



**GenWatch3®**  
**GW\_Trio**  
**Software Version 2.23.5**  
**Module Book**

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### 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.

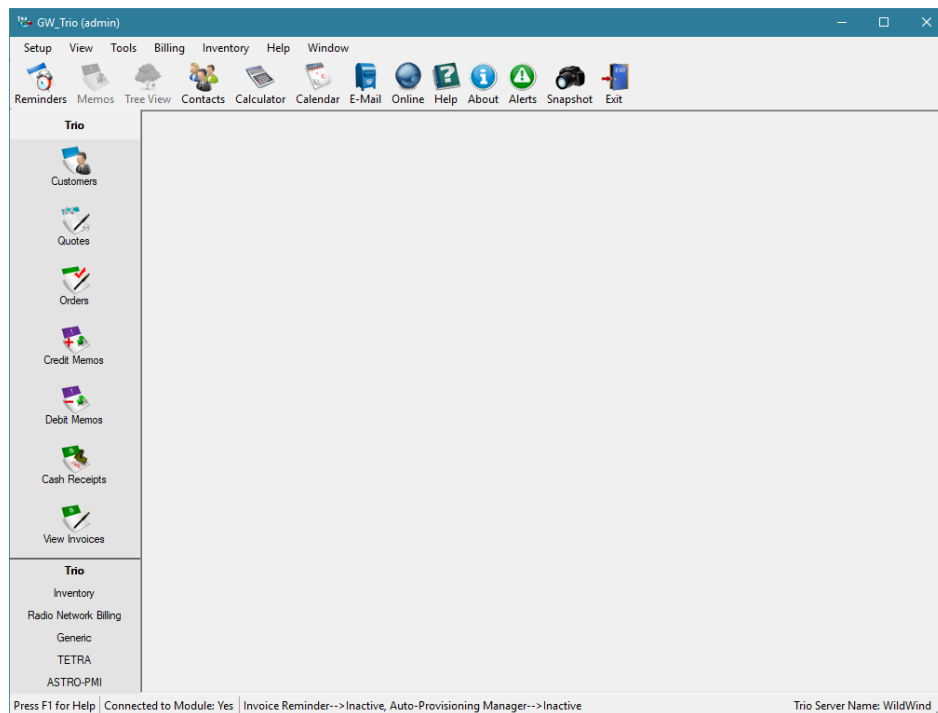
This chapter provides an overview of the GW\_Trio (or simply Trio) module and its function within the GenWatch3 solution.

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

## 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 a 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**
  - Set up available languages that can be assigned to a Trio customer.
  - Welcome and Contract letters can be generated in the customer's language.
- **Billing Frequency/Cycles**
  - Set up Billing Frequencies and cycles for use with the Invoicing run.
- **Vendor Types**
  - Define types of vendors used to categorize dealers and vendors.
- **Customer Types**
  - Define types of customers used to categorize customers.
- **Unit Types**
  - Define types of units used to categorize radios/devices.
  - Mobile, Portable, Console, and Base are predefined unit types that are automatically created when Trio is installed.
- **Chart of Accounts**
  - Set up basic Chart of Accounts for use throughout Trio.
  - Store Account Number, Name, Asset Type, Balance Type, Child Accounts, etc.
  - View Balances and History of each account.
  - Create Asset, Liability, Expense, Income, Equity, and Cost of Goods Sold accounts.
- **Tax Entity**
  - Create and manage individual tax entities, such as state, local, federal sales tax entities.
  - Specify Tax Percent or Amount, Tax Type, General Ledger account for each entity.
- **Tax Groups**
  - 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**
  - Create and manage customer-level recurring or one-time charges that can be billed to customers.
- **Exchange Rates**
  - Used by Trio's multi-currency capabilities to create and manage exchange rate information.

- **Discounts**
  - Create and manage discounts that can be applied to customers on a recurring basis.
  - Line-item discounts which discount specific invoice line items.
  - Bottom-line discounts which discount the entire invoice.
  - Exclude specific line items from a bottom-line discount.
  - Various options available for determining the lifetime of the discounts. (End Date, number of invoices, single invoice, etc.)
  - Set up a secondary customer to be billed for any amounts discounted.
- **Service Request / Trouble Ticketing**
  - Track a service request for a radio or system through 3 stages. (Create, Repair, Close)
  - 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 Memo View 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**
  - List all transactions posted to a customer's account and displays their total balance.
  - Include Invoices, Payments, Credit Memos, Debit Memos, and Beginning Balances.
  - Easily access and view any listed document with one click.
- **Financials**
  - View high-level overview of customer's financial statistics.
  - Show Average Days to Pay and Financial Aging figures.
  - 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 Tree View 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
- Email any Pending or Closed invoices directly from Customer screen.

## **Basic Commissioning Module**

- **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.
- 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.)
  - Assign fixed or percentage commission amounts.
  - Assign basic criteria for assigning commissions.
- Inventory items can be defined as commissionable or not.

## Basic Inventory Module

- **Inventory Products**
  - Store basic information on models of inventoried items.
  - Assign default price for when item is sold/rented.
  - 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
  - View list of documents (invoices, etc.) which include model.
- **Inventory Items**
  - Store information about each individual inventory item such as Serial Number, Cost, Price, Notes, Origin information, Usage Information, Custom data.
- **Inventory Warehouses**
  - Manage warehouse information for use in the *Inventory Items* window.
- **Inventory Categories**
  - Manage categories to assign to inventory products.
- **Inventory Types**
  - 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.
  - Up to 4 monthly invoice cycles permitted.
  - Up to 3 quarterly invoice cycles permitted.
  - Up to 6 semi-annual invoice cycles permitted.
  - Up to 12 annual invoice cycles permitted.
- Maintain Invoicing options.
  - Prorate new charges.
  - Reverse prorate deactivations, disabled billing.
- Preview invoices.
- Post-view invoices for reprinting.
- Edit pending invoices.
- Print batches of invoices.
- Email pending invoices to customers
- 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.
  - 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. We can work with the supplier 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.
  - ARPU (Average Revenue Per Unit)
  - TARPU (Telephone ARPU)
  - PARPU (Private Conversation ARPU)
  - DARPU (Dispatch ARPU)
  - Current number of Active Customers
  - Current number of Active Radios
  - Number of Radios activated this month
  - Number of Radios deactivated this month
- Options to set up how ARPU is calculated.

## **Basic Accounts Receivables Module**

- **Quotes**
  - Create quotes for potential customers and convert them into orders.
- **Orders**
  - Add line items for any inventory items, radio rate plans, etc.
- **Debit Memos**
  - Create transactions to debit a customer's existing credit memos or payments.
- **Credit Memos**

- 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.
- 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, RFSS, and 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, zone, and 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.



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

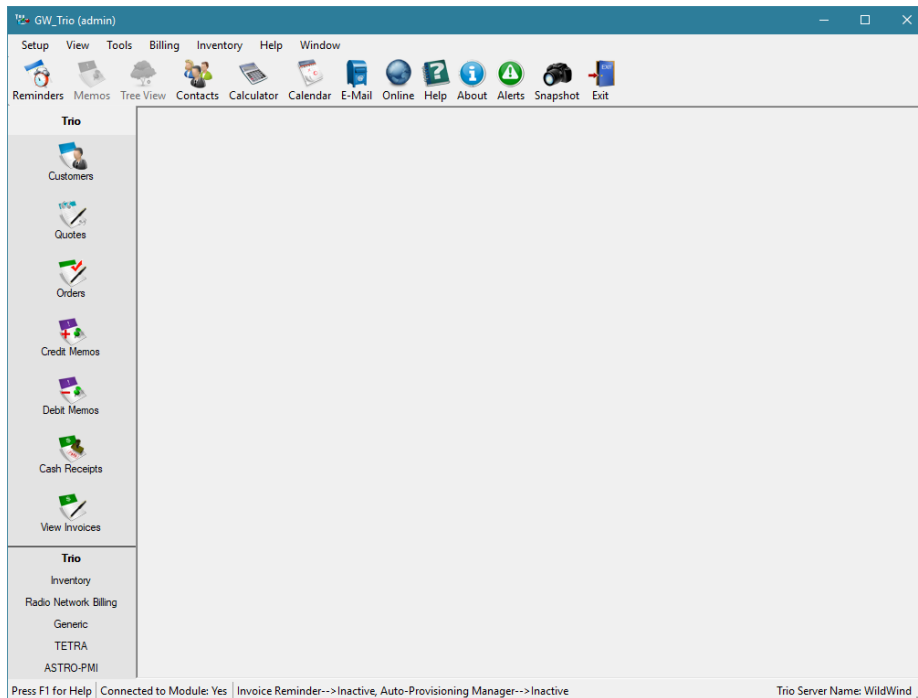
This chapter contains the following sections:

- **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

## 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 17-21*.

## 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* (Memo View) 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 *Tree View* 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.

The screenshot shows the 'Charges' window with the following fields and values:

Field	Value
Company ID	GEN
Charge Code	Charge15
Description	15 System Use
Amount	15.000
GL Code	4
Income	
Date Entered	1/4/2017 3:58:09 PM
Who Entered	Admin
Date Changed	1/30/2019 11:10:00 AM
Who Changed	admin

Checkboxes on the right:

- ☒ Recurring
- ☒ Default Currency
- ☐ Commissionable?
- ☐ Taxable

At the bottom, there are navigation buttons (back, forward, etc.) and a status bar showing 'Charge: 2 of 5'.

**Figure 2.2** – Charges Window

## 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 uses 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 note that the Label for a highlighted field will become Bold. There are also some instances where a field itself 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.

The screenshot shows a software window titled "Charges". It contains several input fields and checkboxes. The "Charge Code" and "GL Code" fields are highlighted in orange. The "Amount" field has the value "0.000". The "Description" field is empty. The "Company ID" is set to "GEN". On the right, a table shows audit trail information: Date Entered (2/1/2019 10:19 AM), Who Entered (admin), Date Changed (2/1/2019 10:19 AM), and Who Changed (admin). Below this are checkboxes for "Recuring" (unchecked), "Default Currency" (checked), "Commissionable?" (unchecked), and "Taxable" (checked). At the bottom, a status bar displays "Charge: New Charge" with navigation icons on either side.

**Figure 2.3** – Highlighted data entry fields

## 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: 2 of 5*. This indicates that the charge currently displayed is the second of five 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 will not have all buttons.

### 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** (✎) button will be replaced by an **Update** (💾) button. Once all desired and necessary information has been entered, clicking the **Update** (💾) button will save the new record.

### Edit Button (✎)

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

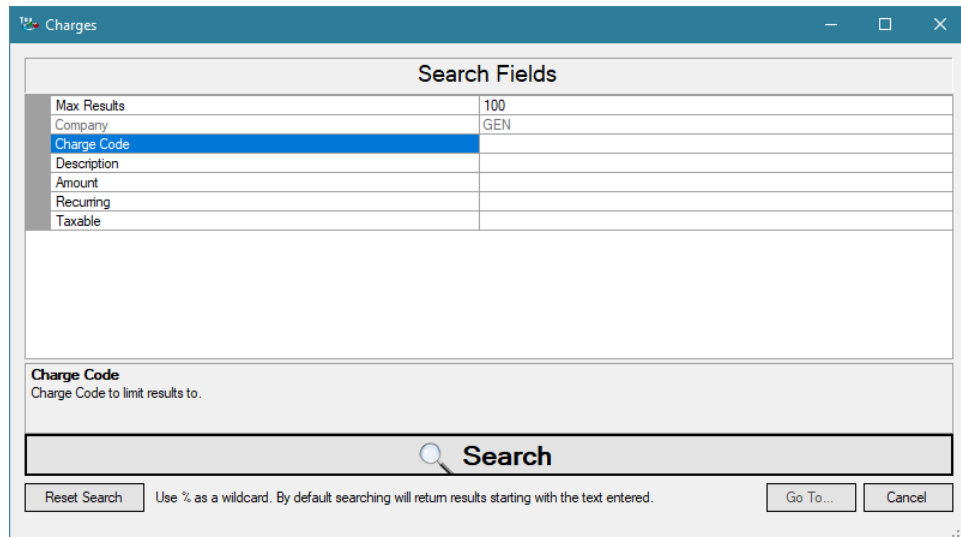
### Finish Button (✓)

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 (this behavior can be changed via the main Options window).

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.



The **Charges Search** window is a dialog box with a title bar that says "Charges". It contains a section titled "Search Fields" with a table of search criteria. The "Charge Code" field is highlighted in blue. Below the table is a "Charge Code" label and a text input field. At the bottom, there is a "Search" button with a magnifying glass icon, a "Reset Search" button, a "Go To..." button, and a "Cancel" button. A note at the bottom states: "Use % as a wildcard. By default searching will return results starting with the text entered."

Search Fields	
Max Results	100
Company	GEN
Charge Code	
Description	
Amount	
Recurring	
Taxable	

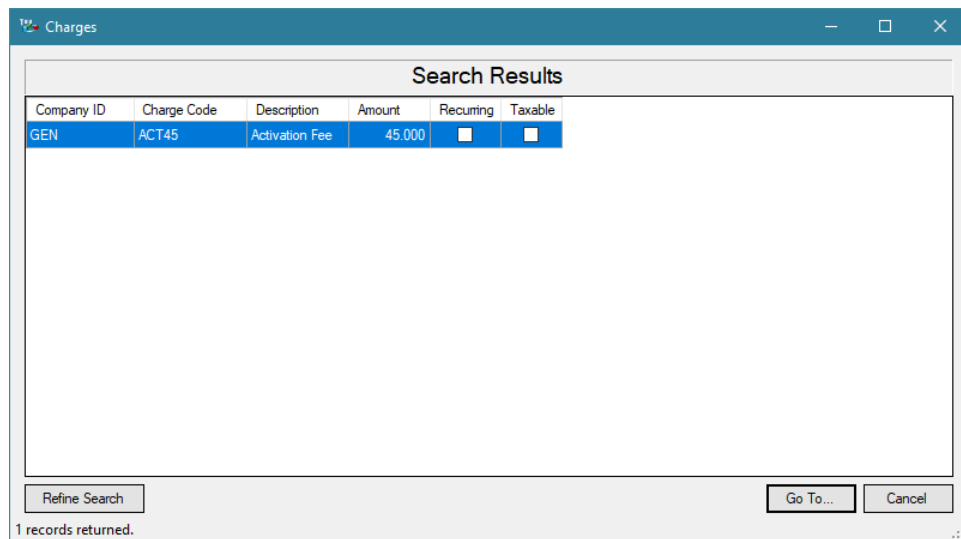
**Charge Code**  
Charge Code to limit results to.

**Search**

Reset Search    Use % as a wildcard. By default searching will return results starting with the text entered.    Go To...    Cancel

**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.




The **Charges Search Results** window is a dialog box with a title bar that says "Charges". It contains a section titled "Search Results" with a table of search results. The table has columns for Company ID, Charge Code, Description, Amount, Recurring, and Taxable. The first row shows results for Company ID GEN, Charge Code ACT45, Description Activation Fee, Amount 45.000, Recurring (unchecked), and Taxable (checked). Below the table is a "Refine Search" button, a "Go To..." button, and a "Cancel" button. A note at the bottom states: "1 records returned."

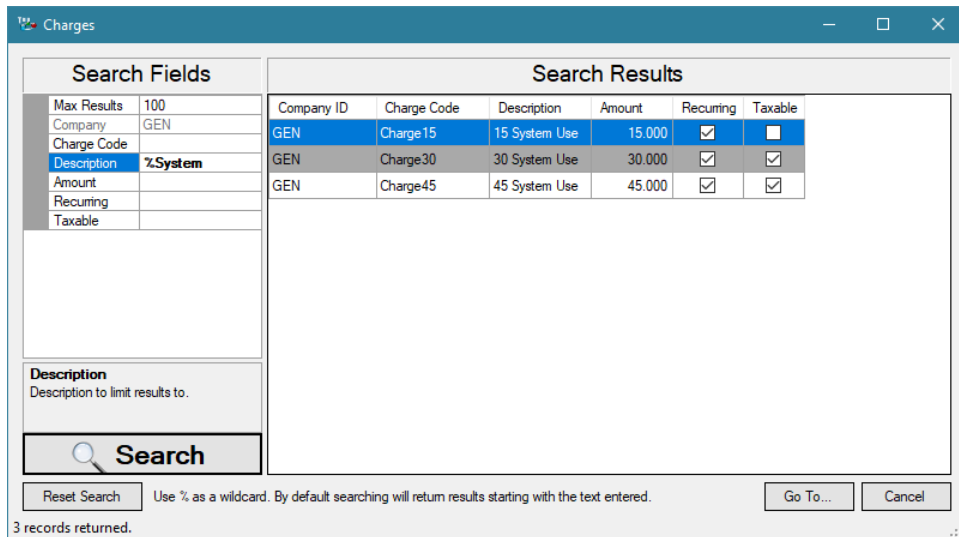
Company ID	Charge Code	Description	Amount	Recurring	Taxable
GEN	ACT45	Activation Fee	45.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Refine Search**    Go To...    Cancel

1 records returned.

**Figure 2.5** – *Charges Search Results*

The percent sign (%) can be used as a wildcard 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.



The screenshot shows a window titled 'Charges' with a search interface. On the left, the 'Search Fields' sidebar includes: Max Results (100), Company (GEN), Charge Code, Description (%System), Amount, Recurring, and Taxable. Below these is a 'Description' field with the text 'Description to limit results to.' and a 'Search' button with a magnifying glass icon. At the bottom of the sidebar are 'Reset Search' and 'Go To...' buttons. The main area, 'Search Results', contains a table with 7 columns: Company ID, Charge Code, Description, Amount, Recurring, and Taxable. It lists 3 records: GEN/Charge15/15 System Use/15.000, GEN/Charge30/30 System Use/30.000, and GEN/Charge45/45 System Use/45.000. A status bar at the bottom indicates '3 records returned.' and a 'Cancel' button is on the right.

Company ID	Charge Code	Description	Amount	Recurring	Taxable
GEN	Charge15	15 System Use	15.000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GEN	Charge30	30 System Use	30.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GEN	Charge45	45 System Use	45.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Figure 2.6** – Wildcard Search Results

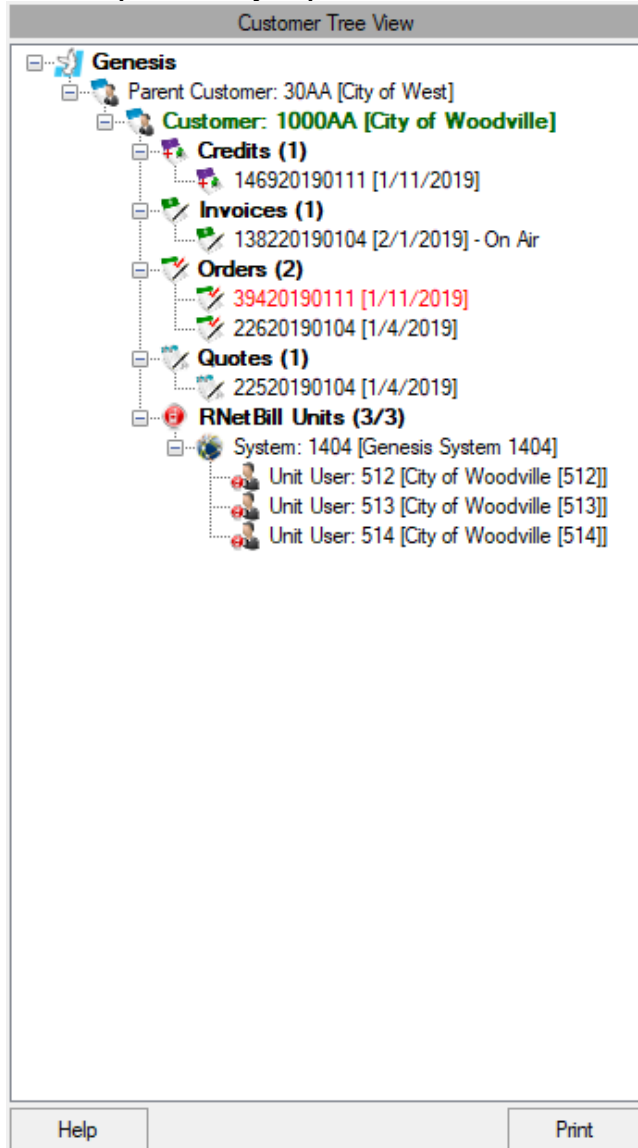
There are three ways to return to the parent data entry window.

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

The Tree View shows context aware information based on the current window being shown. You can modify what is shown via the *Tools*→*My Settings* menu option. When viewing a customer (Figure 2.7) 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 window 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

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

The *Customer* window is divided into the following sections:

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



An asterisk (\*) next to a field denotes that it is required.

### **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. It 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 1 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.
  - 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).
  - 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.
  - For more information on Region see the *Regions* section in *Chapter 12 – Radio Network Billing (RNETBILL)*.




Region 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 3.2) 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.

