Cash Receipts**: Describes the Cash Receipts window.
- **Inventory**: Describes the Inventory Products and associated windows.
- **Options**: Describes the Options window.
- **Order/Invoicing Process**: Describes the process of creating and invoicing an order.
- **Invoice Run**: Describes the process of carrying out an invoice run.
- **RNetBill**: Describes the Radio Network Billing modules.
- **TETRA**: Describes the TETRA modules.
- **Generic**: Describes the Generic modules.
- **ASTRO-PMI**: Describes the particulars of ASTRO-PMI via Trio.
- **Company**: Describes the Company window and its child windows.
- **Financials**: Describes the windows and options accessible from the Financials menu.
- **Commissioning**: Describes the windows and options accessible from the Commissioning menu.
• **Preferences**: Describes the windows and options accessible from the Preferences menu.

• **Tools**: Describes the windows and options accessible from the Tools menu.

• **Billing**: Describes the windows and options accessible from the Billing menu.

• **Miscellaneous**: Describes windows not covered in other chapters.

This manual contains the following images, used to indicate that a segment of text requires special attention:

- **Additional Information**: Additional information is used to indicate shortcuts or tips.

- **Warning**: Warnings are used to indicate possible problem areas, such as a risk of data loss or incorrect/unexpected function.
This chapter provides an overview of the GW_Trio (or simply Trio) module and its function within the GenWatch3 solution.

This chapter contains the following sections:

- **What Is Trio?**: Describes the role and function of the Trio module.
- **Core Trio Features**: Describes the core features of the Trio module.
- **Trio Radio System Modules**: Describes the available system modules and their basic features.

**What is Trio?**

The Trio module is a full billing and management application specifically targeting the two-way communications industry. It is built from the ground up with such systems and their owners in mind in order to best allow those owners to bill and manage their systems. Trio couples billing and accounting related features with modules designed for specific system types to enable system owners to bill the entities using their systems in ways not possible with any other package.

![Figure 1.1 – GW_Trio](image-url)
**Core Trio Features**

**Core Company Information**

- Trio stores and utilizes a great deal of information in order to efficiently and effectively bill and manage customers and systems.

- **Company**
  - Multi-company aware. Multiple companies can be accessed from one client installation of Trio. One installation of GenWatch3 host with Trio is required per company. *Additional database and hardware requirements apply along with additional licensing fees.*
  - Store Company Name, Address, Phone, Email, Shipping Info, Customer Care contacts, Billing Options, etc. per company.
  - Define and open/close accounting periods (monthly, quarterly, or yearly).
  - Assign General Ledger accounts as required by Trio.
  - Set up aging periods.
  - Create and manage Company Subsidiaries.

- **Vendor/Dealer**
  - Create and manage multiple dealers, vendors, repair shops, etc.
  - Store Name, Address, Phone, Email, etc. per dealer.

- **Salesperson**
  - Create and manage multiple salespeople for use with basic commissioning features and reporting.
  - Store Name, Address, Phone, Email, etc. per salesperson.

- **Churn Codes**
  - Allow the setup of *churn reasons.* (codes to define why radios/units are activated or deactivated)
  - Allow the setup of *secondary churn reasons* for each primary churn code. (secondary codes help give more specific information)

- **Geo Codes**
  - Allow the configuration of geo codes to define specific geographical regions such as counties. This is useful for generating reports based on such regions.

- **SIC Codes**
  - Standard Industrial Classification codes for categorizing a customer's type of business.
  - Trio comes with a standard list of codes, but the SIC codes window provides an easy way to customize the list to fit any need.
• **Languages**
  o Set up available languages that can be assigned to a Trio customer.
  o Welcome and Contract letters can be generated in the customer’s language.

• **Billing Frequency/Cycles**
  o Set up Billing Frequencies and cycles for use with the Invoicing run.

• **Vendor Types**
  o Define types of vendors used to categorize dealers and vendors.

• **Customer Types**
  o Define types of customers used to categorize customers.

• **Unit Types**
  o Define types of units used to categorize radios/devices.
  o Mobile, Portable, Console, and Base are predefined unit types that are automatically created when Trio is installed.

• **Chart of Accounts**
  o Set up basic Chart of Accounts for use throughout Trio.
  o Store Account Number, Name, Asset Type, Balance Type, Child Accounts, etc.
  o View Balances and History of each account.
  o Create Asset, Liability, Expense, Income, Equity, and Cost of Goods Sold accounts.

• **Tax Entity**
  o Create and manage individual tax entities, such as state, local, federal sales tax entities.
  o Specify Tax Percent or Amount, Tax Type, General Ledger account for each entity.

• **Tax Groups**
  o In conjunction with the Tax Entity window, allow the user to set up groups of taxes for use in specific cities or geographical areas that have different total sales tax amounts.

• **Charges**
  o Create and manage customer-level recurring or one-time charges that can be billed to customers.

• **Exchange Rates**
  o Used by Trio's multi-currency capabilities to create and manage exchange rate information.
• **Discounts**
  o Create and manage discounts that can be applied to customers on a recurring basis.
  o Line-item discounts which discount specific invoice line items.
  o Bottom-line discounts which discount the entire invoice.
  o Exclude specific line items from a bottom-line discount.
  o Various options available for determining the lifetime of the discounts. (End Date, number of invoices, single invoice, etc.)
  o Set up a secondary customer to be billed for any amounts discounted.

• **Service Request / Trouble Ticketing**
  o Track a service request for a radio or system through 3 stages. (Create, Repair, Close)
  o Capable of storing any pertinent information and comments regarding the request, along with easy viewing of requests at any stage.

**Customer Care Features**

• Access to all Customer information from a central Customer window.
• Automatically generate new Customer IDs based on existing Customer IDs.
• Customer Contact List: A quick reference to all Customers and their contact information.
• Create memos pertaining to each customer.
• Easily view all memos via the MemoView sidebar.
• Search customers by Name, Customer ID, City, State, System Type, Phone Number, etc.
• Store basic contact information such as Customer Name, Phone, Fax, and Email.
• Store multiple billing and shipping addresses per customer and set default addresses for each.
• Assign and manage various billing options per customer such as Invoice Detail and Language, Billing Frequency, Next Bill Date, etc.
• Assign and manage other customer information such as Tax ID, P.O. #, P.O. End Date, Tax Group, Tax Exempt Status, Dealer, Salesperson, SIC Code, etc.
• Set Customers as Parent customers and assign other Trio customers as their children.
• View and manage recurring charges assigned to the customer.
• View and manage discounts assigned to the customer.
• Easily access Payments, Orders, Credit Memo, and Debit Memo windows listing only the current customer's documents.
• Generate Welcome and Contract End letters.
• Manage recurring and one-time invoice comments.
• Disable/Enable Customer to stop/start their billing.
• Mark and search by customer’s billable status.

Transactions
  o List all transactions posted to a customer's account and displays their total balance.
  o Include Invoices, Payments, Credit Memos, Debit Memos, and Beginning Balances.
  o Easily access and view any listed document with one click.

Financials
  o View high-level overview of customer's financial statistics.
  o Show Average Days to Pay and Financial Aging figures.
  o Show Year to Date, Last Year, and Lifetime figures of Sales, Invoices, Payments, and Credits.

• Create and manage Beginning Invoice amounts for the importing of customers who have previously been billed outside of Trio.
• Integrated with Trio's TreeView sidebar to easily access subscribers, invoices, orders, payments, etc. associated with the customer.
• Quick access to calculator.
• Integrated Help System.
• Email a customer from the Customer window. *(Requires internet access and an email client to be installed on the Trio workstation.)*

Customer Contract Management
• Adjustable Contract Length
• Customer VIP and Status

Basic Commissioning Module

Vendor/Dealer
  o Create and manage multiple dealers, vendors, repair shops, etc.
  o Store Name, Address, Phone, Email, etc. per dealer.

Salesperson
  o Create and manage multiple salespeople for use with basic commissioning features and reporting.
  o Store Name, Address, Phone, Email, etc. per salesperson.
• Create and define Incentive Bonuses for specific types of sales.

• Create commissions and groups of commissions for sales of specific item types. (radios, rate plans, etc.)
  o Assign fixed or percentage commission amounts.
  o Assign basic criteria for assigning commissions.

• Inventory items can be defined as commissionable or not.

Basic Inventory Module

• Inventory Products
  o Store basic information on models of inventoried items.
  o Assign default price for when item is sold/rented.
  o Track basic statistics on each item model.
    ▪ Quantity on hand, on order, etc.
    ▪ View inflow/outflow for each month.
    ▪ Standard, average, and last cost
    ▪ Standard, average, and last price
    ▪ Inventory value at standard, average, and last cost
  o View list of documents (invoices, etc.) which include model.

• Inventory Items
  o Store information about each individual inventory item such as Serial Number, Cost, Price, Notes, Origin information, Usage Information, Custom data.

• Inventory Warehouses
  o Manage warehouse information for use in the Inventory Items window.

• Inventory Categories
  o Manage categories to assign to inventory products.

• Inventory Types
  o Manage types and their properties to assign to inventory products.

Basic Invoicing Module

• Invoice customers on a monthly, quarterly, semi-annual, or annual basis per customer.

• On Invoicing days, a message can be sent asking permission to begin an invoicing run.

• Create one-time (Point of Sale) invoices for non-recurring charges
• Specify language preference for each customer and print their invoice in that language every billing cycle. (May require additional customization fees.)

• Choose detail or summary invoices, depending on each customer's preference.

• Set up Invoicing periods.

• Set individual dates for each billing frequency.
  o Up to 4 monthly invoice cycles permitted.
  o Up to 3 quarterly invoice cycles permitted.
  o Up to 6 semi-annual invoice cycles permitted.
  o Up to 12 annual invoice cycles permitted.

• Maintain Invoicing options.
  o Prorate new charges.
  o Reverse prorate deactivations, disabled billing.

• Preview invoices.

• Post-view invoices for reprinting.

• Edit pending invoices.

• Print batches of invoices.

• Utilize SAP Crystal Reports as the basis for displaying invoices to create professional invoices complete with logos, comments, etc.

• First page is summary with tear-off payment voucher.

• Secondary pages are detailed, selectable per customer and detailed down to the individual radio level.

• Meet Latin American invoicing requirements.

**Background Processing of Airtime Files**

• Allow near-real time airtime analysis and billing.

• Integrate with Genesis GenGET or GenWatch3 software to process and bill group, private, and interconnect airtime use. (*Requires RNetBill or TETRA Trio system modules.*)

**Fixed Fee Calculation**

• Allow automatic prorating of normal monthly fees for initial contract start (can be turned on or off, according to your company preference).

• Fixed fees are assessed to a unit in advance for the entire billing period (month, quarter, etc.).

• Master Customers can be created as a cosigner for Child Customers. Master Customers can have separate billing addresses from Child Customers and receive a summary invoice of all Children's balances.
• Bill Account level Fees that are one-time or monthly recurring charges.
  o Can be used for billing set up fees, charging for Customer web access, anything that applies to the entire account.
• Bill for Batteries, Accessories, etc.

Interface to Client Master Accounting System
• For an additional cost, Trio can be interfaced with a Master Accounting System supplier or VAR. We can work with the supplier or VAR to create an interface from the Trio GL to the Master Accounting Software
• Trio uses an open and available General Ledger (GL). The database definition is available for interface with client supplied Master Accounting Software.

Trio Snapshot
• Trio Snapshot shows high level overview of revenue and other basic statistics of the company being managed in Trio.
  o ARPU (Average Revenue Per Unit)
  o TARPU (Telephone ARPU)
  o PARPU (Private Conversation ARPU)
  o DARPU (Dispatch ARPU)
  o Current number of Active Customers
  o Current number of Active Radios
  o Number of Radios activated this month
  o Number of Radios deactivated this month
• Options to set up how ARPU is calculated.

Basic Accounts Receivables Module
• Quotes
  o Create quotes for potential customers and convert them into orders.
• Orders
  o Add line items for any inventory items, radio rate plans, etc.
• Debit Memos
  o Create transactions to debit a customer’s existing credit memos or payments.
• Credit Memos
  o Create transactions to credit a customer or a specific invoice.
• **Cash Receipts / Payments**
  - Create transactions to pay outstanding invoices or beginning balances.

• **Uber Wizard**
  - A wizard to guide you through the process of invoicing an order.
  - Follow a logical pattern to ensure all information is entered properly to have successfully provisioned and invoiced units, every time.

• Basic AR Aging reporting.
• Records created with General Ledger detail for all charges.

**Reporting Module**

• Includes several standard reports for accessing and displaying data from all portions of the application available in either English or Spanish.

• Ranging from simple listings of customer information to detailed airtime reports, they provide quick and simple access to professional reports.

• Each report has a custom list of parameters from which to narrow and select the data to be displayed in the report and selected parameters are included in the report.

• In addition to core Trio reports, each radio system type comes with several reports specifically made for that type

• Utilize SAP Crystal Reports as the basis for displaying reports.

• Crystal Reports enables the exporting of report results to PDF, Excel, and other formats.
**Trio Radio System Module Features**

**Radio Network Billing**

- Use to bill any system type that can have its air call archived by GenGET or GenWatch3 such as ASTRO.
- Multiple system support.
- Multiple RFSS support.
- Multiple site support.
- Site Clusters (Genesis exclusive).
  - Allow radios to be billed different rates for “local” and “roaming” calls based on what sites the radios talk on.
  - Create custom groups of RNetBill sites.
  - Assign radios to a specific cluster.
  - Charge radio for roaming if it is used on sites not in its site cluster.

- **System, RFSS, Site, Radio, and Talkgroup** windows to track and link assets from a system perspective
  - **RFSS**: Reserve Radio and Talkgroup IDs for specific customers.
  - **Site**: Include any site-specific attributes such as Alias, Latitude, Longitude, Number of Channels, Contact Information, and Site Image.
  - **Radio/Unit User**: Assign Dealer, Salesperson, Serial Number, Alias, Unit Type, Site Cluster, Billing Options, Talkgroups, etc.

- **Site Cluster, DID** (Direct Inward Dial), and **Region** windows
  - **Region**: Reserve Radio and Talkgroup IDs for specific cities or other geographical regions. Customer can then be assigned IDs based on their home region

- Airtime Billing Capable
  - In conjunction with a GenGET or GenWatch3 installation, radios can be billed per minute for airtime usage.
  - Retrieve and processes airtime usage in near real time.
  - Use different rates for Interconnect, Private, and Group airtime use.
  - Cap airtime charges per Radio ID per invoice.

- Track Site outages and view individual channel information per site.
- Support for I7/T8 ID notation for older ASTRO systems.
- **Site Map**: Import and view a picture/graphic/map of the location of RNetBill RFSS, sites, etc.
Dimetra/TETRA

- Multiple system support.
- Multiple Zone support.
- Multiple Site support.
- Site Clusters (Genesis Exclusive).
  - Allow radios to be billed different rates for “local” and “roaming” calls based on what sites the radios talk on.
  - Create custom groups of Dimetra sites.
  - Assign radios to a specific cluster.
  - Charge radio for roaming if it is used on sites not in its site cluster.
- System, Zone, Site, Radio, Radio Users, Talkgroup, etc. windows to track and link assets from a system perspective
  - Zone: Reserve Radio and Talkgroup IDs for specific customers
  - Site: Include any site-specific attributes such as Alias, Latitude, Longitude, Number of Channels, Contact Information, and Site Image.
  - Radio: Assign Dealer, Salesperson, Serial Number, Alias, Unit Type, Site Cluster, Billing Options, Talkgroups, etc.
  - Radio/Radio User: Store all capabilities for each radio and radio user, including User Capability Profile, Valid Sites Profile, Security Group, Emergency Alarm Comments, Interconnect, PABX access, PSTN access, PacketData access, ShortData access, ICMP, Assigned RAG, Access Point Name, Assigned IP Address, Full Duplex, DID, Ambience Monitoring, Ambience Initiation, Network Ingress Filter, and more.
  - Talkgroup: Store any Talkgroup and Multigroup specific capabilities. (Including Alias, ID, Security Group, Capability Profile, Valid Sites Profile, Preempt Capable, Interrupt or Wait Mode, etc.).
- Site Cluster, DID (Direct Inward Dial)
- Service and Rate Plan windows
- Airtime Billing Capable
  - In conjunction with a GenGET or GenWatch3 installation, radios can be billed per minute for airtime usage.
  - Retrieve and processes airtime usage in near real time.
  - Use different rates for Interconnect, Private, and Group airtime use.
  - Cap airtime charges per Radio ID per invoice.
- Track Site outages and view individual channel information per site.
- Store TEI ID for each radio.
• Store ISSI and any GSSIs for each radio.

• **Site Map:** Import and view a picture/graphic/map of the location of Dimetra zones, sites, etc.

• View Home Zone mappings of all Radio and Talkgroup IDs.
Generic System Module

- System
  - Store alias, location, status, etc. attributes.
  - Track outages and resolutions.

- Radio
  - Store serial number, dealer, salesperson, model number, etc. attributes per radio.
  - Access personalities assigned to each radio.

- Personality
  - Store and edit up to 16 personalities per radio.
  - Assign Alias, Radio ID, System ID, Primary Personality, Billing Options, Rate Plan, etc. attributes per personality.

- Service and Rate Plan windows

ASTRO-PMI

- Mediation and Provisioning support
  - Activating/Deactivating radios in Trio will provision them accordingly on the ASTRO-PMI system.
  - Making changes to capabilities and attributes of radios will be propagated out to the system itself.

- Site Clusters (Genesis Exclusive).
  - Allow radios to be billed different rates for “local” and “roaming” calls based on what sites the radios talk on.
  - Create custom groups of ASTRO-PMI sites.
  - Assign radios to a specific cluster.
  - Charge radio for roaming if it is used on sites not in its site cluster.

- Service and Rate Plan windows

- Airtime Billing Capable
  - In conjunction with a GenGET or GenWatch3 installation, radios can be billed per minute for airtime usage.
  - Retrieve and processes airtime usage in near real time.
  - Use different rates for Interconnect, Private, and Group airtime use.
  - Cap airtime charges per Radio ID per invoice.
Chapter 2

Navigation

This chapter provides an overview of the basic navigation features of Trio and that of the data entry windows in Trio.

This chapter contains the following sections:

- **Main Trio Window**: Describes the main Trio graphical user interface (GUI) and its contents.
- **Menu Bar**: Describes the various menus in the main Trio GUI.
- **Toolbar**: Describes the Trio toolbar and its contents.
- **Left Menu**: Describes the Left Menu and its contents.
- **Status Bar**: Describes the status bar and its contents.
- **Data Entry Basics**: Describes the navigation methods and other functionality common to most data entry windows within Trio.
- **Search Window**: Describes the Search window displayed when opening various Trio windows.
- **Tree View**: Describes how to use and navigate the Tree View sidebar.
**Main Trio Window**

The main Trio GUI (Figure 2.1) consists of five sections.

- The *menu bar* across the top consisting of the Setup, View, and other menus.
- The *toolbar* directly below the menu bar.
- The *Left Menu* sidebar along the left-hand side of Trio.
- The *status bar* along the bottom of the Trio window.
- The work area filling the rest of the Trio window.

![Figure 2.1 – Trio Main Window](image)

**Menu Bar**

The *menu bar* consists of several menus allowing the user to access most of the portions of Trio. Many of these menus are described in detail in *Chapters 19-23*. 
**Toolbar**

The toolbar consists of easy access to several basic features in Trio.

- **Reminders:** Allows the user to create a simple reminder with a specific due date and time. Trio will pop up a reminder window at the appropriate time displaying the reminder message.

- **Memos:** When enabled, shows a sidebar on the right side of the main working area. The sidebar contains memos created for a specific customer. The Memos sidebar (MemoView) is described in more detail in Chapter 3 – Customers.

- **Tree View:** When enabled, shows a sidebar on the right side of the main working area. The sidebar contains information that allows one-click access to information associated with the current window being viewed. The TreeView is described in more detail in the Tree View section.

- **Contacts:** Displays a concise list of all existing customers in Trio and the basic contact information for each.

- **Calculator:** One-click access to the built-in Windows calculator.

- **Calendar:** Small, simple window displaying a calendar.

- **E-Mail:** Creates a blank email addressed to Genesis Trio Support.

- **Online:** Opens a new web browser window.

- **Help:** Opens this document (Trio Help Manual).

- **About:** Opens the Trio About window with information about the Trio software version, Copyright, and Licensing.

- **Alerts:** Opens the Alerts window. This window shows any Trio Twilight or other types of alerts generated by Trio. Most commonly, alerts are generated when the airtime crunching/billing process creates alerts for air call which could not be billed. If alerts exist, the Alerts toolbar image will flash between green and red.

- **Snapshot:** Opens the Trio Snapshot window which gives the user a high-level summary of revenue and billing statistics in Trio.

- **Exit:** Closes Trio.
**Left Menu**

The **Left Menu** of Trio gives access to the core billing related windows as well as to the modules for each system type Trio is licensed for. It consists of at least two sections.

- **Trio**: The *Trio* section contains buttons allowing the user to display the *Customers, Quotes, Orders, Credit Memos, Debit Memos, Cash Receipts*, and *View Invoices* windows.

- **Inventory**: The *Inventory* section has buttons to display the *Inventory Products* and *Inventory Items* windows.

There will also be a section for each system type the user’s installation of Trio is licensed for. Within each section will be buttons that give access to each of the modules contained with each system type. These modules are described in detail within the chapters concerning each system type.

**Status Bar**

The **status bar** of Trio contains three sections.

- **Connected**: The first section shows if Trio is connected to the Trio module of the GenWatch3 host.

- **Services Status**: The next section lists whether the Invoice Reminder and Auto-Provisioning Manager services are running.

- **Server**: The last section shows the name of the SQL Server Trio is connected to.
**Data Entry Basics**

Trio, at its core, is a data entry and retrieval application. As such, many of the data entry and retrieval windows in Trio have several common elements. These elements are described in this section. Figure 2.2 shows the Trio Charges window and will be used as an example to describe the common elements of Trio’s data entry windows.

![Figure 2.2 – Charges Window](image)

**Data Fields**

Each data entry window will have one or more data fields to display the current record being shown or edited. In Figure 2.2, these fields would be the **Company ID, Charge Code, Description**, etc.

**Validation Highlighting**

Trio makes use of validation highlighting to make the user aware that the field needs attention. “Validation Highlighting” refers to the fact that the data entry fields’ background color will change to a more noticeable color, but also note that the Label for a field that becomes highlighted will become Bold, and there are some instances where a field cannot be highlighted so the Bold label will indicate the field needs attention. There are two reasons why a field might become highlighted: the field is required and hasn’t had a value entered yet or invalid data was entered.

The highlighted fields in Figure 2.3 are examples of required fields. When a window is opened for the first time or it enters Add mode Trio will highlight all the fields that are required in order to create the new item.

For ease of use, the highlighting is also reactive, as the highlighting is determined by the data entered. The highlighting of a field will clear as soon as a user enters valid information, or in the case of containers such as Drop-Down lists or Date fields the highlighting will clear as soon as a value is selected. Moreover, if the user enters invalid data the field will immediately become highlighted.
To determine what is wrong with the cells when they are highlighted simply click the update button and a message will appear letting you know what fields are required or what is wrong with them if they are invalid. As an example, if a user enters a charge code that is already in use, the **Charge Code** field will become highlighted, the **Charge Code** label will be bold, and upon clicking update will inform the user that the code is already in use.

![Figure 2.3 – Highlighted data entry fields](image)

**Search Button**

Most data entry windows will also have a **Search** button. Clicking this button will bring up a window allowing the user to input criteria to narrow down the list of records to display in the parent data entry window. This window is described in more detail in the *Search Window* section later in this chapter.

**Location**

In each data entry window, there is a status line in the bottom section indicating how many data records can currently be viewed and navigated amongst. Referring to Figure 2.2, this location status states **Charge: 1 of 2**. This indicates that the charge currently displayed is the first of two charges the user can navigate between. Double-clicking on this status line will bring up a dialog box allowing the user to enter a desired record to move to.

When adding a new charge (Figure 2.3), this location status states **Charge: New Charge**. Other data entry windows will display a similar status indicating the user is adding a new record.
Navigation Buttons

There are also four buttons allowing the user to navigate amongst the records currently available. These are the First («), Previous (‹), Next (›), and Last (») buttons. Clicking each will move to the corresponding record in the set of records.

Editing Buttons

The final five buttons common to most data entry windows are the Add (+), Edit (↵), Cancel (x), Delete (−), and Finish (✔) buttons. Depending on the type of data record being viewed, some windows may not have an Add (+) or Delete (−) button.

Add Button (+)

When present, clicking this button will clear all fields in the data entry window allowing the user to enter valid information to create a new record. The Edit (โรค) button will be replaced by an Update (รวด) button. Once all desired and necessary information has been entered, clicking the Update (รวด) button will save the new record.

Edit Button (↵)

Clicking the Edit (โรค) button will put the current data record into an editing state allowing the user to change any editable fields. Once clicked, the Edit (โรค) button will be replaced by an Update (รวด) button. Once any changes have been made to the fields, clicking the Update (รวด) button will save the changes.

Cancel Button (x)

The Cancel (x) button will generally become active only after the user has clicked the Add (+) or Edit (↵) buttons. When adding or editing a record, clicking the Cancel (x) button will discard the new record or any changes as appropriate. It will return the window to the record shown prior to clicking the Add (+) or Edit (↵) buttons.

Delete Button (−)

When present, clicking this button will delete the currently displayed record. The user will be prompted to confirm the deletion.

Finish Button (✔)

Clicking the Finish (✔) button will close the data entry window.
Search Window

As stated earlier, most data entry windows will have a Search button. Clicking the Search button will display a Search window allowing the user to search for records. This window will also appear by default anytime a module is clicked that has records in it (can be changed in Options). Continuing to use the Charges window as an example, clicking its Search button will display the Charges Search window as shown in Figure 2.4.

Figure 2.4 – Charges Search Window

To search for data records, type criteria next to any of the Search Fields listed. Using Figure 2.4 as an example, typing act in the Description parameter and pressing the Search button will return any charges whose description starts with act. Figure 2.5 shows sample results.

Figure 2.5 – Charges Search Results
The wildcard % can be used in any position of most text search fields. The search will return results that contain any text in place of the %. As an example, typing %System in the Description parameter and pressing the Search button will return any charges whose description contains System (See Figure 2.6). The % wildcard does not need to be added to the end of the search; by default, Trio will return any results that start with the entered criteria (Thus the above is equivalent to %System%). Clicking the Reset button will clear all parameters of any criteria previously typed in. Clicking the Search button will return a new list of results based on the new criteria.