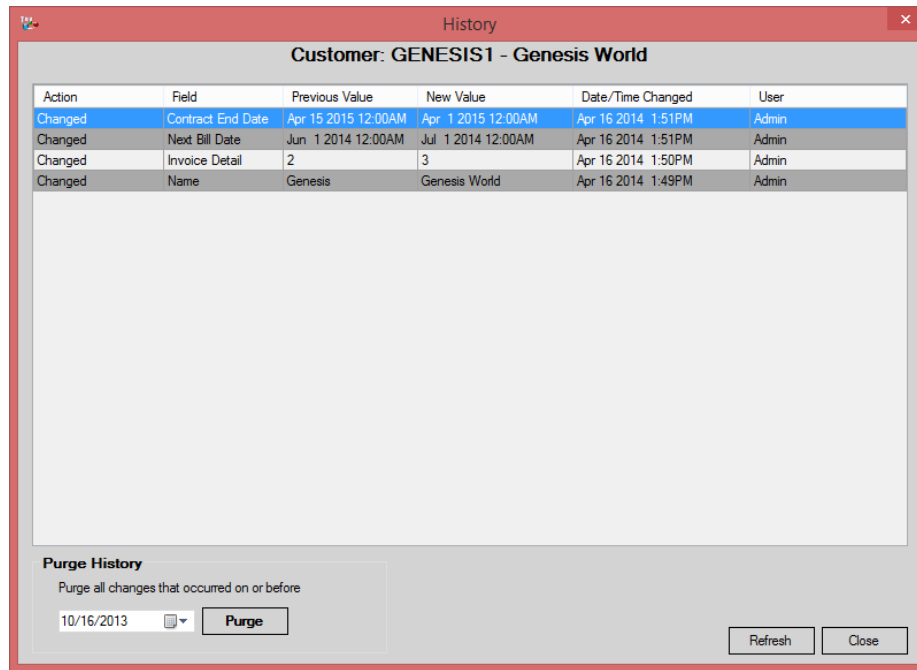


Figure 3.2 – Customer History Window

## 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 3.3). 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.

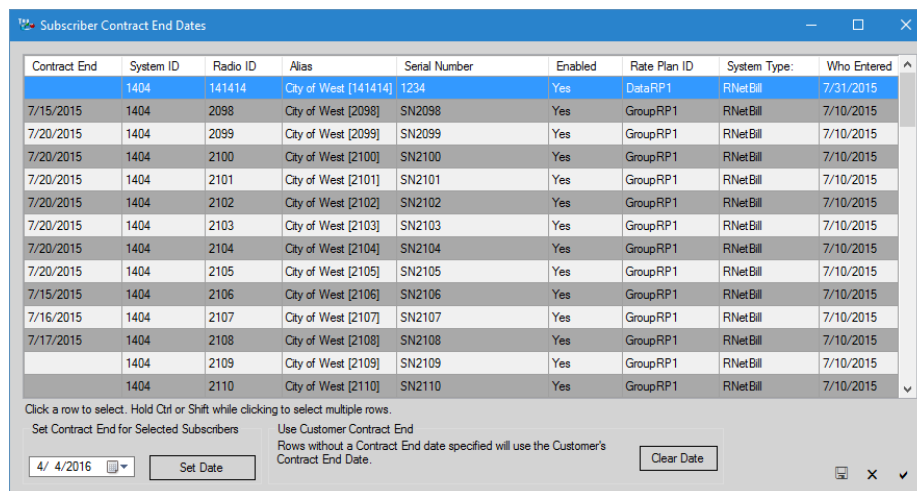


Figure 3.3 – Subscriber Contract End Dates Window

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.

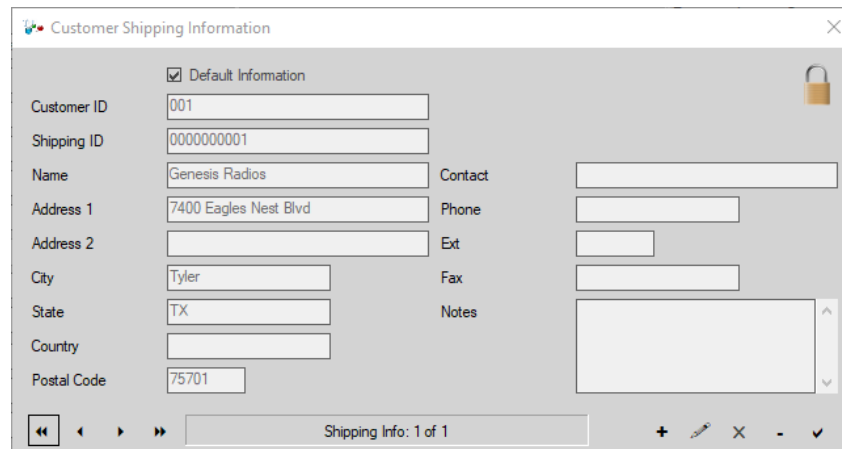
To clear the date set for any subscribers, select them, and click the **Clear Date** button. This will cause those subscribers to effectively use the customer's **Contract End** date.



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 3.4). 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.

A screenshot of a software window titled "Customer Shipping Information". The window has a light gray background and a standard Windows-style title bar with a close button. Inside, there's a "Default Information" checkbox which is checked. Below this, there are several input fields arranged in two columns. The left column contains fields for "Customer ID" (001), "Shipping ID" (000000001), "Name" (Genesis Radios), "Address 1" (7400 Eagles Nest Blvd), "Address 2" (empty), "City" (Tyler), "State" (TX), "Country" (empty), and "Postal Code" (75701). The right column contains fields for "Contact" (empty), "Phone" (empty), "Ext" (empty), "Fax" (empty), and a "Notes" text area. At the bottom, there's a navigation bar with buttons for back, forward, and search, and a status indicator that says "Shipping Info: 1 of 1".

**Figure 3.4** – Ship To Window

## Customer Shipping Information Fields



An asterisk (\*) denotes a field as required.

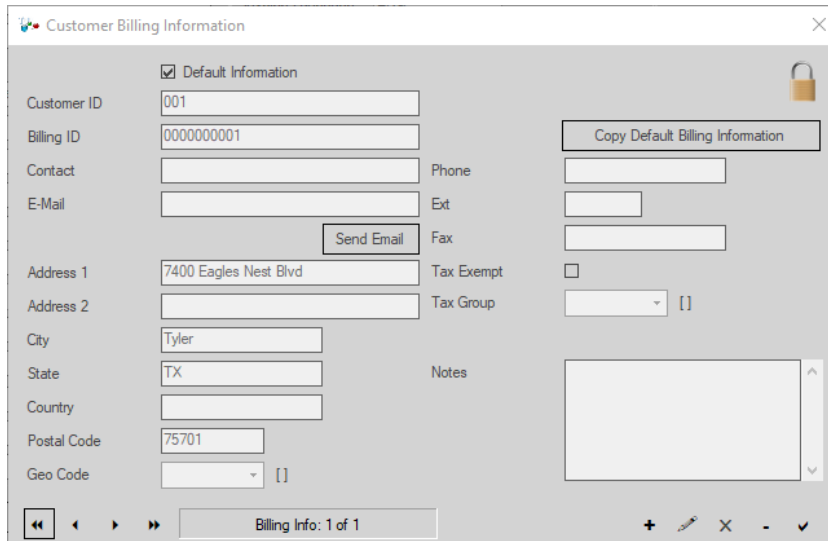
- **Customer ID\*** is a text field that is automatically filled in with the customer ID that is being edited.
- **Shipping ID\*** is a text field for the unique ID for this shipping information allowing 1-20 characters.
- **Name** is a text field allowing 1-50 characters.
- **Address 1\*** is a text 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 3.5). 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.

The **Send Email** button allows the user to create a new e-mail message in the default email application addressed to the address in the E-Mail field. E-Mail addresses with special international characters (UTF-8) are not supported.

The **Copy Default Billing Information** button is enabled when adding or editing a billing information record that is not marked as the *Default Information*. Clicking this button will copy all values from the default information record to the current record.



**Figure 3.5** – Bill To Window

### Customer Billing Information Fields



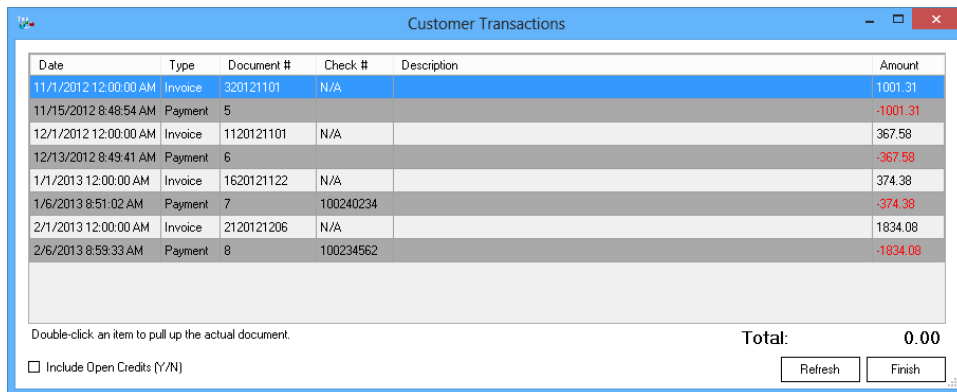
An asterisk (\*) denotes a field as required.

- **Default Information** specifies whether the billing information is the default/primary information for the customer.
- **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.
- **Contact** is a text field for the name of the billing information contact allowing 1-30 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. E-Mail addresses with special international characters (UTF-8) are not supported.
  - ex. email@domain.com
  - This address will also be used when emailing customer invoices or emailing pending invoices.
- **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 as a text field allowing 1-20 alphanumeric characters.
- **Postal Code\*** text field allowing 1-20 numeric only characters.
- **Geo Code** is a dropdown for the geo code associated with the billing information.
- **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.
- **Tax Exempt** specifies whether the billing information is tax exempt. The customer's tax exempt status is determined by how this is set in the default billing information record.
- **Tax Group** is a dropdown specifying what tax group the billing information is associated with. The customer's tax group is determined by the group specified here in the default billing information record.
- **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 3.6). 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.



The screenshot shows a window titled "Customer Transactions" with a table of transactions. The table has columns for Date, Type, Document #, Check #, Description, and Amount. The transactions are as follows:

Date	Type	Document #	Check #	Description	Amount
11/1/2012 12:00:00 AM	Invoice	320121101	N/A		1001.31
11/15/2012 8:48:54 AM	Payment	5			-1001.31
12/1/2012 12:00:00 AM	Invoice	1120121101	N/A		367.58
12/13/2012 8:49:41 AM	Payment	6			-367.58
1/1/2013 12:00:00 AM	Invoice	1620121122	N/A		374.38
1/6/2013 8:51:02 AM	Payment	7	100240234		-374.38
2/1/2013 12:00:00 AM	Invoice	2120121206	N/A		1834.08
2/6/2013 8:59:33 AM	Payment	8	100234562		-1834.08

Below the table, there is a note: "Double-click an item to pull up the actual document." and a checkbox labeled "Include Open Credits (Y/N)". At the bottom right, there is a "Total:" label with the value "0.00" and two buttons: "Refresh" and "Finish".

**Figure 3.6** – Transactions Window

- **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.



## Financials

While viewing a customer, clicking the **Financials** button in the *Customer* window will display the *Customer Financials* window for that customer (Figure 3.7). 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.

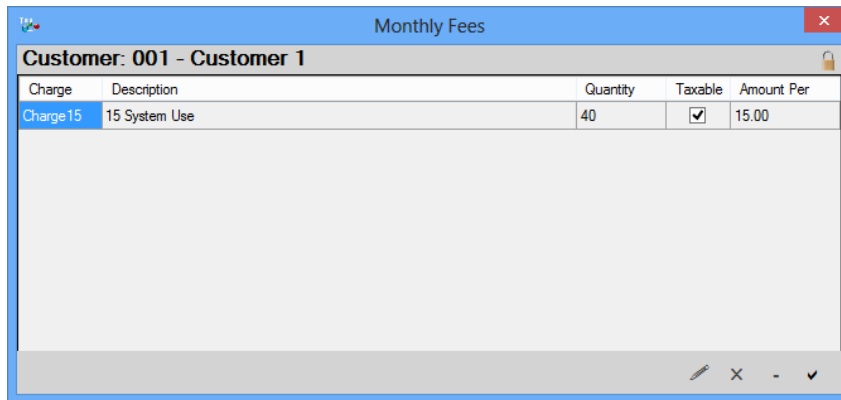
The screenshot shows a window titled "Customer Financials" with a blue header bar. Inside, there are input fields for "Customer ID" (004) and "Name" (Customer 4). To the right, "Average Days to Pay" is 9.00. Below this is an "Aging" table with columns for different day ranges and a total. At the bottom, there are three columns for "Year to Date", "Last Year", and "Lifetime" statistics for Sales, Invoices, Payments, and Credits. A "Finish" button is in the bottom right corner.

Customer Financials				
Customer ID	004			Average Days to Pay
Name	Customer 4			9.00
Aging				
0 to 30 days	31 to 60 days	61 to 90 days	Over 90 days	Total
0.00	0.00	0.00	0.00	0.00
	Year to Date	Last Year	Lifetime	
Sales	2208.46	1368.89	3577.35	
Invoices	2	2	4	
Payments	3577.35	0.00	3577.35	
Credits	0.00	0.00	0.00	
<div>Finish</div>				

**Figure 3.7** – Customer Financials Window

## Monthly Fees

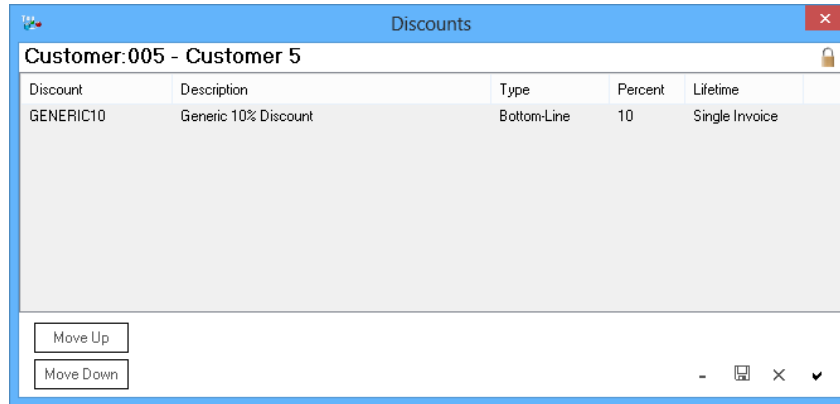
While viewing a customer, clicking the **Monthly Fees** button in the *Customer* window will display the *Monthly Fees* window for that customer (Figure 3.8). This window displays a list of the recurring charges currently being billed to a customer. If the *Customer* window is in Edit mode, displaying 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.



**Figure 3.8** – 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 3.9). 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.



**Figure 3.9** –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 3.10). 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.

Reference ID	Posted	Date	Total	Description
620121101	<input checked="" type="checkbox"/>	11/1/2012	2500.00	Beginning Balance

Reference ID:  **Posted**

Posted:

Total:

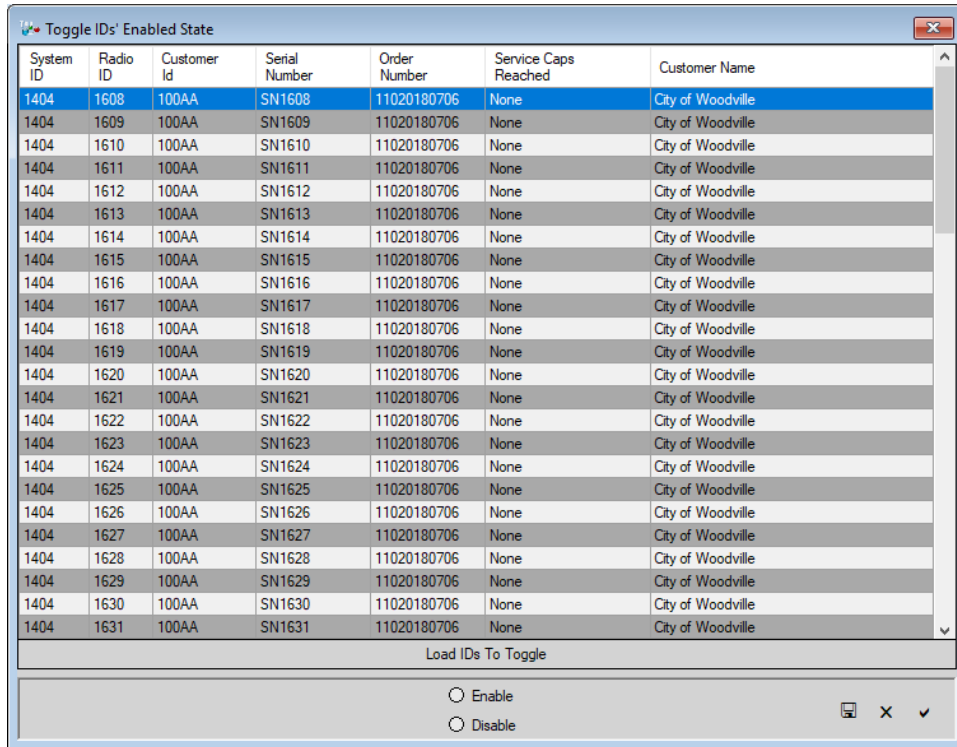
Description:

**Figure 3.10** – *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 3.11). 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.



The screenshot shows a window titled "Toggle IDs' Enabled State" with a table of radio IDs. The table has columns for System ID, Radio ID, Customer Id, Serial Number, Order Number, Service Caps Reached, and Customer Name. The first row is highlighted in blue. Below the table is a section labeled "Load IDs To Toggle" with two radio buttons: "Enable" and "Disable".

System ID	Radio ID	Customer Id	Serial Number	Order Number	Service Caps Reached	Customer Name
1404	1608	100AA	SN1608	11020180706	None	City of Woodville
1404	1609	100AA	SN1609	11020180706	None	City of Woodville
1404	1610	100AA	SN1610	11020180706	None	City of Woodville
1404	1611	100AA	SN1611	11020180706	None	City of Woodville
1404	1612	100AA	SN1612	11020180706	None	City of Woodville
1404	1613	100AA	SN1613	11020180706	None	City of Woodville
1404	1614	100AA	SN1614	11020180706	None	City of Woodville
1404	1615	100AA	SN1615	11020180706	None	City of Woodville
1404	1616	100AA	SN1616	11020180706	None	City of Woodville
1404	1617	100AA	SN1617	11020180706	None	City of Woodville
1404	1618	100AA	SN1618	11020180706	None	City of Woodville
1404	1619	100AA	SN1619	11020180706	None	City of Woodville
1404	1620	100AA	SN1620	11020180706	None	City of Woodville
1404	1621	100AA	SN1621	11020180706	None	City of Woodville
1404	1622	100AA	SN1622	11020180706	None	City of Woodville
1404	1623	100AA	SN1623	11020180706	None	City of Woodville
1404	1624	100AA	SN1624	11020180706	None	City of Woodville
1404	1625	100AA	SN1625	11020180706	None	City of Woodville
1404	1626	100AA	SN1626	11020180706	None	City of Woodville
1404	1627	100AA	SN1627	11020180706	None	City of Woodville
1404	1628	100AA	SN1628	11020180706	None	City of Woodville
1404	1629	100AA	SN1629	11020180706	None	City of Woodville
1404	1630	100AA	SN1630	11020180706	None	City of Woodville
1404	1631	100AA	SN1631	11020180706	None	City of Woodville

Load IDs To Toggle

☐ Enable ☐ Disable

**Figure 3.11** – Toggle IDs' Enable State

- **Load IDs to Toggle** allows the list of IDs to be changed.

## Email Invoices

While viewing a customer, clicking the **Email Invoices** button in the *Customer* window will display the *Email Customer Invoices* window for that customer (Figure 3.12). This window displays all pending and closed invoices for the customer allowing them to be emailed to the customer. The user can specify a subject and body for the email and select which invoices to be attached. The recipients listed are the email addresses from the customer's billing information records. The user can add one-time recipients as well. When the **Send Email** button is clicked, the Trio module on the GenWatch3 host will export the included invoices as PDFs, attach them to an email, and send to the selected recipients. The status section will show the status of the export and email process. The user can also click the **Show Log** button to see a report of the status. The **Include All/Selected** and **Exclude All/Selected** buttons allow for quickly including/excluding sets of invoices.

Include	Invoice	Invoice Date	Invoice Status	Total	Previous Balance
<input checked="" type="checkbox"/>	4784720200203	3/1/2020	Pending	\$10,364.00	\$73
<input checked="" type="checkbox"/>	4723820200103	2/1/2020	Closed	\$10,364.00	\$721
<input checked="" type="checkbox"/>	4666720191202	1/1/2020	Closed	\$10,364.00	\$711
<input type="checkbox"/>	4608520191101	12/1/2019	Closed	\$10,364.00	\$701
<input type="checkbox"/>	455041022019	11/1/2019	Closed	\$10,364.00	\$721
<input type="checkbox"/>	448938302019	10/1/2019	Closed	\$10,364.00	\$714
<input type="checkbox"/>	443217312019	9/1/2019	Closed	\$10,364.00	\$704

Figure 3.12 – Email Customer Invoices

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.

**Quotes Window Fields:**

- System Type: RNetBill
- Company ID: GEN
- Customer ID: 720AA
- Billing ID: 0000000001
- Shipping ID: 0000000001
- City of Burton: 10 Eagles Nest Blvd
- Ship To: City of Burton, 10 Eagles Nest Blvd
- Tax Group: Burton, TX, USA
- Quote Date: 1/4/2019
- Quote Number: 20020190104
- Date Entered: 1/4/2019 3:58:09 PM
- Who Entered: Admin
- Date Changed: 1/4/2019 3:58:09 PM
- Who Changed: Admin
- Purchase Order ID:
- Approval Code: (None)
- Enter Approval Code:
- Dealer:
- Salesperson:
- Create Order:
- Print:

Item ID	Description	Item Qty	Charge Qty	Unit Price	Disc %	Total
H810CN9NA2AN	SL7550	1	1	0.00	0	0.00
Charge15	\$15 System Use	1	1	15.00	0	15.00
GroupRP1	Group Call \$10	1	1	10.00	0	10.00

**Summary:**

- Subtotal: 25.00
- Federal Excise Tax: 0.00%
- Sales Tax: 0.00%
- Gross Receipts Tax: 0.00%
- Balance Due: 25.00

**Figure 4.1 – Quotes Window**

**Orders Window**

**INVOICED**

Order Number: 120170104

Date Entered: 1/4/2017 3:58:09 PM  
Who Entered: Admin  
Date Changed: 1/4/2017 3:58:09 PM  
Who Changed: Admin

Purchase Order ID:   
Invoice Number: 120170104

System Type: RNetBill  
Company ID: GEN  
Customer ID: 720AA  
Billing ID: 0000000001  
Bill To: City of Burton, 10 Eagles Nest Blvd, Burton, TX, USA  
Shipping ID: 0000000001  
Ship To: City of Burton, 10 Eagles Nest Blvd, Burton, TX, USA  
Tax Group:   
Order Date: 1/4/2017

Order Type: ☐ Normal/Recurring ☐ Point of Sale

Dealer:  Salesperson:

Item ID	Description	Item Qty	Charge Qty	Unit Price	Disc %	Total
H81QCH9NAZAN	SL7550	3	3	0.00	0	0.00
Charge15	\$15 System Use	3	3	45.00	0	90.00
GroupRP1	Group Call \$10	3	3	30.00	0	60.00

Add / Remove Units Remove Item

Notes:

Order Summary

Total Units:	3	Subtotal	150.00
Assigned Units:	3	Federal Excise Tax	0.00 % 0.00
Total Rate Plans:	3	Sales Tax	0.00 % 0.00
Total Monthly Fees:	3	Gross Receipts Tax	0.00 % 0.00
Total System Items:	0	<b>Order Total</b>	150.00

Order: 1 of 100

**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 asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field 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*

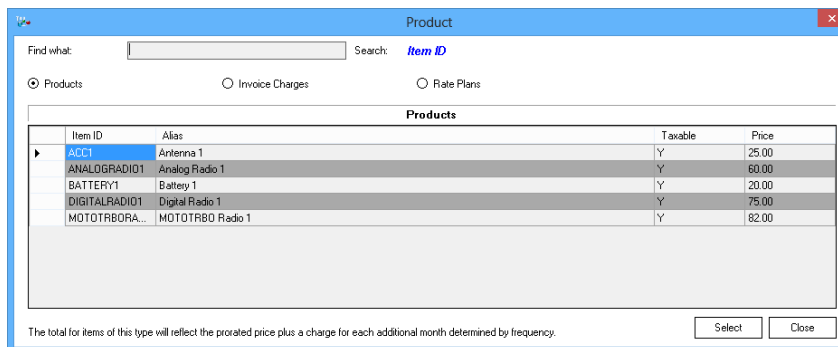


- **Bill To** is the set of fields associated with the Billing ID, these will be automatically filled in.
- **Tax Group** is automatically filled in with the tax group associated with the selected customer.
- **Shipping ID** is a dropdown field that is automatically filled in with the default shipping 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*
  - 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*
  - 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*
  - 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*
  - 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

- **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.
  - 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.
  - 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.
  - **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.
  - Other fields might be required based upon settings in the **Inventory→Types** menu.
  - 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*.



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) 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.

**Debit Memos**

Debit Entry Number: 2920130206 **POSTED**

Company ID: gen --[ Genesis ]

Customer ID: 1000AA

Billing ID: 0000000001

Bill To: City of Valley View  
5800 Eagles Nest Blvd  
Tyler TX 75703  
USA

Approval Code: Admin-20130206-1253

Type of Debit: ☒ Debit Credit Memo ☐ Debit Cash Receipt

Selected Credit Memo: 2820130206

Effective Date: 2/6/2013

Date Entered: 2/6/2013 12:53:29 PM  
Who Entered: Admin  
Date Changed: 2/6/2013 12:53:50 PM  
Who Changed: Admin

Selected Credit Memo:  
Date: 2/6/2013  
Total: 50.00  
Debitable: 0.00

GL Acct	GL Acct Name	Amt on Document	Debit Amt
4	Income	50.00	5.00

Remove

Enter Approval Code

Notes

Summary:  
Subtotal: 5.00  
Total Debit: 5.00

Debit Memo: 1 of 1

Post

**Figure 5.1** – Debit Memos Window



An asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field 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.



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) 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**

**Credit Entry Number:** 20320130123

**POSTED**

**Approval Code:** Admin-20130123-1245

**Type of Credit:**  
☒ General Credit  
☐ Specific Credit

**Reason:** 15 System Downtime/Poor Service

GL Acct	GL Acct Name	Tax	Amt on Invoice	Credit Amount
4	Income	<input type="checkbox"/>	0.00	40.00

**Summary**

Subtotal	40.00
Sales Tax	0.00%
Gross Receipts Tax	0.00%
Credit Total	40.00

**Notes**

**Post**

**Figure 6.1** – Credit Memos Window



An asterisk (\*) denotes a field as required.

- **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\*** (Only visible if Specific Credit is selected) 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 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.

The screenshot shows the 'Cash Receipts' window with the following details:

- Company ID:** GEN [Genesis]
- Customer ID:** 1150AA [City of Valentine]
- Cash GL Account:** 1 Assets
- Payment Date:** 1/21/2013
- Payment Type:** Cash
- Payment Amount:** 1500.00
- Notes:** (Empty text area)
- Payment ID:** 1
- Date Entered:** 1/21/2013 3:04:00 PM
- Who Entered:** Admin
- Date Changed:** 1/21/2013 3:04:00 PM
- Who Changed:** Admin
- Payment Currency:**
  - ☒ Normal/Default
  - ☐ Other
- Check Amt:** 1,500.00
- Applied Amt:** 1,500.00
- Difference:** 0.00

**Outstanding Invoices Table:**

Document Number	Document Type	Document Date	Document Total	Other Payments	This Payment	Document Balance	Currency Type
<input checked="" type="checkbox"/> 11520130121	Invoice	2/1/2013	5550.00	0.00	1500.00	4050.00	Normal/Default

CR: 1 of 1

Buttons: Void, NSF, Post

Figure 7.1 – Cash Receipts Window



An asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field 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.



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



An asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field 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*
  - For more information on GL Sales Account see the *Chart of Accounts* section in *Chapter 17 – Financials*.
- **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 asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field 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.

	Default	Item ID	Description	Qty	Amount per Item	Total Amount
1	<input checked="" type="checkbox"/>	ACC1	Antenna 1	1	25.00	25.00

**Figure 8.3** – Item Pricing Window

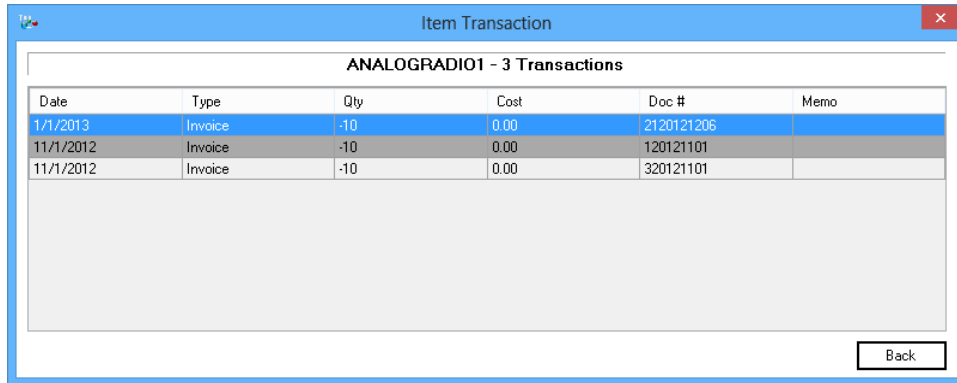


*Italics show when a field can be modified.*

- **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.



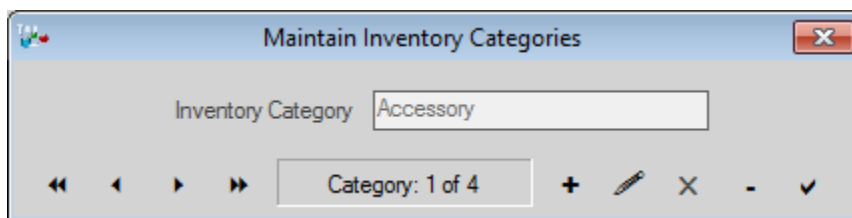
Date	Type	Qty	Cost	Doc #	Memo
1/1/2013	Invoice	-10	0.00	2120121206	
11/1/2012	Invoice	-10	0.00	120121101	
11/1/2012	Invoice	-10	0.00	320121101	

**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.

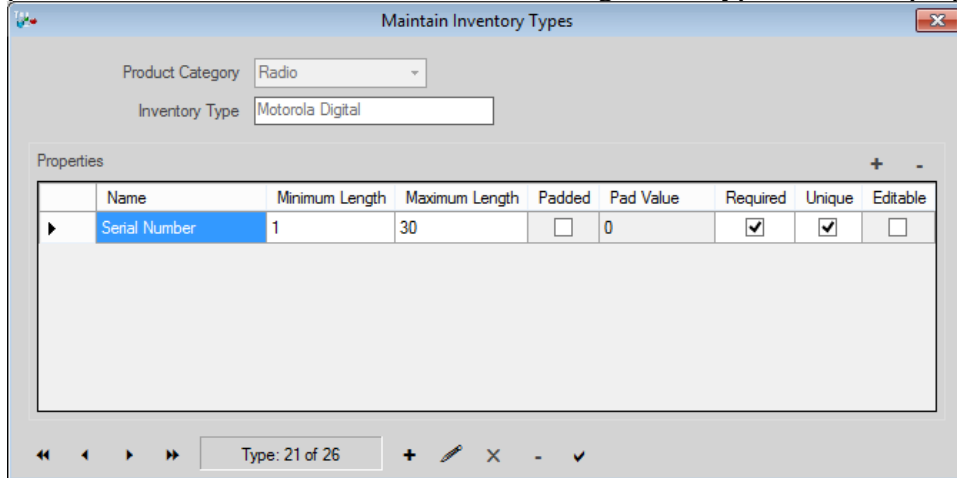


**Figure 8.5** – Maintain Inventory Categories Window

- **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.



	Name	Minimum Length	Maximum Length	Padded	Pad Value	Required	Unique	Editable
▶	Serial Number	1	30	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Figure 8.6** – Maintain Inventory Types Window



*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.

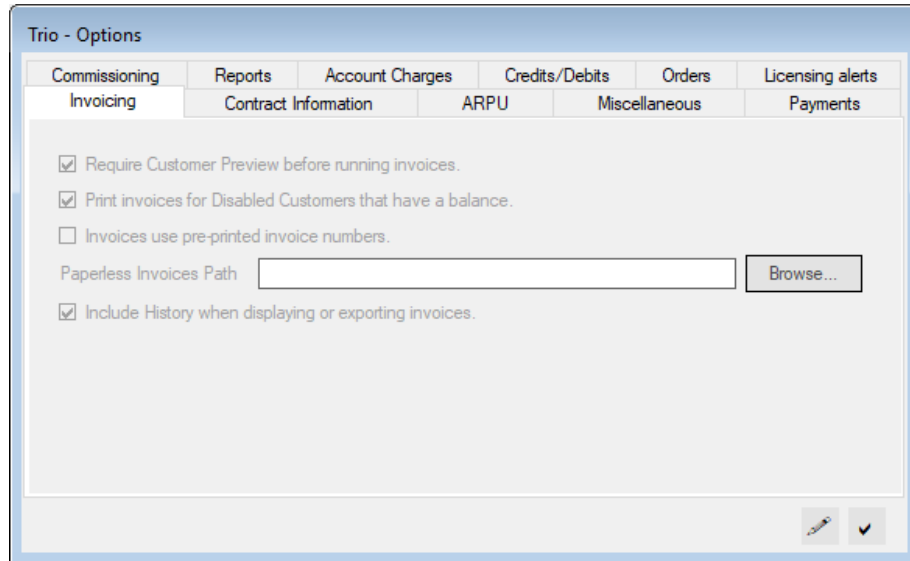
This chapter provides an overview of the *Trio - Options* window.

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.



**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.
- **Include History when displaying or exporting invoices:** If checked, the "Customer Summary" section of an invoice will include the customer's Previous Balance, Payments as of the invoice date, and Debits/Credits Received.
  - Regardless of this setting, the **Invoice Print Level** dropdown in the *View Invoices* window will always allow viewing the invoice either way. The Summary option will show/hide the historical values according to this setting. A corresponding **Summary With History** or **Summary Without History** option will display the opposite of this setting.

## 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.

The screenshot shows the 'Trio - Options' dialog box with the 'Contract Information' tab selected. The dialog has a tabbed interface with the following tabs: Commissioning, Reports, Account Charges, Credits/Debits, Orders, Licensing alerts, Invoicing, Contract Information, ARPU, Miscellaneous, and Payments. The 'Contract Information' tab is active and contains the following settings:

- ☐ Automatically print contract end notices?
- What time of day would you like to check for contracts ending? 8:40:10 AM
- How many days in advance would you like to send out notices? 45
- Computer to print Contract End notices from: [Empty text box]

At the bottom right of the dialog, there are two icons: a pencil icon and a checkmark icon.

**Figure 9.2** – Contract Information Tab



## 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.

The screenshot shows a software window titled "Trio - Options". It has a tabbed interface with the following tabs: Commissioning, Reports, Account Charges, Credits/Debits, Orders, Licensing alerts, Invoicing, Contract Information, ARPU (selected), Miscellaneous, and Payments. The ARPU tab is active and displays the text "Include in ARPU calculation:" followed by three checked checkboxes: "Fixed Charges (Rate Plan Charges)", "Variable Charges (Airtime)", and "Account Charges (Activation Fees)". At the bottom right of the window, there are icons for a pencil (edit) and a checkmark (save).

**Figure 9.3 – ARPU Tab**

- **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.

Trio - Options

Commissioning	Reports	Account Charges	Credits/Debits	Orders	Licensing alerts
Invoicing	Contract Information	ARPU	Miscellaneous	Payments	

Customer and Unit Manager:  
Trio

Default Activation Churn Code  
A001

New Customer  
Default Deactivation Churn Code  
D001

Customer Turned Off

☒ Enable New Customer ID Suggestion  
☐ Show Popup for Limit Reached Alerts

**Figure 9.4** – Miscellaneous Tab

- **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.
- **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.
  - 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.
  - 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.
  - 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.

- **Enable New Customer ID Suggestion** is auto-completing 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

- **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.
  - 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.

Trio - Options	
Invoicing	Contract Information
Commissioning	Reports
Account Charges	Credits/Debits
Orders	Licensing alerts

☐ Use Commissioning

Posting Day: 10

Collection End Day: 7

Collection Days: 5

(Chum End Day = Collection End Day - Collection Days)

**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.

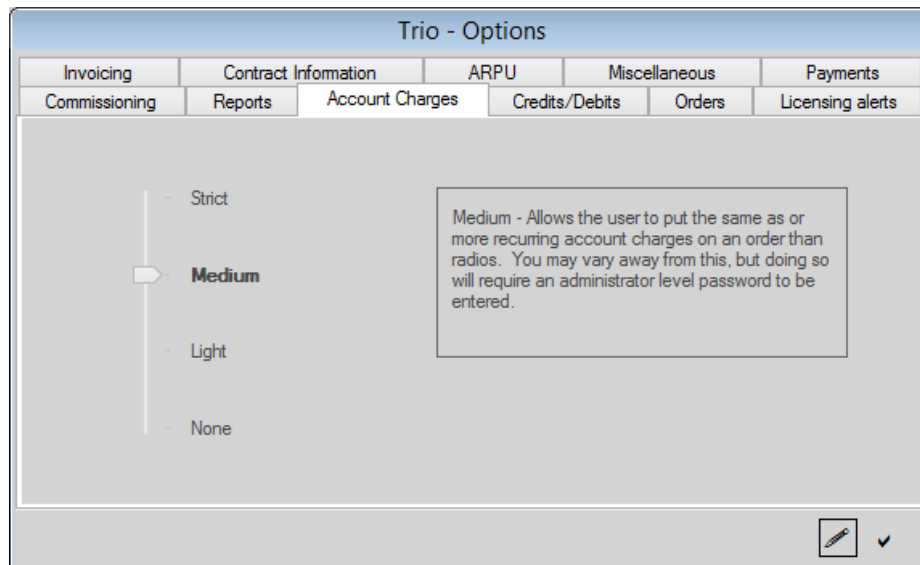
The screenshot shows a software window titled "Trio - Options". It features a tabbed interface with the following tabs: Invoicing, Contract Information, ARPU, Miscellaneous, Payments, Commissioning, Reports, Account Charges, Credits/Debits, Orders, and Licensing alerts. The "Reports" tab is currently selected. Within this tab, there is a section labeled "Report Footer Verbiage" containing a text input field with the text "Genesis Confidential". At the bottom right of the window, there is a small icon of a pencil inside a square, followed by a checkmark icon.

**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.



**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.

The screenshot shows a software window titled "Trio - Options". It has a tabbed interface with the following tabs: Invoicing, Contract Information, ARPU, Miscellaneous, Payments, Commissioning, Reports, Account Charges, Credits/Debits (which is the active tab), Orders, and Licensing alerts. The main content area of the "Credits/Debits" tab contains the following elements:

- A label: "Maximum amount that a user can credit/debit without an approval code."
- A text input field containing the value "0.00".
- A checkbox labeled "Automatically generate service credits when a radio/personality is disabled or deleted." which is currently unchecked.
- A checked checkbox labeled "Automatically generate credits for rate plans during the Revert To process."
- A note below the checked checkbox: "Changes to the Fixed Charges during the Revert To process take effect immediately."

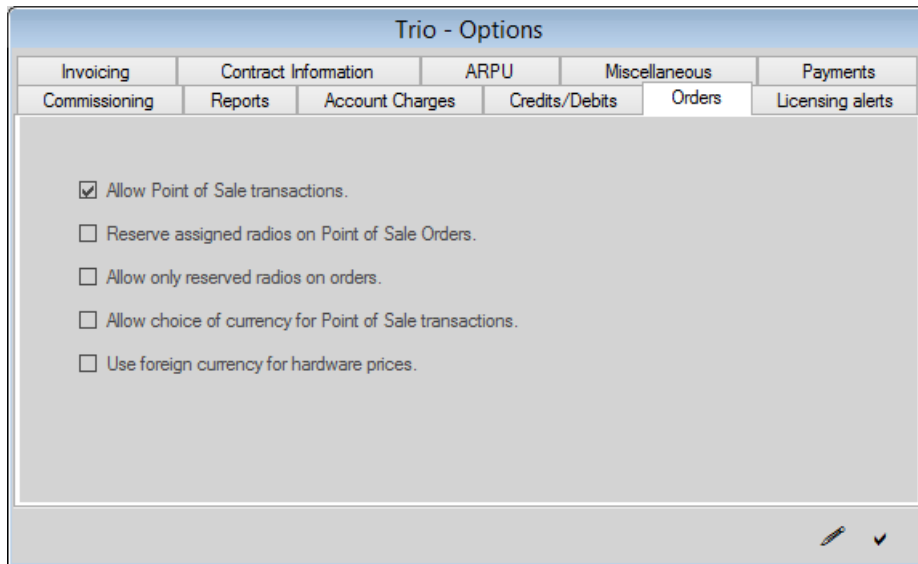
At the bottom right of the window, there are icons for a pencil (edit) and a checkmark (save).

**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.



The screenshot shows a window titled "Trio - Options". It has a tabbed interface with the following tabs: Invoicing, Contract Information, ARPU, Miscellaneous, Payments, Commissioning, Reports, Account Charges, Credits/Debits, Orders (selected), and Licensing alerts. The "Orders" tab is active, displaying five checkboxes:   
1. ☒ Allow Point of Sale transactions.   
2. ☐ Reserve assigned radios on Point of Sale Orders.   
3. ☐ Allow only reserved radios on orders.   
4. ☐ Allow choice of currency for Point of Sale transactions.   
5. ☐ Use foreign currency for hardware prices.   
At the bottom right of the dialog, there are icons for a pencil (edit) and a checkmark (save).

**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*.

System Type	Licensed Item	Alert Enabled	'Remaining Licensed'
RNetBill	Radios	<input type="checkbox"/>	80000
Generic	Radios	<input type="checkbox"/>	200
Tetra	Radios	<input type="checkbox"/>	20000
ASTRO-PMI	Radios	<input type="checkbox"/>	20000

**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.
  - **Once** is an option that will only generate an alert the first time an *Alert Enabled* item falls within the *Remaining Licensed* limit.
  - **Daily** is an option that will generate alerts every day while an *Alert Enabled* item falls within the *Remaining Licensed* limit.
  - **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**.

Item Type	Show	Expand
Child Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Radios	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quotes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cash Receipts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Memos	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Debit Memos	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**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 Memo View 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.

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.

The screenshot shows the 'Orders' window in 'Add mode'. The interface includes several sections:

- System Type:** A dropdown menu with 'GEN' selected.
- Company ID:** A text field containing 'GEN'.
- Customer ID:** A dropdown menu with a search icon.
- Billing ID:** A dropdown menu.
- Bill To:** A text area for address information.
- Tax Group:** A dropdown menu.
- Order Date:** A date picker set to '2/ 1/2019'.
- Order Type:** Radio buttons for 'Normal/Recurring' (selected) and 'Point of Sale'.
- Dealer:** A dropdown menu.
- Salesperson:** A dropdown menu.
- Order Number:** A section with 'Date Entered', 'Who Entered', 'Date Changed', and 'Who Changed' fields, all showing '2/1/2019 10:28:18 AM' and 'admin'.
- Purchase Order ID:** A text field.
- Invoice Number:** A text field.
- Buttons:** 'View Invoice' and 'Order Wizard' buttons.
- Item Grid:** A table with columns: Item ID, Description, Item Qty, Charge Qty, Unit Price, Disc %, and Total. It is currently empty.
- Remove Item:** A button below the item grid.
- Notes:** A text area for additional information.
- Summary:** A section at the bottom right showing 'Subtotal', 'Federal Excise Tax', 'Sales Tax', 'Gross Receipts Tax', and 'Order Total', all with values of '0.00'.
- Footer:** Navigation buttons and the text 'Order: New Order'.