![Figure 2.6 – Wildcard Search Results](image)

There are three ways to return to the parent data entry window.

1. Double-clicking on any of the rows in the search results will return to the parent data entry window and display the selected record.
2. Clicking the Go To button will return to the parent window and display the selected record from the search results.
3. Clicking Cancel or “X” will return to the parent window without changing the record displayed or result set being used in the parent window.

In the Search Results window, clicking the Refine Search button will display a Search Fields sidebar next to the Search Results list. You can add or remove criteria from any of the fields to narrow or broaden the list of Search Results returned (See Figure 2.6). Max Results is a common search criterion that allows the user to change the upper limit on how many results they want to be returned when they search, by default this is set to 100. Dropdown criteria allow the user to select an option to narrow the Search Results. Date criteria allow the user to select a single date, or a date range to narrow the Search Results. Text criteria allow the user to type text into the field in order to return any results that start with the entered text.
Tree View

Shows context aware information based on the current form being shown. You can modify what is shown in the My Settings menu. As shown in Figure 2.7, when viewing a customer, it shows all the customer’s Parent Customers, Child Customers, Invoices, Credit Memos, etc. By clicking on an item in the Tree View you can open the respective form on the specified item. You can also print a fully expanded version of the Tree View at any time.

Figure 2.7 – The Tree Window
Chapter 3

Customers

This chapter provides an overview of the *Customer* window in Trio and any associated windows.

This chapter contains the following sections:

- **Customer Window**: Describes the Customer window itself.
- **Customer History**: Describes the Customer History window.
- **Ship To**: Describes the Ship To addresses window.
- **Bill To**: Describes the Bill To addresses window.
- **Transactions**: Describes the Transactions window.
- **Financials**: Describes the Financials window.
- **Monthly Fees**: Describes the Monthly Fees window.
- **Discounts**: Describes the Discounts window.
- **Beginning Balances**: Describes the Beginning Balances window.

**Customer Window**

The *Customer* window in Trio allows the user to add, view or edit all information directly pertaining to customers being billed by Trio. In Trio, a customer is any agency or entity who would receive invoices for billed charges/services. By setting the appropriate fields a customer can be configured to be billed monthly, quarterly, semi-annually, or annually.

![Figure 3.1 – Customer Window](image-url)
The *Customer* window is divided into the following sections:

- **Customer Identification**
- **Default Billing Information**
- **Details 1**
- **Details 2**
- **Invoice Comments**

An * denotes required fields.

**Customer Identification**

The top-left section of the *Customer* window provides fields to identify the customer. Customers are identifiable by the **Company, Subsidiary, Customer ID, Corp. Control #, Name, and Name 2** fields.

- **Company** is a required field that is filled in automatically. It cannot be modified.

- **Subsidiary** is a dropdown menu that allows any subsidiaries that have been created to be selected. For more information on Subsidiary see the *Subsidiaries* section in Chapter 16 – *Company*.

- **Customer ID** is a required field that must be a unique ID with 1-20 Alphanumeric Characters. This field can be modified only when adding a customer.

- **Corp. Control #** allows a value to be set based upon the Corporate Control Number Mask set up in the *Company* window.

- **Name** is a required field allowing 1-50 characters.

- **Name 2** is an overflow name field that can be used to specify *Departments of* or similar information. It allows 1-50 alphanumeric characters.

**Default Billing Information**

The **Default Billing Information** section allows the user to view the billing address and contact information for a customer. To edit these fields, see the *Bill To* Section below. When a Customer is created, this is where the default billing information is entered. The **Default Billing Information** contains the following fields: **Address 1, Address 2, City, State, Country, Postal Code, Geo Codes, Contact, E-Mail, Phone, Ext, Fax**.

- **Address** is a text field that specifies the default billing address for the customer, with 1-50 Characters.

- **Address 2** is the optional second line address field allowing 1-50 Characters.
• **City** corresponds to the default billing address above as a text field of 1-30 Characters specifying the city of the default billing address.

• **State** corresponds to the default billing address above as a text field of 1-5 Alphanumeric Characters and should be the abbreviated form of the state for the default billing address.

• **Country** corresponds to the default billing address above and is a text field of 1-20 Alphanumeric Characters.

• **Postal Code** corresponds to the default billing address above and is a one to 20-digit numeric only field.

• **Geo Codes** is a dropdown that allows the user to select any Geo Codes that have been created.
  - For more information on Geo Codes see the *Geo Codes* section in *Chapter 19 – Preferences*.

• **Contact** is a text field of 1-30 characters

• **E-Mail** is the default e-mail address for the customer with 1-100 alphanumeric characters.
  - If an E-mail address is entered, then it must have an alphanumeric character(s), the @ symbol, another alphanumeric character(s) and end with a period followed by at least 2 additional alphanumeric characters representing the top-level domain.
  - ex. email@domain.com

• **Phone** is the default contact number with a text field allowing 1-20 numeric or “-” characters.

• **Ext** is a text field for the phone extension allowing 1-10 numeric only characters

**Details 1**

The *Details 1* section allows the user to view and edit various information including invoice, billing, and contract information. *Details 1* contains the following fields: **Invoice Detail, Invoice Language, Billing Frequency, Billing Cycle, Next Bill Date, VIP Rating, Contract End/Subscriber Contract Dates, SIC Code, Parent Customer, Billable, Paperless Billing, and Billed Locally**.

• **Invoice Detail** allows for the type of invoice detail level to be selected from a drop down.

• **Invoice Language** allows the user to specify language preference for each customer and print their invoice in that language every billing cycle. (May require additional customization fees.)
• **Billing Frequency** allows the user to select from a dropdown which billing frequency they wish to apply to the customer. These options come from cycles defined in the *Cycles* window.

• **Billing Cycle / Next Bill Date** are filled in upon selecting the **Billing Frequency**. These cycles and dates come from ones defined in the *Cycles* window.

• **VIP Rating** allows the user to select what rating they would like to give the customer (1-15).

• **Contract End** allows the user to quickly select a date for the customer’s contract to end on via a simple date selector.

• **Subscriber Contract Dates** button will show the *Subscriber Contract End Dates* window when clicked. This window allows the user to specify contract end dates per subscriber. It is described in more detail later in this chapter.

• **SIC Codes** (Standard Industrial Classification Codes) are codes defining types of businesses and companies. These are selectable from a dropdown menu.
  
  o For more information on SIC Code see the *SIC Codes* section in *Chapter 19 – Preferences*.

• **Parent Customer** Clicking the parent customer box provides the user with a customer search window to find and select the customer they wish to assign as the parent customer.

• **Billable** is a checkbox that allows the user to select whether the customer is enabled for billing.

• **Paperless Billing?** is a checkbox that allows the user to select if the customer’s pending invoices should be saved as PDFs rather than printing. For more information on Paperless Billing see the *Print Pending Invoices* section in *Chapter 21 – Billing*.

• **Billed Locally?** Is a checkbox that allows the user to select whether unapplied portions of a payment are subtracted from the deferred paid amount.

• **Credit Limit** is a checkbox that will place a limit on the amount of usage allowed for this customer. The limit can be defined with the box to the right.

• **Auto Disable Radios** is a checkbox that will cause Trio to send Radio Disable commands to a Dimetra UCS interface when the Credit Limit or a usage cap is reached.
Details 2

The Details 2 section allows the user to view and edit various information including P.O., Tax, Account, and Dealer information. Details 2 contains the following fields: Tax ID / SSN, P.O. Number, P.O. End Date, Average Days to Pay, Customer Type, Tax Exempt, Tax Group, GL Sales Account, Dealer, Salesperson, and Region.

- **Tax ID / SSN** is a text field that allows the user to specify a Tax ID or SSN of 1-20 characters.
- **P.O.** is a text field that specifies a P.O. number of 1-50 characters.
- **P.O. End Date** allows the user to quickly select a date for the P.O. End Date via a simple date selector.
- **Average Days to Pay** is a decimal field that displays the average days a customer takes to fully pay off their invoice.
- **Customer Type** is a dropdown that allows the user to select from existing customer types.
  - For more information on Customer Type see the *Customer Types* section in Chapter 19 – Preferences.
- **Tax Exempt** is a checkbox that shows the tax-exempt status of a customer. This can be specified in the *Bill To* window.
- **Tax Group** is a dropdown menu that is only available if the user is not tax exempt. If available, tax group will be populated with any tax groups created in the *Tax Group* setup window. This can be specified in the *Bill To* window.
  - For more information on Tax Group see the *Tax Groups* section in Chapter 17 – Financials.
- **Local Option Code** is a text field that will only be visible if a tax group is selected that has a Local Option Tax Entity as one of the Included Tax Entities. If visible, this field allows 1-5 characters.
- **GL Sales Account** is a dropdown that allows the user to pick which General Ledger account should be assigned to the customer.
  - For more information on GL Sales Account see the *Chart of Accounts* section in Chapter 17 – Financials.
- **Dealer** is a dropdown that allows the user to select a dealer for the customer.
  - For more information on Dealers see the *Vendor* section in Chapter 18 – Commissioning.
• **Salesperson** is a dropdown that allows the user to select salesperson for the customer. The salesperson dropdown will be populated with salespersons for the selected **Dealer**. (It cannot be edited without first selecting a Dealer).
  
  o For more information on Salesperson see the *Salesperson* section in *Chapter 18 – Commissioning*.

• **Region** is a dropdown menu that allows RNetBill customers to be assigned to a region. The region dropdown will be populated with any regions created from the Regions module.
  
  o For more information on Region see the *Regions* section in *Chapter 12 – Radio Network Billing (RNETBILL)*.

Regions will only be present in Trio systems licensed for RNetBill

**Invoice Comments**

The *Invoice Comments* section allows the user to view and edit the Recurring, and One-Time invoice comments that appear on that customer’s invoice

• **Recurring Invoice Comments** is a text field allowing up to 1000 characters that will appear on each invoice for the customer.

• **One-Time Invoice Comments** is a text field allowing up to 1000 characters that will appear on the next invoice for the customer.
**Customer History**

The Customer History (Figure 3.1b) window allows the user to see what changes have been made to a Customer, when the changes were made, and by whom. This can be accessed through the button.

![Customer History Window](image)

**Figure 3.1b – Customer History Window**

**Subscriber Contract Dates**

While viewing a customer, clicking the Subscriber Contract Dates button in the Details 1 section of the Customer window will display the Subscriber Contract End Dates window for that customer (Figure 3.2). It will list all the customer’s subscribers and their current contract end date. The user can set contract end dates for individual or groups of subscribers.

![Subscriber Contract End Dates Window](image)

**Figure 3.2 – Subscriber Contract End Dates Window**
The *Contract End* cell of each subscriber will show the currently configured date. If the cell is blank, no date has been set and the effective contract date would be the *Contract End* date configured in the *Customers* window.

To set the date for an individual subscriber, click its Contract End cell in the grid to reveal a date picker. Select a date and after any other changes are complete, click the **Save** button.

To set the date for multiple subscribers at once, select all applicable rows by clicking each. Holding the Ctrl or Shift key while clicking each will select multiple rows. After the appropriate rows are selected, select the date using the date picker in the lower left and click the **Set Date** button.

To clear the date set for any subscribers, select them and click the **Clear Date** button. This will cause those subscribers to effectively use the customer’s *Contract End* date.

Contract end dates can also be set individually using the Unit User module of the appropriate system type.

**Ship To**

While viewing a customer, clicking the **Ship To** button in the *Customer* window will display the *Ship To* window for that customer (Figure 3.3). This window allows the user to view, edit, and navigate amongst the shipping addresses for the customer. In addition to being able to edit the address information, the user can set which address is the default shipping address and add notes to each address.

![Figure 3.3 – Ship To Window](image-url)
Customer Shipping Information Fields

An * denotes required fields

- **Customer ID*** is a text field that is automatically filled in with the customer ID that is being edited.
- **Shipping ID*** is a text field for the unique ID for this shipping information allowing 1-20 characters.
- **Name** is a text field allowing 1-50 characters.
- **Address 1*** is a text field for the first address line of the shipping information allowing 1-50 characters.
- **Address 2** is a text field for the optional second line of the address.
- **City*** is a text field of 1-30 Characters specifying the city of the selected shipping info.
- **State*** is a text field of 1-5 alphanumeric characters and should be abbreviated form of the state.
- **Country** is a text field allowing 1-20 alphanumeric characters.
- **Postal Code*** is a text field allowing 1-20 numeric only characters.
- **Contact** is a text field for the name of the shipping information contact allowing 1-30 characters
- **Phone** is the contact number with a text field allowing 1-20 numeric only characters.
- **Ext** is a text field for the phone extension allowing 1-10 numeric only characters
- **Fax** is a text field allowing 1-20 numeric only characters.
- **Notes** is a text field allowing information about the shipping information to be stored. The notes field allows up to 2000 characters.
**Bill To**

While viewing a customer, clicking the **Bill To** button in the *Customer* window will display the *Bill To* window for that customer (Figure 3.4). This window allows the user to view, edit, and navigate amongst the billing addresses for the customer. In addition to being able to edit the address information, the user can set which address is the default billing address, set the Tax Group for that address, and add notes to each address.

![Customer Billing Information Window](image)

**Figure 3.4 – Bill To Window**

**Customer Billing Information Fields**

An * denotes required fields

- **Customer ID*** is a text field that is automatically filled in with the customer ID that is being billed.
- **Billing ID*** is a text field for the unique ID for this billing information allowing 1-10 characters.
- **Address 1*** is a text field for the first address line of the billing information allowing 1-50 characters.
- **Address 2*** is a text field for the optional second line of the address.
- **City*** is a text field of 1-30 characters specifying the city of the default billing address.
- **State*** is a text field of 1-5 alphanumeric characters and should be the abbreviated form of the state for the default billing address.
- **Country*** is a text field allowing 1-20 alphanumeric characters.
- **Postal Code*** text field allowing 1-20 numeric only characters.
- **Contact** is a text field for the name of the billing information contact allowing 1-30 characters
- **Phone** is the contact number with a text field allowing 1-20 numeric only characters.
- **Ext** is a text field for the phone extension allowing 1-10 numeric only characters.
- **Fax** is a text field allowing 1-20 numeric only characters.
- **E-Mail** is the e-mail address for the billing address with 1-100 alphanumeric characters
  - If an E-mail address is entered, then it must have the @ symbol and end with a period and at least 2 additional characters representing the top-level domain.
  - ex. email@domain.com
- **Notes** is a text field allowing information about the billing information to be stored. The notes field allows up to 2000 characters.
Transactions

While viewing a customer, clicking the **Transactions** button in the **Customer** window will display the Transactions window for that customer (Figure 3.5). This window displays a list of the customer’s posted documents such as invoices, credits, debits, and payments. This window does not display orders which have not been invoiced yet, nor pending payments/credits/debits/invoices. The total shown in this window is the customer’s current outstanding balance.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Document #</th>
<th>Check #</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/15/2012</td>
<td>Payment</td>
<td>110101</td>
<td>N/A</td>
<td></td>
<td>-660.30</td>
</tr>
<tr>
<td>1/21/2012</td>
<td>Invoice</td>
<td>1103121601</td>
<td>N/A</td>
<td></td>
<td>307.50</td>
</tr>
<tr>
<td>1/23/2012</td>
<td>Payment</td>
<td>6</td>
<td>N/A</td>
<td></td>
<td>307.50</td>
</tr>
<tr>
<td>1/27/2012</td>
<td>Invoice</td>
<td>6020121122</td>
<td>N/A</td>
<td></td>
<td>-374.30</td>
</tr>
<tr>
<td>1/30/2012</td>
<td>Payment</td>
<td>7</td>
<td>10003472</td>
<td></td>
<td>374.30</td>
</tr>
<tr>
<td>2/1/2012</td>
<td>Invoice</td>
<td>2103121206</td>
<td>N/A</td>
<td></td>
<td>-1034.08</td>
</tr>
<tr>
<td>2/5/2012</td>
<td>Payment</td>
<td>8</td>
<td>100234652</td>
<td></td>
<td>-1034.08</td>
</tr>
</tbody>
</table>

Double-click an item to pull up the actual document.

- **Include Open Credits (Y/N)** is a checkbox that allows the user to show or hide Open Credits.
- **Refresh** is a button that will refresh all the customer transactions with the current data.
- **Finish** is a button that closes the form.

Figure 3.5 – **Transactions** Window
Financials

While viewing a customer, clicking the **Financials** button in the *Customer* window will display the *Financials* window for that customer (Figure 3.6). This window displays basic financial statistics for the customer. It shows aging statistics as well as how sales, payment, and credit amounts are distributed over the current year, previous year, and lifetime.

![Customer Financials Window](image)

*Figure 3.6 – Customer Financials Window*
While viewing a customer, clicking the Monthly Fees button in the Customer window will display the Monthly Fees window for that customer (Figure 3.7). This window displays a list of the recurring charges currently being billed to a customer. If the Customer window is in Edit mode, displaying this window will allow the user to change the Quantity, Taxable, and Amount Per columns. When the user changes any value in the Quantity, Taxable, and Amount Per columns, then the Update button will flash indicating there is a change that can be saved. Clicking the Update button in this window will cause the customer’s current invoice to be modified appropriately. Clicking the Remove (-) button will delete the selected charge from the customer’s current and future invoices.

![Monthly Fees Window]

**Figure 3.7 – Monthly Fees Window**
**Discounts**

While viewing a customer, clicking the **Discounts** button in the **Customer** window will display the **Discounts** window for that customer (Figure 3.8). This window displays a list of discounts currently assigned to the customer. These discounts are applied to the customer’s invoice during the regular invoice run. If the **Customer** window is in Edit mode, these discounts can be removed or reordered. If multiple discounts are assigned to a customer, the order they are listed in this window determines the order in which they are applied to an invoice. Reordering the discounts can affect how the invoice is discounted.

![Discounts Window](image)

**Figure 3.8 – Discounts Window**

- **Move Up** is a button that moves the selected discount up in the order that it will be applied to an invoice.
- **Move Down** is a button that moves the selected discount down in the order that it will be applied to an invoice.
**Beginning Balances**

While viewing a customer, clicking the **Beg Balances** button in the **Customer** window will display the **Customer Beginning Balances** window for that customer (Figure 3.9). This window displays a customer’s beginning balances (if any). When a customer is created in Trio, if they have a beginning balance from a previous accounting software or billing process, the amount and description can be entered here. Upon entering a beginning balance here, the user can use the **Billing** → **Invoicing** → **Post Beginning Balances** menu option to post that amount to the General Ledger and cause it to appear as part of the customer’s outstanding balance in the **Transactions** window.

![Customer Beginning Balances](image)

**Figure 3.9 – Customer Beginning Balances Window**

- **Reference ID** is a field that is automatically filled in by Trio.
- **Posted** is a date selection field that can be used to select when the balance is posted.
- **Total** is a required text field that allows a money value to be entered.
- **Description** is a text field that allows the description for the balance to be entered. This field allows up to 500 characters to be entered.
**Toggle Radios**

While viewing a customer, clicking the **Toggle Radios** button in the **Customer** window will display the **Toggle IDs’ Enable State** window for that customer (Figure 3.10). This window displays the radios for an RNetBill system. It allows the radios to be enabled or disabled on the system using the Dimetra UCS interface.

![Toggle IDs’ Enable State](image)

**Figure 3.10** – Toggle IDs’ Enable State

- **Load IDs to Toggle** allows the list of IDs to be changed.
Chapter 4  Quotes & Orders

This chapter provides an overview of the Quote and Order windows in Trio as well as associated windows.

This chapter contains the following sections:

- **Quote & Order Windows**: Describes the common features of these two windows as well as the differences.
- **Add Items**: Describes the Add Items windows.
- **Assign Units**: Describes the Assign Units windows.
- **Create Order**: Describes the Create Order button and its results.
- **Print**: Describes the Print button and its results.
- **View Invoice**: Describes the View Invoice button and its results.
- **Uber Wizard**: Briefly describes the Uber Wizard button and its results.

**Quote & Order Windows**

The *Quotes* and *Orders* windows in Trio share many common elements. Their functionality is described here along with any differences. The *Quotes* window allows a quote of proposed new billing charges to be created, printed, and given to a customer for review. The quote, upon acceptance, can be converted to an Order. An order document can then be invoiced to add the charges to the customer’s invoice and change their billing. Figures 4.1 and 4.2 show the *Quotes* and *Orders* windows, respectively.

**Figure 4.1 – Quotes Window**
Figure 4.2 – Orders Window

A Quote is purely optional and not required in order to create and invoice an Order.

When adding radios to an order, the user is generally required to assign serial numbers to the included radios. This facilitates the invoicing of an order to provision the Unit IDs corresponding to the radios being sold or given to the customer. This invoicing process is described in detail in Chapter 10 – Order/Invoicing Process. The following sections describe windows that may be displayed during the creation or editing of a Quote or Order.

An * denotes required fields

*italics* show when a field can be modified

- **System Type** is a dropdown that lists all systems that Trio is licensed for. *Add*
- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown that lists all Customer IDs that are available. *Add*
  - For more information on Customers see Chapter 3 – Customers.
- **Billing ID** is a dropdown field that is automatically filled in with the default billing information for the selected customer. If a user wishes to change the Billing, Clicking the Billing ID will show the list of all available Billing IDs for the selected customer. *Add, Edit*
• **Bill To** is the set of fields associated with the Billing ID, these will be automatically filled in.

• **Tax Group** is automatically filled in with the tax group associated with the selected customer.

• **Shipping ID** is a dropdown field that is automatically filled in with the default shipping information for the selected customer. If a user wishes to change the Shipping, Clicking the Shipping ID will show the list of all available Shipping IDs for the selected customer. *Add*

• **Ship To** is a set of fields that will be automatically filled in with the shipping information associated with the Shipping ID.

• **Order Date** (Order Only) is a date field that allows the user to select any day from the beginning of the current calendar month, to the current date. *Add, Edit*
  
  o If a user Invoices an order that is set to a past date, Trio will ask the user if they want to reconfigure the values to today’s date.

• **Quote Date** (Quote Only) is automatically filled in with the current date.

• **Order type** (Order Only) is an option that becomes available after enabling point of Sale transaction from the **Tools**→**Options**→**Orders** menu. By default, orders are Normal/Recurring orders. If **Point of Sale** is selected, then the order will no longer be a recurring Order. *Add*
  
  o For more information on the Point of Sale Option see the **Orders** section in **Chapter 9 – Options**.

• **Enter Approval Code** (Quote Only) is a button that will prompt the user to enter Administrator level credentials and will place the Approval Code on the Quote form provided the credentials are verified. *Edit*

• **Dealer** is a dropdown that allows the user to select a dealer for the customer. *Add, Edit*
  
  o For more information on Dealers see the **Vendor** section in **Chapter 18 – Commissioning**.

• **Salesperson** is a dropdown that allows the user to select salesperson for the customer. The salesperson dropdown will be populated with salespersons for the selected **Dealer**. *Add, Edit*
  
  o For more information on Salesperson see the **Salesperson** section in **Chapter 18 – Commissioning**.
- **Add / Remove Units** (Order Only) is a button that will be visible once a *Product* is added to the order, and the **Update** button is clicked. The **Add / Remove Units** button will be enabled once a *Product* line item is selected from the grid. **Edit**

  - See Figure 4.2 for an example of selecting a line item.
  - For more information on Adding items, See the *Add Items* section below.

- **Remove Item** is a button that will remove any selected line item (Products, Invoice Charges, or Rate Plans) from the grid and order. **Add, Edit**

- **Add Point of Sale Note** is a button that will only be visible if the **Order Type** is *Point of Sale*. Clicking the **Add Point of Sale Note** button will bring up a text box that allows the user to enter Comments that will appear on the Point of Sale Invoice. **Edit**

**Add Items**

When creating or editing a quote or order, clicking the Item ID column of a row in the window’s item grid will display a small blank button in the right side of that cell. Clicking this button will display the **Add Items** window (Figure 4.3).

**Figure 4.3 – Add Items Window**

The Add Items window lets the user add *Products, Invoice Charges, and Rate Plans* to an Order or Quote. Any Products for the selected system type will be displayed when the **Products** option is selected. Any Invoice charges available in trio will be displayed when the **Invoice Charges** option is selected. Any Rate Plans for the selected system type will be displayed when the **Rate Plans** option is selected. The **Add Items** window shows information about each item including the **ID, Description, and the Cost.**

- **Find what**: is a text box that will move the selected item to the listed items that match or start with the text that a user enters the **Find what**: field.

- **Products** is an option that will display any Products relevant to the selected system type.
- For more information on Products see the *Inventory Products* section in *Chapter 8 – Inventory*.

- **Invoice Charges** is an option that will display any Charges that are available in Trio.
  - For more information on Charges see the *Charges* section in *Chapter 17 – Financials*.

- **Rate Plans** is an option that will display any Rate Plans that are available for the selected System Type. (Not available with Point of Sale Orders)
  - For more information on Charges see the *Rate Plan* section in *Chapter 12 – Radio Network Billing (RNETBILL)* for the system Type you wish to add the Rate Plan to.

**Assign Units**

In order to assign Units (serial numbers) to an order document, there must be a line item on the order for a radio model. After an order is saved, click the *Edit* button and then select the radio model line item from the order grid. The *Add/Remove Units* button will be available to click. Clicking this button will display the *Add/Remove Units* window (Figure 4.4). This window is used to select existing serial numbers from Trio’s inventory or to type in new serial numbers and assign them to the current order. These serial numbers will be used later during the invoicing process of the order.

![Figure 4.4 – Add/Remove Units Window](image)

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• **Inventory Items** is an option (bottom left of the window) that when clicked will list any Inventory Items that have been created for the System Type selected in the *Orders* window. Inventory Items can be added from the **Inventory ➔ Inventory Items** menu.
  o Two types of items will populate the Inventory Items list. Items that were created via the Inventory Items, and Items created via the Units/Radios module.
    ▪ Any Item that has been assigned to a Unit User will NOT be available in the Inventory Items List.
  o For more information on Products see the *Inventory Items* section in *Chapter 8 – Inventory*.

• **Non-Inventory Items** is an option that will display text boxes for the user to enter new Serial Numbers.
  o **Serial Number** * is a required field if the user chooses to enter non-Inventory Items. The Serial Number must be unique to the Product Category it is being assigned to.
  o Other fields might be required based upon settings in the **Inventory ➔ Types** menu.
  o Creating an Order and assigning a Unit via the Non-Inventory Items will place the new inventory item in the **Inventory Items** module upon successfully finishing the Uber Wizard.

**Create Order**

After a quote document has been created and approved, it can be converted to an order document by clicking the **Create Order** button. This process will undertake the necessary steps to convert the quote to an order and allow it to be invoiced. The user will be able to view the resulting order document via the *Orders* window.

**Print**

After a quote with items on it has been saved, it can be printed. Pressing the **Print** button will display a print preview, in which the Bill To, Ship To, System/Company/Salesperson, and line items along with their prices will be displayed.

**View Invoice**

After an order has been invoiced using the **Uber Wizard** button, the order will be associated with an invoice. This invoice will contain any non-recurring charges the order contained as well as the first set of recurring charges if applicable. The **View Invoice** button will become available at this time. Clicking it will display the associated invoice allowing the user to see the associated charges and any
other charges which may have previously or subsequently been added to that invoice.

**Uber Wizard**

Once an order has been created and all necessary items have been added and assigned, it can be invoiced by clicking the Uber Wizard button. The Uber Wizard (Uber meaning “super” or “hyper”) was created as a simple and easy process to complete all the necessary data entry, provisioning, and invoicing work needed to fully invoice any order created in Trio. The Uber Wizard and invoicing process is described in more detail in Chapter 10 – Order/Invoicing Process.
Chapter 5

This chapter provides an overview of the Debit Memos window in Trio. This chapter contains the following sections:

- **Debit Memos Window**: Describes the Debit Memos window.
- **Approval Code**: Describes creating an Approval Code.
- **Posting Debit**: Describes the process of posting a Debit Memo

**Debit Memos Window**

The Debit Memos window (Figure 5.1) in Trio allows the user to create a document that creates a debit against a specified credit memo or cash receipts document. Debits can be made only against posted credits or payments. A customer can be added from the Customer ID dropdown. After a customer is selected, any credit memos, and cash receipts documents will be populated in the Selected Credit Memo section. Once a credit or payment document has been selected, the user can specify the GL account and amount to debit from the specifics of the document being debited.

![Figure 5.1 – Debit Memos Window](image-url)
An * denotes required fields.

**Italics** show when a field can be modified.

- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown menu that is populated with any customer IDs available in Trio. *Add*
- **Billing ID** is a dropdown field that is automatically filled in with the default billing information for the selected customer. If a user wishes to change the Billing, Clicking the Billing ID will show the list of all available Billing IDs for the selected customer. *Add, Edit*
- **Bill To** is the set of fields associated with the Billing ID, these will be automatically filled in.
- **Type of Debit** is a section that will allow the user to select if they want to debit against a specified credit memo or cash receipts document. *Add, Edit*
  - **Debit Credit Memo** is an option that will populate the **Selected Credit Memo** dropdown with any posted Credit Memos.
  - **Debit Cash Receipt** is an option that will populate the **Selected Cash Receipt** dropdown with any posted Cash Receipts.
- **Selected Document (Credit Memo or Cash Receipt)** is a dropdown that will be populated with any of the documents that are of the type selected. Once a document is selected, information about the selected document will be displayed on the right including **Date, Total, and Debitable** amount. Once a document is selected, the Grid will become editable, and Line Items for the GL Account can be added. *Add, Edit*
- **Enter Approval Code** See **Approval Code** section below. *Edit*
- **Post** See section **Posting Debit** below. *View*

**Approval Code**

Once a debit memo has been created and saved, it must have an Approval Code specified before it can be posted to the customer’s account. To generate an approval code, Trio requires an administrator level user to enter their login and password. To add an Approval Code, simply click the **Edit** button and then click the **Enter Approval Code** button. A prompt will appear asking the user to enter the user and password of an administrator user. If that is valid, Trio will display an **Approval Code** window with a generated approval code. This can be changed if desired. Clicking **OK** in that window will return the user to the **Debit Memos** window, updating it with the Approval Code. Click the **Update** button to save the debit memo with the new approval code. At this point, the user will be able to post the debit memo.
**Posting Debit**

After a debit memo has been created and an approval code is created, the debit can be posted to the customer’s account. Clicking the *Post* button will do so. The posting process will debit the specified amount on the specified credit or payment. Any invoices paid or credited by the debit’s associated payment or credit will have their paid amount decreased accordingly. This process will also rectify the General Ledger accordingly.
Chapter 6

This chapter provides an overview of the *Credit Memos* window in Trio.

This chapter contains the following sections:

- **Credit Memos Window**: Describes the *Credit Memos* window.
- **Approval Code**: Describes creating an Approval Code.
- **Posting Credit**: Describes the process of posting a Credit Memo

**Credit Memos Window**

The *Credit Memos* window (Figure 6.1) in Trio allows the user to create a document that creates either a general open credit on a customer’s account or a specific credit for the balance of an individual invoice. Specific credits can be applied only against posted invoices. Once a customer and type of credit has been selected, the user can specify the GL Account and amount to credit.

![Credit Memos Window](image)

**Figure 6.1 – Credit Memos Window**
An * denotes required fields.

- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown menu that is populated with any customer IDs available in Trio.
- **Billing ID** is a dropdown field that is automatically filled in with the default billing information for the selected customer. If a user wishes to change the Billing, clicking the Billing ID will show the list of all available Billing IDs for the selected customer.
- **Bill To** is the set of fields associated with the Billing ID, these will be automatically filled in.
- **Type of Credit** is a section that will allow the user to select if they want to create a General Credit, or Specific Credit for a pending invoice.
  - **General Credit** is an option that will allow the user to create a General Credit for the selected customer.
  - **Specific Credit** is an option that will populate the **Invoice Reference** dropdown with any posted Invoices for the selected customer.
- **Invoice Reference** is a dropdown that will be populated with any posted invoices for the selected customer. Once a document is selected, information about the selected document will be displayed on the right including **Date, Total** and **Balance Due**. In addition to this information, if the customer is associated with a Tax Group, the Tax Group ID will be displayed. Once a document is selected, the Grid will become editable, and Line Items for the GL Account can be added.
- **Reason** is a dropdown that is populated with a list of reasons for the credit being created.
- **Enter Approval Code** See Approval Code section below.
- **Post** See section **Posting Credit** Below.

**Approval Code**

Once a credit memo has been created and saved, it must have an Approval Code specified before it can be posted to the customer’s account. To generate an approval code, Trio requires an administrator level user to enter their login and password. To add an Approval Code, simply click the **Edit** button and then click the **Enter Approval Code** button. A prompt will appear asking the user to enter the user and password of an administrator user. If the credentials entered are valid, Trio will display an **Approval Code** window with a generated approval code. This can be changed if desired. Clicking **OK** in that window will return the user to the **Credit Memos** window, updating it with the Approval Code. Click the
Update button to save the credit memo with the new approval code. At this point, the user will be able to post the credit memo.

**Posting Credit**

After a credit memo has been created and an approval code is created, the credit can be posted to the customer’s account. Clicking the Post button will do so. If the credit is a General Credit, then an Open Credit document will be created on the customer’s account in the amount specified. Future invoices will be automatically paid using the open credit until the open credit amount is exhausted. A Specific Credit will credit the selected invoice for the amount specified. This will cause the invoice to have its unpaid balance decreased. This process will also rectify the General Ledger accordingly.
This chapter provides an overview of the Cash Receipts (Payment) window.

This chapter contains the following sections:

- **Cash Receipts Window**: Describes the Cash Receipts window.
- **Posting Cash Receipt**: Describes the process of posting a Cash Receipt.
- **Void Cash Receipt**: Describes the process and effect of voiding a Cash Receipt.
- **NSF Cash Receipt**: Describes the process and effect of marking a Cash Receipt as NSF (Non-Sufficient Funds).

**Cash Receipts Window**

The Cash Receipts window in Trio allows the user to create and post payments onto a customer’s account (Figure 7.1). The user can select the Payment Date, Payment Type, and Amount. The user can also divide a payment to be applied amongst one or multiple invoices, paying them partially or in full. Cash Receipts will be posted on the current day and must be posted to the current period. This means the payment will require all previous periods for the current day to be closed.

![Cash Receipts Window]

**Figure 7.1 – Cash Receipts Window**
An * denotes required fields.

**Italics** show when a field can be modified.

- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown menu that is populated with any customer IDs available in Trio. *Add*
- **Cash GL Account** is a dropdown menu that will be populated with GL Asset Accounts. *Add*
- **Payment Date** is a date selector that allows the user to record when the payment occurred. *Add, Edit*
- **Payment Type** is a dropdown that is populated with the different forms of payment. *Add, Edit*
  - If a payment type of Check is selected, then a required **Check Number** field will appear.
  - If a card payment type is selected, then a required credit card number field will appear, along with an expiration date field.
- **Payment Amount** is a text field that requires a money value to be entered. *Add, Edit*
- **Payment Currency** allows the type of currency to be selected. *Add, Edit*
  - **Normal/Default Currency**: Selecting this option will display all invoices using the Normal/Default currency that have an open balance.
    - When using the Normal/Default Currency option any amount may be entered in the **Payment Amount** field. Any amount greater than the total of the available invoices an Open Credit for the difference will be created.
  - **Other**: Selecting this option will display all invoices using a non-Default currency that have an open balance.
    - When using the Other option, the **Payment Amount** field becomes disabled since Trio does not allow Open Credits to be created with non-default currency nor does it allow invoices using a non-default currency to be partially paid. Instead, selecting an invoice in the grid will update the amount field with the selected invoice’s amount.
- **Post** See section *Posting Credit* below. *View*
- **Void** See *Void Cash Receipt* below. *View*
- **NSF** See *NSF Cash Receipt* below. *View*
**Posting Cash Receipt**

Posting a cash receipt has the effect of incrementing the paid balance of each selected invoice with the specified amount and updating the General Ledger accordingly.

**Void Cash Receipt**

If, after posting a payment, it is determined that the payment needs to be removed from the customer’s account, clicking the **Void** button will cause the payment to be rolled back. The General Ledger will be updated, and the paid balances will be reduced for all specified invoices accordingly.

**NSF Cash Receipt**

If, after a payment is posted, it is returned marked as NSF (Non-Sufficient Funds), clicking the **NSF** button will cause the payment to be rolled back. All specified invoices will have their paid balances reduced appropriately. In addition, the General Ledger will be updated accordingly. The customer will also have their current invoice charged with an NSF fee if the *NSF Charge* option is enabled and configured in the *Trio Options* window.
Chapter 8  Inventory

This chapter provides an overview of the various Inventory windows.

This chapter contains the following sections:

- **Overview:** Describes the Inventory feature of Trio.
- **Inventory Products:** Describes the Inventory Products window.
- **Inventory Items:** Describes the Inventory Items window.
- **Pricing:** Describes the Item Pricing window.
- **Transactions:** Describes the Item Transaction window.
- **Inventory Categories:** Describes the Inventory Categories window.
- **Inventory Types:** Describes the Maintain Inventory Types window

**Overview**

The inventory within Trio consists of two main windows.

- **Inventory Products**
- **Inventory Items**

Together, these windows allow the user to perform basic inventory management as required by the rest of the Trio software.

Additionally, the Inventory Categories and Inventory Types windows allow the user to manage the categories, types, and their properties for use when creating Inventory Products.
Inventory Products

The Inventory Products window is the top-level inventory window (Figure 8.1). Here the user creates and manages the various model numbers or SKUs. Each unique type of product (radio model, battery model, etc.) the user desires to manage in Trio must be created as an inventory product in Trio.

Figure 8.1 – Inventory Products Window

The Inventory Products window is divided into four main sections: Product Information, Inflow/Outflow, Accounting Options, and Invoicing.

An * denotes required fields.

*Italics* show when a field can be modified.

Product Information is the set of fields mainly found on the left-hand side of the window with the following fields:

- **Product ID*** is a text field that allows the user to enter the ID that will be associated with the product. The field allows 1-20 alphanumeric characters (capitalized only). *Add*
- **Alias*** is a text field that allows the user to give the product a user-friendly name. The field allows 1-50 characters. *Add, Edit*
- **Description** is a text field that allows the user to describe the product. The field allows up to 2000 characters. *Add, Edit*
- **Product Category*** is a dropdown that is populated with all Product types that are available within Trio. Product Categories can be added through the **Inventory ➔ Categories** menu. *Add*
• **Product Type** is a dropdown that is populated with any product types associated with the selected Product Category. Product Types can be added to Trio through the *Inventory*→*Types* menu. *Add*

• **URL** is a text field that allows the user to store the link of a relevant web page. The field allows up to 500 characters. *Add, Edit*

• **Show URL** is a button that opens the web address saved in the URL field in the user’s default browser.

• **Qty on Hand** is a read only text field that shows how many of the Product Type are in Inventory. For more information see Usage Type in the *Inventory Items* section below.

• **Qty on Order** is a text field that allows the user to input how many of the selected Product is currently on order. *Add, Edit*

• **Reorder Level** is a text field that allows up to 20 numeric characters. *Add, Edit*

• **Provisionable** is a checkbox that allows the user to indicate whether the product is provisionable (i.e. can be assigned a subscriber ID). Radio and Data Device products are provisionable by default and all others are not.

• **Inactive** is a checkbox that allows the user to indicate whether the product is inactive. When inactive, new inventory items for the product cannot be added or invoiced.

• **Taxable** is a checkbox that allows the user to indicate whether the product will be taxed or not.

• **Product Items** is a button that opens the *Inventory Items* window. See the *Inventory Items* below.

• **Pricing** is a button that opens the *Pricing* window. See the *Pricing* section below.

• **Transactions** is a button that opens the *Item Transaction* window. See the *Transaction* section below.

**Inflow/Outflow** is accessible by click the *Inflow/Outflow* tab. This section allows the user to monitor the inflow and outflow of the Product currently open. The user can change the month they wish to view by clicking the dropdown at the top of the inflow/outflow section and picking from the list of months.

**Accounting Options** is accessible by clicking the *Accounting Options* tab and deals with the accounting information pertinent to the product.

• **Sales GL Account** is a dropdown that is populated with any Sales Accounts available in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the product. *Add, Edit*
  
  o For more information on GL Sales Account see the *Chart of Accounts* section in *Chapter 17 – Financials*. 

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- **Inventory GL Account** is a dropdown that is populated with any Asset Accounts available in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the product. *Add, Edit*

- **Cost of Goods GL Account** is a dropdown that is populated with any Cost of Goods Sold Accounts available in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the product. *Add, Edit*

- **Revenue GL Account** is a dropdown that is populated with any Revenue Accounts available in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the product. *Add, Edit*

- **Vendor ID** is a dropdown that allows the user to select a vendor for the product. *Add, Edit*
  - For more information on Vendors see the Vendor section in *Chapter 18 – Commissioning*.

- **Commissionable** is a checkbox that allows the user to select if they want the product to be commissionable or not. *Add, Edit*
  - For more information on Commissioning see *Chapter 18 – Commissioning*.

**Invoicing** is accessible by clicking the Invoicing tab. The user is provided the **Standard Cost** field and can enter a monetary value for the standard cost of the product. In addition, there are several other read only fields that display Invoicing information about the products in Trio.
Inventory Items

The Inventory Items window in Trio allows the user to enter individual items into the inventory. Just as the Inventory Products window is where each product model is managed, the Inventory Items window is where each individual serial number of a model is managed. Trio’s inventory allows for only radio serial numbers to be managed.

Figure 8.2 – Inventory Items Window

An * denotes required fields.

Italics show when a field can be modified.

- **Product ID** is a dropdown that is populated with any products available in Trio. *Add*
  - For more information see the Inventory Products section above.

- **Serial Number** is a read only text field that displays the serial number of the selected item.

- **Serial Number** is also a text field under the Custom Data Values tab that allows the user to choose the serial number of the item. *Add*

- **Alias** is a text field that allows the user to give the inventory item a user-friendly name. This field allows up to 50 characters. *Add, Edit*

- **Company** is automatically filled in.
- **Customer** is a read only field that displays any customer associated with the inventory item, if any such customer is available.

- **Trio Order Doc Number** is a read only field that is only used once an item is associated with an Order (Details Below).
  - If the Trio Order Doc Number contains a value, then the inventory item is associated with an order. In this case, the Trio Order Doc Number is the Order’s Doc Number. This indicates that the inventory item is already associated with an existing Order and will not be available in the *Add Inventory Items* window of the Order Assign Units Process.
  - If the Trio Order Doc Number is blank, then the inventory item was either:
    - Created, but not yet associated with a unit user. This indicates that the inventory item will be available to add to an order through the *Add Inventory Items* window of the Order Assign Units Process.
    - OR the inventory item was created and associated with a unit user outside of the Order process. In this case, the inventory item will not be available in the *Add Inventory Items* window of the Order Assign Units Process.
  - For more information on adding Inventory items to Orders see *Assign Units* section in Chapter 4 – *Quotes & Orders*.

- **Status** is a dropdown that allows the user to select if the item is Activated or Deactivated. *Add, Edit*

- **Date Received** is a Date Selection field that allows the user to pick what day the item was received. *Add, Edit*

- **Notes** is a text field that allows the user to enter in any custom notes associated with the Item. The field allows up to 2000 characters. *Add, Edit*

- **Reserved** is a checkbox that allows the user to select if the Inventory Item is reserved for a customer. *Add, Edit*
  - **(Customer)** is a field that is only visible if the Reserved checkbox is checked. The field is a dropdown that is populated with any customers available in Trio. *Add, Edit*

- **Item Origin** is a dropdown on the *Item Origin/Usage Type* tab that allows the user to select the origin of the Item. *Add, Edit*
  - Different Item Origins have different fields that will populate the *Origin: Other* section of the form.

- **Usage Type** is a dropdown that allows the user to pick what the Item’s intended usage is. *Add, Edit*
Pricing

The pricing of an inventory product can be managed using the Item Pricing window (Figure 8.3). This window is shown by clicking the Pricing button in the Inventory Products window. When an inventory product is created, default 0.00 pricing is automatically created. Trio will use the default pricing line whenever an inventory product is added to an order.

![Item Pricing Window](image)

**Figure 8.3 – Item Pricing Window**

*Italics show when a field can be modified.*

- **Item ID** is automatically filled in based on the Inventory Product selected.
- **Description** is automatically filled in based on the Inventory Product selected.
- **Qty** is a text field that allows the user to change the quantity of the item. The field is numeric only. *Add, Edit*
- **Default** is a checkbox that allows the user to select if the selected item is the default. *Add, Edit*
- **Amount per Item** is a text box that allows the user to enter a money value for the price per item. *Add, Edit*
- **Total Amount** displays the total of the quantity and price per item.
**Transactions**

The user can see all posted invoices that an inventory product has been on in the Item Transaction window (Figure 8.4). This window is shown by clicking the **Transactions** button in the Inventory Products window.

![Item Transaction Window](Image)

**Figure 8.4 – Item Transaction Window**

The Item Transaction window allows the user to quickly view information on invoices that have had the selected Product on it. The grid displays the **Date**, **Type**, **Qty** (quantity), **Cost**, **Doc#** (invoice order number) and **Memo**.

**Inventory Categories**

The Maintain Inventory Categories window (Figure 8.5) allows the user to manage inventory product categories in Trio. It can be accessed from the Inventory -> Categories menu. When creating inventory products, its category is a required field and this window is where those categories are managed. Categories can be created, modified, and deleted as desired. Two pre-defined categories, **Radio** and **Data Device**, cannot be modified or deleted. To delete any other Category, it cannot be in use by an Inventory Product.

![Maintain Inventory Categories Window](Image)

**Figure 8.5 – Maintain Inventory Categories Window**

- **Inventory Category** is name of the category.
**Inventory Types**

The *Maintain Inventory Types* window (Figure 8.6) allows the user to manage inventory product types. It can be accessed through the **Inventory -> Types** menu. When creating an inventory product, the type must be chosen after selecting a category. A product type narrowly defines what the product is and defines what custom properties are associated with any items of a specific product. This window allows the user to manage those types and their properties.

![Figure 8.6 – Maintain Inventory Types Window](image)

*Italics show when a field can be modified.*

- **Product Category** shows the chosen category for the current type. *Add*
- **Inventory Type** is the name of the current type. *Add, Edit*
- **Properties** is a list of properties that defines the type along with the criteria for each. Press the + or – buttons in the upper right to add or remove properties. *Add, Edit*

Specific pre-defined types have limitations in how they can be modified or deleted. **Radio** and **Data Device** categories are used extensively within Trio and cannot have new types declared for them nor can existing types be deleted. Additionally, the pre-defined types under these categories cannot have their names or **Serial Number/ICCID** property modified in any way. Aside from the Serial Number/ICCID property, any of these types can have their existing properties modified, deleted, or added to as desired. Types under different categories along with their properties can be modified or deleted.

Each property of a type can be configured to narrowly define what values a user may specify for that property when creating or modifying an Inventory Item of a Product of the selected type. These criteria are as follows:

- **Name** specifies the name of the custom property.
- **Minimum Length** specifies the minimum number of characters that must be specified for the property.
- **Maximum Length** specifies the maximum number of characters that can be specified for the property.

- **Padded** denotes whether values entered are prepended with a Pad Value if the value entered by the user is shorter than the minimum length of the property.

- **Pad Value** specifies the single character to pad/prepend property values shorter than the minimum length of the property. If the value is to be padded, the Pad Value will be prepended to the entered value repeatedly until the property value reaches the minimum length required.

- **Required** denotes whether the user is required to enter a value for this property when creating or modifying an associated Inventory Item.

- **Unique** denotes whether the value entered for an item must be unique or not. This uniqueness is across all products of the selected type, not just unique to the specific product.

- **Editable** denotes whether the user can modify the value entered after the item is initially created.
Chapter 9  Options

This chapter provides an overview of the Trio - Options window.

This chapter contains the following sections:

- **Overview**: Describes the purpose of the Trio - Options window.
- **Invoicing**: Describes the Invoicing tab.
- **Contract Information**: Describes the Contract Information tab.
- **ARPU**: Describes the ARPU tab.
- **Miscellaneous**: Describes the Miscellaneous tab.
- **Payments**: Describes the Payments tab.
- **Commissioning**: Describes the Commissioning tab.
- **Reports**: Describes the Reports tab.
- **Account Charges**: Describes the Account Charges tab.
- **Credits/Debits**: Describes the Credits/Debits tab.
- **Orders**: Describes the Orders tab.
- **Licensing Alerts**: Describe the Licensing alerts tab.
- **My Settings**: Describes the My Settings window.
Overview

The Trio - Options window (Figure 9.1) allows the user to set options to customize how Trio operates. Each tab of this window is described in the following sections.

![Trio - Options Window]

**Figure 9.1 – Trio - Options Window**

After Clicking Edit, any number of changes can be made to the current tab. At any point the user can Click Update if they want to save the current changes to the current tab in Options. The user will be prompted for administrator level credentials. If changes are made, and the user clicks a different tab, they will be asked if they want to save the changes or not.

Invoicing

The Invoicing tab, as shown in Figure 9.1, contains several options relating to the invoice run process and to printing invoices.

- **Require Customer Preview before running invoices**: If checked, when carrying out an invoice run, Trio will display the Customer Preview window prior to the actual invoice run.

- **Print invoices for Disabled Customers that have a balance**: If checked, when printing invoice batches, disabled customers whose invoice has a balance will have their invoice included. With this option unchecked, a disabled customer’s invoice will be printed whether it has a balance or not.

- **Invoices use pre-printed invoice numbers**: Used primarily to satisfy Latin America invoicing requirements, this option, when checked, will prompt the user to supply a preprinted invoice number or range of numbers that are pre-printed on the paper the invoices are printed on.
- **Paperless Invoices Path**: The path set here is where invoices for customers marked as Paperless Billing are saved when printing pending invoices.

**Contract Information**

The *Contract Information* tab allows the user to configure Trio to automatically generate Contract End notices. Trio will use the Microsoft Word template found at the Contract End path set in the *Languages* window to generate and display a Microsoft Word document for customers who have reached the end of their contract. The date Trio uses is the *Contract End* field in the *Customers* window.

![Figure 9.2 – Contract Information Tab](image)

**ARPU**

Average Revenue Per Unit (ARPU) is a statistic calculated and shown in the *Snapshot* window of Trio. The *ARPU* tab (Figure 9.3) allows the user to set whether certain types of charges are included in that calculation.
• **Fixed Charges** is a checkbox that allows the user to specify if they wish to include Rate Plan Charges in the ARPU calculation.

• **Variable Charges** is a checkbox that allows the user to specify if they wish to include Airtime Charges in the ARPU calculation.

• **Account Charges** is a checkbox that allows the user to specify if they wish to include Activation Fee Charges in the ARPU calculation.

**Miscellaneous**

The *Miscellaneous* tab (Figure 9.4) allows the user to set Default Churn Codes and other settings.
• **Default Activation Churn Code** is required upon initial setup of Trio but can also be edited later. This field is a dropdown menu that displays all activation Churn Codes available in Trio.
  
  o The churn code selected for the default activation churn code will be the churn code that is automatically used anytime a churn is created behind the scenes.
  
  o For more information on Churn Codes see the *Churn Codes* section in *Chapter 19 – Preferences*.

• **Default Deactivation Churn Code** is required upon initial setup of Trio but can also be edited later. This field is a dropdown menu that displays all deactivation Churn Codes available in Trio.
  
  o The churn code selected for the default activation churn code will be the churn code that is automatically used anytime a deactivation churn is created behind the scenes.
• **Customer and Unit Manager** is the section that configures interaction between Trio and GenIIB.
  
  - This section allows the user to configure how Trio integrates with the GenIIB product when it is purchased with Trio.
  - This will be configured upon initial installation and integration between those other products. Any changes should be done only after consultation with Genesis support.

• **Enable New Customer ID Suggestion** is autocompleting for new customer IDs.

• **Show Popup for Limit Reached Alerts** enables a popup that will appear when a customer reaches a limit.

**Payments**

The *Payments* tab (Figure 9.5) allows the user to configure Trio to apply late fees to a customer’s invoice if they have not fully paid past invoices. The user can select an existing charge to use as the late fee to be applied. The grace period can also be configured. The *Payments* tab also allows the user to configure Trio to apply an NSF (Non-Sufficient Funds) charge to a customer’s invoice if a payment is rejected by the bank due to insufficient funds. The user can select an existing charge to use as the charge to be applied. If the user clicks the NSF button in the *Cash Receipts* window on a payment, that payment will be voided, and the customer will have the specified NSF charge applied to their next invoice.

![Figure 9.5 – Payments Tab](image)

- **Apply Late Fees?** is a checkbox that allows the user to apply a late fee to invoices that are not fully paid.
• **Fee to apply** is required if Apply Late Fees is selected. The field is a dropdown menu that is populated with any charges available in Trio.
  
  o For more information on Charges see the **Charges** section in **Chapter 17 – Financials**.