**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.

The screenshot shows the 'Product' window with a search bar and three radio buttons: 'Products' (selected), 'Invoice Charges', and 'Rate Plans'. Below the radio buttons is a table titled 'Products' with the following data:

Item ID	Alias	Taxable	Price
H55QDC9JA1AN	XPR6300	Y	0.000
H55QDC9LA1AN	XPR6350	Y	0.000
H55QDH9LA1AN	XPR6550	Y	0.000
H56RDN9KA1AN	XPR7550	Y	0.000
H81QCN9NA2AN	SL7550	Y	0.000
M27QNH9LA1AN	XPR4550	Y	0.000
M27QPC9LA1AN	XPR4350	Y	0.000
M28QNN9KA1AN	XPR5550	Y	0.000

At the bottom of the window, there is a note: 'The total for items of this type will reflect the prorated price plus a charge for each additional month determined by frequency.' and two buttons: 'Select' and 'Close'.

**Figure 10.2** – Product window

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).

**Add / Remove Units**

Radio: Digital Radio 1

Total Units Required: 1

Units Selected: 1

Units Remaining: 0

**Non-Inventory Units**

Serial Number	IMEI

> <

**Selected Units**

Serial Number	IMEI
021	000000000000021

↑ ↓

☐ Inventory Items ☒ Non-Inventory Items

OK Cancel

**Figure 10.3** – Add / Remove Units window

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.

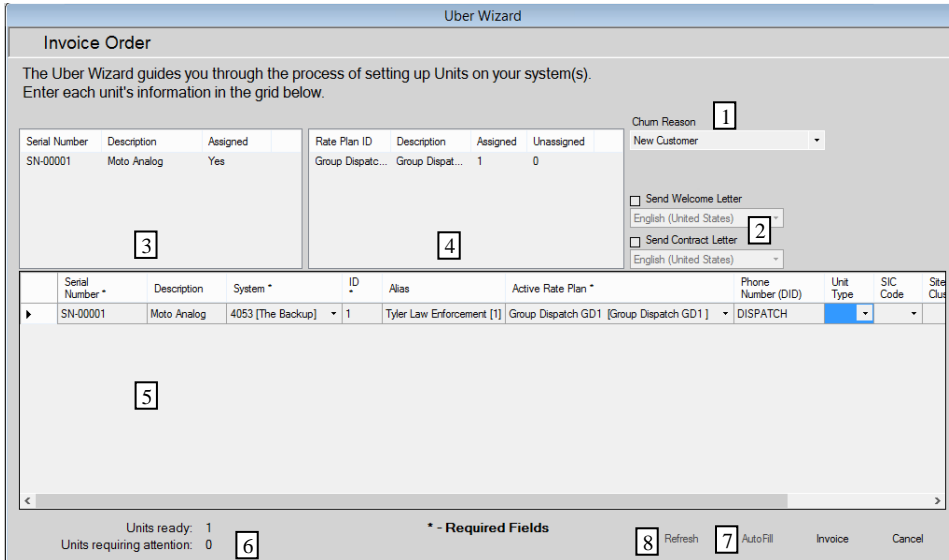
## Uber Wizard

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)



The Uber Wizard guides you through the process of setting up Units on your system(s). Enter each unit's information in the grid below.

Serial Number	Description	Assigned	Rate Plan ID	Description	Assigned	Unassigned
SN-00001	Moto Analog	Yes	Group Dispatch...	Group Dispatch...	1	0

Churn Reason: 1 New Customer

☐ Send Welcome Letter

English (United States) 2

☐ Send Contract Letter

English (United States)

Serial Number *	Description	System *	ID *	Alias	Active Rate Plan *	Phone Number (DID)	Unit Type	SIC Code	Site Out
SN-00001	Moto Analog	4053 [The Backup]	1	Tyler Law Enforcement [1]	Group Dispatch GD1 [Group Dispatch GD1]	DISPATCH			

Units ready: 1 6

Units requiring attention: 0

\* - Required Fields 8 Refresh 7 AutoFill Invoice Cancel

**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.



This chapter provides an overview of the invoice run process.

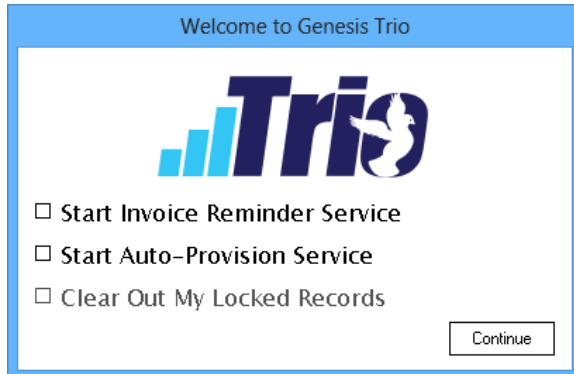
This chapter contains the following sections:

- **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.

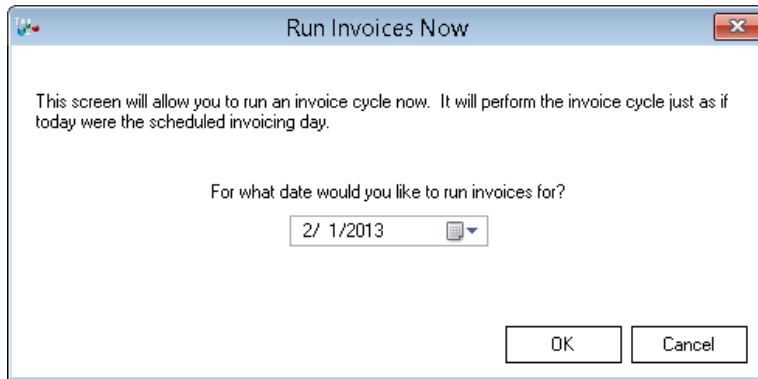
Trio can automatically notify administrative users when it is time to begin the invoice run process. To receive this notification, the **Invoice Reminder** service must be started by an administrator. (Figure 11.1)



**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)

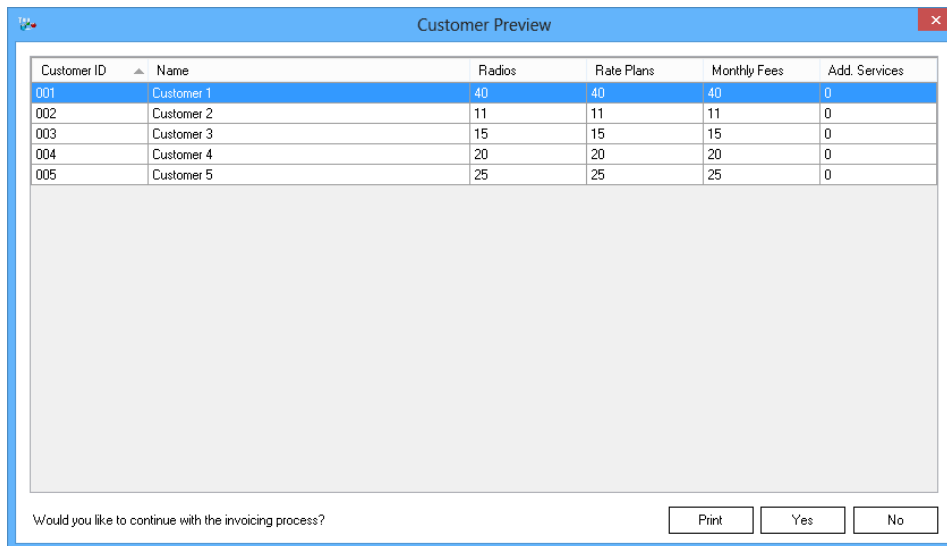


**Figure 11.2** – Run Invoices Now window

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*.



**Figure 11.3** – Customer Preview window

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)

Invoice Cycle Summary

Date for this Invoice Batch:  
4/1/2013

This batch is from Frequency:  
Monthly  
and Cycle:  
1

The first invoice number:  
3020130212

Message to appear on invoice:

Run Invoices Now

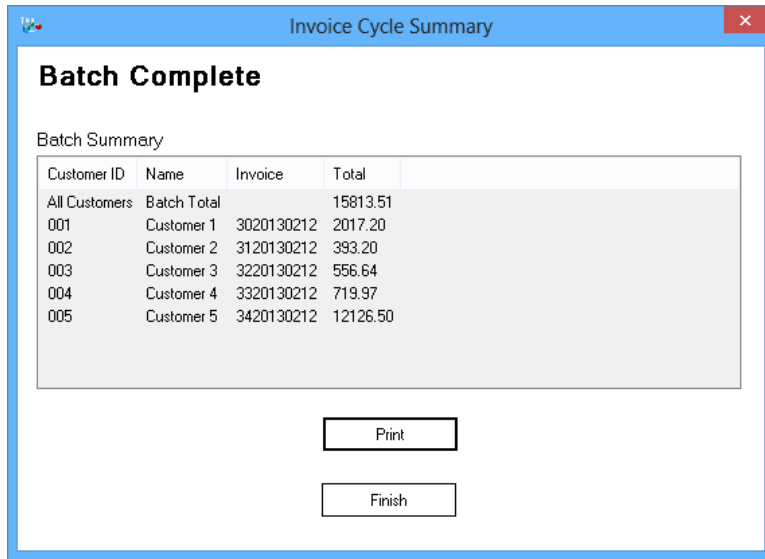
**Figure 11.4** – Invoice Cycle Summary window

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).



**Figure 11.5** – Invoice Cycle Summary Batch Complete window



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.

## System

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.

The screenshot shows the 'Systems' window with the 'Technical' tab selected for '1404 [Demo System 1404]'. The form contains the following fields and controls:

- Company ID:** 'gen' (with '[ Genesis ]' below it).
- System ID:** '1404' (with a magnifying glass icon).
- Alias:** 'Demo System 1404'.
- Site Map Location:** An empty text field with a 'Browse...' button below it.
- Uses I7/T8 Notation:** An unchecked checkbox.
- Metadata Table:**

Date Entered	11/1/2012 9:00:19 AM
Who Entered	Admin
Date Changed	11/1/2012 12:47:51 PM
Who Changed	Admin
- Action Buttons:** 'Reserve IDs', 'Reserve Talkgroup IDs', 'Re-Crunch', and 'Add Memos'.

At the bottom, there are navigation arrows, a 'System: 1 of 2' indicator, and icons for edit, delete, and save.

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

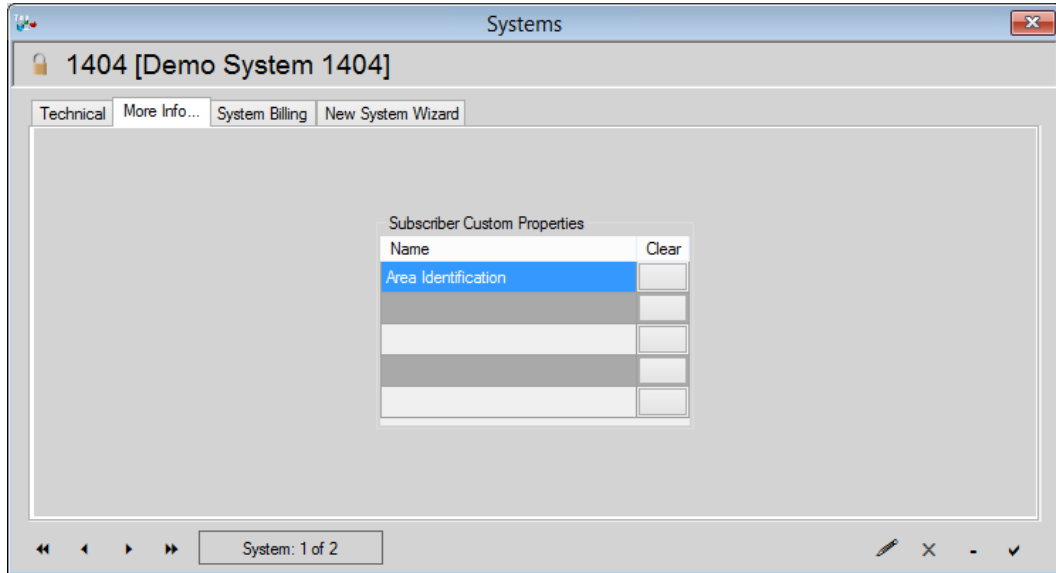


An asterisk (\*) denotes a field as required.

- **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)*.



**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.

Systems

1404 [Demo System 1404]

Technical More Info... System Billing New System Wizard

GL Account

Call Elimination  
Less than  sec

Dialled Call Elimination  
Less than  digits

Exception

Add

Exception

Remove

Call Time Ranges

	Round To	After
▶ 1st	1 sec	0
2nd	1 sec	0
3rd	1 sec	0
4th	1 sec	0
5th	1 sec	0
6th	1 sec	0

System: 1 of 2

**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.
- **Dialled 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.

Available ID Range(s)	
Radios	To
1	999
5000	13999999

System ID: 1404  
Demo System 1404

Customer: 001  
Customer 1

☐ Add ☒ Remove ☐ Import From

Remove Single ID

Remove Range

Finish

Assigned ID Range(s)	
From	To
1000	1999

IDs in Range: 999  
Total: 13995999

IDs in Range: 1000  
Total: 1000

**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.

Available ID Range(s)	
Radios	To
1001	19999
20501	13999999

System ID: 1404  
Demo System 1404

Customer: 001  
Customer 1

☐ Add ☒ Remove ☐ Import From

Remove Single ID

Remove Range

Finish

Assigned ID Range(s)	
From	To
1	1000
20000	20500

IDs in Range: 18999  
Total: 13998498

IDs in Range: 1000  
Total: 1501

**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

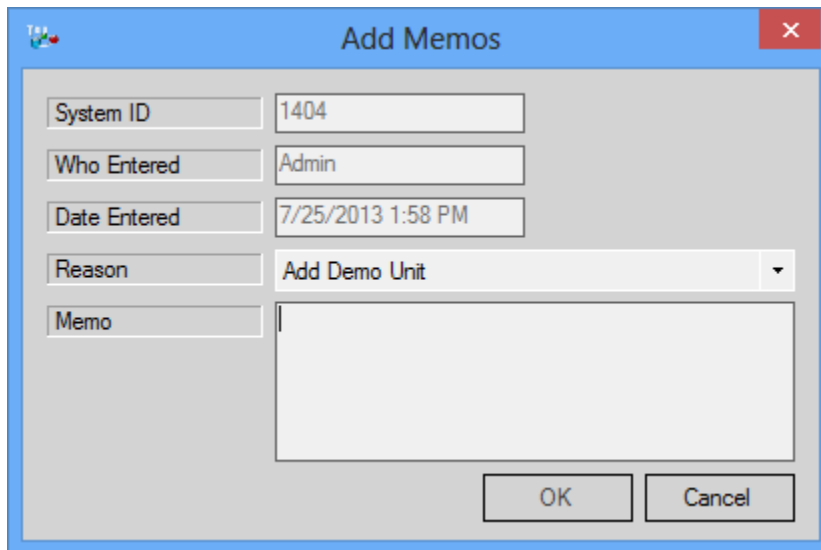
be reserved for the selected customer. This number must be greater than 0, and less than or equal to the value in the **To** field.

- **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.

The image shows a screenshot of a software window titled "Add Memos". The window has a blue title bar with a close button (X) in the top right corner. Inside the window, there are several input fields: "System ID" with the value "1404", "Who Entered" with the value "Admin", "Date Entered" with the value "7/25/2013 1:58 PM", and "Reason" with a dropdown menu showing "Add Demo Unit". Below these fields is a large text area labeled "Memo" which is currently empty. At the bottom right of the window are two buttons: "OK" and "Cancel".

**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.

Demo RFSS 2	
System ID	1404 [ Demo System 1404 ]
RFSS ID	2
Alias	Demo RFSS 2

Date Entered	4/10/2014 2:51:41 PM
Who Entered	Admin
Date Changed	4/10/2014 2:53:51 PM
Who Changed	Admin

RFSS: 1 of 1

**Figure 12.7** – RFSSs Module



An asterisk (\*) denotes a field as required.

- **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.

## Sites

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.

The screenshot shows the 'Sites' module window with the 'Technical' tab selected. The window title is 'Sites'. The sub-header is 'Demo Site 1'. Below the header are four tabs: 'Technical', 'Site Image', 'Site Contacts', and 'New Site Wizard'. The 'Technical' tab contains the following fields and information:

- System ID:** 1404 (with a dropdown arrow). Below it, 'Demo System 1404' is displayed.
- RFSS ID:** 2 (with a dropdown arrow). Below it, 'Demo RFSS 2' is displayed.
- Site ID:** 1 (with a dropdown arrow and a magnifying glass icon).
- Alias:** Demo Site 1 (with a text input field).
- Latitude:** 0.0000000 (with a dropdown arrow and a required field asterisk).
- Longitude:** 0.0000000 (with a dropdown arrow and a required field asterisk).
- Qty of Channels:** 1 (with a dropdown arrow).

On the right side, there is a table showing audit information:

Date Entered	4/10/2014 2:56:54 PM
Who Entered	Admin
Date Changed	4/10/2014 2:56:54 PM
Who Changed	Admin

At the bottom right, there are two buttons: 'View Channel Information' and 'Track Outages'. At the bottom left, there are navigation arrows and a status bar that says 'Site: 1 of 1'. At the bottom right, there are icons for edit, delete, and save.

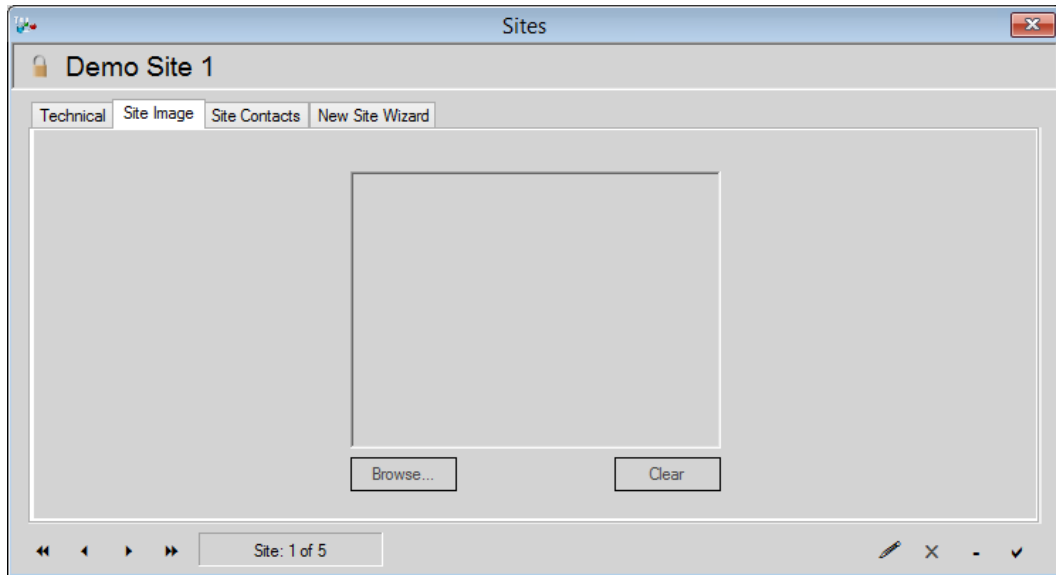
**Figure 12.8** – Sites Module – Technical Tab



An asterisk (\*) denotes a field as required.

- **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

- **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

- **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

System - 1404  
RFSS - 2  
Site - 1 [Demo Site 1]

Ch	Frequency	Channel Type	Secure
1			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
6			<input type="checkbox"/>
7			<input type="checkbox"/>
8			<input type="checkbox"/>
9			<input type="checkbox"/>
10			<input type="checkbox"/>
11			<input type="checkbox"/>
12			<input type="checkbox"/>
13			<input type="checkbox"/>
14			<input type="checkbox"/>
15			<input type="checkbox"/>
16			<input type="checkbox"/>
17			<input type="checkbox"/>
18			<input type="checkbox"/>

**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.

**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.

The screenshot shows the 'Site Clusters' module for 'Southwest'. The 'New Site Cluster Wizard' tab is active. The 'System ID' field is set to 1404, with a tooltip showing '[ Demo System 1404 ]'. The 'Site Cluster ID' field is set to 6. The 'Alias' field is set to Southwest. The 'Available Sites' grid is empty. The 'Included Sites' grid contains one site: Demo Site 1. The status bar at the bottom indicates 'Site Cluster: 1 of 1'.

RFSS	Site	Alias
2	1	Demo Site 1

**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.

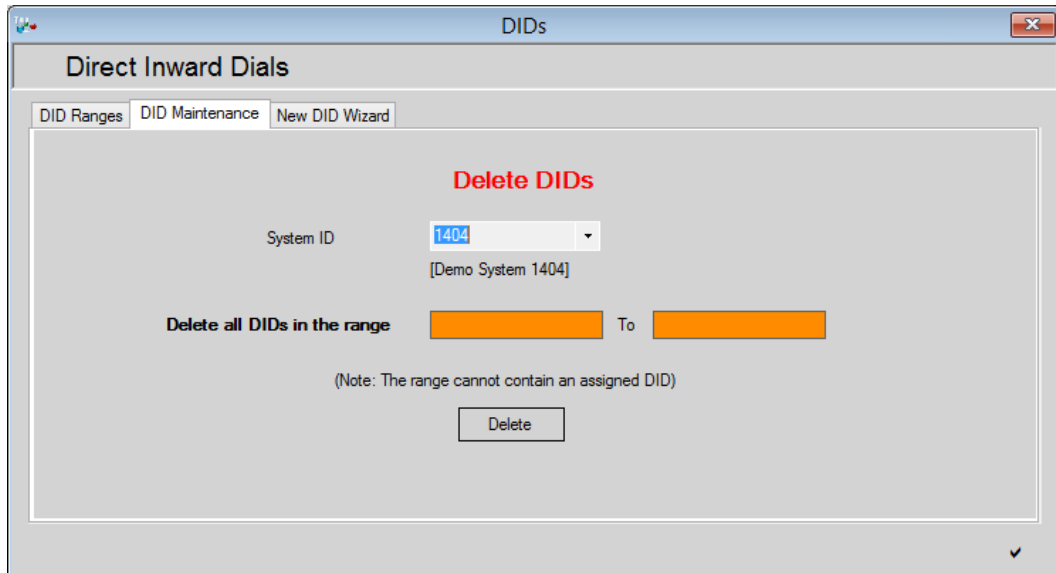
## DIDs

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.