• **Allow billing periods grace period** is a dropdown menu that allows the user the option of specifying how many billing periods are grace periods for the late fee.

• **Apply NSF Charge** is a checkbox that allows the user to enable or disable Non-Sufficient Funds charge.

• **Charge to apply** is required only if Apply NSF Charge is enabled. This field is a dropdown menu that is populated with any charges available within Trio.

**Commissioning**

The **Commissioning** tab (Figure 9.6) allows the user to configure Trio to use commissioning and the basic commissioning options.

![Commissioning Tab](image)

**Figure 9.6 – Commissioning Tab**

• **Use Commissioning** is a checkbox that enables the following fields.

• **Posting Day** is a combo box that allows the user to select which day of the month to post commissions.

• **Collection End Day** is a combo box that allows the user to select which day of the month to stop collecting commissions.

• **Collection Days** is a combo box that allows the user to select how many days the salesperson must collect a commission.
Reports

The Reports tab (Figure 9.7) allows the user to configure the footer text which appears at the bottom of reports generated by Trio.

![Trio - Options](image)

Figure 9.7 – Reports Tab

- **Report Footer Verbiage** is a text field that allows up to 100 characters.

Account Charges

The Account Charges tab (Figure 9.8) allows the user to set what ratio of monthly fees to radios is allowed or required on an order.

![Trio - Options](image)

Figure 9.8 – Account Charges Tab
• **Strict** is a Trio setting that requires the user to put the same number of recurring account charges as radios on an order.
  - If a user attempts to put a different number of recurring charges than the number of radios, they will be prompted to enter administrator level credentials.

• **Medium** is a Trio setting that allows the user to put *the same as or more* recurring account charges as there are radios.
  - If a user attempts to put in fewer charges than the number of radios, they will be prompted for administrator level credentials.

• **Light** is a Trio setting that allows the user to put *the same as or less* recurring account charges as there are radios.
  - If a user attempts to put in more charges than the number of radios, they will be prompted for administrator level credentials.

• **None** is a Trio setting that allows the user to put any combination of account charges and radios as they please. No administrator credentials will ever be requested.

**Credits/Debits**

The *Credits/Debits* tab (Figure 9.9) allows the user to configure several options pertaining to whether credits should be automatically created in certain circumstances.

![Trio - Options](image)

*Figure 9.9 – Credits/Debits Tab*
• **Maximum amount** is a text field that allows the user to set a monetary value such that anytime a credit or debit is created that is more than the amount set the user will be prompted to enter administrator level credentials in order to Post the credit/debit.

• **Generate Service credits** is a checkbox that allows the user to choose whether Trio should generate credits for rate plan services when a subscriber/unit user/personality is disabled or deleted.

• **Generate Rate Plan credits** is a checkbox that allows the user to choose whether Trio should generate credits for current rate plan services when a subscriber’s rate plan is reverted to a new rate plan.

**Orders**

The *Orders* tab (Figure 9.10) allows the user to configure several options regarding how Orders can be created.

![Trio - Options](image)

**Figure 9.10** – Orders Tab

• **Allow Point of Sale transactions** is a checkbox that allows a user to enable or disable POS (Point of Sale) transactions. If POS transactions are disabled, then the Order Type on the Orders form will only not be editable, and the only Orders that can be created are Normal/Recurring orders. If POS transactions are enabled, then users can create Point of Sale orders.

• **Reserve assigned radios on Point of Sale Orders** is a checkbox. If this is enabled, then radios/units can be added to Point of Sale orders. The Order process will automatically reserve the unit for Point of Sale transactions. If this feature is disabled, then radios/units cannot be added to point of sale orders.
• **Allow only reserved radios on orders** is a checkbox. If this feature is enabled, then users will not be allowed to add any radios that have not been reserved for a customer.

• **Allow choice of currency for Point of Sale transactions** and **Use foreign currency for hardware prices** are features that deal with how foreign currency is dealt with in Trio. If you would like to know more information about these features, contact Genesis support.

**Licensing Alerts**

The *Licensing alerts* tab (Figure 9.11) allows the user to configure several options regarding when alerts are generated for licensed products. Items listed in the grid can have alerts enabled. If an item is *Alert Enabled* then when the number of licenses remaining for the item is less than or equal to the *Remaining Licensed*, an alert will be generated. The frequency of such alerts can be set to *Once*, *Daily*, or *Weekly*.

![Trio - Options](image)

**Figure 9.11** – Licensing alerts Tab

• **Reminder Frequency** is a set of options that allows the user to configure how often reminders are sent out for *Alert Enabled* Items.
  
  o **Once** is an option that will only generate an alert the first time an *Alert Enabled* item falls within the *Remaining Licensed* limit.

  o **Daily** is an option that will generate alerts every day while an *Alert Enabled* item falls within the *Remaining Licensed* limit.

  o **Weekly** is an option that will generate alerts every week while an *Alert Enabled* item falls within the *Remaining Licensed* limit.

• **Alert Enabled** is a button that will allow the user to enable or disable alerts for the line item in the grid. No alerts will be generated for Items with disabled alerts regardless how many licenses remain.
• **Remaining Licensed** is a text field that allows the user to specify at what remaining level of license they want to generate alerts. The *Remaining Licensed* value is the value such that when the total remaining licenses is less than or equal to the specified value, alerts can be generated.

**My Settings**

The *My Settings* window (Figure 9.12) allows the user to configure several options regarding how Trio looks and performs under their current user. It is accessible through **Tools -> My Settings**.

![My Settings Window](image)

**Figure 9.12 – My Settings Window**

- **Current User** is a read only value that displays the current user.
- **Play a sound when reminder comes due** is a checkbox that allows the user to specify if they would like to select a specific sound that will play when a reminder comes due.
  - For more information on Reminders, see *Reminders* section in Chapter 20 – Tools.
- **Show Search Form** is a checkbox that will enable or disable the automatic search feature for modules.
  - The search window will still be accessible by clicking the **Search** button in any searchable forms.
- For more information on Searching see the *Search Window* section in *Chapter 2 – Navigation*.

- **Display MemoView when opening Customer Screen** is a checkbox that allows the user to specify if they would like the MemoView to display when the Customer window opens.

- **Customer Tree View** is a section that gives the user capabilities of customizing the Customer Tree View. Items can be shown, or hidden, as well as shown in expanded mode.
Chapter 10  Order/Invoicing Process

This chapter provides an overview of the Order creation and invoicing process. This chapter contains the following sections:

- **Overview**: Describes the basic process of creating and invoicing an order.
- **Order Prerequisites**: Describes the items and data required to successfully invoice an order.
- **Order Creation**: Describes the process of creating an order, adding items to it, and other necessary steps.
- **Uber Wizard**: Describes the basic Uber Wizard window and elements common to every system type.
- **Provisioning & Invoicing**: Describes what occurs as the order is invoiced and any units are provisioned.

**Overview**

At the core of Trio is the ability to bill and invoice customers. This includes adding new charges to a customer’s regular, recurring invoice. This chapter describes the process for creating and invoicing a basic order that adds and assigns a single subscriber to a customer’s account and modifies their invoice appropriately.

At a very high level, the process starts by creating an order for a customer. In creating the order, subscriber hardware, rate plans, and charges (monthly fees) are added and serial numbers are assigned to the order. The subscribers are then provisioned via the Uber Wizard. Finally, the Uber Wizard creates or modifies the customer’s On Air invoice appropriately.

**Order Prerequisites**

Prior to creating an order, there are several types of data that need to be in place. Creating a record for one of these prerequisites allows it to be used for any future orders. These prerequisite types of data are listed and described in this section.

- **Customer**
  - An order is a set of charges to be billed to a specific customer; so naturally, the customer itself must exist in Trio prior to creating the order. A customer is created using the Customer window. This window is described in more detail in Chapter 3 – Customers.

- **Service**
  - One or more services are bundled into a Rate Plan that is assigned to each radio billed and managed in Trio. These services must be created before creating a rate plan. Services are specific to each
individual system type licensed in Trio. More detail on services can be found in the Services section of the appropriate system type chapter.

- Rate Plan
  - Each radio billed and managed in Trio must have a rate plan assigned to it. The order process allows the user to designate which rate plan a new radio will use. Thus, the rate plan must be created first in order to be used on an order. Rate Plans are specific to each individual system type licensed in Trio. More detail on rate plans can be found in the Rate Plans section of the appropriate system type chapter.

- Account Charge
  - Account charges are one-time or recurring charges which are not associated to a specific radio. Instead these charges are associated directly with the customer itself. On an order, it is generally required that the same number of recurring charges be added to the order as the number of radios on the order, although this can be configured differently if desired. Charges are described in more detail in the Charges section of Chapter 17 – Financials.

- Hardware
  - Any radios added to an order must be added using the hardware model number of the radio. The model number and the characteristics of that type of radio are created in Trio using the Inventory Products window. This window is described in more detail in Chapter 8 – Inventory.
**Order Creation**

To create an order, open the *Orders* window. If there are orders already in Trio, the first step will be to click the **Add** button. This will clear all necessary fields and the *Orders* window will be put in Add mode (Figure 10.1). If no orders exist in Trio, this window will automatically open in Add mode.

![Orders Window in Add mode](image.png)

**Figure 10.1 – Orders Window in Add mode**

The first step is to select a customer from the **Customer ID** dropdown. (If the *Orders* window is opened by clicking the **Orders** button in the *Customers* window, the **Customer ID** field is automatically filled with the Customer ID from the *Customers* window.)

The second step is to select a System Type from the **System Type** dropdown. This determines the type of subscribers that can be added via the order and restricts what hardware, rate plans, etc. can be assigned to the order.

After selecting the **Customer ID** and **System Type**, the **Billing ID**, **Shipping ID**, **Order Date**, **Order Type**, **Dealer**, and **Salesperson** fields should be entered as appropriate. Depending on how Trio is configured, it may not be possible to change the **Order Type** to **Point of Sale**.

Once those fields have been selected, line items can be added to the order. This is done by clicking on an empty line in the item grid and clicking the small button which appears in the Item ID column. This will display the *Add Items* window (Figure 10.2). This window is used to add line items to the order. These line items are separated into three categories in the *Add Items* window.

- **Products**: Any hardware items such as radios, accessories, etc. will be listed in this category. For subscriber hardware models (such as radios),
only those models which can be used with the order’s system type will be listed.

- **Invoice Charges**: All one-time and recurring account charges will be displayed in this category. These charges are added and managed using the Charges window. More detail on this window can be found in the Charges section of Chapter 17 – Financials.

- **Rate Plans**: The third category contains a list of all rate plans which exist in Trio for the order’s system type.

![Figure 10.2 – Product window](image)

Clicking the Select button after choosing a charge from one of the three lists will add the line item to the order. The selected charge will then be shown in the item grid of the Orders window.

The Item and Charge quantities of each line item can be changed by selecting the appropriate cell in the line and changing the quantity as desired.

After all items have been added to the order, the order must be saved by clicking the Update button.

Before continuing to the next phase of the order process, any subscriber hardware (like radios) line items must have serial numbers assigned to them. This specifies which physical devices are to be associated with this order.

To assign serial numbers to the order, the order must be in Edit mode. Clicking the Edit button on the Orders window will allow the order to be edited. Once in Edit mode, serial numbers are assigned by first selecting the line item of the model number. This will activate the Add / Remove Units button. Clicking this button will display the Add / Remove Units window (Figure 10.3).
From this window, serial numbers can be assigned to the order from hardware which already exists in Trio’s inventory or by entering a new serial number not currently in Trio. New serial numbers entered via this window will be automatically added to Trio’s inventory later in the order process. After the appropriate number of serial numbers has been assigned to this order, clicking the OK button will return to the Order window. If there are any other subscriber hardware line items on the order, serial numbers must be assigned to them by selecting the appropriate line item and repeating this process.

Once serial numbers for all subscriber hardware line items have been assigned, clicking the Update button will save the order. At this point, the Order Summary section should be examined to ensure that all required line items have been properly prepared for the Uber Wizard phase of the order process.

The Order Summary section shows how many subscribers are on the order. It also shows how many of those subscribers have serial numbers assigned as well as how many rate plans and monthly fees (account charges) exist on the order. The default Trio configuration requires the following:

- Each subscriber must have a serial number assigned to it.
- There must be an equal number of rate plans on the order as subscribers. These rate plans can be divided amongst multiple rate plan line items on the order.
- There must be an equal number of monthly fees (recurring account charges) on the order as there are subscribers.

This default configuration can be changed as desired using the Options window. These options are described in the Orders section of Chapter 9 – Options.

Any item in the Order Summary which does not meet the requirements as configured in the Options window will have the quantity shown in the Order Summary marked in red. If an item in the Order Summary is marked as red, then add/remove rate plans or monthly fees as necessary or assign serial numbers if
required. The order process cannot continue until all items are satisfied and the quantities are marked in black in the *Order Summary*.

Once the *Order Summary* is shown to satisfy the requirements of an order, the order process can progress to the Uber Wizard phase.

**Uber Wizard**

The purpose of the Uber Wizard is to provide a single window in which to provide all information necessary for Trio to add any subscribers into Trio and begin invoicing them correctly.

Once an order has been created, items have been added, serial numbers have been assigned, and all other requirements have been met, the order/invoicing process can move to the next phase. Clicking on the **Uber Wizard** button in the *Orders* window will start the next phase.

If an order is created without any subscriber hardware model line items, but consists solely of charges such as account charges, then the **Uber Wizard** window is not shown and the charges are simply added to the customer’s invoice as described in the following *Provisioning & Invoicing* section.

Once the **Uber Wizard** button has been clicked, Trio will prompt the user to confirm that Trio should proceed with the Uber Wizard process. After this confirmation, the **Uber Wizard** window will appear. (Figure 10.4)

**Figure 10.4 – Uber Wizard window**

Figure 10.4 shows the Uber Wizard as it appears for an order created for an RNetBill customer. For other system types such as Generic or TETRA, the only differences in this window will be the columns which appear in the Subscriber Provisioning Grid.

The various sections of the **Uber Wizard** window are described below and correspond to the numbers shown in Figure 10.4.
1. **Churn Reason:** The **Churn Reason** dropdown is used to select a reason for the radios becoming active. Churn reasons are managed using the **Churn Codes** window which is described in the **Churn Codes** section of Chapter 19 – **Preferences**. A churn reason must be selected in order to finish invoicing the order.
   
a. **Secondary Churn Reason:** The **Secondary Churn Reason** is only visible if a **Churn Reason** is selected that has at least one **Secondary Churn Reason** associated with it. If a **Churn Reason** has a **Secondary Churn Reason** associated with it, then the **Secondary Churn Reason** dropdown will be visible. The user can select a **Secondary Churn Reason** and therefore add more detail to the main **Churn Reason**. **Secondary Churn Codes** are described in the **Churn Codes** section of Chapter 19 – **Preferences**.

2. **Sending Letters:** After Trio has provisioned and invoiced an order, it can create a Welcome and/or Contract letter which includes the radios provisioned in the order. These letters are created using a Microsoft Word template document. The path to these templates is set in the **Languages** window and is described in the **Languages** section of Chapter 19 – **Preferences**.

3. **Serial Number List:** This list shows each serial number assigned to the current order, its description, and whether all necessary information has been assigned to it in the Uber Wizard.

4. **Rate Plan List:** This rate plan list shows each distinct rate plan on the order, how many of each has been associated with a serial number in the Uber Wizard, and how many have not.

5. **Subscriber Provisioning Grid:** This grid is where all necessary information is entered for each serial number. Each serial number assigned to the order will be listed here. The information entered here will determine how Trio bills and manages the subscriber. In addition to entering information in this grid, clicking the **Details** button of a subscriber will display the **Subscriber Details** window which allows even more details to be configured for the subscriber if desired.

6. **Subscriber Summary:** The subscriber summary shows how many subscribers have all necessary information assigned to them and how many still require attention.

7. **AutoFill:** AutoFill will take information from the first row in the Subscriber Provisioning Grid and apply specific information from that row to any subsequent rows.

8. **Refresh:** Refreshes the form when changes have been made in Trio that could affect the Uber process. See the *Refreshing the Uber Wizard* section below.

While entering information in the Uber Wizard, the subscribers are not invoiced or provisioned until the **Invoice** button is enabled. As information is entered, Trio
will validate the **System, ID**, etc. of each serial number to ensure that duplicate or invalid information will not be provisioned into Trio.

Once the information for the first serial number has been entered, an **AutoFill** button will appear. When clicked, this button will fill in basic information for all additional serial numbers in the list. It will automatically fill information, such as **System, Billing Enabled, Talkgroups, Unit Type, SIC Code, Site Cluster**, etc., for the remaining serial numbers. This decreases the amount of manual data entry required for orders with many subscribers.

Once all required information has been entered for each serial number in the Unit Provisioning Grid, the **Invoice** button will be activated. Once all information is correct, the Invoice button must be clicked to begin the actual Provisioning and Invoicing phase.

**Refreshing the Uber Wizard**

While entering information into the Uber Wizard, if there is any data that is needed but not available it can be added while the Uber Wizard is still open. For instance, if a different set of **Radio IDs** will be used for the radios being added to Trio than what are reserved, they can be reserved through the **Systems Module** without closing the wizard.

When any information is added, updated, or deleted that could affect the wizard while it is open the wizard will require a refresh before continuing. By clicking the **Refresh** button, a message will appear listing all the changes that have been made and give the option of refreshing or postponing the refresh.

By clicking **OK** the wizard will be refreshed. Note that this can cause entered data to be cleared. For example, if a system that was selected in the wizard is deleted from the **System Module**, then that data will be cleared in the wizard, along with any information that was dependent on the system.

By clicking **Cancel** the Refresh will be postponed but will still be required. This option allows the entered data to be changed so that the refresh will not cause any loss of data. Using the example above, it is now known that the selected system is no longer available so by cancelling, a new system can be selected and the dependent data updated, or if it was a mistake the system can be added back before the refresh so that the data in the wizard will not be changed.

**Provisioning & Invoicing**

This final phase of the Order/Invoicing process is where all information entered the order and the Uber Wizard is committed into Trio and the customer has their invoice created or modified appropriately. This process will first take the **Serial Number, System, ID**, and other data entered in the **Subscriber Provisioning Grid** for each subscriber and provision them into Trio. This will create the **ID** in Trio, assign the appropriate rate plan to it and provision all other details of the **ID** as entered in the **Subscriber Provisioning Grid.** After provisioning/creating the subscribers, Trio will then create or modify the customer’s invoice as necessary to begin billing the customer for the new subscribers. Finally, if either the **Welcome**
or **Contract Letter** was selected to be generated, Trio will create a new letter as appropriate with the subscriber information it just provisioned.

Upon the successful provisioning and invoicing of an order, the *Uber Wizard* window will be closed, and the *Orders* window will be updated to show that the order has been invoiced. The order will be modified to show the invoice number that was created or modified to include the charges from the order. This invoice can be viewed by clicking on the **View Invoice** button in the *Orders* window.
Chapter 11

Invoice Run

This chapter provides an overview of the invoice run process.

This chapter contains the following sections:

- **Overview**: Describes the process of undertaking an invoice run.

**Overview**

Running invoices in Trio is the process whereby Trio takes all invoices marked with a status of “On Air” for a specific invoice date, processes each, prepares them for printing or sending to the user by changing their status to “Pending”, and creates a new “On Air” invoice for each customer’s next invoice date.

Trio can automatically notify administrative users when it is time to begin the invoice run process. To receive this notification, the **Invoice Reminder** service must be started by an administrator. (Figure 11.1)

![Trio Welcome window](image)

**Figure 11.1** – Trio Welcome window

With the **Invoice Reminder** service active, Trio will regularly check whether an existing invoice date has arrived. When an invoice date arrives, Trio will display a notification for all administrative users that it is time to begin the invoice run process.

To begin an invoice run, the **Billing**→**Invoicing**→**Run Invoices Now** menu option of Trio must be clicked. This will display the **Run Invoices Now** window. (Figure 11.2)
To begin a manual invoice run, an existing invoice date must be selected. Trio will automatically enter the first available invoice date. Clicking the OK button will begin the invoice run process.

The first step Trio will take is to wait for any air call crunching procedures to finish. When Trio receives confirmation from the database that any such procedures are complete, it will begin the invoice run process.

Trio can be configured to require that the Customer Preview feature be run before the invoice run. This configuration is described in the Invoicing section of Chapter 9 – Options. If configured, the Customer Preview window will be shown. (Figure 11.3) The Customer Preview window is described in the Customer Preview section of Chapter 21 – Billing.

The invoice run can then be continued by clicking the Yes button.

After the Customer Preview window is shown (or immediately after the Run Invoice Now window otherwise), the Invoice Cycle Summary window is shown. (Figure 11.4)
This window summarizes what invoices will be run during this invoice run. A message can also be created or changed that will appear on each invoice. This message can be modified at other times in the Company window of Trio.

Clicking the Run Invoices Now button will begin the processing of all On Air invoices for the selected Invoice Date. This process will carry out four primary tasks for each invoice in the run.

- Add line items to the invoice for all air call usage which has occurred since the customer’s previous invoice.
- Recalculate invoice totals as necessary.
- Change the invoice’s status to Pending.
- Create a new On Air invoice for the customer which covers the customer’s next billing period.

The Invoice Cycle Summary window will show the progress of the invoice run as it modifies each invoice. Once the invoice run is complete, it will display an invoice batch summary of the customer, invoice number, and total of each invoice included in the invoice run (Figure 11.5).
### Batch Complete

#### Batch Summary

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Name</th>
<th>Invoice Date</th>
<th>Invoice Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Customer 1</td>
<td>2020-10-21</td>
<td>207.20</td>
</tr>
<tr>
<td>002</td>
<td>Customer 2</td>
<td>2020-10-21</td>
<td>292.20</td>
</tr>
<tr>
<td>003</td>
<td>Customer 3</td>
<td>2020-10-21</td>
<td>550.64</td>
</tr>
<tr>
<td>004</td>
<td>Customer 4</td>
<td>2020-10-21</td>
<td>715.57</td>
</tr>
<tr>
<td>005</td>
<td>Customer 5</td>
<td>2020-10-21</td>
<td>120.26</td>
</tr>
</tbody>
</table>

| All Customers | Batch Total | 1563.51       |

**Figure 11.5 – Invoice Cycle Summary Batch Complete window**
Chapter 12  Radio Network Billing (RNETBILL)

This chapter provides an overview of Radio Network Billing (RNetBill) and the associated Trio modules.

This chapter contains the following sections:

- **Overview**: Describes RNetBill and its relation to Trio.
- **System**: Describes the System module.
- **Reserve Radio IDs**: Describes the Reserve Radio IDs module.
- **Reserve Talkgroup IDs**: Describes the Reserve Talkgroup IDs module.
- **Add Memos**: Describes the Add Memos module.
- **RFSSs**: Describes the RFSSs module.
- **Sites**: Describes the Sites module.
- **Clusters**: Describes the Site Cluster module.
- **DIDs**: Describes the DIDs module.
- **Radios**: Describes the Radios module.
- **Unit User**: Describes the Unit User module.
- **Services**: Describes the Services module.
- **Rate Plans**: Describes the Rate Plans module.
- **Talkgroups**: Describes the Talkgroups module.
- **Regions**: Describes the Regions module.

**Overview**

The RNetBill modules are used to create and manage any system that can have airtime usage archived by GenGET or GenWatch3. This includes but is not limited to systems like ASTRO. Using the RNetBill modules to manage a system coupled with the appropriate GenGET or GenWatch3 installation will allow Trio to bill for airtime usage on that system. The RNetBill modules manage a system’s specific entities such as Systems, RFSSs, Sites, Talkgroups, Radios, Services, Rate Plans, etc. These different entities are used throughout the rest of Trio. The following sections briefly describe each RNetBill module and its purpose.
The **System** module (Figure 12.1) is used to manage RNetBill systems as it pertains to Trio. System Billing Information such as **Call Elimination, Call Time Ranges**, etc. is managed with this module. **Radio** and **Talkgroup ID** ranges for a specific system can also be reserved here for specific RNetBill customers.

![System Module - Technical Tab](image)

**Figure 12.1 – System Module – Technical Tab**

An * denotes required fields.

- **System ID** is the primary system Identification. This field allows 3-4 hexadecimal characters (0-9, A-F).
- **Alias** is the user-friendly name for the system allowing 1-50 characters.
- **Site Map Location** is a text field that allows the user to Browse… and select the location of picture/graphic/map of the location of RNetBill sites.
- **Uses I7/I8 Notation** is a checkbox that formats ID’s in a way to be compatible with older Astro Systems.
- **Reserve IDs** see **Reserve IDs** section below.
- **Reserve Talkgroup IDs** see **Reserve Talkgroup IDs** section below.
- **Re-Crunch** is a button that will find any information marked as **twilight** from the crunching process (meaning the entity could not be billed and an alert was generated) and will mark it for re-crunching. For more information on Crunching see **Back Office Descriptions - Crunching** in **Appendix A**.
- **Add Memos** see **Add Memos** section below.

The **More Info** tab (Figure 12.2) is the RNetBill **Subscriber Properties** tab. This allows custom properties to be created for each RNetBill system. Once custom
properties are created, they will appear on each unit user associated with the RNetBill system. For more information on **Subscriber Custom Properties** see the *Unit User* section in *Chapter 12 – Radio Network Billing (RNETBILL).*

![Image](image_url)

**Figure 12.2 – System Module – More Info Tab**

- **Name** is a text field that allows the user to define custom subscriber properties. Once a new subscriber custom property is saved, it will appear on every subscriber that is part of the selected RNetBill system. This field allows up to 50 characters.

- **Clear** is a button that will remove entries for the selected custom properties on all subscribers that have the selected custom property.

The *System Billing* tab (Figure 12.3) manages the RNetBill system usage billing information. This tab allows the user to set up how usage is billed on the selected system. If features of the *System Billing* tab are desired, please contact Genesis Support.
Figure 12.3 – System Module – System Billing Tab

- **GL Account** is a combo box that allows the user to specify the default account used for usage billing.

- **Call Elimination** includes a number box that specifies the cutoff time in seconds for a call under which a customer will not be billed.

- **Call Time Ranges** allow different rounding figures to be used depending on the length of a call.

- **Dialed Call Elimination** includes a number box that specifies the number of digits an interconnect call phone number must be more than to be billed. There are exception numbers that can be added regardless of the value in the number box.

*New System Wizard* tab is wizard that takes the user through a step by step process of creating a new RNetBill system. For more information on the individual fields of the wizard, see the corresponding fields above.
Reserve Radio IDs

The Reserve Radio IDs module (Figure 12.4) manages how Radio IDs are reserved for customers within Trio. It is accessed by clicking the Reserve IDs button in the Technical tab of the Systems module. This module allows the user to reserve a range of Radio IDs for a specific customer. Reserved IDs can then be used in the Order process for the customer they are reserved for. In order to make changes to the Reserved IDs module, click Edit on the System form. Then click the Reserve IDs button.

Figure 12.4 – Reserve Radio IDs Module

- **Available ID Range(s)** is the grid on the left side of the Reserve Radio IDs window and is used to show the user what IDs are available to reserve for a customer.

- **Assigned ID Range(s)** is the grid on the right-hand side of the Reserve Radio IDs window and is used to show the user what IDs are currently reserved for the selected customer.

- **System ID** is automatically filled in with the system that the Reserve Radio IDs window was opened from.

- **Customer** is a dropdown menu that is populated with any customer available in Trio. Selecting a customer will allow the user to reserve Radio IDs for that customer.

- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected customer.
- **From** is a text field that is available when the **Add** option is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected customer. This number must be greater than 0, and less than or equal to the value in the **To** field.

- **To** is a text field that is available when **Add** option is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected customer. This number must be less than 14000000, and greater than or equal to the value in the **From** field.

- Clicking the **Add Range** button after entering valid values in the **From** and **To** fields will reserve the range for the selected customer.

- **Remove** is an option that will provide the necessary field for removing either a single ID, or a range of IDs that have already been reserved for the selected customer.

  - **Remove Single ID** is a button and associated text field that will remove a single ID from the assigned ID Range(s). If an ID is entered into the text box, and **Remove Single ID** is clicked, then the ID will be removed from the **Assigned ID Range(s)**. If the ID that was entered is not a part of the **Assigned ID Range(s)**, then the user will be informed that there was no ID to remove.

  - **Remove Range** is a button that will remove the entire range that is selected in the **Assigned ID Range(s)** grid on the right.

- **Import From** is an option that will provide the necessary field for importing reserved IDs from another RNetBill System to the current System.

  - **System** is a dropdown Menu that is populated with any other RNetBill System other than the current system that is being edited. If the user selects another RNetBill system and clicks **Import IDs**, any **Reserved IDs** for the selected customer will be imported and reserved for selected customer under the system that the **Reserve Radio IDs** form was opened from.

- **Finish** is a button that will close the form.
**Reserve Talkgroup IDs**

The *Reserve Talkgroup IDs* module (Figure 12.5) manages how *Talkgroup IDs* are reserved for customers within Trio. It is accessed by clicking the Reserve Talkgroup IDs button on the Technical tab of the Systems module. This module allows the user to reserve a range of *Talkgroup IDs* for a specific customer. In order to make changes to the *Reserved Talkgroup IDs* module, click *Edit* on the System form. Then Click the *Reserve Talkgroup IDs* button.

![Reserve Talkgroup IDs Module](image)

**Figure 12.5 – Reserve Talkgroup IDs Module**

- **Available ID Range(s)** is the grid on the left side of the *Reserve Talkgroup IDs* window and is used to show the user what *Talkgroup IDs* are available to reserve for a customer.

- **Assigned ID Range(s)** is the grid on the right-hand side of the *Reserve Talkgroup IDs* window and is used to show the user what *Talkgroup IDs* are currently reserved for the selected customer.

- **System ID** is automatically filled in with the system that *Reserve Talkgroup IDs* was opened from.

- **Customer** is a dropdown menu that is populated with any customer available in Trio. Selecting a customer will allow the user to reserve *Talkgroup IDs* for that customer.

- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected customer.
From* is a text field that is available when Add is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected customer. This number must be greater than 0, and less than or equal to the value in the To field.

To* is a text field that is available when Add is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected customer. This number must be less than 14000000, and greater than or equal to the value in the From field.

Clicking the Add Range button after entering valid values in the From and To fields will reserve the range for the selected customer.

Remove is an option that will provide the necessary field for removing either a single ID, or a Range of IDs that have already been reserved for the selected customer.

Remove Single ID is a button and associated text field that will remove a single ID from the assigned ID Range(s). If an ID is entered into the text box, and Remove Single ID is clicked, then the ID will be removed from the Assigned ID Range(s). If the ID that was entered is not a part of the Assigned ID Range(s), then the user will be informed that there was no ID to remove.

Remove Range is a button that will remove the entire Range that is selected in the Assigned ID Range(s) grid on the right.

Import From is an option that will provide the necessary field for importing reserved IDs from another RNetBill System to the current System.

System is a dropdown Menu that is populated with any other RNetBill System other than the current one that is being edited. If the user selects another RNetBill system and clicks Import IDs, any Reserved Talkgroup IDs for the selected customer will be imported and reserved for the selected customer under the system that the Reserve Radio IDs form was opened from.

Finish is a button that will close the form.
**Add Memos**

The *Add Memos* module (Figure 12.6) is a simple memo creation window that can be used to create memos for the selected RNetBill system. It is accessed by clicking the *Add Memos* button on the Technical tab of the Systems module. Memos can be viewed via the *Memos* button on the *Toolbar*. When enabled, a sidebar is shown on the right side of the main Trio window. This window is populated with memos for the specific system.

![Add Memos Module](image)

**Figure 12.6 – Add Memos Module**

- **Reason** is a dropdown menu that allows the user to select from a list of reasons for the memo’s creation.
- **Memo** is a text field that allows the user to enter up to 500 characters.
- **OK** is a button that will post the Memo and Reason.
- **Cancel** is a button that will exit out of the memo window without posting.
**RFSSs**

Within an RNetBill system, RFSSs and Sites are in place to model the actual sites and RFSSs that are a part of the system. A RFSS is a collection of one or more sites. The RFSSs module (Figure 12.7) manages all the RFSSs within any RNetBill systems defined in the Systems module.

![Figure 12.7 – RFSSs Module](image)

An * denotes required fields.

- **System ID*** is a field that is automatically filled in with the ID of the system for the current record. In the wizard, it is a dropdown menu that is populated with any existing RNetBill Systems in Trio.

- **RFSS ID*** is a text field that is automatically filled in. In the wizard, it allows the user to specify the ID of the RFSS. This field allows numeric values between 1 and 64.

- **Alias** is a text box that allows the user to specify a user-friendly name that is associated with the RFSS. This field allows up to 50 characters.

*New RFSS Wizard* tab is wizard that takes the user through a step by step process of creating a new RNetBill RFSS. For more information on the individual fields of the wizard, see the corresponding fields above.
The *Sites* module (Figure 12.8) is used to manage the sites of any RNetBill systems defined in Trio. Each site is unique within its *System* and *RFSS*. A site image and site contacts can also be assigned using this module.

![Figure 12.8 – Sites Module – Technical Tab](image)

*Denotes required fields*

- **System ID** is a field automatically filled in. In the wizard, it is a dropdown menu that is populated with any RNetBill *System* available in Trio.

- **RFSS ID** is a field automatically filled in. In the wizard, it is a dropdown that is populated with any *RFSS* associated with the selected system.

- **Site ID** is a text field automatically filled in. In the wizard, it is a field that allows the user to specify the ID for the site. This field allows 1-4 numeric values.

- **Alias** is a text field that allows the user to specify a user-friendly name for the site. This field allows up to 50 characters.

- **Qty of Channels** is a field that lets the user specify how many channels are on the system. The maximum number is 128.

- **Latitude** is a field that lets the user select the latitude location of the site.

- **Longitude** is a field that lets the user select the longitude location of the site.
The *Site Image* tab (Figure 12.9) is used to associate images with RNetBill sites.

![Figure 12.9 – Sites Module – Site Image Tab](image)

- **Browse** is a button that allows the user to select an image associated with the site. In the wizard, it is called Change.
- **Clear** is a button that clears the image currently loaded in the Site Image Tab.

The *Site Contacts* tab (Figure 12.10) is used to add contact information for the selected site. The wizard does not put information in these fields.

![Figure 12.10 – Sites Module – Site Contacts Tab](image)

- **Contact Name** is a text field that allows the user to enter a contact name to associate with the site. This field allows 1-50 characters.
- **Phone** is a text field that allows the user to enter a number for the contact name. This field allows 0-14 numeric characters including “,” and “-”.

- **Add** is a button that will add the **Contact Name** and **Phone Number** to the RNetBill Site contacts list.

- **Edit Contact** is a button that allows the user to edit the selected contact from the grid.

- **Remove** is a button that removes the selected contact from the list of contacts.

The **Channel Information** tab (Figure 12.11) under **Sites, Technical** tab is used to store and manage information about the site’s Channel. The number of rows is equal to the Qty of Channels under **Sites. Sites** must be in edit mode to modify.

Reducing the Qty of Channels does not delete any data. It only reduces the number shown.

The maximum Qty of Channels is 128.

![Channel Information](image)

**Figure 12.11 – Site Module – View Channel Information**

- **Frequency** is a text field that allows the user to enter the Frequency for a Channel on the site (8 numeric characters).

- **Channel Type** is a dropdown that allows the user to select a channel type (*Control Only, Control & Voice, Voice Only, Data*).

- **Secure** is a dropdown that allows the user to select if the channel is secure or not.
The *Track Outages* tab (Figure 12.12) manages outages associated with the site.

![Image of Track Outages tab]

**Figure 12.12 – Site Module – Track Outages**

- **Date Occurred** is a date selector that allows the user to select the date that an Outage occurred.
- **Time** is a time selection field that allows the user to select the time of day that the outage occurred.
- **Service Technician** is a text field that allows the user to enter the name of the service technician. This field allows up to 100 characters.
- **Comments** is a text field that is used to enter comments and information describing the outage. This field allows up to 1000 characters.
- **Root Cause** is a dropdown that allows the user to select from a list of root causes.
- **Equipment Origin** is a dropdown that allows the user to select from a list of equipment to select as the origin.
- **Length of Outage** is a field that allows the user to select how long the outage lasted.
- **Resolved** is a checkbox that allows the user to select if the Outage was resolved as an issue. If this checkbox is selected, the following fields will be enabled.
- **Date Resolved** is a date parts field that allows the user to specify when the resolution took place.
- **Resolution** is a text field that allows the user to enter comments describing the resolution.
The **New Site Wizard** tab is a wizard that takes the user through a step by step process of creating a new RNetBill Site. For more information on the individual fields of the wizard, see the corresponding fields above.

**Clusters**

The **Site Clusters** module (Figure 12.13) is used to define custom groups of sites within a system. Each radio ID within Trio can be assigned to a Site Cluster. If Trio is being used to bill customers for their airtime usage, **Site Clusters** can be used to bill each radio at differing rates dependent upon the site the call occurred on. If the radio has usage on a site included in its **Site Cluster**, it will be billed at the rate defined in the **Variable Rate** field of the corresponding Service on its Rate Plan. Any usage by the radio on a site not included in its **Site Cluster** will cause the radio to be billed at the rate defined in the **Roaming Rate** field of the corresponding Service on its Rate Plan.

![Site Clusters Module](image)

*Figure 12.13 – Site Clusters Module*

- **System ID** is a non-modifiable text field that displays the System that the Site Cluster was created for. During the creating of a Site Cluster via the **New Site Cluster Wizard** tab this field is a dropdown menu containing all the available systems.

- **Site Cluster ID** is a non-modifiable text field that displays the Site Cluster. During creation, the wizard allows the user to specify the ID for the Cluster. This field allows numeric values in the range of 1 to 2,147,483,647.

- **Alias** is a text field that allows the user to specify a user-friendly name for the cluster. This field allows up to 50 characters.

- **Available Sites** is a grid that lists all the sites available on the selected system. Only sites that are not already on the Included Sites grid will be listed here.

- **Included Sites** is a grid that lists all the sites on the selected system that are included in the site cluster.
• **(Right Arrow)** is a button that moves the selected site from the Available Sites list and moves it to the Included Sites list

• **(Left Arrow)** is a button that moves the selected site from the Included Sites list and moves it to the Available Sites list
  
  Once the form is saved (through the creation of a cluster, or the editing of an existing cluster, the sites listed in the Included Sites list will be a part of the Site Cluster.

The *New Site Cluster Wizard* tab is a wizard that takes the user through a step by step process of creating a new RNetBill Site Cluster. For more information on the individual fields of the wizard, see the corresponding fields above.

**DIDs**

The *Direct Inward Dial* (DID) module (Figure 12.14) is used to define and manage the available DID numbers for a system. These numbers are simply the interconnect phone numbers defined on the system which are used to route phone calls to the respective radio ID within the system. DIDs defined in this module can then be assigned to radio IDs as necessary.

![DIDs Module – DID Ranges Tab](image)

**Figure 12.14** – DIDs Module – DID Ranges Tab

• **System ID** is a dropdown menu that is populated with any available RNetBill systems. When not in the New DID Wizard, this dropdown is not editable and shows the system ID for the selected range of DIDs.

• **From** is a text field that holds the beginning value of a range of DIDs.

• **To** is a text field that holds the ending value of a range of DIDs.

• **Delete Range** will delete the selected range from the record.
The *DID Maintenance* tab (Figure 12.15) provides the tools for remove DIDs, or ranges of DIDs.

**Figure 12.15 – DIDs Module – DID Maintenance Tab**

- **System ID** is a dropdown menu that is populated with any TETRA system available in Trio.
- **Delete all DIDs in the range:** is the set of text boxes that allow the user to specify the range of DIDs to remove. The range of DIDs entered cannot contain any assigned DIDs.
- **Delete** is a button that when pressed will remove the range of DIDs entered in the fields above it for the selected system.

The *New DID Wizard* tab is a wizard that takes the user through a step by step process of creating a new range of DIDs for an RNetBill system. For more information on the individual fields of the wizard, see the corresponding fields above.
**Radios**

The physical radios assigned to RNetBill radio IDs within Trio are managed using the *Radios* module (Figure 12.16). For RNetBill systems, radio IDs can be created directly in the *Unit User* module or through the Order/Invoicing process. Within the RNetBill modules, each serial number has exactly one Radio ID assigned to it. The radio ID information can be viewed in the *Unit User* module. From within the *Radios* module, a user can manage the **Model Number**, **Dealer**, **Salesperson**, **SIC Code**, **Unit [Radio] Type**, and other hardware specific information for each radio.

![Figure 12.16 – IDs Module](image)

An * denotes required fields.

- **Model Number*** is a dropdown that is populated with any RNetBill Radio Inventory products available in Trio. For more information on Inventory Products see *Inventory Products* section in *Chapter 8 – Inventory*.

- **Serial Number*** is a text field that displays the serial number associated with the RNetBill Radio. This field cannot be modified.
• **Dealer** is a dropdown that allows the user to select a dealer for the radio.
  
  o For more information on Dealers see the *Vendor* section in *Chapter 18 – Commissioning*.

• **Salesperson** is a dropdown that allows the user to select salesperson for the radio. The salesperson dropdown will be populated with salespersons for the selected **Dealer**.
  
  o For more information on Salesperson see the *Salesperson* section in *Chapter 19 – Commissioning*.

• **SIC Code** is a dropdown that is populated with any SIC (Standard Industrial Classification) Codes that are available in Trio. Custom SIC Codes can be created.
  
  o For more information on SIC Codes see the *SIC Codes* section of *Chapter 19 – Preferences*.

• **Unit Type** is a dropdown that is populated with different types of devices.

• **Comments** is a text box that allows the user to save information about the radio. This field allows up to 500 characters.

• **Technical Info** see *Technical Info* below

• **View Personalities** is a button that opens the Unit User associated with the radio. Must be in view mode.
  
  o See the *Unit User* section below for more information on Unit Users.

The *Technical Information* window (Figure 12.17) displays important technical information about the radio in a simple and easy to read form.

![Technical Information Window](image)

*Figure 12.17 – Technical Information Window*
The Unit Users module (Figure 12.18) manages billing and other information for all RNetBill Radio IDs. Each radio (serial number) which exists in the Radios module has a corresponding Unit User (radio ID) in this module. These serial numbers/radio IDs are added to the RNetBill modules via the Order/Invoicing process (see Chapter 10 – Order/Invoicing Process) or new Unit Users may be created directly within the Unit User module. Once created, the ID and its information can be managed from this module.

It is possible to change the Customer ID of a Unit User without deleting and re-adding the Unit User. To change the Customer ID:

1. Disable billing for that Unit User by clicking the **Disable Billing** button and entering a churn reason for disabling the unit.
2. Edit the Unit User and choose the correct, new customer from the **Customer ID** dropdown. Update the Unit User.
3. Enable billing for the Unit User by clicking the **Enable Billing** button and entering a churn reason.
An * denotes required fields.

*Italics* indicate when fields are editable.

- **System ID** is a dropdown menu that is populated with any RNetBill Systems that are available. *Add*
- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown menu that is populated with any customer ID’s available in Trio. *Add*
- **Radio ID** is a text field that holds the ID of the radio associated with the Unit User. This field must be a numeric value between 1 and 14,000,000. If the user attempts to use a Radio ID that is not reserved for the selected system, a confirmation will be presented. *Add*
- **Alias** is a text field used to give the Unit User a user-friendly name. This text field allows up to 50 characters. *Add, Edit*
- **Model Number** is a dropdown menu that is populated with any RNetBill Inventory Products. *Add*
- **Serial Number** is a text field that is used to store the serial number associated with the radio being entered. This field allows 1-30 characters. *Add, Edit*
- **Site Cluster** is a dropdown menu populated with any site cluster associated with the selected system that allows the user to pick which Site Cluster the Unit User is associated with. *Add, Edit*
  - For more information on Site Clusters see the *Clusters* section in this chapter.
- **DID** is a dropdown that is populated with DIDs for the selected system. *Add, Edit*
- **Enable Usage** is an option that allows the user to enable or disable the usage of the Unit User. *Add, Edit*
- **Disable/Enable Billing** is a button that allows the user to enable or disable billing for unit users. Disabling or Enabling Billing will prompt the user for an activation or deactivation Churn Code. *View*
- **Technical Info** see *Technical Info* below.
- **Churn History** see *Churn History* below.
The Billing Information tab (Figure 12.19) manages the billing information for the Unit User.

![Image of the Billing Information tab](image.png)

**Figure 12.19 – Unit Users Module – Billing Information Tab**

- **Rate Plan** is a dropdown menu that is populated with any RNetBill Rate Plans available in Trio. For more information on Rate Plans and their interaction with Orders and Invoicing, see *Quote & Order Windows* in Chapter 4 – Quotes & Orders. Add.

- **Revert To** is a dropdown menu that is populated with any RNetBill Rate Plan other than the Rate Plan that the Unit User is currently associated with. **Revert to** allows the user to change from one rate plan to another. Once a rate plan is selected from this menu, a **Revert Now** checkbox will become available allowing the user to revert to the selected rate plan upon saving. If the user does not want to revert immediately, they can select a date to revert on. *Add, Edit*

- **Revert Now** is an option that allows the user to change from the selected **Rate Plan** to the selected **Revert To** rate plan when the Unit User is updated. *Edit*

- **Apply Revert to Date** is a date selector that allows the user to specify a date on which to change from the selected **Rate Plan** to the selected **Revert To** rate plan. This field will only be editable when a rate plan is selected from the **Revert To** menu. *Add, Edit*

- **Long Distance Rate** is a text field that allows the user to specify the long-distance rate for the unit user. This field allows monetary values. *Add, Edit*

- **Use Customer Contract End Date** is a checkbox that, when unchecked, allows the user to specify a contract end date for that specific unit user. If set, this date will override the unit user’s customer’s contract end date.
• **Combine Private Call and Dispatch minutes** is an option that allows the user to choose to keep Private Call, and Dispatch minutes distinct, or to combine (pool) them. If pooled minutes feature is desired, contact Genesis support. *Add, Edit*

• **Rate Plan Locked** is a checkbox that when checked does not allow services to be added or removed from the rate plan assigned to the unit user. If the checkbox is not selected, then services can be added or removed from the rate plan assigned to the unit user. *Add, Edit*

• **Lock Rates** is a checkbox that when checked does not allow the rates on included services to be edited for the unit user. If the checkbox is not selected, then services can be added or removed from the rate plan assigned to the unit user. *Add, Edit*

• **No Air No Fix** is a checkbox that manages if the rate plan will charge if no air time occurs. If features of the No Air No Fix are desired, please contact Genesis Support. *Add, Edit*

The *Properties* tab (Figure 12.20) manages the custom properties for the unit user. Any Custom properties that have been created for the selected system will appear in this tab.

![Figure 12.20 – Unit Users Module – Properties Tab](image)

- **Property** is a column in the grid for the name of any custom properties that have been created in the systems module.
  - For more information on Custom Properties see the *More Info* tab in the *System* section of *Chapter 12 – Radio Network Billing (RNETBILL)*.

- **Value** is a text field that allows the user to enter up to 50 characters for the selected custom property. *Add, Edit*
The *Services* tab (Figure 12.21) manages the services assigned to the Rate Plan that the Unit User is on.

![Figure 12.21 – Unit Users Module – Services Tab](image)

- **Available Services** is a grid that is populated with any RNetBill services that are not already on the rate plan assigned to the unit user.
- **Services on Rate Plan** is a grid that is populated with any services included on the rate plan assigned to the unit user. *Add, Edit*
- “<” or “>” allows the user to add or remove services in addition to the ones included in the rate Plan. “Rate Plan Locked” under the Billing Information tab must be unchecked. *Add, Edit.*

The *Talkgroup* tab (Figure 12.22) manages talkgroups that the unit user is in.

![Figure 12.22 – Unit Users Module – Talkgroups Tab](image)
• **Talkgroup ID** is a text field that allows the user to enter talkgroup IDs and assign them to the unit user. *Add, Edit*
  
  o In order to add a talkgroup, a valid talkgroup ID that is available in the selected system that the unit user is a part of must be entered.
  
  o For more information on Talkgroups see the *Talkgroup* section below.

• **Assigned Talkgroups** is a grid that lists all talkgroups that the selected unit user is part of.

The *Technical Information* window (Figure 12.23) shown when clicking the Technical Information button on the Personality tab displays important technical information about the radio in a simple and easy to read form.

![Technical Information Window](image)

**Figure 12.23 – Technical Information Window**

The *Churn History* window (Figure 12.24) shown when clicking the *Churn History* button on the Personality tab provides an easy way to view the churn events for the Unit User.

![Churn History Window](image)

**Figure 12.24 – Unit User Module – Churn History**
A Service can be equated to a feature on a radio (Group calls, Private Calls, SMS, Interconnect, etc.). Each service deals with a single RNetBill related feature. The Services module (Figure 12.25) is used to set different properties of each service dependent upon the service’s type (Group, Interconnect, Data, Private, etc.). Services defined in this module can be grouped into Rate Plans using the RNetBill Rate Plans module.

**Figure 12.25 – Services Module**

*Denotes required fields

- **Service Template ID** is a text field that is used to specify the Identification of the service. This field allows 1-20 characters (other than "'"&"). *Add*
- **Service Code** is a dropdown menu that is populated with all the service codes available for RNetBill. *Add*
- **Invoice Description** is a text field that allows the user to give the service a user-friendly name. This field allows 1-50 characters. *Add, Edit*
- **Fixed Charge** is a text field that will be applied to each billing cycle regardless of usage. *Add, Edit*
- **Variable Charge** is a text field that will be applied to each minute of usage. This field allows monetary values. *Add, Edit*
- **Variable Charge Cap** is a text field that allows the user to set a limit to the amount that can be applied to the Variable Charge for a unit user with this service. *Add, Edit*
- **Overages Charge** is a text field that will be applied to minutes of usage that is outside of the Free Minutes range. This field allows monetary values. *Add, Edit*
- **Overages Charge Cap** is a text field that allows the user to set a limit to the amount of **Overages Charges** that can be applied to a unit user with this service. *Add, Edit*

- **Roam Rate** is a text field that will be applied to minutes of usage that are made from sites not in the Site Clusters that the unit user it associated with. This field allows monetary values. *Add, Edit*

- **Roam rate Cap** is a text field that allows the user to set a limit to the amount of Roaming Charges that can be applied to a unit user with this service. *Add, Edit*

- **Unit of Measure** is set to minutes and cannot currently be modified.

- **Free Minutes** is a text field that allows the user to specify how many free minutes (variable minutes) are available per billing cycle. This field is numeric only field. *Add, Edit*

- **Free Calls** is a text field that allows the user to specify how many free calls are available per billing cycle. This field is a numeric only field. *Add, Edit*

- **Pooled Minutes** is a checkbox that allows the user to specify if the user wants to combine private call minutes and group dispatch minutes. If pooled minutes feature is desired, contact Genesis support. *Add, Edit*

- **GL Account** is a dropdown that is populated with any GL Accounts pertinent to services in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the service. *Add, Edit*
  
  - For more information on GL Accounts see the *Chart of Accounts* section in Chapter 17 – Financials.

- **Airtime GL Account** is a dropdown that is populated with any GL Accounts pertinent to services in Trio. The dropdown allows the user to pick which General Ledger account should be assigned to the service. *Add, Edit*

- **Commissionable** is an option that allows the user to select if they want the service to be commissionable or not. *Add, Edit*
  
  - For more information on Commissioning see Chapter 18 – Commissioning.

*New Service Template Wizard* tab is wizard that takes the user through a step by step process of creating a new RNetBill Service. For more information on the individual fields of the wizard, see the corresponding fields above.
**Rate Plans**

A Rate Plan is simply a group of Services. The RNetBill *Rate Plans* module (Figure 12.26) is used to manage these rate plans. Each Rate Plan contains the billing information for all included services. As radios are added into Trio to be billed, they are assigned a rate plan. That rate plan thus defines how Trio will bill the customer that the radio is assigned to.

![Rate Plans Module](image)

**Figure 12.26 – Rate Plans Module – Technical Tab**

Note that if there are radios which will revert to a rate plan that does not have both the Interconnect and DID services, and the rate plan is modified so that it does have both the Interconnect and DID services, an alert will appear while it is being updated listing all of the radios that will require DIDs to be reserved for the Revert To process.

An * denotes required fields.

- **Rate Plan ID** is a text field that allows the user to specify the identification of the rate plan. This field allows 1-20 characters. It can be entered only when the Rate Plan is first created.

- **Description** is a text field that enables the user to describe the rate plan and its use. This field allows 1-60 characters.

- **Long Distance Rate** is a text field that lets the user set the rate of making long distance communication. This field requires a monetary value.

- **Start Date** is a date selector that is used to specify the start day of the selected rate plan.