**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.

The screenshot shows the 'Radios' module window with a tab for 'SN101'. The 'Technical' tab is active, displaying various fields for radio configuration. On the left, there are input fields for Company ID (GEN), Customer ID (520AA), Model Number (H81QCN9NA2AN), Serial Number (SN101), Dealer, Salesperson, and SIC Code (9229). On the right, there is a table for audit information (Date Entered, Who Entered, Date Changed, Who Changed), a Unit Type dropdown (Base), and a large text area for Comments. At the bottom right, there are buttons for 'Technical Info.' and 'View Personalities'. The bottom status bar shows 'ID: 4 of 100'.

Audit Information	
Date Entered	1/4/2017 3:58:09 PM
Who Entered	Admin
Date Changed	2/4/2019 8:46:02 AM
Who Changed	admin

Figure 12.16 – Radios Module

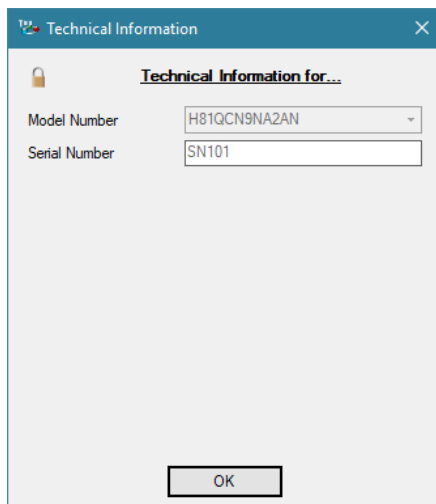


An asterisk (\*) denotes a field as required.

- **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.
  - 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 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.
  - 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.
  - 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.



**Figure 12.17** – *Technical Information* Window

## Unit User

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.

**Unit Users**

**Serial Number - SN101**

Personality | Billing Information | Properties | Services | Talkgroups

System ID: 1404 [ Genesis System 1404 ]

Company ID: GEN [ Genesis ]

Customer ID: 520AA [ County of Mitchell ]

Radio ID: 101

Alias: County of Mitchell [101]

Model Number: H81QCN9NA2AN

Serial Number: SN101 ☒ Enable Usage?

Site Cluster: 4 South Sites

DID:

Date Entered: 1/4/2017 3:58:09 PM  
 Who Entered: Admin  
 Date Changed: 2/4/2019 8:47:58 AM  
 Who Changed: admin

Date Off: 1/ 1/2100

Disable Billing | Technical Info. | Churn History

Personality: 1 of 1

**Figure 12.18** – Unit Users Module – Personality Tab

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 asterisk (\*) denotes a field as required.



The *Add* and/or *Edit* in *italics* after each field show when a field can be modified.

- **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.

Unit Users

Serial Number - SN101

Personality Billing Information Properties Services Talkgroups

Rate Plan GroupRP1 ☒ Use Customer Contract End Date  
Group Call \$10

Revert To

Apply Revert to Date 1/ 5/2017  Combine Private Call and Dispatch minutes ☐  
Long Distance Rate 0.000 Rate Plan Locked Y/N ☒  
Start Date 1/ 4/2017  Lock Rates Y/N ☒  
End Date 1/ 5/2017  No Air No Fix ☐

Call Detail

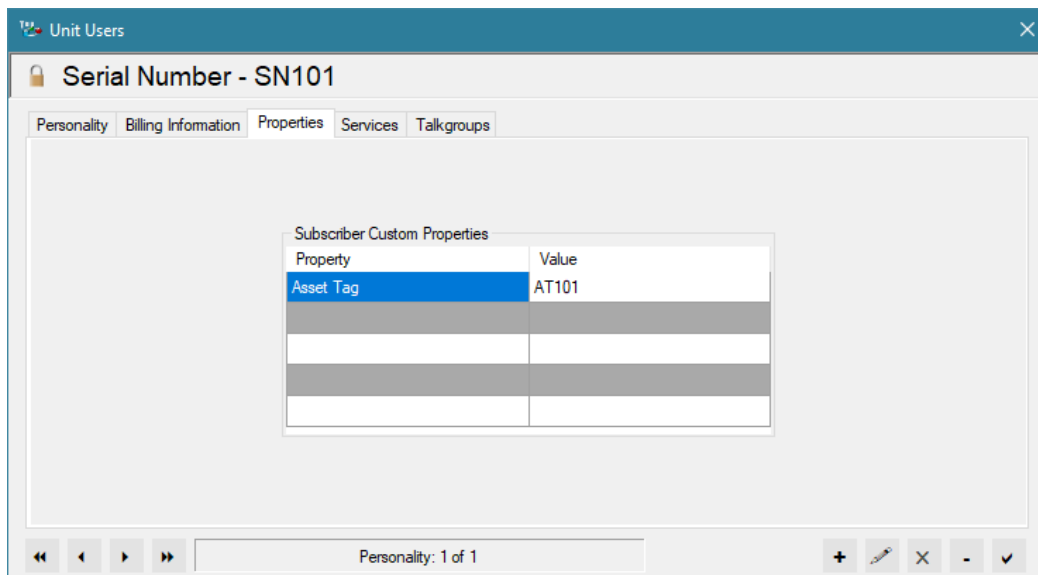
Personality: 1 of 1

**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.

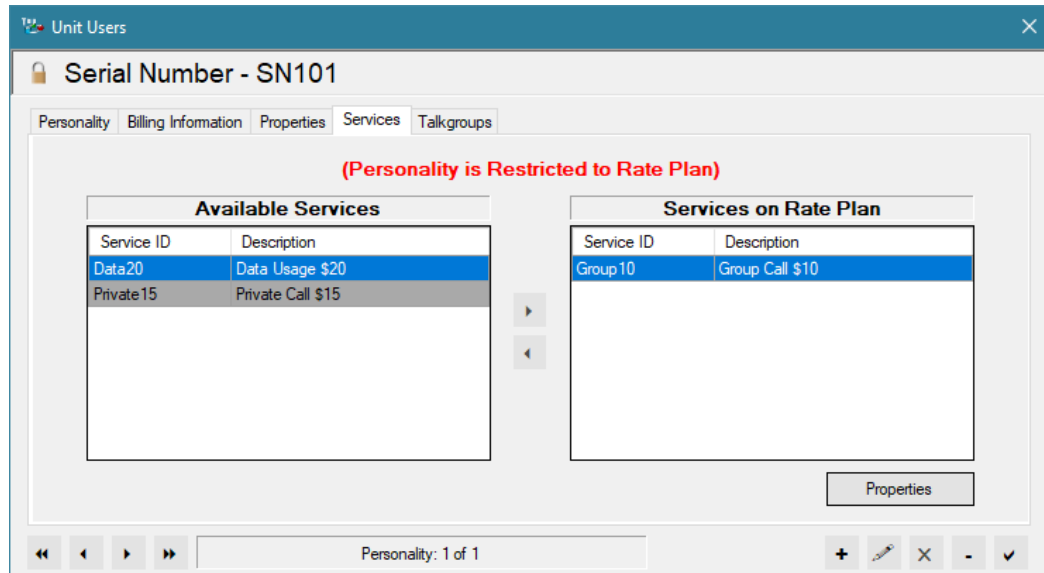


**Figure 12.20** – Unit Users Module – Properties Tab

- **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*



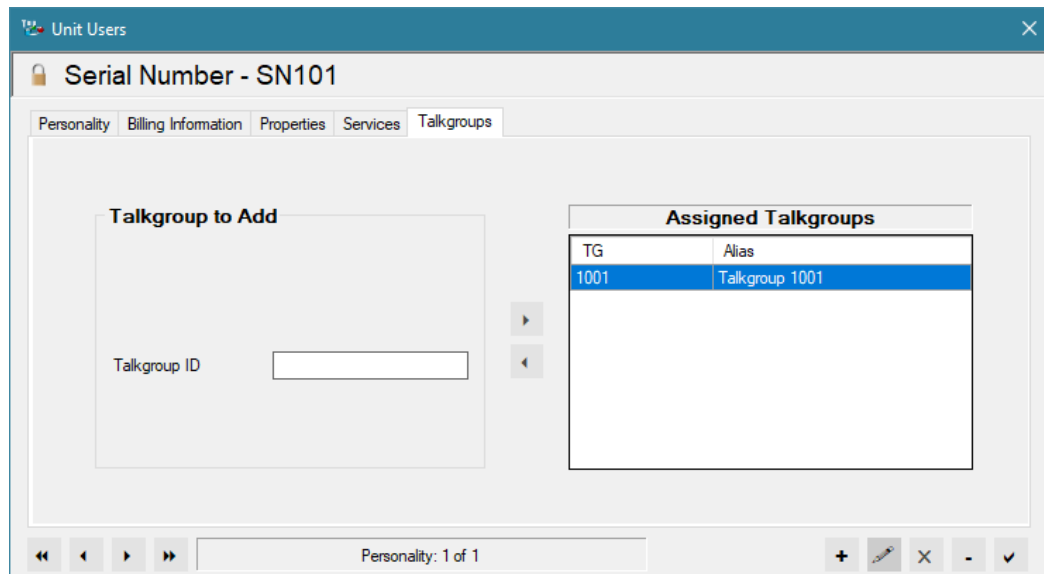
The *Services* tab (Figure 12.21) manages the services assigned to the Rate Plan that the Unit User is on.



**Figure 12.21** – Unit Users Module – Services Tab

- **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.*

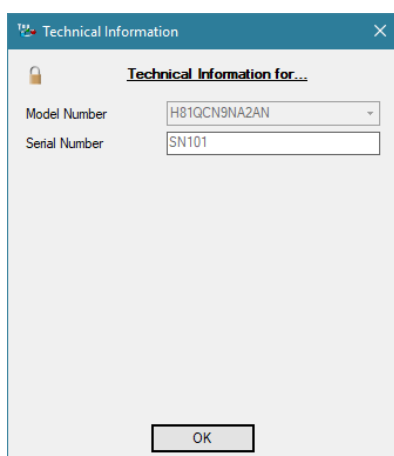
The *Talkgroup* tab (Figure 12.22) manages talkgroups that the unit user is in.



**Figure 12.22** – Unit Users Module – Talkgroups Tab

- **Talkgroup ID** is a text field that allows the user to enter talkgroup IDs and assign them to the unit user. *Add, Edit*
  - 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 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

Technical Information for...

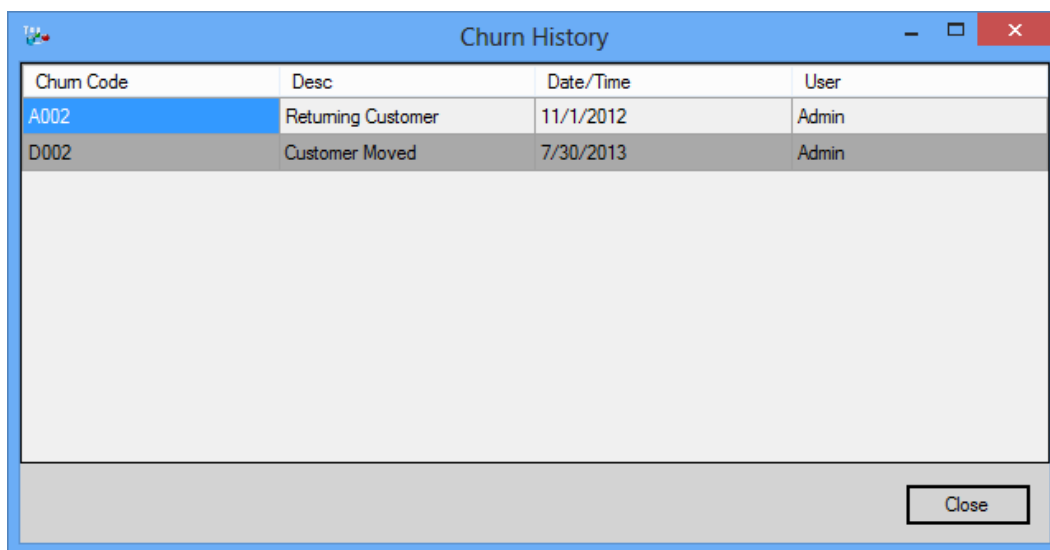
Model Number: H81QCN9NA2AN

Serial Number: SN101

OK

**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 Code	Desc	Date/Time	User
A002	Returning Customer	11/1/2012	Admin
D002	Customer Moved	7/30/2013	Admin

Close

**Figure 12.24** – Unit User Module – Churn History

## 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 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.

The screenshot shows a web application window titled 'Services'. Inside, there's a tabbed interface with 'Technical' and 'New Service Template Wizard'. The 'Technical' tab is active, displaying a form for 'Call Forwarding 15'. The form includes fields for 'Service Template ID' (CallForwardService1), 'Service Code' (14), 'Invoice Description' (Call Forwarding 15), 'Fixed Charge' (15.00), 'Variable Charge' (0.30), 'Overages Charge' (0.50), 'Roam Rate' (0.40), 'Unit Of Measure' (Minutes), 'Free Minutes' (0), 'Free Calls' (0), 'Pooled Minutes?' (checkbox), 'Variable Charge Cap' (0.00), 'Overages Charge Cap' (0.00), 'Roam Rate Cap' (0.00), 'GL Account' (4), 'Airtime GL Account' (4), 'Date Entered' (1/22/2013 8:13:21 AM), 'Who Entered' (Admin), 'Date Changed' (1/22/2013 8:13:21 AM), 'Who Changed' (Admin), 'Commissionable?' (checkbox), and 'Income' (4). Navigation buttons at the bottom indicate 'Service: 1 of 1'.

Figure 12.25 – Services Module



An asterisk (\*) denotes a field as required.

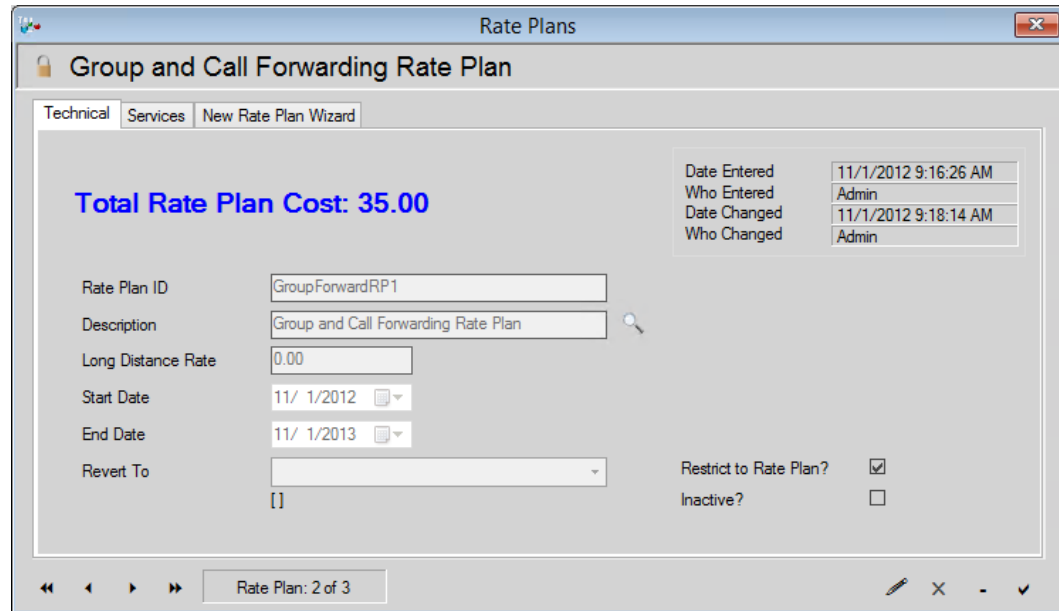
- **Service Template ID\*** is a text field that is used to specify the Identification of the service. This field allows 1-20 characters (other than |'?'&'). *Add*
- **Service Code\*** is a dropdown menu that is populated with all the service codes available for RNetBill. *Add*
- **Invoice Description\*** 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.

The screenshot shows a software window titled "Rate Plans" with a sub-header "Group and Call Forwarding Rate Plan". It features three tabs: "Technical", "Services", and "New Rate Plan Wizard", with "Technical" being the active tab. The main area displays "Total Rate Plan Cost: 35.00" in blue. Below this, there are several input fields: "Rate Plan ID" (containing "GroupForwardRP1"), "Description" (containing "Group and Call Forwarding Rate Plan"), "Long Distance Rate" (containing "0.00"), "Start Date" (set to "11/ 1/2012"), "End Date" (set to "11/ 1/2013"), and "Revert To" (a dropdown menu showing "[ ]"). To the right of these fields is a table with audit information: "Date Entered" (11/1/2012 9:16:26 AM), "Who Entered" (Admin), "Date Changed" (11/1/2012 9:18:14 AM), and "Who Changed" (Admin). Further right are two checkboxes: "Restrict to Rate Plan?" (checked) and "Inactive?" (unchecked). At the bottom, there are navigation arrows and a status bar indicating "Rate Plan: 2 of 3".

**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.

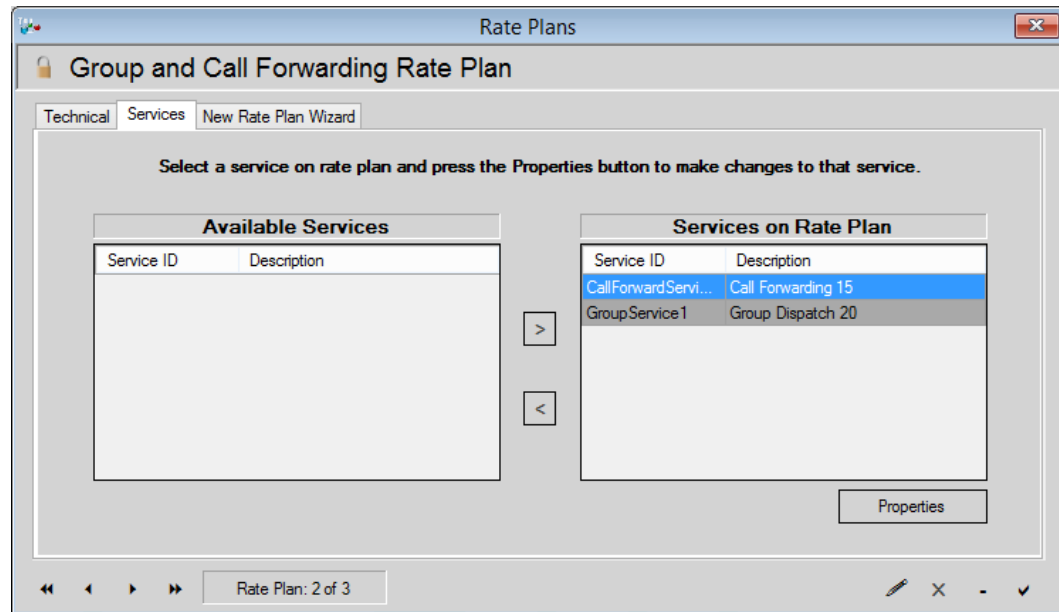


An asterisk (\*) denotes a field as required.

- **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.



**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).

**Service Properties**

**Service - Interconnect**

Service Code: 1 Interconnect

Fixed Charge: 10.00

Variable Charge: 15.00 Variable Charge Cap: 35.00

Overages Charge: 5.00 Overages Charge Cap: 50.00

Roam Rate: 1.70 Roam Rate Cap: 500.00

Free Minutes: 5 Airtime GL Account: 12345

Free Calls: 0 Income

Unit Of Measure: Minutes GL Account: 12345

Pooled Minutes? ☐ Income

Commissionable? ☐

Buttons: Edit, Cancel, OK

**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.

The screenshot shows the 'Talkgroups' application window with the 'New Talkgroup Wizard' tab selected. The wizard is for creating a new talkgroup named 'Talkgroup 2000'. The 'System ID' is set to '1404', which is also the 'Demo System'. The 'Talkgroup ID' is '2000' and the 'Talkgroup Alias' is 'Talkgroup 2000'. The 'Priority Monitor' checkbox is unchecked, 'Active?' is checked, 'Reserve for a customer?' is unchecked, and 'Fail Soft' is checked. On the right, a table shows the creation details: Date Entered, Who Entered, Date Changed, and Who Changed, all set to 4/10/2014 3:57:56 PM and Admin. Below the table, a dropdown menu is open, showing options: RFSS, Site, Channel, and Frequency. The bottom of the window shows navigation arrows and a status bar indicating 'Talkgroup: 1 of 1'.

**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.



## Regions

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.