- **End Date** is a date selector that is used to specify the end day of the selected rate plan.
• **Revert To** is a dropdown that is used to specify a default rate plan that subscribers assigned to the rate plan being shown will change to. Reverting from one rate plan to another can be done through the unit user module.

• **Restrict to Rate Plan** is a checkbox that defines the default of whether a new unit user’s rate plan can have services added or subtracted.

• **Inactive** is a checkbox that indicates whether this rate plan can be chosen as an option in any place a rate plan can be selected.

The *Services* tab (Figure 12.27) manages the services that are applied to the rate plan.

![Rate Plans Module – Services Tab](image)

**Figure 12.27** – Rate Plans Module – Services Tab

• **Available Services** is a list of RNetBill services that are not on the selected rate plan, but available.

• **Services on Rate Plan** is a list of the RNetBill services that are included on the selected rate plan.

• **Properties** is a button that when clicked opens the *Service Properties* window (Figure 12.27b).
Figure 12.27b – Service Properties

The Service Properties window allows the various charges, free calls and minutes, and payment accounts for a service to be modified.

New Rate Plan Wizard tab is wizard that takes the user through a step by step process of creating a new RNetBill Rate Plan. For more information on the individual fields of the wizard, see the corresponding fields above.
Talkgroups

The Talkgroups module (Figure 12.28) is used to manage any talkgroups within existing RNetBill systems.

![Talkgroups Module](image)

**Figure 12.28 – Talkgroups Module**

- **System ID** is a text field that is populated with the talkgroup’s System ID. It cannot be modified once created. In the wizard it is a dropdown menu of all existing RNetBill Systems.

- **Talkgroup ID** is a text field that allows the user to specify the ID of the talkgroup. It cannot be modified once created. This field allows integer values between 1 and 13999999.

- **Alias** is a text field used to give the talkgroup a user-friendly name. This text field allows up to 50 characters.

- **Priority Monitor** is a checkbox that lets the user indicate whether this talkgroup is marked as priority monitor on the system itself.

- **Active?** Is a checkbox that lets the user mark if the talkgroup is active or not.

- **Fail Soft** is a checkbox that, for systems using the I7/T8 notation, allows you to specify the failsoft channel/frequency of the talkgroup.
The *Regions* module (Figure 12.29) can be used to manage regions for the RNetBill systems in Trio. IDs and Talkgroups can be reserved for a region. RNetBill customers can be assigned to a region. Any radio or talkgroup IDs associated with the customer must come from the reserved ranges for that customer’s region.

**Figure 12.29 – Regions Module – Region Information**

- **Region ID** is a text field that allows the user to specify the ID for the region. This field allows 1-10 characters. It cannot be modified once created.
- **Region Name** is a text field that allows the users to specify a user-friendly name for the region. This field allows 1-50 characters.
The *Region IDs/TGs* tab (Figure 12.30) manages how Radio IDs and Talkgroups are reserved for regions within Trio.

- **Reserve Radio IDs** is a button that opens the *Reserve Radio IDs* module (Figure 12.31).
- **Reserve Talkgroup IDs** is a button that opens the *Reserve Talkgroup IDs* module (Figure 12.32).
The *Reserve Radio IDs for Region* module (Figure 12.31) manages how Radio IDs are reserved for regions within Trio. The module allows the user to assign a range of **Radio IDs** to a specific region. In order to make changes to the Reserved IDs module, click **Edit** on the regions form, and then click the **Reserve Radio IDs** button.

**Figure 12.31** – Regions Module – Reserve Radio IDs for Region

- **Available ID Range(s)** is the grid on the left side of the *Reserve Radio IDs* form and is used to show the user what IDs are available to reserve for a region.

- **Assigned ID Range(s)** is the grid on the right-hand side of the *Reserve Radio IDs* form and is used to show the user what IDs are currently reserved for the selected region.

- **Region ID** is automatically filled in with the region that the module was opened from.

- **System ID** is a dropdown menu that is populated with all RNetBill systems.

- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected region.
  
  - **From** is a text field that is available when the **Add** option is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected region. This number must be greater than 0, and less than or equal to the value in the **To** field.
To* is a text field that is available when the Add option is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected region. This number must be less than 14000000, and greater than or equal to the value in the From field.

Clicking the Add Range button after entering valid values in the From and To fields will reserve the range for the selected region.

- **Remove** is an option that will provide the necessary field for removing either a single ID, or a Range of IDs that have already been reserved for the selected region.
  - **Remove Single ID** is a button and associated text field that will remove a single ID from the Assigned ID Range(s). If an ID is entered into the text box, and Remove Single ID is clicked, then the ID will be removed from the Assigned ID Range(s). If the ID that was entered is not a part of the Assigned ID Range(s), then the user will be informed that there was no ID to remove.
  - **Remove Range** is a button that will remove any selected range from the Assigned ID Range(s) grid on the right.

- **Import From** is an option that will provide the necessary field for importing reserved IDs from another RNetBill System to the current System.
  - **System** is a dropdown Menu that is populated with any other RNetBill System other than the current one that is being edited. If the user selects another RNetBill system and clicks Import IDs, any Reserved IDs for the selected region will be imported and reserved for the selected region under the system that Reserve IDs was opened from.

- **Finish** is a button that will close the form.
The Reserve Talkgroup IDs for Region module (Figure 12.32) manages how Talkgroup IDs are reserved for regions within Trio. The Reserve Talkgroup IDs module allows the user to assign a range of Talkgroup IDs to a specific region. In order to make changes to the Reserved Talkgroup IDs module, click Edit on the regions form, and then click the Reserve Talkgroup IDs button.

![Reserve Talkgroup IDs for Region](image)

**Figure 12.32 – Regions Module – Reserve Talkgroup IDs for Region**

- **Available ID Range(s)** is the grid on the left side of the Reserve Talkgroup IDs for Region form and is used to show the user what talkgroup IDs are available to reserve for a region.

- **Assigned ID Range(s)** is the grid on the right-hand side of the Reserve Talkgroup IDs for Region form and is used to show the user what talkgroup IDs are currently reserved for the selected region.

- **Region ID** is automatically filled in with the region that the module was opened from.

- **System ID** is a dropdown menu that is populated with all RNetBill systems.

- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected region.
  - **From** is a text field that is available when the Add option is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected region. This number must be greater than 0, and less than or equal to the value in the **To** field.
To* is a text field that is available when the Add option is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected region. This number must be less than 14000000, and greater than or equal to the value in the From field.

Clicking the Add Range button after entering valid values in the From and To fields will reserve the range for the selected region.

- **Remove** is an option that will provide the necessary field for removing either a single ID, or a Range of IDs that have already been reserved for the selected region.
  
  - **Remove Single ID** is a button and associated text field that will remove a single ID from the Assigned ID Range(s). If an ID is entered into the text box, and Remove Single ID is clicked, then the ID will be removed from the Assigned ID Range(s). If the ID that was entered is not a part of the Assigned ID Range(s), then the user will be informed that there was no ID to remove.
  
  - **Remove Range** is a button that will remove the entire Range that is selected from the Assigned ID Range(s) grid on the right.

- **Import From** is an option that will provide the necessary field for importing reserved IDs from another RNetBill System to the current System.
  
  - **System** is a dropdown Menu that is populated with any other RNetBill System other than the current one that is being edited. If the user selects another RNetBill system and clicks Import IDs, any Reserved Talkgroup IDs for the selected region will be imported and reserved for selected region under the system that Reserve IDs was opened from.

Finish is a button that will close the form.
Chapter 13  TETRA

This chapter provides an overview of the TETRA system type and its associated Trio modules.

This chapter contains the following sections:

- **Overview**: Describes the TETRA system type and its relation to Trio.
- **Tetra Systems**: Describes the Tetra Systems module.
- **Reserve Radio IDs**: Describes the Reserve Radio IDs module.
- **Reserve Talkgroup IDs**: Describes the Reserve Talkgroup IDs module.
- **Add Memos**: Describes the Add Memos module.
- **Tetra Zones**: Describes the Tetra Zones module.
- **Tetra Sites**: Describes the Tetra Sites module.
- **Tetra Site Clusters**: Describes the Tetra Site Clusters module.
- **Tetra DID**: Describes the Tetra DID module.
- **Tetra Radios**: Describes the Tetra Radios module.
- **Tetra Unit User**: Describes the Tetra Unit User module.
- **Tetra Services**: Describes the Tetra Services module.
- **Tetra Rate Plans**: Describes the Tetra Rate Plans module.
- **Tetra Talkgroups**: Describes the Tetra Talkgroups module.
- **Tetra Call Routes**: Describes the Tetra Call Routes module.
- **Tetra Home Zone Mapping**: Describes the Tetra Home Zone Mapping module.
- **Tetra Multigroup**: Describes the Tetra Multigroup module.
- **Tetra Radio User Capability Profile**: Describes the Tetra Radio User Capability Profile module.
- **Tetra Radio User Interconnect Profile**: Describes the Tetra Radio User Interconnect Profile module.
- **Tetra Status Set**: Describes the Tetra Status Set module.
- **Tetra Tg/Mg Capability Profile**: Describes the Tetra Tg/Mg Capability Profile module.
- **Tetra User Group**: Describes the Tetra User Group module.
- **Tetra Security Group**: Describes the Tetra Security Group module.
Overview

The TETRA system type modules are used to create and manage TETRA specific entities such as Systems, Zones, Sites, IDs, Unit Users, Capability Profiles, Services, Rate Plans, etc. These different entities are used throughout the rest of Trio. The following sections briefly describe each TETRA module and its purpose.

Tetra Systems

The Tetra Systems module (Figure 13.1) is used to manage TETRA systems as it pertains to Trio. System Billing Information such as Call Elimination, Call Time Ranges, etc. is managed with this module. Radio and talkgroup ID ranges for a specific system can also be reserved here for specific TETRA customers. The Dimetra User Configuration Server (UCS) configuration data is also managed from within this module.

Technical tab (Figure 13.1) is the main Tetra system tab containing technical information about Tetra systems.

![Tetra Systems Module Technical Tab](image)

Figure 13.1 – Tetra Systems Module – Technical Tab

An * denotes required fields.

- **Company ID** is automatically filled in with the company Trio is configured for.
- **Subsidiary ID** is a dropdown that lets the user indicate which subsidiary owns the System.
- **System ID** is the primary system Identification. This field allows 8 numeric characters. It cannot be modified once created.
- **Alias** is the user-friendly name for the system allowing 1-50 characters.
• **Site Map Location** is a text field that allows the user to **Browse**... and select the location of picture/graphic/map of the location of Tetra sites.

• **Location** is a text field that allows the user to enter in information about the System location. This field allows up to 500 characters.

• **Reserve IDs** see **Reserve IDs** section below.

• **Reserve Talkgroup IDs** see **Reserve Talkgroup IDs** section below.

• **Add Memos** see **Add Memos** section below.

The first **More Info** tab (Figure 13.2) is used for the **Tetra Subscriber Properties**. This allows custom properties to be created for each Tetra system. Once custom properties are created, they will appear on each unit user associated with the Tetra system. For more information on **Subscriber Custom Properties** see the **Unit User** section in **Chapter 13 – Tetra**.

![Figure 13.2 – Tetra Systems Module – More Info 1 Tab](image)

• **Name** is a text field that allows the user to define custom subscriber properties. Once a new subscriber custom property is saved, it will appear on every subscriber that is part of the selected Tetra system. This field allows up to 50 characters.

• **Clear** is a button that will remove entries for the selected custom properties on all subscribers that have the selected custom property.
The second *More Info* tab (Figure 13.3) is used for additional information about the system. This tab allows **Comments**, **Descriptions**, and **Origins** to be saved.

**Figure 13.3** – Tetra Systems Module – More Info 2 Tab

- **Comments** is a text field that allows comments to be created and stored for the Tetra system. This field allows up to 500 characters.

- **Site Description** is a text field that allows site descriptions to be created and stored for the Tetra system. This field allows up to 500 characters.

- **Origin** is a text field that allows origin notes to be created and stored for the Tetra system. This field allows up to 500 characters.
The *System Billing* tab (Figure 13.4) has the Tetra system billing information. This tab allows the user to set up how usage is billed on the selected system. If features of the System billing tab are desired, please contact Genesis Support.

![Image of Tetra Systems Module – System Billing Tab](image)

**Figure 13.4 – Tetra Systems Module – System Billing Tab**

- **GL Account** is a combo box that allows the user to specify the default account used for usage billing.

- **Call Elimination** includes a number box that specifies the cutoff time in seconds for a call under which a customer will not be billed.

- **Call Time Ranges** allow different rounding figures to be used depending on the length of a call.

- **Dialed Call Elimination** includes a number box that specifies the number of digits an interconnect call phone number must be more than to be billed. There are exception numbers that can be added regardless of the value in the number box.

The *New System Wizard* tab is a wizard that takes the user through a step by step process of creating a new TETRA system. For more information on the individual fields of the wizard, see the corresponding fields above.
Reserve IDs

The *Reserve Radio IDs* module (Figure 13.5) manages how Radio IDs are reserved for customers within Trio. This module is accessed via the *Reserve IDs* button in the Tetra System *Technical* tab (See Figure 13.1). The *Reserve Radio IDs* module allows the user to assign a range of Radio IDs to a specific customer. Reserved IDs can then be used in the Order process for the customer they are reserved for. In order to make changes to the *Reserve Radio IDs* module, click *Edit* on the *Technical* tab, and then click the *Reserve IDs* button.

![Figure 13.5 – Reserve Radio IDs Module](image)

- **Available ID Range(s)** is the grid on the left side of the *Reserve Radio IDs* form and is used to show the user what IDs are available to reserve for a customer.
- **Assigned ID Range(s)** is the grid on the right-hand side of the *Reserve Radio IDs* form and is used to show the user what IDs are currently reserved for the selected customer.
- **System ID** is automatically filled in with the system that *Reserve Radio IDs* was opened from.
- **Customer** is a dropdown menu that is populated with any customers available in Trio. Selecting a customer will allow the user to reserve Radio IDs for that customer.
- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected customer.
o **From** is a text field that is available when the **Add** option is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected customer. This number must be greater than 0, and less than or equal to the value in the **To** field.

o **To** is a text field that is available when the **Add** option is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected customer. This number must be less than 14000000, and greater than or equal to the value in the **From** field.

o Clicking the **Add Range** button after entering valid values in the **From** and **To** fields will reserve the range for the selected customer.

- **Remove** is an option that will provide the necessary field for removing either a single ID, or a Range of IDs that have already been reserved for the selected customer.

  o **Remove Single ID** is a button and associated text field that will remove a single ID from the **Assigned ID Range(s)**. If an ID is entered into the text box, and **Remove Single ID** is clicked, then the ID will be removed from the **Assigned ID Range(s)**. If the ID that was entered is not a part of the **Assigned ID Range(s)**, then the user will be informed that there was no ID to remove.

  o **Remove Range** is a button that will remove any selected range of IDs from the **Assigned ID Range(s)** grid.

- **Import From** is an option that will provide the necessary field for importing reserved IDs from another Tetra System to the current System.

  o **System** is a dropdown menu that is populated with any available Tetra Systems other than the current system being edited. If the user selects another Tetra system and clicks **Import IDs**, any reserved IDs for the selected customer will be imported and reserved for the selected customer under the system that the **Reserve Radio IDs** form was opened from.

- **Finish** is a button that will close the form.
**Reserve Talkgroup IDs**

The *Reserve Talkgroup IDs* module (Figure 13.6) manages how Talkgroup IDs are reserved for customers within Trio. This module is accessed via the *Reserve Talkgroup IDs* button in the Tetra System *Technical* tab (See Figure 13.1). The *Reserve Talkgroup IDs* module allows the user to assign a range of Talkgroup IDs to a specific customer. In order to make changes to the *Reserved Talkgroup IDs* module, click *Edit* on the System form. Then click the *Reserve Talkgroup IDs* button.

![Reserve Talkgroup IDs Module](image)

**Figure 13.6** – Reserve Talkgroup IDs Module

- **Available ID Range(s)** is the grid on the left side of the *Reserve Talkgroup IDs* form and is used to show the user what talkgroup IDs are available to reserve for a customer.

- **Assigned ID Range(s)** is the grid on the right-hand side of the *Reserve Talkgroup IDs* form and is used to show the user what talkgroup IDs are currently reserved for the selected customer.

- **System ID** is automatically filled in with the system that *Reserve Talkgroup IDs* was opened from.

- **Customer** is a dropdown menu that is populated with any customers available in Trio. Selecting a customer will allow the user to reserve Talkgroup IDs for that customer.

- **Add** is an option that will provide the necessary fields for reserving ID ranges for the selected customer.
From* is a text field that is available when the Add option is selected. This is a numeric only field that will be the starting number of the range to be reserved for the selected customer. This number must be greater than 0, and less than or equal to the value in the To field.

To* is a text field that is available when the Add option is selected. This is a numeric only field that will be the ending number of the range to be reserved for the selected customer. This number must be less than 14000000, and greater than or equal to the value in the From field.

Clicking the Add Range button after entering valid values in the From and To fields will reserve the range for the selected customer.

- **Remove** is an option that will provide the necessary field for removing either a single ID, or a Range of IDs that have already been reserved for the selected customer.

  - **Remove Single ID** is a button and associated text field that will remove a single ID from the Assigned ID Range(s). If an ID is entered into the text box, and Remove Single ID is clicked, then the ID will be removed from the Assigned ID Range(s). If the ID that was entered is not a part of the Assigned ID Range(s), then the user will be informed that there was no ID to remove.

  - **Remove Range** is a button that will remove any selected range from the Assigned ID Range(s) grid.

- **Import From** is an option that will provide the necessary field for importing reserved IDs from another Tetra System to the current System.

  - **System** is a dropdown menu that is populated with any available Tetra Systems other than the current system being edited. If the user selects another Tetra system and clicks Import IDs, any reserved Talkgroup IDs for the selected customer will be imported and reserved for the selected customer under the system that the Reserve Talkgroup IDs form was opened from.

- **Finish** is a button that will close the form.
**Add Memos**

The *Add Memos* window (Figure 13.7) is a simple memo creation window that can be used to create memos for the selected Tetra system. It can be accessed by clicking the Add Memos button in the Technical tab of the System module. Memos can be viewed via the *Memos* button on the *Toolbar*. When enabled, a sidebar is shown on the right side of the main Trio window. This window is populated with memos for the specific system.

![Add Memos Window](image)

*Figure 13.7 – Add Memos Module*

- **System ID** is a text field that displays the System the memo will be applied toward.
- **Who Entered** is a text field that displays the user entering the memo.
- **Date Entered** is a text field that displays the date and time the memo is created.
- **Reason** is a dropdown menu that allows the user to select from a list of reasons for the memo’s creation.
- **Memo** is a text field that allows the user to enter up to 500 characters.
- **OK** is a button that will post the *Memo* and *Reason*.
- **Cancel** is a button that will exit out of the memo window without posting.
**Tetra Zones**

The *Tetra Zones* module (Figure 13.8) manages all the zones within any TETRA systems defined in the *Systems* module. Within a TETRA system, *Zones* and *Sites* are in place to model the actual sites and zones that are a part of the system. A zone is a collection of one or more sites.

![Tetra Zones Module – Technical Tab](image)

**Figure 13.8 – Tetra Zones Module – Technical Tab**

An * denotes required fields.

- **System ID* is a text field filled with the System ID the zone belongs to. In the wizard, it is a dropdown menu that is populated with any TETRA Systems that are available. It cannot be modified once the zone is created.

- **Zone ID* is a text field specifies the ID of the zone. This field allows numeric values between 1 and 64

- **Alias* is a text box that allows the user to specify a user-friendly name that is associated with the zone. This field allows up to 50 characters.

- **Security Group* is a text field that allows the user to specify which *Security Group* the selected zone is associated with. For more information on *Security Groups* see the *Security Group* section below.

The *New Zone Wizard* tab is wizard that takes the user through a step by step process of creating a new TETRA zone. For more information on the individual fields of the wizard, see the corresponding fields above.
**Tetra Sites**

The Tetra Sites module (Figure 13.9) is used to manage the sites of any TETRA systems defined in Trio. Each site is unique within its System and Zone. A site image and site contacts can also be assigned using this module.

Figure 13.9 – Tetra Sites Module – Technical Tab

- **System ID** is a text field that displays the System ID. In the wizard, it is a dropdown menu that is populated with any TETRA system available in Trio. It cannot be modified once created.

- **Zone ID** is a text field that displays the Zone ID. In the wizard, it is a dropdown menu that is populated with any TETRA zones associated with the selected system ID. It cannot be modified once created.

- **Site ID** is a text box that allows the user to specify the ID of the site. The field must be unique for the selected System ID and Zone ID and allows numeric values between 1 and 100. It cannot be modified once created.

- **Alias** is a text box that allows the user to specify a user-friendly name that is associated with the site. This field allows up to 16 alphanumeric characters. It cannot be modified once created.

- **Latitude** is a field that allows the user to specify the Latitude degree. This field allows degrees between -90 and 90 degrees.

- **Longitude** is a field that allows the user to specify the Longitude degree. This field allows degrees between -180 and 180 degrees.

- **Qty of Channels** is a selection field that allows the user to specify the number of channels for the selected site. This field allows for a maximum of 128 channels.
- **Security Group** is a text field that allows the user to specify the *Security Group* for the site. This field allows 1-16 characters.

- **View Channel Information** See the *View Channel Information* section below.

- **Track Outages** See the *Track Outages* section below.

The *Site Image* tab (Figure 13.10) is used to associate images with TETRA sites.

![Figure 13.10 – Sites Module – Site Image Tab](image)

- **Browse** is a button that allows the user to select an image associated with the site.

- **Clear** is a button that clears the image currently loaded in the Site Image Tab.
The *Site Contacts* tab (Figure 13.11) is used to add contact information for the selected site.

![Diagram of Site Contacts tab](image)

**Figure 13.11 – Site Module – Site Contacts**

- **Contact Name** is a text field that allows the user to enter a contact name to associate with the site. This field allows 1-50 characters.

- **Phone** is a text field that allows the user to enter a number for the contact name. This field allows 0-14 numeric characters including “.” and “-”.

- **Add** is a button that will add the **Contact Name** and **Phone** number to the TETRA Site contacts list.

- **Edit Contact** is a button that allows the user to edit the selected contact from the grid.

- **Remove** is a button that removes the selected contact from the list of contacts.
The *Channel Information* window (Figure 13.12) under **Sites, Technical** tab is used to store and manage information about the site’s Channel. The number of rows is equal to the Qty of Channels under **Sites**. **Sites** must be in edit mode to modify.

- The maximum Qty of Channels is 128.

---

**Figure 13.12** – Site Module – View Channel Information

- **Frequency** is a text field that allows the user to enter the Frequency for a Channel on the site. (Numeric values only)
- **Channel Type** is a dropdown that allows the user to select a channel type (*Control Only, Control & Voice, Voice Only, Data*).
- **Secure** is a dropdown that allows the user to select if the channel is secure or not.
The *Track Outages* window (Figure 13.13) manages outages associated with the site. Sites must be in View mode to edit. Every field can be modified at any time.

![Track Outages Window](image)

**Figure 13.13 – Site Module – Track Outages**

- **Date Occurred** is a date selector that allows the user to select the date that an Outage occurred.
- **Time** is a time selection field that allows the user to select the time of day that the outage occurred.
- **Service Technician** is a text field that allows the user to enter the name of the service technician. This field allows up to 100 characters.
- **Comments** is a text field that is used to enter comments and information describing the outage. This field allows up to 1000 characters.
- **Root Cause** is a dropdown that allows the user to select from a list of root causes.
- **Equipment Origin** is a dropdown that allows the user to select from a list of equipment to select as the origin.
- **Length of Outage** is a field that allows the user to select how long the outage lasted. (0-100,000)
- **Resolved** is an option that allows the user to select if the Outage was resolved as an issue. If this option is selected, the following fields will be enabled.
  - **Date Resolved** is a date selection field that allows the user to specify when the resolution took place.
  - **Resolution** is a text field that allows the user to enter comments describing the resolution. (0-1000)
The *New Site Wizard* tab is a wizard that takes the user through a step by step process of creating a new TETRA Site. For more information on the individual fields of the wizard, see the corresponding fields above.

**Tetra Site Cluster**

The Tetra *Site Cluster* module (Figure 13.14) is used to define custom groups of TETRA sites within a system. Each radio ID within Trio can be assigned to a *Site Cluster*. If Trio is being used to bill customers for their airtime usage, *Site Clusters* can be used to bill each radio at differing rates dependent upon the site the call occurred on. If the radio has usage on a site included in its *Site Cluster*, it will be billed at the rate defined in the *Variable Rate* field of the corresponding *Service* on its *Rate Plan*. Any usage by the radio on a site not included in its *Site Cluster* will cause the radio to be billed at the rate defined in the *Roaming Rate* field of the corresponding *Service* on its *Rate Plan*.

![Figure 13.14 – Tetra Site Cluster Module](image)

- **System ID** is a text field that displays the System ID. In the wizard, it is a dropdown menu that is populated with any TETRA systems available in Trio. It can be modified only during creation.
- **Site Cluster ID** is a text field that allows the user to specify the ID of the site cluster. This field allows up to 10 numeric characters. It can be modified only during creation.
- **Alias** is a text field that allows a user to specify a user-friendly name for the site cluster. This field allows up to 50 characters.
- **Available Sites** is a grid that is populated with all sites associated with the selected system that are not already included in the site cluster. Clicking the right arrow will move the selected site from the **Available Sites** grid to the **Included Sites** grid.
- **Included Sites** is a grid that is populated with all the sites that are a part of the site cluster. Clicking the left arrow will move the selected site from the **Included Sites** to the **Available Sites**.
The New Site Cluster Wizard tab is a wizard that takes the user through a step by step process of creating a new TETRA Site Cluster. For more information on the individual fields of the wizard, see the corresponding fields above.

**Tetra DID**

The Tetra DID (Direct Inward Dial) module (Figure 13.15) is used to define and manage the available DID numbers for a system. These numbers are simply the interconnect phone numbers defined on the system which are used to route phone calls to the respective radio ID within the system. DIDs defined in this module can then be assigned to radio IDs as necessary.

![Tetra DID Module](image)

**Figure 13.15 – Tetra DID Module – DID Ranges Tab**

- **System ID** is a text field that contains the System ID. In the wizard, it is a dropdown menu that is populated with any TETRA systems available in Trio.
- **From** is a column that holds the beginning values of DID ranges.
- **To** is a column that holds the ending values DID ranges.
The *DID Maintenance* tab (Figure 13.16) provides the tools to remove DIDs, or ranges of DIDs.