Region Information	
Region ID	1
Region Name	Region 1

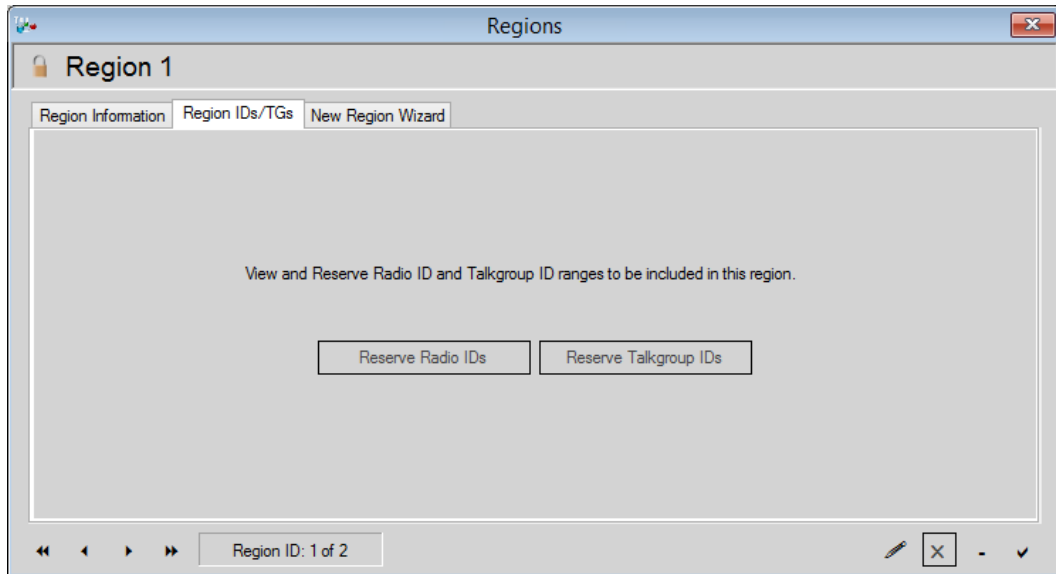
Date Entered	11/1/2012 9:20:08 AM
Who Entered	Admin
Date Changed	11/1/2012 12:54:27 PM
Who Changed	Admin

Region ID: 1 of 2

**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.



**Figure 12.30** – Regions Module – Region IDs/TGs

- **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.

Available ID Range(s)	
Radios	To
1	999
6000	13999999

Region ID: 1  
Region 1  
System ID: 1404  
Demo System 1404

☐ Add ☒ Remove ☐ Import From

Remove Single ID

Remove Range

Finish

IDs in Range: 999  
Total: 13994999

Assigned ID Range(s)	
From	To
1000	5999

IDs in Range: 5000  
Total: 5000

**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 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.

Available ID Range(s)	
Radios	To
1	8000999
8003001	13999999

Region ID: 1  
Region 1  
System ID: 1404  
Demo System 1404

☐ Add ☒ Remove ☐ Import From

Remove Single ID  
Remove Range

Finish

Assigned ID Range(s)	
From	To
8001000	8003000

IDs in Range: 8000999  
Total: 13997998

IDs in Range: 2001  
Total: 2001

**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 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.

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.

11111111 [Tetra System 1]			
Technical		More Info...	
More Info...		System Billing	
New System Wizard			
Company ID	gen	Date Entered	11/1/2012 9:33:43 AM
	[ Genesis ]	Who Entered	Admin
Subsidiary ID		Date Changed	11/1/2012 9:33:43 AM
		Who Changed	Admin
System ID	11111111		
Alias	Tetra System 1		
Site Map Location			
	Browse...		
Location			
		Reserve IDs	
		Reserve Talkgroup IDs	
		Add Memos	
System: 1 of 2			

**Figure 13.1** – Tetra Systems Module – Technical Tab



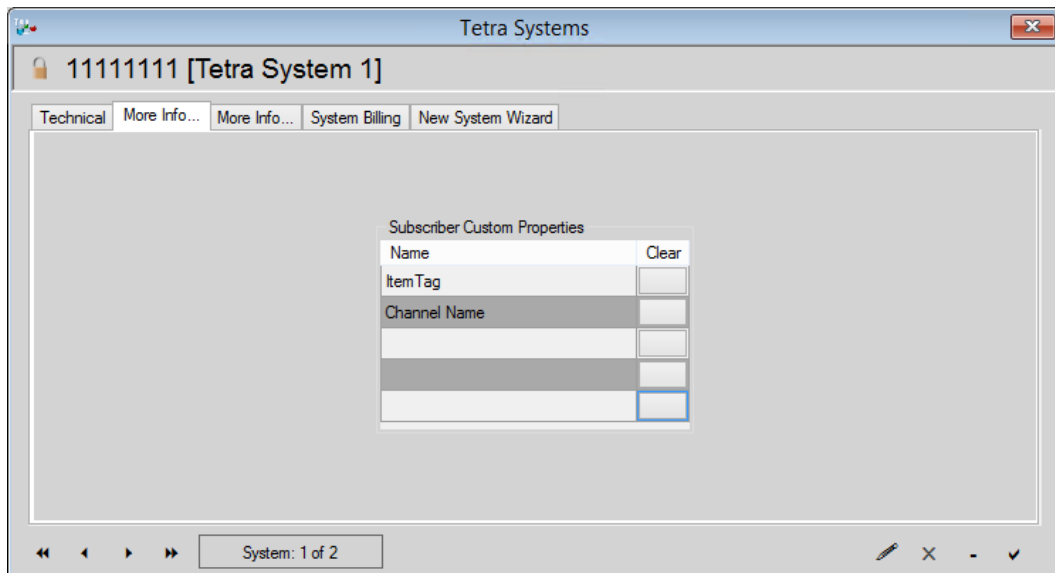
An asterisk (\*) denotes a field as required.

- **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**

- **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.

The screenshot shows a software window titled "Tetra Systems". Inside, there's a header bar with a lock icon and the text "11111111 [Tetra System 1]". Below this is a tabbed interface with five tabs: "Technical", "More Info...", "More Info...", "System Billing", and "New System Wizard". The second "More Info..." tab is selected. This tab contains three large text input areas, each with a label and a vertical scrollbar: "Comments", "Site Description", and "Origin". At the bottom of the window, there are navigation controls (back, forward, first, last), a status box that says "System: 1 of 2", and three icons: a pencil (edit), an 'X' (delete), and a checkmark (save).

**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.

Technical More Info... More Info... System Billing New System Wizard

GL Account [dropdown]

Call Elimination  
Less than 0 sec

Dialled Call Elimination  
Less than 0 digits

Exception  
[input field]  
Add  
Exception  
[input field]  
Remove

	Round To	After
1st	1 sec	0
2nd	1 sec	0
3rd	1 sec	0
4th	1 sec	0
5th	1 sec	0
6th	1 sec	0

System: 1 of 2

**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.
- **Dialled 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.

Available ID Range(s)	
Radios	To
1	154555
159000	13999999

System ID: 11111111  
Tetra System 1  
Customer: 005  
City of Valentine

☐ Add ☒ Remove ☐ Import From

Remove Single ID  
Remove Range

IDs in Range: 154555  
Total: 13995555

IDs in Range: 4444  
Total: 4444

Finish

**Figure 13.5** – Reserve Radio IDs Module

- **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.

- **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 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.
  - **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.

The screenshot shows the 'Reserve Talkgroup IDs' window. It features two main grids: 'Available ID Range(s)' on the left and 'Assigned ID Range(s)' on the right. The 'Available' grid shows a range from 1 to 13999, with a total of 13998 IDs. The 'Assigned' grid shows a range from 14000 to 15000, with a total of 1001 IDs. In the center, there are fields for 'System ID' (11111111), 'Customer' (005), and 'City of Valentine'. Below these are radio buttons for 'Add', 'Remove' (selected), and 'Import From'. There are also buttons for 'Remove Single ID', 'Remove Range', and 'Finish'.

Available ID Range(s)	
Radios	To
1	13999
15001	13999999

System ID: 11111111  
Tetra System 1  
Customer: 005  
City of Valentine

☐ Add ☒ Remove ☐ Import From

Remove Single ID  
Remove Range  
Finish

Assigned ID Range(s)	
From	To
14000	15000

IDs in Range: 13999  
Total: 13998998

IDs in Range: 1001  
Total: 1001

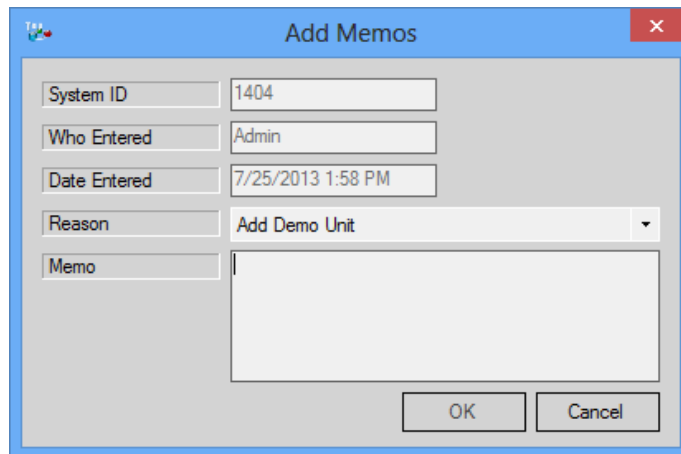
**Figure 13.6** – Reserve Talkgroup IDs Module

- **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.



**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.

The screenshot shows the 'Tetra Zones' application window with the 'Technical' tab selected. The 'New Zone Wizard' is active, displaying a form for creating a new zone. The form includes the following fields:

- System ID:** A text field containing '11111111' with a dropdown arrow. Below it, a label '[ Tetra System 1 ]' is visible.
- Zone ID:** A text field containing '2'.
- Alias:** A text field containing 'Zone 2'.
- Security Group:** A text field containing '1'.

On the right side of the form, there is a table showing audit information:

Date Entered	11/1/2012 9:34:56 AM
Who Entered	Admin
Date Changed	11/1/2012 9:34:56 AM
Who Changed	Admin

At the bottom of the window, there are navigation arrows and a status bar indicating 'Zone: 2 of 4'.

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



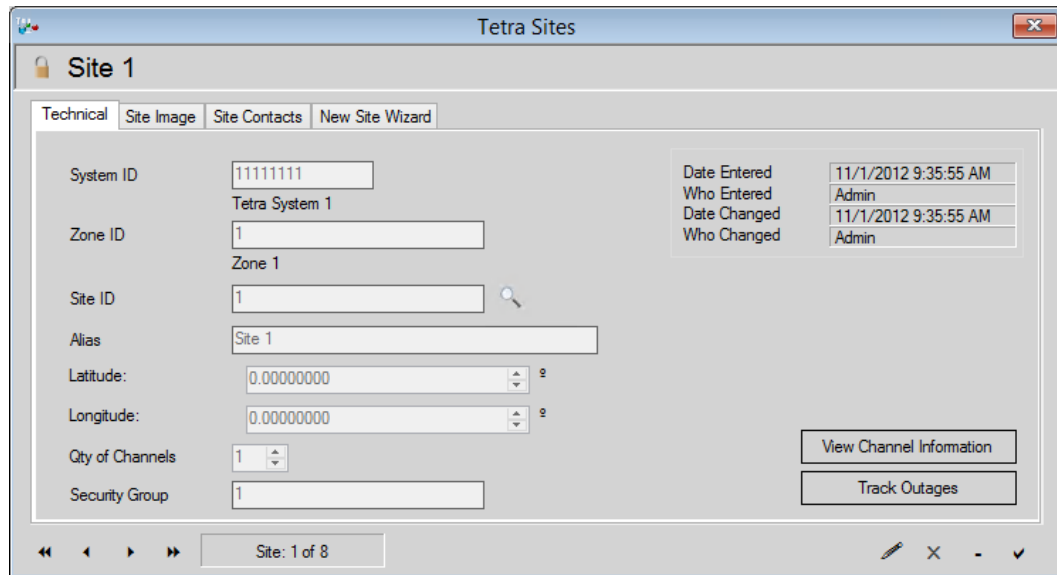
An asterisk (\*) denotes a field as required.

- **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.



The screenshot shows the 'Tetra Sites' window with the 'Technical' tab selected. The window title is 'Tetra Sites'. Below the title bar, there's a sub-header 'Site 1' with a lock icon. The main area contains several input fields and a metadata table. The input fields are: System ID (11111111), Zone ID (1), Site ID (1), Alias (Site 1), Latitude (0.0000000), Longitude (0.0000000), Qty of Channels (1), and Security Group (1). The metadata table shows: Date Entered (11/1/2012 9:35:55 AM), Who Entered (Admin), Date Changed (11/1/2012 9:35:55 AM), and Who Changed (Admin). At the bottom right, there are buttons for 'View Channel Information' and 'Track Outages'. At the bottom left, there are navigation arrows and a status bar showing 'Site: 1 of 8'.

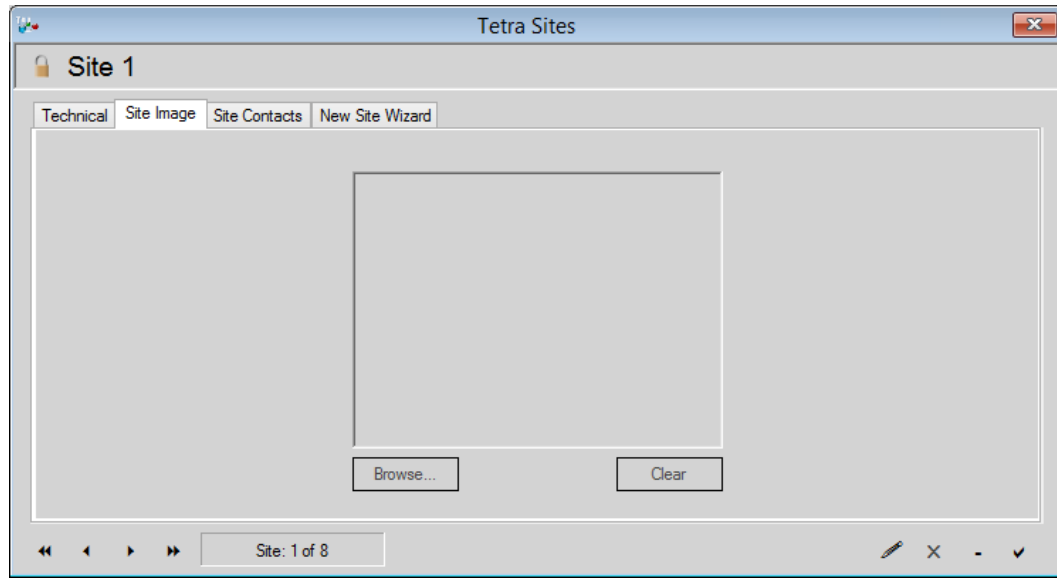
Date Entered	11/1/2012 9:35:55 AM
Who Entered	Admin
Date Changed	11/1/2012 9:35:55 AM
Who Changed	Admin

**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

- **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.

The screenshot shows a web application window titled "Tetra Sites". Inside, there's a tabbed interface with "Site 1" selected. The "Site Contacts" tab is active, showing a form on the left and a table on the right. The form has two text input fields labeled "Contact Name" and "Phone", and an "Add" button below them. The table on the right has two columns: "Contact Name" and "Phone". It contains one row with the text "Maintenance Service" and the phone number "555-555-5555". Below the table are "Edit Contact" and "Remove" buttons. At the bottom of the window, there are navigation arrows, a status bar showing "Site: 1 of 8", and standard window controls.

Contact Name	Phone
Maintenance Service	555-555-5555

**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.

Ch	Frequency	Channel Type	Secure
1			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
6			<input type="checkbox"/>
7			<input type="checkbox"/>
8			<input type="checkbox"/>
9			<input type="checkbox"/>
10			<input type="checkbox"/>
11			<input type="checkbox"/>
12			<input type="checkbox"/>
13			<input type="checkbox"/>
14			<input type="checkbox"/>
15			<input type="checkbox"/>
16			<input type="checkbox"/>
17			<input type="checkbox"/>
18			<input type="checkbox"/>

**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.

**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

- **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.

System ID: 11111111 [Tetra System 1]

From	To
1001000	1003000
9035550000	9035550100

Assigned: 1  
Unassigned: 100  
Range Total: 101

Delete Range

System: 1 of 2

**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.

The screenshot shows a software window titled "Tetra DID" with a tabbed interface. The "DID Maintenance" tab is selected, showing a "Delete DIDs" section. It includes a "System ID" dropdown menu set to "11111111" with "[Tetra System 1]" below it. Below this, there are two text boxes for "Delete all DIDs in the range of:" with values "1001500" and "1001800" separated by "To". A note states "(Note: The range cannot contain an assigned DID)". A "Delete" button is at the bottom. The window has a standard Windows-style title bar and a small checkmark icon in the bottom right corner.

**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.

The screenshot shows the 'Tetra Radios' window with a 'Technical' tab selected. The form contains the following fields and values:

- System ID: 11111111 (dropdown menu)
- Model Number: TETRARAD101 (dropdown menu)
- Serial Number: 004 (text field)
- Radio ID (ISSI): 1004 (text field)
- TEI / SIM ID: (empty text field)
- Dealer: GENVEND (dropdown menu)
- Salesperson: GENSALES (dropdown menu)
- SIC Code: (empty dropdown menu)

On the right side, there is a table for audit trail:

Date Entered	Who Entered	Date Changed	Who Changed
11/1/2012 12:00:00 AM	Admin	11/1/2012 12:00:00 AM	Admin

Below the table are fields for Security Group (1) and Unit Type (Base). There is also a large text area for Comments. At the bottom right are buttons for 'Technical Info.' and 'View Personalities'. The status bar at the bottom indicates 'ID: 4 of 10'.

Figure 13.17 – Tetra Radios Module

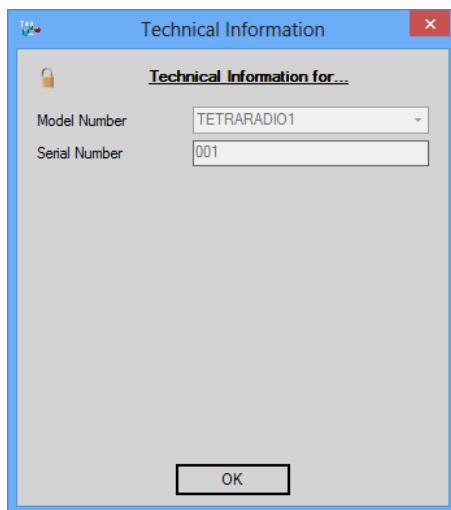


An asterisk (\*) denotes a field as required.

- **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.



**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.

The screenshot shows a software window titled "Tetra Unit Users" with a sub-header "Radio User - City Personnel". The window contains several tabs: "Personality", "Billing Information", "Capabilities", "More Capabilities", "Services", and "Talkgroups". The "Billing Information" tab is active. It displays a form with the following fields and values:

- System ID: 23112323 (dropdown menu)
- Company ID: gen (dropdown menu)
- Customer ID: 002 (dropdown menu)
- Radio User Alias: City Personnel (text field)
- Radio ID (ISSI): 1004 (text field)
- DID: (empty dropdown menu)
- Security Group: 1 (dropdown menu)
- Talkgroup: (None) (dropdown menu)
- Site Cluster: (empty dropdown menu)
- Date Entered: 7/29/2013 1:05:57 PM
- Who Entered: Admin
- Date Changed: 7/29/2013 1:05:57 PM
- Who Changed: Admin
- Date Off: 1/ 1/2100 (dropdown menu)
- Dealer: GENVEND (dropdown menu)
- Salesperson: GENSALES (dropdown menu)
- SIC Code: (empty dropdown menu)

There are also checkboxes for "Enable Usage?" and "Disable Billing", and a "Churn History" button. The bottom of the window shows "Radio User: 1 of 1" and navigation icons.

**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 asterisk (\*) denotes a field as required.

- **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.

The screenshot shows the 'Tetra Unit Users' window with the 'Billing Information' tab selected for 'Radio User - 1001a'. The tab contains several fields and checkboxes:

- Rate Plan:** A dropdown menu currently showing 'GroupRP1'.
- Revert To:** A dropdown menu currently showing 'GroupRP2'.
- Apply Revert to Date:** A date selector showing '4/ 4/2017'.
- Rate Plan Locked Y/N:** A checkbox that is checked.
- Lock Rates Y/N:** A checkbox that is checked.
- Contract End:** A date selector showing '4/ 4/2017'.
- Use Customer Contract End Date:** An unchecked checkbox.
- Revert Now:** An unchecked checkbox.

At the bottom right of the form area is a 'Call Detail' button. The window title bar indicates 'Radio User: 1 of 1'.

**Figure 13.20** – Tetra Unit Users Module – Billing Information Tab

- **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

**Tetra Unit Users**

**Radio User - City Personnel**

Personality | Billing Information | **Capabilities** | More Capabilities | Services | Talkgroups

Interconnect Enabled ☐

Radio User Interconnect Profile ▼

Enable Packet Data ☐

Access Point

Assigned IP

Radio User Capability Profile ▼ Profile 2

Radio User Valid Sites Profile

Emergency Alarm Comments

Subscriber Custom Properties

Property	Value
ItemTag	Test Radio
Channel Name	Test Channel

Radio User: 1 of 1

**Figure 13.21** – Tetra Unit Users Module - Capabilities Tab

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

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

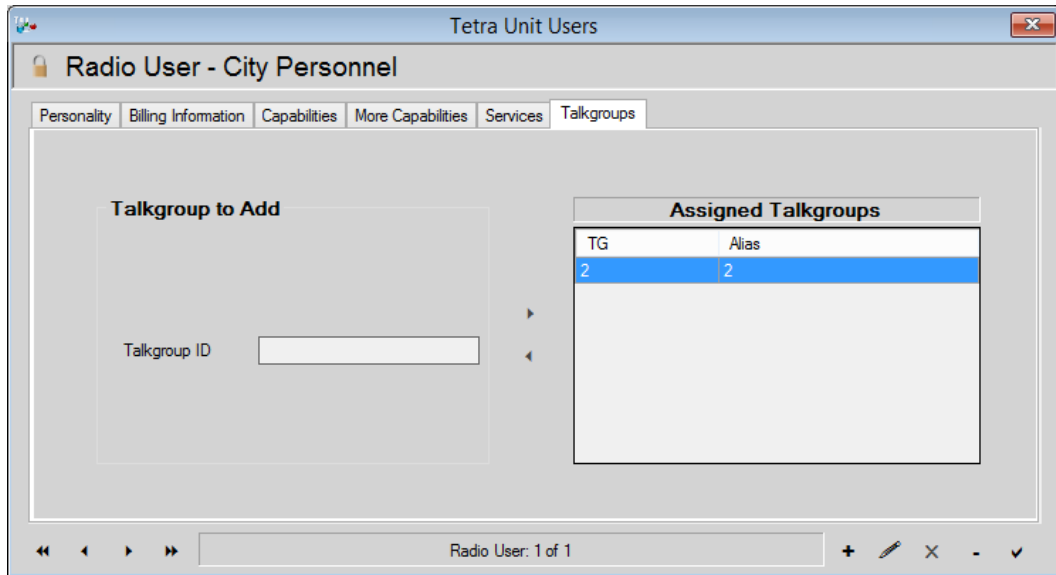
The *Services* tab (Figure 13.23) manages the services assigned to the Rate Plan that the Unit User is on.

**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.



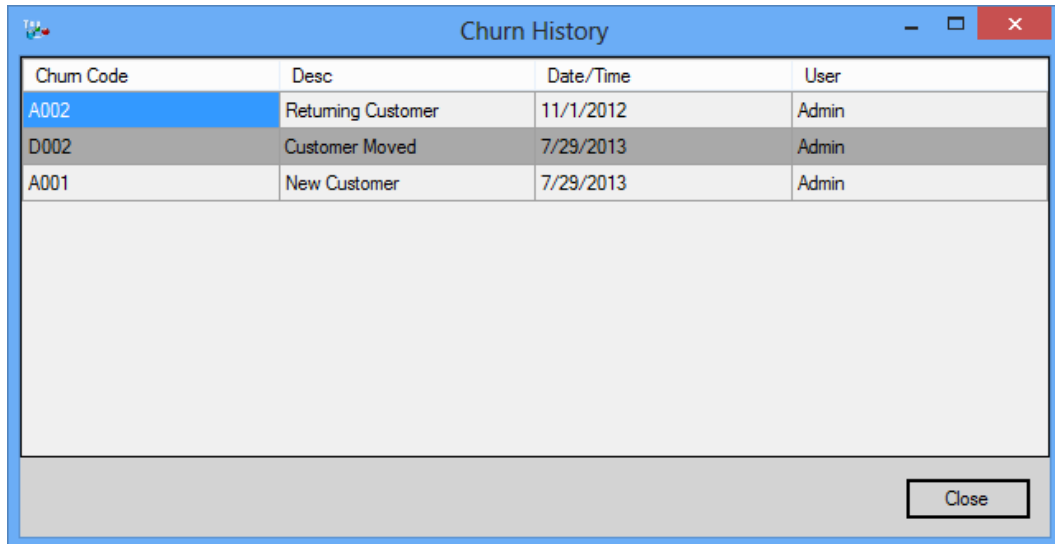
The *Talkgroup* tab (Figure 13.24) manages talkgroups that the unit user is in.



**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.



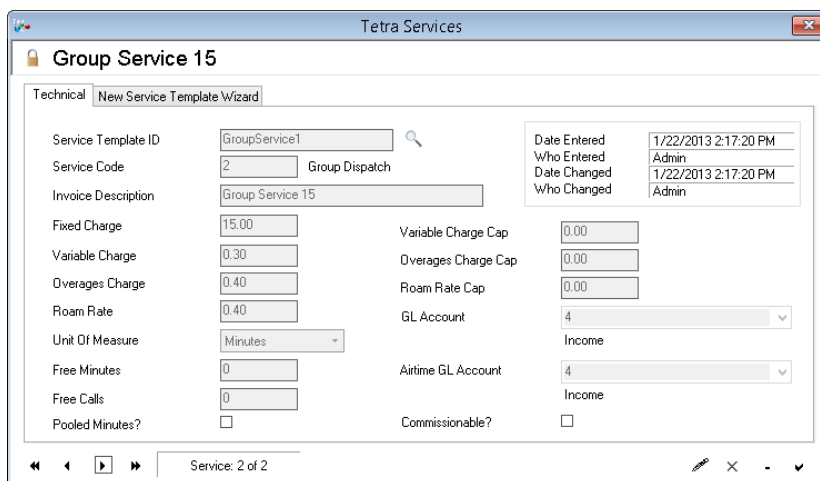
Churn Code	Desc	Date/Time	User
A002	Returning Customer	11/1/2012	Admin
D002	Customer Moved	7/29/2013	Admin
A001	New Customer	7/29/2013	Admin

Close

**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.



**Tetra Services**

**Group Service 15**

Technical | New Service Template Wizard

Service Template ID	GroupService1	Date Entered	1/22/2013 2:17:20 PM
Service Code	2 Group Dispatch	Who Entered	Admin
Invoice Description	Group Service 15	Date Changed	1/22/2013 2:17:20 PM
		Who Changed	Admin

Fixed Charge	15.00	Variable Charge Cap	0.00
Variable Charge	0.30	Overages Charge Cap	0.00
Overages Charge	0.40	Roam Rate Cap	0.00
Roam Rate	0.40	GL Account	4
Unit Of Measure	Minutes	Income	
Free Minutes	0	Airtime GL Account	4
Free Calls	0	Income	
Pooled Minutes?	<input type="checkbox"/>	Commissionable?	<input type="checkbox"/>

Service: 2 of 2

**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.

The screenshot shows the 'Tetra Rate Plans' window with the 'Group Dispatch Rate Plan' selected. The 'New Rate Plan Wizard' tab is active. The 'Total Rate Plan Cost' is displayed as 15.00. The configuration fields include:

- Rate Plan ID: GroupRP1
- Description: Group Dispatch Rate Plan
- Long Distance Rate: 0.10
- Start Date: 11/ 1/2012
- End Date: 11/ 1/2013
- Revert To: [ ]
- Restrict to Rate Plan?: ☒
- Inactive?: ☐

A metadata table in the top right corner shows:

Date Entered	11/1/2012 9:52:21 AM
Who Entered	Admin
Date Changed	7/26/2013 11:15:00 AM
Who Changed	Admin

The bottom status bar indicates 'Rate Plan: 4 of 4'.

Figure 13.27 – Tetra Rate Plans Module

## Tetra Talkgroups

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

The screenshot shows the 'Tetra Talkgroups' window with the 'TG-1' selected. The 'New Talkgroup Wizard' tab is active. The configuration fields include:

- System ID: 11375231
- Talkgroup ID: 1
- Talkgroup Alias: TG-1
- Security Group: 1
- Console Tg/Mg Capabilities Profile: 1
- Tg/Mg Capability Profile: Profile 1
- Tg/Mg Valid Sites Profile: 1
- Reserve for a customer?: ☐
- Enabled: ☒
- Preempt Capable: ☐
- Talkgroup Regroupable: ☒
- Band Channels Assigned: ☐

A metadata table in the top right corner shows:

Date Entered	1/22/2013 2:51:43 PM
Who Entered	Admin
Date Changed	1/22/2013 2:52:34 PM
Who Changed	Admin

The 'Fail Soft' checkbox is checked. A configuration table on the right shows:

Zone
1
Site
1
Channel
101.11011
Frequency
101.11011

The bottom status bar indicates 'Talkgroup: 1 of 1'.

Figure 13.28 – Tetra Talkgroups Module

## Tetra Call Routes

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

The screenshot shows the 'Tetra Call Routes' window with a tab for 'Route 1'. It contains a 'New Call Route Wizard' section with fields for System ID (11375231), Zone ID (1), Route ID (1), Route Alias (Route 1), Security Group (1), Call Route Type (PABX), Gateway ID (16000001), Outgoing Prefix, and Incoming Prefix. A metadata table on the right shows the date and user for when the route was entered and changed. A 'Notes' section is also present.

Route 1	
System ID	11375231
Zone ID	[ Tetra System 1 ]
Route ID	1
Route Alias	Route 1
Security Group	1
Call Route Type	PABX
Gateway ID	16000001
Outgoing Prefix	
Incoming Prefix	

Metadata	
Date Entered	1/22/2013 2:57:10 PM
Who Entered	Admin
Date Changed	1/22/2013 2:57:10 PM
Who Changed	Admin

Notes

**Figure 13.29** – Tetra Call Routes Module

## 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.

The screenshot shows the 'Tetra Home Zone Mapping' window with a tab for 'Zone Map 1'. It contains a 'Home Zone Mapping' section with fields for System ID (11375231), Map ID (1), Map Alias (Zone Map 1), Security Group (1), and Map Procedure Type (Automatic). A metadata table on the right shows the date and user for when the map was entered and changed. There are also checkboxes for 'Synchronize Individual To SSI Map' and 'Synchronize Individual To Group Map'.

Zone Map 1	
System ID	11375231
Map ID	1
Map Alias	Zone Map 1
Security Group	1
Map Procedure Type	Automatic

Metadata	
Date Entered	1/22/2013 2:36:53 PM
Who Entered	Admin
Date Changed	1/22/2013 2:36:53 PM
Who Changed	Admin

Synchronize Individual To SSI Map ☒

Synchronize Individual To Group Map ☐

**Figure 13.30** – Tetra Home Zone Mapping Module

## 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.

The screenshot shows the 'Tetra Multigroups' window with a tabbed interface. The 'Technical' tab is active, displaying configuration fields for 'Multigroup 2'. The fields include System ID (11375231), Multigroup ID (2), Multigroup Alias (Multigroup 2), Security Group (1), Console Tg/Mg Capabilities Profile (1), TG/MG Capabilities Profile (Profile 1), and TG/MG Valid Sites Profile (1). On the right, there is a metadata table and a set of checkboxes for 'Band Channels Assigned', 'Enabled', and 'Preempt Capable'. The 'Multigroup Mode' section has radio buttons for 'Interrupt' and 'Wait'. The status bar at the bottom indicates 'Multigroup: 1 of 1'.

Date Entered	
Who Entered	1/22/2013 3:01:12 PM
Who Entered	Admin
Date Changed	
Who Changed	1/22/2013 3:01:12 PM
Who Changed	Admin

Band Channels Assigned	
Enabled	<input checked="" type="checkbox"/>
Preempt Capable	<input type="checkbox"/>

Multigroup Mode:  
☐ Interrupt  
☒ Wait

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.

The screenshot shows the 'Tetra Radio User Capabilities Profile' window with a tabbed interface. The 'Profile 1' tab is active, displaying configuration fields for 'Radio User C.P.'. The fields include System ID (11375231), Profile ID (1), Profile Alias (Profile 1), Security Group (1), Dispatch/PC Priority Level (10), Primary Status Set Alias (STATUS-SET-1), Secondary Status Set Alias (STATUS-SET-1), Called User Preemption (DISABLED), and User Group Alias. On the right, there is a metadata table and a set of checkboxes for various capabilities. The status bar at the bottom indicates 'Radio User C.P. 1 of 1'.

Date Entered	
Who Entered	1/22/2013 2:42:11 PM
Who Entered	Admin
Date Changed	
Who Changed	1/22/2013 2:42:11 PM
Who Changed	Admin

Private Call Enabled	
Dispatch Enabled	<input checked="" type="checkbox"/>
Dispatch Emergency Enabled	<input checked="" type="checkbox"/>
Multigroup Enabled	<input type="checkbox"/>
Multigroup Emergency Enabled	<input type="checkbox"/>
Group Scanning Enabled	<input checked="" type="checkbox"/>
Private Call Preempt Enabled	<input type="checkbox"/>

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.

The screenshot shows the 'Tetra Radio User Interconnect Profile' window. It has a tabbed interface with 'Profile 1' selected. The 'Radio User I.P.' tab is active, showing fields for System ID (11375231), Profile ID (1), Profile Alias (Profile 1), Security Group (1), Priority Level (10), Inbound Exclusion Class No., and Outbound Exclusion Class No. A metadata table on the right shows the profile was entered and changed on 1/22/2013 at 2:58:51 PM by Admin. The bottom status bar indicates 'Radio User I.P. 1 of 1'.

Profile 1	
Radio User I.P.	Call Routes
System ID	11375231 Tetra System 1
Profile ID	1
Profile Alias	Profile 1
Security Group	1
Priority Level	10
Inbound Exclusion Class No.	
Outbound Exclusion Class No.	
Date Entered	1/22/2013 2:58:51 PM
Who Entered	Admin
Date Changed	1/22/2013 2:58:51 PM
Who Changed	Admin

**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.

The screenshot shows the 'Tetra Status Set' window. It has a tabbed interface with 'STATUS-SET-1' selected. The 'Status Set' tab is active, showing fields for System ID (11375231), Status Set ID (1), Status Set Alias (STATUS-SET-1), and Security Group (SYSTEM). A metadata table on the right shows the status set was entered and changed on 1/22/2013 at 1:45:25 PM by Admin. The bottom status bar indicates 'Status Set: 1 of 2'.

STATUS-SET-1	
Status Set	Status Set Map
System ID	11375231 Tetra System 1
Status Set ID	1
Status Set Alias	STATUS-SET-1
Security Group	SYSTEM
Date Entered	1/22/2013 1:45:25 PM
Who Entered	Admin
Date Changed	1/22/2013 1:45:25 PM
Who Changed	Admin

**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.

The screenshot shows the 'Tetra Tg/Mg Capabilities Profile' window for 'Profile 1'. It contains two main sections: configuration fields on the left and a metadata table on the right.

Tg/Mg C.P.	
System ID	11375231
Tetra System 1	
Profile ID	1
Profile Alias	Profile 1
Security Group	1
User Group Alias	
Dispatch/PC Priority Level	10
Conversation Type	PTT-ID
Busy Override	All Start
Talkgroup Inactivity Time	12 hours
Emergency Acknowledged By	CADI
Date Entered	1/22/2013 2:48:48 PM
Who Entered	Admin
Date Changed	1/22/2013 2:48:48 PM
Who Changed	Admin
Audio Interrupt Mode	Never
Data Channel Preemption	Disabled
Emergency Enabled	<input checked="" type="checkbox"/>
Emergency to Invalid Sites Enabled	<input checked="" type="checkbox"/>
Priority Monitor	<input type="checkbox"/>
Allow Calls without MCEG Resource	<input checked="" type="checkbox"/>
Route Status Events to Console	<input type="checkbox"/>
Status Acknowledged By	Zone Controller

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.

The screenshot shows the 'Tetra User Group' window for 'User Group 1'. It contains configuration fields on the left and a metadata table on the right.

User Group	
System ID	11375231
Tetra System 1	
User Group ID	1
User Group Alias	User Group 1
Security Group	1
Notes	
Date Entered	1/22/2013 2:14:14 PM
Who Entered	Admin
Date Changed	1/22/2013 2:14:14 PM
Who Changed	Admin

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.

**SYSTEM**

Security Group

**Note that the Tetra User Configuration Server does not allow for the provisioning of the Security Group object. When adding a new Security Group make sure that it already exists in the User Configuration Server so that it can be used throughout Trio.**

Date Entered	2/14/2013 8:53:57 AM
Who Entered	Admin
Date Changed	2/14/2013 8:53:57 AM
Who Changed	Admin

System ID: 29891874  
Tetra System 2

Security Group ID: 1

Security Group Alias: SYSTEM

Security Group: 3 of 3

**Figure 13.37** – Tetra Security Group Module



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.

The screenshot shows the 'Generic Systems' window with a tabbed interface. The 'Technical' tab is active, displaying fields for Company ID (GEN), Subsidiary ID ([ Genesis ]), System ID (Gen1), Alias (Generic System 1), Location (empty), and Status (Active). A metadata box on the right shows 'Date Entered' and 'Who Entered' as 1/22/2013 9:05:16 AM and Admin. Action buttons include 'Track Outages', 'View Contacts', and 'Add Memos'. The bottom status bar indicates 'System: 1 of 1'.

Figure 14.1 – Generic Systems Module

## 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.

The screenshot shows the 'Generic Radios' window with a tabbed interface. The 'Technical' tab is active, displaying fields for Company ID (GEN), Customer ID (1000AA), System ID (Gen1), Model Number (GENERICRADIO1), Serial Number (001), Dealer ([ City of Valley View ]), Salesperson ([ Cash Grain Farms ]), and SIC Code (0119). A metadata box on the right shows 'Date Entered' and 'Who Entered' as 1/22/2013 12:00:00 AM and Admin. Action buttons include 'Technical Info.' and 'View Personalities'. The bottom status bar indicates 'ID: 1 of 5'.

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.

The screenshot shows the 'Generic Unit User' window with a tabbed interface. The 'Personality' tab is active, displaying a form for 'Serial Number - 1'. The form includes fields for Serial Number (1), Personality (1), System ID (2342), Radio ID (0001), Alias (Gen2 [0001]), and Unit Type. A history table on the right shows 'Date Entered', 'Who Entered', 'Date Changed', and 'Who Changed' for the entry. At the bottom, there are 'Disable Billing' and 'Churn History' buttons, and a status bar indicating 'Personality: 1 of 10'.

Date Entered	Who Entered	Date Changed	Who Changed
3/11/2014 2:48:17 PM	Admin	3/13/2014 3:32:22 PM	Admin

**Figure 14.3** – Generic Unit User 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.

The screenshot shows the 'Generic Services' window with the 'New Service Template Wizard' tab selected. The wizard is for 'Generic Service Charge 20'. The fields are as follows:

Field	Value
Service Template ID	GenericCharge
Service Code	13
Invoice Description	Generic Service Charge 20
Fixed Charge	20.00
Commissionable?	<input type="checkbox"/>
GL Account	4
	Income

On the right, a metadata table shows:

Field	Value
Date Entered	1/22/2013 9:08:50 AM
Who Entered	Admin
Date Changed	1/22/2013 9:08:50 AM
Who Changed	Admin

At the bottom, it says 'Service: 1 of 2'.

Figure 14.4 – Generic Services 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.

The screenshot shows the 'Generic Rate Plans' window with the 'New Rate Plan Wizard' tab selected. The wizard is for 'Group Rate Plan 1'. The fields are as follows:

Field	Value
Rate Plan ID	GroupRP1
Description	Group Rate Plan 1
Start Date	1/22/2013
End Date	1/22/2014
Revert To	[ ]
Restrict to Rate Plan?	<input checked="" type="checkbox"/>
Inactive?	<input type="checkbox"/>

At the top left, it says 'Total Rate Plan Cost: 15.00'. On the right, a metadata table shows:

Field	Value
Date Entered	1/22/2013 9:11:02 AM
Who Entered	Admin
Date Changed	1/22/2013 9:11:02 AM
Who Changed	Admin

At the bottom, it says 'Rate Plan: 2 of 2'.

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.

The screenshot shows a window titled "Systems" with a sub-header "1 [Astro1]". Below the header are four tabs: "Technical", "More Info...", "System Billing" (which is selected), and "New System Wizard".

The "System Billing" tab contains the following fields and controls:

- Company ID:** A text box containing "GEN" with "[ Genesis ]" below it.
- System ID:** A text box containing "1" with a magnifying glass icon to its right.
- Alias:** A text box containing "Astro1".
- Site Map Location:** A text box with a "Browse..." button below it.
- Metadata Table:** A table showing the following data:

Date Entered	4/16/2014 3:38:22 PM
Who Entered	Admin
Date Changed	4/16/2014 3:38:22 PM
Who Changed	Admin
- Buttons:** Three buttons are located on the right side: "Reserve IDs", "Re-Crunch", and "Add Memos".

At the bottom of the window, there are navigation arrows, a status bar showing "System:: 1 of 1", and a set of icons (pencil, X, minus, checkmark).

**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.

The screenshot displays the 'ASTRO-PMI Clusters' window with a tabbed interface. The 'Cluster1' tab is active, showing a 'Technical' section with a 'New Cluster Wizard' button. Below this, there are input fields for 'Cluster ID' (value: 1) and 'Alias' (value: Cluster1). To the right, a metadata table shows the entry was made on 4/16/2014 by Admin and last changed on 4/17/2014 by Admin. The main area contains two tables: 'Available Sites' and 'Included Sites'. The 'Available Sites' table has one entry: System ID 1, Zone 1, Site 3, Alias Site3. The 'Included Sites' table has two entries: System ID 1, Zone 1, Site 1, Alias Site 1; and System ID 1, Zone 1, Site 2, Alias site2. Navigation arrows are present between the tables and at the bottom of the window.

System ID	Zone	Site	Alias
1	1	3	Site3

System ID	Zone	Site	Alias
1	1	1	Site 1
1	1	2	site2

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.