![DID Maintenance Tab](image)

**Figure 13.16 – DIDs Module – Maintenance Tab**

- **System ID** is a dropdown menu that is populated with any TETRA systems available in Trio.

- **Delete all DIDs in the range of:** is two text boxes that allow the user to specify the range of DIDs to remove. The range of DIDs entered cannot contain any assigned DIDs

- **Delete** is a button that when pressed will remove the range of DIDs entered in the fields above it for the selected system.

The *New DID Wizard* tab is a wizard that takes the user through a step by step process of creating a new range of DIDs for a TETRA system. For more information on the individual fields of the wizard, see the corresponding fields above.
**Tetra Radios**

The physical radios assigned to TETRA radio IDs within Trio are managed using the Tetra Radios module (Figure 13.17). For TETRA Systems, radio IDs can be created and entered Trio through this module or through the Order/Invoicing process. Each serial number has exactly one radio ID assigned to it and each radio ID can be assigned to only one **Unit User** at any given time. The **Unit User** information can be viewed in the Tetra Unit User module. From within the Radios module, a user can manage the **Dealer**, **Salesperson**, **SIC Code**, **Radio [Unit] Type**, and other hardware and radio ID specific information for each radio.

![Tetra Radios Module](image)

**Figure 13.17 – Tetra Radios Module**

An * denotes required fields.

- **System ID** is a dropdown menu that, during creation, is populated with any TETRA Systems that are available. It can only be modified during add.

- **Model Number** is a dropdown that is populated with any TETRA Radio Inventory products available in Trio. For more information on Inventory Products see *Inventory Products* section in Chapter 8 – Inventory.

- **Serial Number** is a text field that holds the serial number associated with the TETRA Radio. This field allows 1-50 characters.

- **Radio ID (ISSI)** is a text field that allows the user to specify the ID of the Radio. This field allows 1-8 numeric characters. It can only be modified during add.

- **TEI / SIM ID** (TETRA Equipment Identifier or SIM card ID) is the electronic ID used for the radio. If the radio uses TEI then the field must begin with the letter T and be followed by 15 hexadecimal characters (0-9 and A-F). If this field uses a SIM card, then the field must start with the letter S and be followed by 20 hexadecimal characters (0-9 and A-F).

- **Dealer** is a dropdown that allows the user to select a dealer for the radio.
For more information on Dealers see the Vendor section in Chapter 18 – Commissioning.

**Salesperson** is a dropdown that allows the user to select salesperson for the radio. The salesperson dropdown will be populated with salespersons for the selected **Dealer**.

- For more information on Salesperson see the *Salesperson* section in Chapter 18 – Commissioning.

**SIC Code** is a dropdown that is populated with any SIC (Standard Industrial Classification) Codes that have available in Trio. Custom SIC Codes can be created.

- For more information on SIC Codes see the *SIC Codes* section of Chapter 19 – Preferences.

**Security Group** is a text field that allows the user to specify which security Group the radio is associated with.

- For more information on Security Groups see Security Group section below.

**Unit Type** is a dropdown that is populated with different types of devices.

**Comments** is a text box that allows the user to save information about the radio. This field allows up to 500 characters.

**Technical Info** see Technical Info below

**View Personalities** is a button that opens the Unit User associated with the radio. To use, the Radios module must be in View mode.

- See the Unit User section below for more information on Unit Users.

The **Technical Information** tab (Figure 13.18) displays important technical information about the radio in a simple and easy to read form.

![Technical Information Window](image.png)

**Figure 13.18 – Technical Information Window**
**Tetra Unit User**

The Unit User module (Figure 13.19) manages billing and other information for all TETRA radio/unit users. For TETRA systems, unit users can be created and entered through this module or through the Order/Invoicing process. Each Unit User which exists can be assigned to at most one radio ID which exists in the Radios module. Once created, the unit user and its information can be managed from this module. In addition to billing information, information regarding the unit user’s capabilities on the system can be managed here too.

![Tetra Unit User Module](image)

**Figure 13.19 – Tetra Unit Users Module**

It is possible to change the Customer ID of a Unit User without deleting and re-adding the Unit User. To change the Customer ID:

1. Disable billing for that Unit User by clicking the **Disable Billing** button and entering a churn reason for disabling the unit.
2. Edit the Unit User and choose the correct, new customer from the Customer ID dropdown. Update the Unit User.
3. Enable billing for the Unit User by clicking the **Enable Billing** button and entering a churn reason.

An * denotes required fields.

- **System ID** is a dropdown menu that is populated with the System ID. During creation, it is populated with any TETRA Systems that are available.
- **Company ID** is automatically filled in.
- **Customer ID** is a dropdown menu that is populated with any customer ID’s available in Trio. It cannot be modified once created.
- **Radio User Alias** is a text field used to give the Unit User a user-friendly name. This text field allows between 1-16 characters.

- **Radio ID (ISSI)** is a text field that holds the ID of the radio associated with the Unit User. If creating a Unit User through the Unit User module, this ID must be a Radio ID that exists for the selected system, and not currently assigned to a different Unit User.

- **DID** is a dropdown that is populated with DIDs for the selected system.

- **Security Group** is a text field that allows the user to specify which security Group the Unit User is associated with.
  - For more information on Security Groups see *Security Group* section below.

- **Talkgroup** is a dropdown menu that allows the user to pick which talkgroup the Unit User is associated with.
  - For more information on talkgroups see *Talkgroups* section below.

- **Site Cluster** is a dropdown menu populated with any site cluster associated with the selected system that allows the user to pick which Site Cluster the Unit User is associated with.
  - For more information on Site Clusters see the *Clusters* section in this chapter.

- **Enable Usage** is an option that allows the user to enable or disable the usage of the Unit User.

- **Date Off** is a date field that informs the user when the Unit User was or will be disabled. It can be modified by reverting the Unit User to a rate plan with a different end date.

- **Dealer** is a dropdown that allows the user to select a dealer for the Unit User.
  - For more information on Dealers see the *Vendor* section in *Chapter 18 – Commissioning*.

- **Salesperson** is a dropdown that allows the user to select salesperson for the Unit User. The salesperson dropdown will be populated with salespersons for the selected **Dealer**.
  - For more information on Salesperson see the *Salesperson* section in *Chapter 18 – Commissioning*.

- **SIC Code** is a dropdown that is populated with any SIC (Standard Industrial Classification) Codes that are available in Trio. Custom SIC Codes can be created.
  - For more information on SIC Codes see the *SIC Codes* section of *Chapter 19 – Preferences*. 


• **Disable/Enable Billing** is a button that allows the user to enable or disable billing for unit users. Disabling or Enabling Billing will prompt the user for an activation or deactivation Churn Code. Unit Users module must be in View mode.

• **Churn History** see *Churn History* below.

The *Billing Information* tab (Figure 13.20) manages the billing information for the Unit User.

![Figure 13.20 – Tetra Unit Users Module – Billing Information Tab](image)

• **Rate Plan** is a dropdown menu that is populated with the current Rate Plan. During creation, it is populated with any TETRA Rate Plans available in Trio. For more information on Rate Plans and their interaction with Orders and Invoicing, see *Quote & Order Windows* in *Chapter 4 – Quotes & Orders*.

• **Revert To** is a dropdown menu that can be populated with any TETRA Rate Plan other than the Rate Plan that the Unit User is currently associated with. **Revert to** allows the user to change from one rate plan to another. Once a rate plan is selected from this menu, a **Revert Now** option will become available allowing the user to revert to the selected rate plan immediately upon saving the selected unit user. If the user does not want to revert immediately, they can select a date to revert on.

• **Revert Now** is an option that allows the user to change from the selected **Rate Plan** to the selected **Revert To** rate plan when the Unit User is updated.

• **Apply Revert to Date** is a date selector that allows the user to specify a day to change from the selected **Rate Plan** to the selected **Revert To** rate plan. This field will only be editable when a rate plan is selected from the **Revert To** menu.
• **Rate Plan Locked** is an option that, when selected, does not allow services to be added or removed from the rate plan assigned to the unit user. If the option is not selected, then services can be added or removed from the rate plan assigned to the unit user through the Services tab.

• **Lock Rates** is an option that when selected does not allow the rates on included services to be edited for the unit user. If the option is not selected, then the rates of the services can be modified from the Properties button under the Services tab.

• **Use Customer Contract End Date** is a checkbox that, when unchecked, allows the user to specify a contract end date for that specific unit user. If set, this date will override the unit user’s customer’s contract end date.

The **Capabilities** tab (Figure 13.21) manages additional capability information associated with the unit User

![Figure 13.21 – Tetra Unit Users Module - Capabilities Tab](image)

The *More Capabilities* tab (Figure 13.22) manages capabilities and Custom Properties associated with the unit User.

![Tetra Unit Users Module – More Capabilities Tab](image)

**Figure 13.22** – Tetra Unit Users Module – More Capabilities Tab

The *Services* tab (Figure 13.23) manages the services assigned to the Rate Plan that the Unit User is on.

![Tetra Unit Users Module – Services Tab](image)

**Figure 13.23** – Tetra Unit Users Module – Services Tab

- **Available Services** is a grid that is populated with any available TETRA services that are not already assigned to the unit user.

- **Services on Rate Plan** is a grid that is populated with any services included on the rate plan assigned to the unit user or that have been manually added.
The *Talkgroup* tab (Figure 13.24) manages talkgroups that the unit user is in.

![Radio User - City Personnel](image)

**Figure 13.24** – Tetra Unit Users Module – Talkgroups Tab

- **Talkgroup ID** is a text field that allows the user to enter talkgroup IDs and assign them to the unit user.
  - In order to add a talkgroup, a valid talkgroup ID that is available in the selected system that the unit user is a part of must be entered.
  - For more information on Talkgroups see the *Talkgroup* section below.

- **Assigned Talkgroups** is a grid that lists all talkgroups that the selected unit user is a part of.

- ▶ allows the user to assign talkgroups to the user

- ◀ allows the user to remove talkgroups from the user.
The *Churn History* tab (Figure 13.25), accessible from the Personality tab, provides an easy way to view the churn events for the Unit User.

![Churn History](image)

**Figure 13.25** – Tetra Unit Users Module – Churn History

**Tetra Services**

A *Service* can be equated to a feature on a radio (*Group calls, Private Calls, SMS, Interconnect, etc.*). Each service deals with a single TETRA related feature. The *Services* module (Figure 13.26) is used to set different properties of each service dependent upon the service’s type (*Group, Interconnect, Data, Private, etc.*). Services defined in this module can be grouped into Rate Plans using the TETRA *Rate Plans* module.

![Services](image)

**Figure 13.26** – Tetra Services Module
**Tetra Rate Plans**

A *Rate Plan* is simply a group of *Services*. The *Tetra Rate Plans* module (Figure 13.27) is used to manage these rate plans. Each rate plan contains the billing information for all included services. As radios are added into Trio to be billed, they are assigned a rate plan. That rate plan thus defines how Trio will bill the customer that the radio is assigned to.

![Figure 13.27 – Tetra Rate Plans Module](image)

**Tetra Talkgroups**

The *Tetra Talkgroups* module (Figure 13.28) is used to manage any talkgroups within existing TETRA systems.

![Figure 13.28 – Tetra Talkgroups Module](image)
**Tetra Call Routes**

The *Tetra Call Routes* module (Figure 13.29) is used to manage any call routes within existing TETRA systems.

![Figure 13.29 – Tetra Call Routes Module](image)

**Tetra Home Zone Mapping**

The *Tetra Home Zone Mapping* module (Figure 13.30) is used to create and manage Home Zone Mappings for existing TETRA systems. *Radio ID* and *TG/MG ID* maps are created on this module as well.

![Figure 13.30 – Tetra Home Zone Mapping Module](image)
**Tetra Multigroup**

The *Tetra Multigroups* module (Figure 13.31) is used to manage multigroups within existing TETRA systems. In addition to being able to manage the talkgroups assigned to a multigroup, the *Capability Profiles* and other attributes of a multigroup can also be managed from within this module.

![Multigroup Module](image)

**Figure 13.31 – Tetra Multigroups Module**

**Tetra Radio User Capability Profile**

The *Tetra Radio User Capability Profile* module (Figure 13.32) can be used to create and manage all attributes of a Radio User Capability Profile of existing TETRA systems.

![Radio User Capability Profile Module](image)

**Figure 13.32 – Tetra Radio User Capability Profile Module**
Tetra Radio User Interconnect Profile

The *Tetra Radio User Interconnect Profile* module (Figure 13.33) is used to create and manage any *Radio User Interconnect Profiles* within existing TETRA systems.

![Tetra Radio User Interconnect Profile Module](image)

**Figure 13.33 – Tetra Radio User Interconnect Profile Module**

Tetra Status Set

The Tetra *Status Set* module (Figure 13.34) is used to create and manage any *Status Sets* and their *Status Set Maps* within existing TETRA systems.

![Tetra Status Set Module](image)

**Figure 13.34 – Tetra Status Set Module**
**Tg/Mg Capability Profile**

The Tetra Tg/Mg Capabilities Profile module (Figure 13.35) is used to manage any such profiles within existing TETRA systems.

**Figure 13.35 – Tetra Tg/Mg Capability Profile Module**

**Tetra User Group**

The Tetra User Group module (Figure 13.36) is used to manage any User Groups within existing TETRA systems.

**Figure 13.36 – Tetra User Group Module**
**Tetra Security Group**

The Tetra *Security Group* module (Figure 13.37) is used to manage any *Security Groups* within existing TETRA systems. This module allows a user to create a logical grouping of radios and infrastructure components to partition the system. “SYSTEM” is the default record for the *Security Group* object. Every TETRA object (module) record is assigned a *Security Group*. Once a *Security Group* is created, it cannot be deleted or modified.

![Tetra Security Group Module](image)

**Figure 13.37** – Tetra Security Group Module
Chapter 14

This chapter provides an overview of the Generic system type and its associated Trio modules.

This chapter contains the following sections:

- **Overview**: Describes the Generic system type and its relation to Trio.
- **Generic System**: Describes the Generic System module.
- **Generic Radios**: Describes the Generic Radios module.
- **Generic Unit User**: Describes the Generic Unit User module.
- **Generic Services**: Describes the Generic Services module.
- **Generic Rate Plans**: Describes the Generic Rate Plans module.

**Overview**

The Generic system type modules are used to create and manage Generic specific entities such as **Systems**, **Radios**, **Unit Users**, **Services** and **Rate Plans**. These different entities are used throughout the rest of Trio. The following sections briefly describe each Generic module and its purpose.

**Generic System**

The *Generic Systems* module (Figure 14.1) is used to manage Generic systems as it pertains to Trio. Managing System **Outages** is also done from within this module.

![Figure 14.1 – Generic Systems Module](image)

**Generic Radios**

The physical radios assigned to Generic radio IDs within Trio are managed using the *Generic Radios* module (Figure 14.2). For Generic systems, Generic radios
can be created directly in the *Generic Radios* module or through the Order/Invoicing process. Once a radio has been configured for billing it will have at least one Unit User/Personality associated with it. Each of these personalities is assigned a Radio ID. The Personality information can be viewed in the *Generic Unit User* module. From within the *Generic Radios* module, a user can manage the **Dealer**, **Salesperson**, **SIC Code**, and other hardware specific information for each radio.

![Generic Radios Module](image)

**Figure 14.2** – Generic Radios Module

**Generic Unit User**

The Generic *Unit User* module (Figure 14.3) manages billing and other information for all Generic radio IDs. Each *Unit User* corresponds to a radio (serial number) in the *Generic Radios* module. These serial numbers are added to the Generic modules via the *Radios* module or the Order/Invoicing process (see *Chapter 10 – Order/Invoicing Process*). Once created, the ID and its information can be managed from this module. Also, additional users (radio IDs/Personalities) can be added to a serial number using this module.
Generic Services

A Service can be equated to a feature on a radio (Group calls, Private Calls, etc.). Each service deals with a single Generic related feature. The Generic Services module (Figure 14.4) is used to set different properties of each service dependent upon the service’s type (Group, Private, etc.). Services defined in this module can be grouped into Rate Plans using the Generic Rate Plans module.

Generic Rate Plans

A Rate Plan is simply a group of Services. The Generic Rate Plans module (Figure 14.5) is used to manage these rate plans. Each rate plan contains the billing information for all included services. As radios are added into Trio to be billed, they are assigned a rate plan. That rate plan thus defines how Trio will bill the customer that the radio is assigned to.
Figure 14.5 – Generic Rate Plans Module
This chapter provides an overview of ASTRO-PMI and the associated Trio modules.

This chapter contains the following sections:

- **Overview**: Describes ASTRO-PMI and its relation to Trio.
- **Configuration**: Describes how to connect to the ASTRO-PMI server.
- **Systems**: Describes the Systems module.
- **ASTRO-PMI Clusters**: Describes the ASTRO-PMI Clusters module.
- **Services**: Describes the Services module.
- **Rate Plans**: Describes the Rate Plans module.
- **ASTRO-PMI Client**: Describes the ASTRO-PMI Client module.

**Overview**

An ASTRO-PMI system has capabilities to allow third-party applications, such as Trio, to carry out certain provisioning commands against the system. This third-party provisioning capability must be purchased from and enabled by Motorola on the ASTRO-PMI system. Additionally, Trio must be licensed for the ASTRO-PMI system type.

Motorola has provided application partners, such as Genesis, with an Application Programming Interface (API) defining how an application can connect and carry out provisioning commands that affect the ASTRO-PMI system. This API also defines what aspects of the ASTRO-PMI system can be managed by the third-party application. The ASTRO-PMI modules in Trio have been designed to allow the user to provision every entity allowed via this API.

Once configured, whenever entities (such as IVD Radios, Profiles, Talkgroups, etc.) are created or managed within Trio, Trio will communicate directly with the ASTRO-PMI server to make the changes. If the request is successful on the ASTRO-PMI server, Trio will continue updating the internal Trio database as necessary. If the request fails, Trio will not make any changes to its own database.

**Configuration**

If Trio is licensed for ASTRO-PMI on a system, the GW Connect module, accessible through the GW_LaunchPad, can be used to configure the connection properties needed to access the ASTRO-PMI server. For more information see the GW Connect Help.
**Systems**

The *Systems* module (Figure 15.1) is used to manage ASTRO-PMI systems as it pertains to Trio. *Call Elimination, Call Time Ranges*, etc. is managed under the System Billing tab.

![Figure 15.1 – Systems Module](image)

**Figure 15.1** – Systems Module
**ASTRO-PMI Clusters**

The **ASTRO-PMI Clusters** module (Figure 15.2) is used to define custom groups of sites within a system. Each ASTRO-PMI radio ID within Trio can be assigned to a Cluster. If Trio is being used to bill customers for their airtime usage, *Clusters* can be used to bill each radio at differing rates dependent upon the site the call occurred on. If the radio has usage on a site included in its Cluster, it will be billed at the rate defined in the **Variable Rate** field of the corresponding Service on its Rate Plan. Any usage by the radio on a site not included in its Cluster will cause the radio to be billed using the **Variable Rate** just as if it were within its Cluster, but will additionally be billed at the rate defined in the **Roaming Rate** field of the corresponding Service on its Rate Plan.

![ASTRO-PMI Clusters Module](image)

**Figure 15.2** – ASTRO-PMI Clusters Module
Services

A Service can be equated to a feature on a radio (Group calls, Private Calls, SMS, Interconnect, etc.). Each service deals with a single ASTRO-PMI related feature. The Services module (Figure 15.3) is used to set different properties of each service dependent upon the service’s type (Group, Interconnect, Data, Private, etc.). Services defined in this module can be grouped into Rate Plans using the ASTRO-PMI Rate Plans module.

![Figure 15.3 – Services Module](image1)

Rate Plans

A Rate Plan is simply a group of Services. The ASTRO-PMI Rate Plans module (Figure 15.4) is used to manage these rate plans. Each Rate Plan contains the billing information for all included services. As radios are added into Trio to be billed, they are assigned a rate plan. That rate plan thus defines how Trio will bill the customer that the radio is assigned to.

![Figure 15.4 – Rate Plans Module](image2)
**ASTRO-PMI Client**

The ASTRO-PMI Client module (Figure 15.5) is used to access information on the ASTRO-PMI server. The Client is divided into Provisionable and Non-Provisionable items. From this module, the user can add, edit, delete, or view all entities on the ASTRO-PMI server accessible to Trio.

![ASTRO-PMI Client Module](image)

**Figure 15.5** – ASTRO-PMI Client Module

**Orphan Radios**

The **Orphan Radio** button will show details of any radios that Trio has billing info for, but which do not exist as an HPD or IVD radio in the ASTRO-PMI server. This can occur when Trio is not used to delete the radio.

**Distribute**

The **Distribute** button notifies the ASTRO-PMI server to distribute any pending changes. It is at the end of the Provisionable Items section.

If a distribution is already in progress, Trio will display a message stating as such. If the user still desires to distribute any pending changes (such as in the case of changes made after the first distribute command was initiated), the user should wait an appropriate amount of time for the distribution to complete before trying again.

**Provisionable Items**

Provisionable Items are items that can be added, edited and removed from the ASTRO-PMI server through the ASTRO-PMI Client module. Radio Billing Info for HPD Radios and IVD Radios (Figure 15.6) is stored in the Trio database,
whereas all other information is stored on the ASTRO-PMI server. When in Edit/Add mode, editable fields appear in black and non-editable fields are grey. Some fields may be expanded to show more information using the arrow to the left of the field title. The following is a list of Provisionable Items:

- Agencygroup
- CCGW-DCG
- Conventional Console Unit
- Conventional Talkgroup
- Conventional Talkgroup Unit
- Conventional Voice and Data Unit
- Conventional Voice Unit
- Data Group Radio Assignment
- Foreign Group
- HPD Radio
- IVD Radio
- Multigroup
- Radio Capabilities Profile
- Radio Interconnect Profile
- Radio Site Access Profile
- RF Cross Busy Cross Mute
- Talkgroup
- TG/MG Capabilities Profile
- TG/MG Site Access Profile
- Trunking Data Group

**Figure 15.6 – IVD Radio**

**Non-Provisionable Items**

*Non-Provisionable Items*, such as RF Sites (Figure 15.7), are items that are stored on the ASTRO-PMI server and cannot be modified through the ASTRO-PMI Client module. Some fields may be expanded to show more information using the
arrow to the left of the field title. The following is a list of Non-Provisionable Items.

- Access Point Name
- ACIM Conventional Channel
- Analog Conventional Channel
- Broadcast Data Agency
- CCGW
- CCGW-HD
- Common Key Reference
- Console Alias Manager
- Console TG/MG Capabilities Profile
- Console User
- Console User Capabilities Profile
- Conventional Broadcast Data Agency
- Conventional Channel Group
- Conventional Home Zone Map
- Conventional Site
- Conventional Talkgroup Channel
- Data Agency Group
- Data Steering Profile
- Default Radio Access Permissions
- Default TG Access Permissions
- Digital Conventional Channel
- External Conventional Talkgroup Channel
- Foreign Group Capabilities Profile
- Foreign Group Site Access Profile
- Foreign Subscriber Data Profile
- Foreign System
- Home Zone Map
- Interconnect Subsystem
- Key Management Facility
- MCC 7500 AIS (VPM-Based)
- MDC 1200 Conventional Channel
- Message Set
- Mixed Mode Conventional Channel
- Page
- Page Group
- Paging Format
- Paging Tone Group
- RF Site
- Security Group
- Status Set
- Subscriber Modulation Map
- System
- Uns
- User Group
- VPM Dispatch Console
- Zone
Figure 15.7 – RF Sites
Chapter 16

This chapter provides an overview of the Company window in Trio and the various windows accessible from it.

This chapter contains the following sections:

- **Overview**: Describes the Company window and its role in Trio.
- **Accounting Periods**: Describes the Accounting Periods window.
- **Sales Particulars**: Describes the Sales Particulars window.
- **Subsidiaries**: Describes the Subsidiaries window.

**Overview**

The Company window (Figure 16.1) allows the user to enter and manage particulars regarding the company licensed for Trio and in using Trio to bill agencies. It is accessible from Setup->Company->Company. The company Name, Address, Image, etc. are used throughout Trio when that information is needed on reports, invoices, etc.

![Company Window](image)

Figure 16.1 – Company Window
**Accounting Periods**

Clicking the **Setup Periods** button in the *Company* window will display the *Accounting Periods* window (Figure 16.2). This window allows the user to define and manage the accounting periods used by the company shown in the *Company* window. *Quarterly, Monthly, Yearly,* or custom periods can be defined.

![Accounting Periods Window](image1)

**Figure 16.2 – Accounting Periods Window**

**Sales Particulars**

Clicking the **Setup Sales** button in the *Company* window will display the *Sales Particulars* window (Figure 16.3). This window allows the user to configure the General Ledger accounts to be used by Trio for various reasons. The GL accounts themselves are created and managed in the *Chart of Accounts* window. This window is described in *Chapter 17 – Financials.*

![Sales Particulars Window](image2)

**Figure 16.3 – Sales Particulars Window**
**Subsidiaries**

Clicking the **Create Subsidiaries** button in the *Company* window will display the *Subsidiaries* window (Figure 16.4). Subsidiaries are used mainly for reporting purposes but allow the user to assign each customer to a subsidiary. The *Subsidiary* window allows the user to create and manage the subsidiaries.

![Figure 16.4 – Subsidiaries Window](image-url)
Chapter 17

Financials

This chapter provides an overview of the financial windows accessible primarily from the Setup→Financial menu.

This chapter contains the following sections:

- **Overview**: Describes the Financial submenu contents.
- **Chart of Accounts**: Describes the Chart of Accounts window.
- **Tax Entities**: Describes the Tax Entities window.
- **Tax Groups**: Describes the Tax Groups window.
- **Charges**: Describes the Charges window.
- **Exchange Rates**: Describes the Exchange Rates window.
- **Discounts**: Describes the Discounts window.

**Overview**

The Setup→Financials submenu gives the user access to several financial related windows. These windows are described in the following sections.

![Figure 17.1 – Financials Submenu](image)

**Figure 17.1** – Financials Submenu
**Chart of Accounts**

The *Chart of Accounts* window (Figure 17.2) allows the user to create and manage any General Ledger accounts that need to be available in Trio. In addition to managing the **Account Number**, **Account Name**, and **Asset Type**, the user can view the account **Balances** and **History**.

![Chart of Accounts Window](image)

*Figure 17.2 – Chart of Accounts Window*
**Tax Entities**

The *Tax Entities* window (Figure 17.3) allows the user to create and manage individual tax entities that are included in a tax group. The *Percent*, *Amount*, *Tax Type*, and *GL Code* can all be assigned.

*Federal Excise Tax* is applicable only to phone, interconnect, and DID charges.

![Tax Entities Window](image)

**Figure 17.3** – *Tax Entities Window*
**Tax Groups**

The Tax Groups window (Figure 17.4) allows the user to create and manage groups of tax entities defined in the Tax Entities window. Each customer managed in Trio can be assigned a tax group. This tax group will define the sales tax charged to the customer on their invoices.

![Tax Groups Window](image)

*Figure 17.4 – Tax Groups Window*

**Charges**

The Charges window (Figure 17.5) allows the user to create and manage any customer level charges. These are not fees specifically associated with individual radios or radio IDs but are simply charges that can be assigned to a customer. Both recurring charges and non-recurring charges can be created. When added to a customer’s account via an invoiced order, recurring charges will automatically be charged to the customer each month and will be displayed in the Customer Monthly Fees window (See Chapter 3 – Customers).

![Charges Window](image)

*Figure 17.5 – Charges Window*
Exchange Rates

Trio has limited multi-currency capabilities. If configured properly, orders and payments can be created using a secondary (non-default) currency. The Exchange Rates window (Figure 17.6) allows the user to set the exchange rate for a specified day. Trio will use, as necessary, the exchange rate for a specified day to accomplish the converting of amounts between currencies.

![Exchange Rates Window](image)

**Figure 17.6 – Exchange Rates Window**

Discounts

The Discounts window (Figure 17.7) can be used to create and manage discounts that can be applied to an entire invoice. This window can be used to assign discounts to customers. These discounts are applied during an invoice run as invoices are marked as Pending.

![Discounts Window](image)

**Figure 17.7 – Discounts Window**
Chapter 18  Commissioning

This chapter provides an overview of the commissioning windows accessible primarily from the Setup ➔ Commissioning menu.

This chapter contains the following sections:

- **Overview**: Describes the Commissioning submenu contents.
- **Vendor**: Describes the Vendor window.
- **Salesperson**: Describes the Salesperson window.
- **Commissions**: Describes the Commissions window.
- **Commission Templates**: Describes the Commission Templates window.
- **Incentive Bonuses**: Describes the Incentive Bonuses window.

**Overview**

The Commissioning menu (Figure 18.1) gives the user access to several commissioning related windows in Trio. These windows are described in the following sections.

![Commissioning Submenu](image)

**Figure 18.1** – Commissioning Submenu
**Vendor**

The *Vendor* window (Figure 18.2) allows the user to create and manage *Dealers* and other types of Vendors. *Dealers* are used in Trio’s commissioning features. *Repair Shop* vendors are used in Trio’s *Service Requests* (Trouble-ticketing) feature.

![Vendor Window](image)

**Figure 18.2 – Vendor Window**

**Salesperson**

The *Saleperson* window (Figure 18.3) allows the user to create and manage Salespeople in Trio.

![Salesperson Window](image)

**Figure 18.3 – Salesperson Window**
Commissions

The Commissions window (Figure 18.4) allows the user to create and manage commissions and the parameters for paying commissions to salespeople.

**Figure 18.4 – Commissions Window**

Commission Templates

The Commission Templates window (Figure 18.5) allows the user to configure commission templates that can be assigned to a salesperson and define how the salesperson will receive commissions.

**Figure 18.5 – Commission Templates Window**
Incentive Bonuses

The Incentive Bonuses window (Figure 18.6) allows the user to create and manage incentive bonuses in Trio.

Figure 18.6 – Incentive Bonuses Window
Chapter 19

Preferences

This chapter provides an overview of the windows accessible primarily from the Setup→Preferences submenu.

This chapter contains the following sections:

- **Overview**: Describes the Preferences submenu contents.
- **Geo Codes**: Describes the Geo Codes window.
- **SIC Codes**: Describes the SIC Codes window.
- **Churn Codes**: Describes the Churn Codes window.
- **Languages**: Describes the Languages window.
- **Cycles**: Describes the Cycles window.
- **Vendor Types**: Describes the Vendor Types window.
- **Customer Types**: Describes the Customer Types window.
- **Unit Types**: Describes the Unit Types window.

**Overview**

The Preferences menu (Figure 19.1) gives the user access to several miscellaneous setup windows used within Trio. These windows are described in the following sections.

![Preferences menu](image)

*Figure 19.1 – Preferences menu*
**Geo Codes**

Customers in Trio can be assigned a Geo Code. These geo codes define a geographical area (such as a county) customers can be grouped into. The *Geo Codes* window (Figure 19.2) allows the user to create and manage these geo codes.

![Geo Codes Window](image)

**Figure 19.2 – Geo Codes Window**

**SIC Codes**

SIC (Standard Industrial Classification) Codes is a standard list of codes defining types of businesses and companies. SIC Codes can be assigned to customers and other entities in Trio from a user-defined list of SIC Codes. These SIC Codes are defined and managed using the *Setup SIC Codes* window (Figure 19.3). Trio provides an extensive list of SIC Codes to choose from or the user can create and define their own SIC Codes if it does not exist in the *Source List*. Codes listed in the *User-Defined List* will be available throughout Trio wherever SIC Code selection is allowed.

![Setup SIC Codes Window](image)

**Figure 19.3 – Setup SIC Codes Window**
**Churn Codes**

Churn describes the action of a subscriber’s billing going from an active to inactive state or vice versa. Whenever billing of a subscriber is activated or deactivated in Trio, Trio tracks the reason for the churn. Reports can thus be run to track why subscribers are being activated/deactivated as well as the ratio between the two actions. The *Churn Codes* window (Figure 19.4) allows the user to create and manage churn reasons. These reasons will then be available when Trio prompts the user for the reason a subscriber is being activated or deactivated.

Secondary Churn Codes can be added for each primary Churn Code. When in **Edit** mode, the secondary Churn Code section becomes editable. Secondary Churn Codes allow more information to be added when activating or deactivating a subscriber. Secondary Churn Codes will be available when Trio prompts the user for a churn reason and a churn reason is selected that has one or more secondary churn codes. If a default secondary churn code was selected, it will be selected upon selecting its primary churn code.

![Churn Codes Window](image)

**Figure 19.4 – Churn Codes Window**

**Churn Code Window Fields**

- **Churn Code** – 1 to 4 alphanumeric characters
- **Prime Category** – Activate or Deactivate
- **Reason** – 1 to 100 characters
- **Secondary Churn Code** – 1 to 4 alphanumeric characters
- **Secondary Reason** – 1 to 100 characters

**Languages**

The *Languages* window (Figure 19.5) allows the user to configure the location of Microsoft Word document templates for *Welcome Letters* and *Contract Letters* created by Trio. The user can also configure the location of the *Contract End Notice* document. The first two letters can be used during the order invoicing process (Uber Wizard) to automatically generate a document with customer and radio information pertaining to that invoice.

![Languages Window](image)

**Figure 19.5 – Languages Window**
The *Cycles* window (Figure 19.6) allows the user to define and manage invoice cycle dates. Trio can bill customers at one of four frequencies:

- **Monthly**: The customer will receive an invoice once every month. (12 per year)
- **Quarterly**: The customer will receive an invoice once every 3 months. (4 per year)
- **Semi-Annually**: The customer will receive an invoice once every 6 months. (2 per year)
- **Annually**: The customer will receive an invoice once per year.

For each billing frequency, the *Cycles* window can be used to create one or more cycles within that frequency. Trio then generates invoice dates for each cycle based on the *Invoice Cycle Date Options* set for that cycle. Existing invoice dates for a cycle are listed in the list on the right side of the window.

Each billing frequency can have a maximum number of cycles. This ability to have multiple cycles allows the user to spread out customers’ invoice dates throughout the year. The maximum number of cycles per frequency is listed below:

- **Monthly**: Four cycles (i.e. one per week)
- **Quarterly**: Three cycles (i.e. one per month)
- **Semi-Annually**: Six cycles (i.e. one per month)
- **Annually**: Twelve cycles (i.e. one per month)

![Cycles Window](image)

Figure 19.6 – *Cycles* Window
**Vendor Types**

The *Maintain Vendor Types* window (Figure 19.7) allows the user to create and manage vendor types that can be used to categorize vendors created in the *Vendors* window.

![Maintain Vendor Types Window](image1)

**Figure 19.7 – Maintain Vendor Types Window**

**Customer Types**

Each customer in Trio is assigned a customer type. These customer types can be created and managed in the *Maintain Customer Types* window (Figure 19.8). Customer Types can be selected from the Details 2 tab of the *Customers* window.

![Maintain Customer Types Window](image2)

**Figure 19.8 – Maintain Customer Types Window**

**Unit Types**

Each unit user in Trio can be assigned a unit type. These unit types can be created and managed in the *Maintain Unit Types* window (Figure 19.9). Unit Types can be selected from the Personality tab of the *Unit User* window. Trio comes with 4 standard unit types: Mobile, Base, Portable, and Console. Unit Types can be deleted only if it is not assigned to any unit users.

![Maintain Unit Types Window](image3)

**Figure 19.9 – Maintain Unit Types Window**
Chapter 20

Tools

This chapter provides an overview of the windows accessible primarily from the Trio Tools menu that have not been covered elsewhere.

This chapter contains the following sections:

- **Overview**: Describes the Tools menu contents.
- **Reminders**: Describes the Reminders window.
- **Service Requests**: Describes the Service Requests window.

**Overview**

The Tools menu (Figure 20.1) gives the user access to several windows. Several menu options provide quick access to Microsoft Windows features.

![Tools Menu](image)

**Figure 20.1 – Tools Menu**

- **Reminders** See Reminders section below.
- **Web Browser**: Opens a new window in the default web browser to the Genesis website.
- **Service Requests** See Service Requests section below.
- **Calculator**: Opens the Windows Calculator application.
- **Calendar**: Opens a small window containing a calendar view of the current month.
- **Options** See Chapter 9 – Options for information on Options.
- **My Settings** See the My Settings section of Chapter 9 – Options for information on My Settings.
Reminders

The **Reminders** window (Figure 20.2) allows the user to create a simple reminder with a specific due date and time. Trio will pop up a reminder window at the specified **Due Date**.

![Reminders Window](Image)

**Figure 20.2 – Reminders Window**

Service Requests

The **Service Requests** window (Figure 20.3) gives the user access to Trio’s work ticketing feature. The window lists all work tickets created in Trio and shows basic information and status about each. The user can click the **Add** button to add additional work tickets or double-click on an existing work ticket to edit or view its details.

![Service Requests Window](Image)

**Figure 20.3 – Service Requests Window**
The Service Item window (Figure 20.4) is displayed when creating or editing a service request. Both Radio and System requests can be created and managed.

![Figure 20.4 – Service Item Window](image-url)
Chapter 21

Billing

This chapter provides an overview of the windows accessible primarily from the Trio Billing menu. This chapter contains the following sections:

- **Overview**: Describes the Billing menu contents.
- **Documents**: Describes the Documents menu contents.
- **Collections**: Describes the Collections menu contents.
- **Invoicing**: Describes the Invoicing submenu contents.
  - **View Invoices**: Describes the View Invoices window.
  - **Invoice Batch Viewer**: Describes the Invoice Batch Viewer window.
  - **Run Invoices Now**: Describes the Run Invoices Now window.
  - **Customer Preview**: Describes the Customer Preview window.
  - **Batch Update Customer Comments**: Describes the Batch Update Customer Comments window.
  - **Edit Pending Invoices**: Describes the Edit Pending Invoices window.
  - **Print Pending Invoices**: Describes the Print Pending Invoices feature.
  - **Post Pending Invoices Now**: Describes the Post Pending Invoices Now feature.
  - **Post Beginning Balances**: Describes the Post Beginning Balances feature.
- **Commissioning**: Describes the Commissioning menu contents.
Overview

The Billing menu (Figure 21.1) in Trio gives the user access to some windows accessible elsewhere, but also to several features available only via the Invoicing submenu.

The Documents and Collections menus give access to the Quote, Order, Credit Memo, Debit Memo, and Cash Receipt windows.

![Billing Menu](image)

**Figure 21.1 – Billing Menu**

Documents

The Documents submenu (Figure 21.2) gives the user access to the main documents available in Trio.

![Documents Submenu](image)

**Figure 21.2 – Documents Submenu**

- **Create/View a Quote** will open the Quote module. For more information on Quotes see the Quotes & Order Windows section in Chapter 4 – Quotes & Orders.
- **Create/View an Order** will open the Order module. For more information on Orders see the Quotes & Order Windows section in Chapter 4 – Quotes & Orders.
- **Create/View a Credit Memo** will open the Credits module. For more information on Credit Memos see the Credit Window section in Chapter 6 – Credits.
- **Create/View a Debit Memo** will open the Debit module. For more information on Debit Memos see the Debit Window section in Chapter 5 – Debits.
**Collections**

The *Collections* submenu (Figure 21.3) gives the user access to the Cash Receipts module in Trio.

![Billing Submenu](image)

**Figure 21.3** – Collections Submenu

*Cash Receipts* will open the Cash Receipts module. For more information on Cash Receipts see the *Cash receipt Window* section in *Chapter 7 – Cash Receipts*.

**Invoicing**

The *Invoicing* submenu (Figure 21.4) gives the user access to several invoicing related windows and features. These are described in the following sections.

![Invoicing Submenu](image)

**Figure 21.4** – Invoicing Submenu
View Invoices

The View Invoices window (Figure 21.5) allows the user to select and view an individual invoice.

![View Invoices Window](image)

Figure 21.5 – View Invoices Window

Invoice Batch Viewer

The Invoice Batch Viewer window (Figure 21.6) allows the user to display a batch of invoices based on criteria set in the window. Clicking the View Invoices button will display all pertinent invoices to the window allowing the user to print or export them.

All invoices will print/be displayed, however, they may not all print in the same group. If multiple Invoice Detail levels are being printed, each level will be printed as a separate group of invoices.

![View Invoice Group Window](image)

Figure 21.6 – View Invoice Group Window
Run Invoices Now

The Run Invoices Now window (Figure 21.7) allows the user to carry out an invoice run on a day other than the actual invoice date. Specifying an existing invoice date and clicking the OK button will begin the invoice run process. For more details on this process see Chapter 11 – Invoice Run.

![Figure 21.7 – Run Invoices Now Window](image)

Customer Preview

The Customer Preview window (Figure 21.8) allows the user to see how many radios, rate plans, and monthly fees each customer is being billed. This is a handy way of ensuring that a customer is being billed the proper number of each prior to carrying out an invoice run.

![Figure 21.8 – Customer Preview Window](image)
Batch Update Customer Comments

The Batch Update Customer Comments window (Figure 21.9) allows for the Recurring Invoice Comments or One-Time Invoice Comments fields in the Customer window to be updated for multiple customers at once. After customers have been selected, the user can then choose to edit either Recurring Comments, or One-Time Comments. The user can then enter text into the field, and choose to prepend, replace, or append to the chosen field for all selected customers. Any customers whose comment field is empty will still have the specified text added to it, regardless if Prepend, Replace or Append is chosen. These comments will then be included on the customer’s next invoice when the invoice run takes place.

![Batch Update Customer Comments Window](image)

Figure 21.9 – Batch Update Customer Comments Window

- The **Customer Grid** is a grid of all customers added via the Add Single or Add Group buttons. This grid shows the Customer ID, Name, and whether there are existing Recurring or One-Time comments for each customer.
- **Add Single** is a button that presents the user with a search window. After searching for a customer, clicking the Add button will add the selected customer to the table.
- **Add Group** is a button that will present the same search window as the Add Single button but clicking the Add button will add all the customers that the search was narrowed down too.
- **Remove** is a button that will remove the selected customer(s) from the grid.
- **Remove All** is a button that will remove all customers from the grid.
• **Prepend** is a button that will prepend the specified text to the chosen comment field for all customers in the grid.
  
  o If **Recurring** is selected, all *Recurring Customer Invoice* comments for the customer(s) in the grid will be prepended with the text entered in the *Recurring Invoice Comments* text field.
  
  o If **One-Time** is selected, all *One-Time Customer Invoice* comments for the customer(s) in the grid will be prepended with the text entered in the *One-Time Invoice Comments*.

• **Replace** is a button that will replace the specified text for the chosen comment field for all customers in the grid.
  
  o If **Recurring** is selected, all *Recurring Customer Invoice* comments for the customer(s) in the grid will be replaced with the text entered in the *Recurring Invoice Comments* text field.
  
  o If **One-Time** is selected, all *One-Time Customer Invoice* comments for the customer(s) in the grid will be replaced with the text entered in the *One-Time Invoice Comments*.

• **Append** is a button that will append the specified text to the end of the chosen comment field for all customers in the grid.
  
  o If **Recurring** is selected, all *Recurring Customer Invoice* comments for the customer(s) in the grid will be appended with the text entered in the *Recurring Invoice Comments* text field.
  
  o If **One-Time** is selected, all *One-Time Customer Invoice* comments for the customer(s) in the grid will be appended with the text entered in the *One-Time Invoice Comments*.

• **Recurring Invoice Comments** is a text field that allows up to 1000 characters

• **One-time Invoice Comments** is a text field that allows up to 1000 characters
Edit Pending Invoices

The *Edit Pending Invoices* window (Figure 21.10) allows the user to manually edit invoices that have already been marked *Pending* but have not yet been posted. This is useful for final tweaking of an invoice should it be necessary prior to printing and sending the invoice to the customer.

![Edit Pending Invoices Window](image)

Figure 21.10 – *Edit Pending Invoices* Window

Print Pending Invoices

The *Print Pending Invoices* menu options allow the user to easily display all invoices currently marked as *Pending*. Any customers marked as *Paperless Billing* (via the Paperless Billing option in the *Customer* window) will have their Pending invoices automatically saved as PDF. These PDF invoices will be saved in a subfolder within the path specified by the *Paperless Billing Path* option in the *Trio Options* window. The subfolder used will start with “Paperless Invoices” and then the Invoice Date corresponding to the invoice exported. Any paperless invoices will not be displayed with the other pending invoices. Once invoices have been posted, the *Print Pending Invoices* option will not be able to display that batch of invoices. The user will need to use the *Invoice Batch Viewer* window to display the pertinent invoices.

Post Pending Invoices Now

The *Post Pending Invoices* menu option allows the user to post (close) all pending invoices to Trio’s General Ledger. Once posted, each invoice will show up on their customer’s *Transaction* window and will affect the customer’s outstanding balance appropriately. More detail is given in *Chapter 11 – Invoice Run*. 
Post Beginning Balances

The Post Beginning Balances menu (Figure 21.11) option allows the user to post any beginning balances created for a customer which have not yet been posted. Beginning Balances are created in the Beginning Balances window for a customer. (See Chapter 3 – Customers) These beginning balances must be posted before they will affect the customer’s outstanding balance.

![Post Beginning Balances Menu](image1.png)

Figure 21.11 – Post Items Window

Commissioning

The Commissioning submenu (Figure 21.12) gives the user ability to post any pending commissions.

![Commissioning Submenu](image2.png)

Figure 21.12 – Commissioning Submenu

For more information on Commissioning see Chapter 18 – Commissioning.
Chapter 22

This chapter provides an overview of other windows not described in other chapters.

This chapter contains the following sections:

- **Snapshot**: Describes the *Snapshot* window.
- **Limit Reached**: Describes the *Limit Reached* window.

**Snapshot**

- The *Trio Snapshot* window (Figure 22.1) shows a high-level overview of revenue and other basic statistics of the company being managed in Trio. It is accessible from the Toolbar. The ARPU (Average Revenue Per Unit) calculations are affected by the options set in the ARPU tab of the *Options* window (See Chapter 9 – *Options*).

![Figure 22.1 – Trio Snapshot Window](image-url)
ARPU Breakdown

The ARPU Breakdown tab (Figure 22.1) breaks out the different types of ARPU calculated by Trio. They are as follows:

- **ARPU (Average Revenue Per Unit):** The overall ARPU including all revenue.
- **DARPU (Dispatch ARPU):** The ARPU including only dispatch/group call related revenue.
- **PARPU (Private Conversation ARPU):** The ARPU including only private call related revenue.
- **TARPU (Telephone ARPU):** The ARPU but including only telephone or interconnect related revenue.
- **Miscellaneous:** Any of the overall ARPU not included in one of the breakout ARPU figures. This would include monthly fees or usage (variable) charges.

Additionally, if multiple systems are managed by Trio, the ARPU figures can be limited to show only for a specific system. By selecting a system from the System dropdown and clicking **Refresh**, the ARPU figures will be recalculated to include only revenue directly related to a specific system. Doing so will not include charges that cannot be definitively associated with a specific system. Such as revenue from recurring monthly fees or hardware purchased by the customer.

Current Status

The Current Status tab (Figure 22.2) displays several basic statistics regarding the units and revenue managed in Trio. They are as follows:

- **Annual Revenue to Date:** The total of all invoices with an invoice date between January 1 and the end of the current month of the current calendar year.
- **Total Number of Active Customers:** The number of enabled customers in Trio.
- **Total Number of Active Units:** The number of enabled (billed) units/subscribers in Trio.
- **Total Number of Talkgroups:** The number of defined talkgroups in Trio.
- **Revenue to Date, This Month:** The total of all invoices with an invoice date in the current calendar month.
- **Total New Units This Month:** The number of units/subscribers added or enabled in Trio during the current calendar month.
- **Total Units Lost This Month:** The number of units/subscribers deleted or disabled in Trio during the current calendar month.
Net Gain/Loss This Month: The difference between the Total New Units and Total Units Lost This Month counts.

Figure 22.2 – Current Status Window
**Limit Reached**

- The *Limit Reached* window (Figure 22.3) shows unacknowledged Credit Limit or usage cap alerts. It will display if the Show Popup for Limit Reached Alerts option is enabled in the Trio - Options window.

![Limit Reached Window](image.png)

**Figure 22.3 – Limit Reached Window**

- **Generate Report**: Creates a report for the information on this window.
- **Disable Radios**: Opens a window to disable the radios listed on this window if the Disable Mode is Manual. Unavailable if the Disable Mode is Automatic.
- **Acknowledge**: Acknowledges the selected alert.
Appendix A  Flowcharts

This appendix contains flowcharts that give a high-level overview of various processes in Trio.

This appendix contains the charts:

- **Accounting “Back Office”**: Describes at a high-level how information flows through Trio.
- **Accounting Timelines**: Describes the Accounting Timelines of when various events take place during an invoice period.

**Accounting “Back Office”**

The *Accounting “Back Office”* chart (Figure A.1) gives a high-level description of the invoicing/posting process. Following the chart are notes describing each point of the chart. The circled numbers in the chart correspond to the numbered list of descriptions. This chart is applicable for any company billing and managing any type of system with Trio, except for the usage billing portions which are applicable only to those types of systems which are capable of usage billing in Trio.
Figure A.1 – Accounting “Back Office”
Back Office Descriptions

1. **CRUNCHING** - Trio takes any new usage information it receives from GenGET and “crunches” the data.
   a. This happens by identifying if the usage belongs to subscribers managed by Trio as well as whether the type of usage is billed by Trio for that subscriber.
   b. If the usage does not meet the criteria, it is flagged and appears as a usage alert in the *Trio Alerts* window.

2. **INVOICING** - Once the usage has been crunched, it flows into Invoicing*.
   *Many set-up features for generating an invoice are decided upon the initial set-up of the software. However, these can be adjusted or modified per customer during the invoicing process or when adding/editing a customer.
   a. Before an invoice can be created, there are many options that need to be set-up such as
      i. **Billing frequency** - monthly, quarterly, semi-annually, or annually.
      ii. **Invoice format** - level of detail shown from basic summary to exhaustive charge details such as Alias, delivery method PFSM (Print-Fold-Stuff-Mail), PDF, or Direct Feed (typically via CSV).
   b. Once set-up is complete the invoices are generated for review.
   c. Upon review, if changes are needed, you return to the invoicing process for corrections.
   d. If the invoices are accurate, you will proceed with the chosen delivery method to the customer.

3. **POST** - After all invoices have been generated and approved, that information goes to Post and can no longer be adjusted.

4. **GENERAL LEDGER** - All Posted data flows into the General Ledger, which breaks down the details from fees, to taxes, to data usage.
   a. General Ledger can generate various reports for review and can feed directly into a separate master accounting program.

5. **ACCOUNTS RECEIVABLE** - From the General Ledger, data flows into Accounts Receivable which gives the big picture on overall balances and credits.
   a. Accounts Receivable can generate various reports for review and can feed directly into a master accounting program.

*(Jump over to “Customer receives invoice” on flow chart)*

6. **PAYMENT TERMS** - During the set-up process, it must be decided how long the customer must return payment (30, 60, 90 days).

7. **PAYMENT PROCESSING** – One of the largest decisions that must be made is if the payments will be processed in-house, or through an outside service.
   a. **Owner** - Handling payments in-house require more staffing but customer service, payment notes, and special needs are typically handled more accurately.
   b. **Lock Box** - Using a Lock Box service removes much of the explicit work load, but customer service can slip through the cracks since all customer
questions will still need to be handled in-house (some things will be lost in translation between Lock Box and staff). Lock Box services, like all options, have positive and negative implications. If you choose a service, make sure they can capture notes accompanying payments and can communicate enough information back to you in order to then communicate clearly and knowledgably with YOUR customer (see #9).

8. **PAYMENT REVIEW** - Payment is received by Lock Box or in house (whichever service is chosen) and must be assessed for payment accuracy. If it is correct, it will be entered in Accounts Receivable so that the following billing cycle starts with a zero balance.

9. **INACCURATE PAYMENTS** - If the payment is incorrect, many decisions need to be made on how to handle:
   a. **Underpayment** - What’s missing? Why did they underpay? Are they disputing part of the invoice? Should a credit memo be created?
   b. **Overpayment** - What to do with the overpayment amount? Why did they overpay? Should a debit memo be created?
   c. **No Payment** - What are your acceptable terms for payment? What is your escalation policy? Who has authority to turn them off?

**Accounting Timelines**

The *Accounting Timelines* chart (Figure A.2) gives a high-level description when specific events usually occur over the course of an invoicing period.
Figure A.2 – Accounting Timelines

Trio- Accounting Timelines

Beginning of Invoicing Period

Run KPI Reports

Half Way Point

(recommended)

Run KPI Reports

(recommended)

OK? OK?

End of Invoicing Period

Check overall health of customer data:
Run KPI reports, run invoices on key customers, check churn & crunching, etc.

ACTIVITIES

Crunching (Hourly)

ONE DAY

Post Payments (Daily)

ONE WEEK

Add / Edit customers & subscribers (Constant)

ONE MONTH