The screenshot shows the 'Services' window with the 'Group Service 15' configuration. The 'Technical' tab is active, and the 'New Service Template Wizard' is displayed. The configuration includes the following fields:

Field	Value
Service Template ID	GroupService1
Service Code	2
Invoice Description	Group Service 15
Fixed Charge	15.00
Variable Charge	0.20
Overages Charge	0.30
Roam Rate	0.50
Unit Of Measure	Minutes
Free Minutes	0
Free Calls	0
Pooled Minutes?	<input type="checkbox"/>
Variable Charge Cap	0.00
Overages Charge Cap	0.00
Roam Rate Cap	0.00
GL Account	4
Airtime GL Account	4
Commissionable?	<input type="checkbox"/>
Date Entered	1/22/2013 10:41:16 AM
Who Entered	Admin
Date Changed	1/22/2013 10:41:16 AM
Who Changed	Admin

Figure 15.3 – Services Module

## 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.

The screenshot shows the 'Rate Plans' window with the 'Group Rate Plan 1' configuration. The 'Technical' tab is active, and the 'New Rate Plan Wizard' is displayed. The configuration includes the following fields:

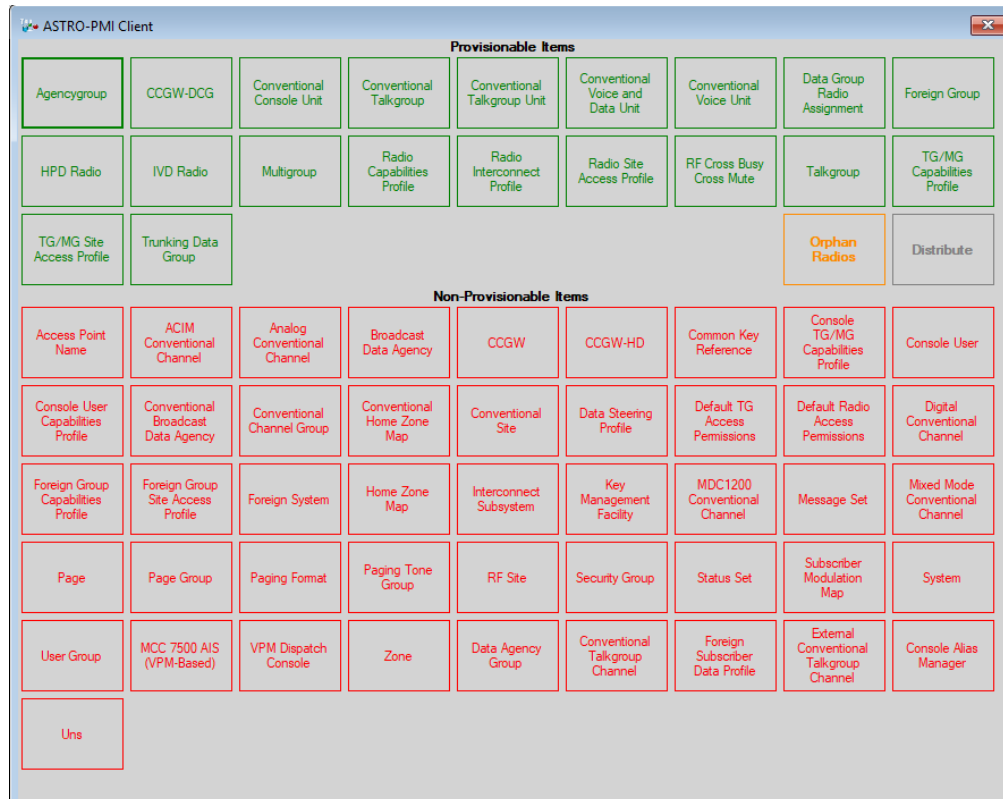
Field	Value
Rate Plan ID	GroupRP1
Description	Group Rate Plan 1
Start Date	1/22/2013
End Date	1/22/2014
Revert To	[ ]
Total Rate Plan Cost	15.00
Restrict to Rate Plan?	<input checked="" type="checkbox"/>
Inactive?	<input type="checkbox"/>
Date Entered	1/22/2013 10:43:41 AM
Who Entered	Admin
Date Changed	1/22/2013 10:43:41 AM
Who Changed	Admin

Figure 15.4 – Rate Plans Module



## 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.




**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

IVD Radio

Alias

Radio 123001

Radio 123002

Radio 123003

Radio 123004

Radio 123005

Radio 203511

Record: 5 of 6

Refresh

Radio Type

Radio Capability Profile

Radio Site Access Profile

Ready Timer (sec)

Secure Communication Mode

Secure Land to Mobile Start Mode

Security Group

Primary Talkgroup

Trunking Subscriber Type

Voice Enabled

Radio Billing Info

Billing Enabled?

Hardware Model

Customer ID

Rateplan ID

Cluster ID

Revert Rateplan ID

Revert Date

Unit Type

Comment

Dealer

Salesperson

Lock Rates

Restrict To Rateplan

Radio User Alias: Radio 123005, Notes: TEMPLATE

Radio ID: 123005, Subscriber Type: IVD

Yes

True

IVDRADIO1

003

GroupRP1

1

1/24/2014

Base

GENVEND

GENSALES

True

True

Add

Edit

Cancel

Delete

Remove Billing Info.

Finish

Date Modified: Jan-24-2013, 16:08:12

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
- SystemWideCall  
Talkgroup
- Uns
- User Group
- Virtual Partner Talkgroup
- VPM Dispatch Console
- Zone

RF Site

Alias

SITE1

SITE2

Record: 1 of 2

Refresh

Date Modified: Jan-08-2013, 09:26:29

Finish

Remote Sites	(Collection)
SYSTEM	SITE1

Misc

- Remote Sites
- Security Group
- Site Alias
- Site ID
- Site Type
- Voice Transport Type
- Zone

Remote Sites

Remote Sites

**Figure 15.7** – RF Sites

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 details of the company licensed for Trio and 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.

The screenshot shows the 'Company' window with the following details:

- Company ID:** GEN
- Name:** Genesis
- Address 1:** 5800 Eagles Nest Blvd
- Address 2:** (empty)
- City:** Tyler
- State:** TX
- Postal Code:** 75703
- Country:** USA
- Phone:** (empty)
- Fax:** (empty)
- Contact:** (empty)
- E-Mail:** (empty)
- Notes:** (empty text area)
- Shipping Info:** (locked section with a lock icon and a 'Same as Billing Address' checkbox)
- Buttons:** Shipping Info, Other Options, Customer Care, Billing Options, Change..., Setup Periods, Setup Sales, Create Subsidiaries

**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.

	Period Start Date	Period End Date	Closed
Period 1 Date	1/1/2013	1/31/2013	<input checked="" type="checkbox"/>
Period 2 Date	2/1/2013	2/28/2013	<input checked="" type="checkbox"/>
Period 3 Date	3/1/2013	3/31/2013	<input checked="" type="checkbox"/>
Period 4 Date	4/1/2013	4/30/2013	<input checked="" type="checkbox"/>
Period 5 Date	5/1/2013	5/31/2013	<input checked="" type="checkbox"/>
Period 6 Date	6/1/2013	6/30/2013	<input checked="" type="checkbox"/>
Period 7 Date	7/1/2013	7/31/2013	<input checked="" type="checkbox"/>
Period 8 Date	8/1/2013	8/31/2013	<input checked="" type="checkbox"/>
Period 9 Date	9/1/2013	9/30/2013	<input type="checkbox"/>
Period 10 Date	10/1/2013	10/31/2013	<input type="checkbox"/>
Period 11 Date	11/1/2013	11/30/2013	<input type="checkbox"/>
Period 12 Date	12/1/2013	12/31/2013	<input type="checkbox"/>

**Auto Setup**  
First Day of Fiscal Year: January Fiscal Year: 2013  
Period Selector: ☒ Monthly Periods ☐ Quarterly Periods ☐ Yearly Periods ☐ Equal Periods  
Fiscal Dist Type: Monthly  
Specify the number of days after a closed period's End Date during which documents can still be posted to that closed period. 0 days

**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*.

**General Ledger Accounts**

Accounts Receivable	1	Sales	4
Cash	1	Returns	6
Cost of Goods Sold	5	Write Offs	6
Inventory	1	Deferred Revenue	4

**Sales Particulars**

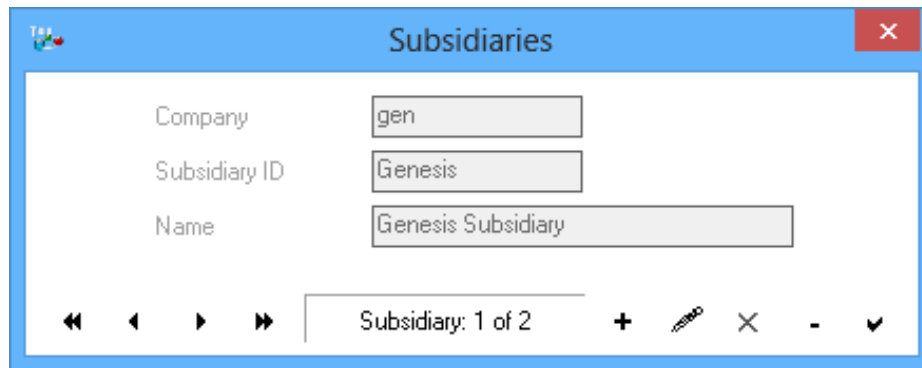
☒ Age by 30 Day Months ☐ Age by Fixed # of Days

	Period 1	Period 2	Period 3
	0 to 30	31 to 60	61 to 90

**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.



The image shows a software window titled "Subsidiaries" with a blue header bar. Inside the window, there are three input fields: "Company" with the value "gen", "Subsidiary ID" with the value "Genesis", and "Name" with the value "Genesis Subsidiary". At the bottom of the window, there is a navigation bar with four arrow buttons (back, forward, etc.), a text indicator "Subsidiary: 1 of 2", and a series of action buttons including a plus sign, a pencil icon, a minus sign, and a checkmark icon.

**Figure 16.4** – *Subsidiaries* Window





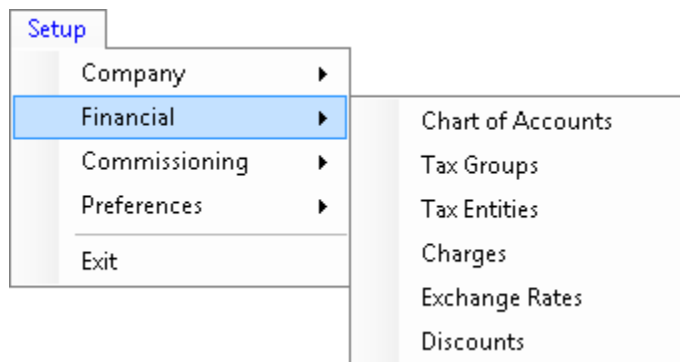
This chapter provides an overview of the financial windows accessible primarily from the **Setup→Financial** menu.

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

## 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**.

The screenshot shows the 'Chart Of Accounts' window. On the left is a tree view of the chart of accounts structure:

- Cost of Goods Sold
  - 5 (COGS)
- Current Assets
  - 1 (Assets)
- Current Liabilities
  - 2 (Liabilities)
- Equity
  - 3 (Equity)
- Expense
  - 6 (Expense)
- Income
  - 4 (Income)

The right pane displays the details for the selected account (Current Assets, Account Number 1):

- Account Status: **Active** (with a lock icon)
- Account Number: 1
- Account Name: Assets
- Asset Type: Current Assets (dropdown menu)
- Balance Type: Debit
- Account Balance: 0.00
- ☐ This Account is a Sub-Account of:

At the bottom, there are two icons: 'Balances' (represented by a bar chart) and 'History' (represented by a document with a bar chart). A 'Deactivate' button is also present. The window has standard OS controls (minimize, maximize, close) at the bottom right.

**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.

A screenshot of a software window titled "Tax Entities". The window has a standard Windows-style title bar with a close button (X) in the top right corner. The main area contains several labeled input fields: "Company ID" with a text box containing "GEN" and the word "Genesis" below it; "Tax ID" with a text box containing "Smith Sales Tax" and a magnifying glass icon to its right; "Description" with a text box containing "Smith County Sales Tax"; "Percent" with a text box containing "0.5" and a percent sign (%) to its right; "Tax Type" with a dropdown menu showing "County"; and "GL Code" with a dropdown menu showing "2" and the word "Liabilities" below it. At the bottom of the window, there is a navigation bar with left and right arrow buttons, a page indicator showing "Tax: 1 of 3", and a set of icons including a plus sign, a pencil, a minus sign, and a checkmark.

**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.

The **Tax Groups** window contains the following elements:

- Company ID:** GEN
- Tax Group ID:** Tyler Sales Tax
- Description:** Tyler Total Sales Tax
- ☐ Inactive
- Included Tax Details:**

Tax ID	TX State Tax
Description	Texas State Tax
Percent	6.25
GL Code	2
	[ Liabilities ]
- Available Tax Entities:** Table with columns Tax ID and Tax %.
- Included Tax Entities:** Table with columns Tax ID and Tax %.

Tax ID	Tax %
TX State Tax	6.25
Tyler Sales Tax	1.50
Smith Sales Tax	0.50
- Buttons:** Refresh Tax Entities, Edit Tax Entities.
- Footer:** Tax Group: 1 of 1, navigation icons, and a toolbar.

**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*).

The **Charges** window contains the following elements:

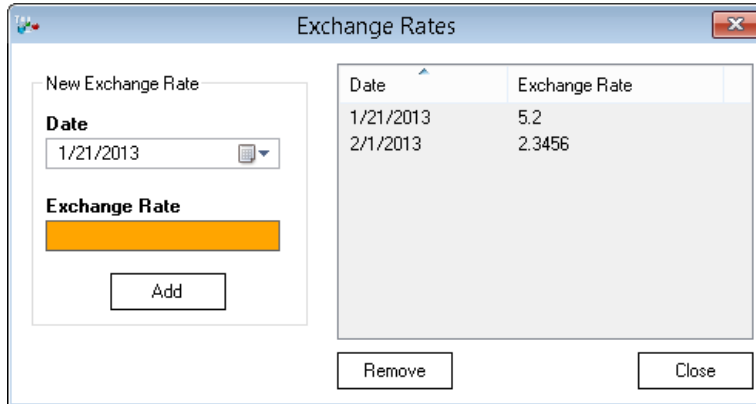
- Company ID:** GEN
- Charge Code:** Charge15
- Description:** 15 System Use
- Amount:** 15.00
- GL Code:** 4
- Income:** Income
- Metadata:**

Date Entered	1/4/2017 3:58:09 PM
Who Entered	Admin
Date Changed	1/30/2019 11:10:00 AM
Who Changed	admin
- Checkboxes:**
  - ☒ Recurring
  - ☒ Default Currency
  - ☐ Commissionable?
  - ☐ Taxable
- Footer:** Charge: 3 of 6, navigation icons, and a toolbar.

**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.



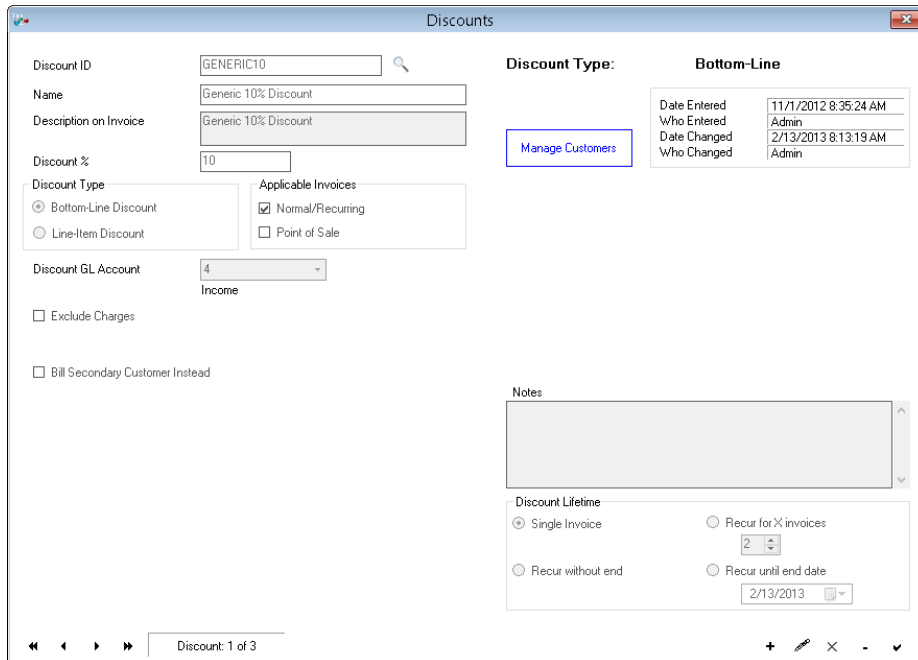
The Exchange Rates window is a standard Windows-style application window with a title bar and a close button. It contains a 'New Exchange Rate' section on the left with a 'Date' dropdown menu (showing 1/21/2013), an 'Exchange Rate' text input field (highlighted in orange), and an 'Add' button. To the right is a table with two columns: 'Date' and 'Exchange Rate'. The table contains two rows of data: 1/21/2013 with an exchange rate of 5.2, and 2/1/2013 with an exchange rate of 2.3456. At the bottom of the window are 'Remove' and 'Close' buttons.

Date	Exchange Rate
1/21/2013	5.2
2/1/2013	2.3456

**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.



The Discounts window is a complex form with multiple sections. On the left, there are input fields for 'Discount ID' (GENERIC10), 'Name' (Generic 10% Discount), and 'Description on Invoice' (Generic 10% Discount). Below these is a 'Discount %' field set to 10. The 'Discount Type' section has two radio buttons: 'Bottom-Line Discount' (selected) and 'Line-Item Discount'. To the right of these is a section for 'Applicable Invoices' with checkboxes for 'Normal/Recurring' (checked) and 'Point of Sale'. Below this is a 'Discount GL Account' dropdown menu showing '4' and 'Income'. There are also checkboxes for 'Exclude Charges' and 'Bill Secondary Customer Instead'. On the right side, there is a 'Discount Type: Bottom-Line' section with a 'Manage Customers' button and a table showing 'Date Entered', 'Who Entered', 'Date Changed', and 'Who Changed' (all showing Admin). Below this is a 'Notes' section with a text area. At the bottom right, there is a 'Discount Lifetime' section with radio buttons for 'Single Invoice' (selected), 'Recur without end', and 'Recur for X invoices' (with a value of 2). There is also a 'Recur until end date' option with a date field set to 2/13/2013. The bottom of the window shows a navigation bar with 'Discount: 1 of 3' and standard window controls.

**Figure 17.7** – Discounts Window



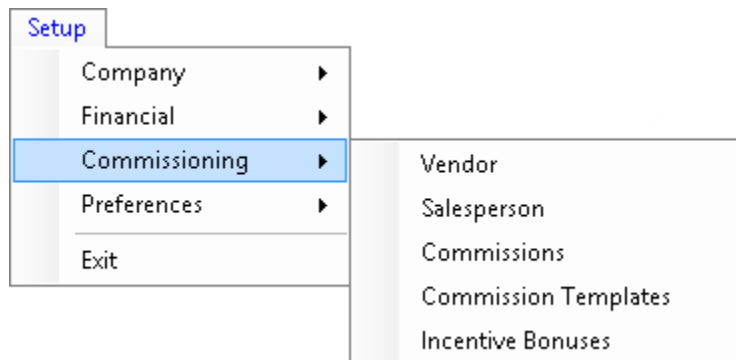
This chapter provides an overview of the commissioning windows accessible primarily from the **Setup→Commissioning** menu.

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.



**Figure 18.1** – Commissioning Submenu

## Vendor

The *Vendors* 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 ID: GENVEND

Name: Genesis Vendor

Address 1: 601 Shelley Dr

Address 2: Suite 202

City: Tyler

State: TX

Postal Code: 75701

Country: USA

Contact:

Phone: Ext:

Fax:

E-Mail:

Vendor Type: Dealer

Notes:

Send Email

Remit To

Inactive (Y/N) ☐

Payment Hold ☐

Tax ID:

Date Entered: 1/21/2013 10:28:00 AM

Who Entered: Admin

Date Changed: 1/21/2013 10:28:00 AM

Who Changed: Admin

Vendor: 1 of 1

Figure 18.2 – Vendors Window

## Salesperson

The *Salesperson* window (Figure 18.3) allows the user to create and manage Salespeople in Trio.

Vendor ID: GENVEND

Salesperson ID: GENSALES

Template ID: []

Name: Genesis Salesperson 1

Name 2:

Address 1: 5800 Eagle's Nest Blvd

Address 2:

City: Tyler

State: TX

Postal Code: 75703

Geo Code: []

Country: USA

Phone: Ext:

Fax:

E-Mail:

Notes:

Send Email

Commission Items

Date Entered: 1/21/2013 10:31:00 AM

Who Entered: Admin

Date Changed: 1/21/2013 10:31:00 AM

Who Changed: Admin

No Template ID

Salesperson: 1 of 1

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.

The **Commissions** window contains the following fields and data:

Field	Value
Commission ID	GenCommID1
Name	Genesis Commission
Item Type	Radio
System Type	RNetBill
Fixed Amount	0.00
Fixed Percent	10
Fixed GL Code	2
Residual Amount	0.00
Residual Percent	0
Residual GL Code	2
Liabilities	
Date Entered	1/21/2013 10:36:28 AM
Who Entered	Admin
Date Changed	1/21/2013 10:36:28 AM
Who Changed	Admin
First Payment Required	<input checked="" type="checkbox"/>
Payment Percent	100
Minimum Days	0
Minimum Amount	0
Charge Back Days	0
Lost Commission Days	0

Navigation: Commission: 1 of 3

**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.

The **Commission Templates** window contains the following fields and data:

Field	Value
Template ID	GenComm Template
Name	Genesis Commission Template
Posting Day	1
Enabled	<input type="checkbox"/>
Date Entered	1/21/2013 10:42:28 AM
Who Entered	Admin
Date Changed	1/21/2013 10:42:45 AM
Who Changed	Admin

**Commission List**

ID	Name
GenCom...	Genesis Commission 2
GenCom...	Genesis Commission 3

**Selected Commissions**

ID	Name
GenCom...	Genesis Commission

Navigation: Template: 1 of 1

**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.

**Incentive Bonuses**

Name: Genesis Incentive Bonus

Item Type: Radio

System Type: RNetBill

GL Code: 6

Expense

Begin Date: 1/21/2013

End Date: 2/20/2013

Inclusive Bonuses: ☒

First Payment Required: ☒

Date Entered	1/21/2013 10:45:19 AM
Who Entered	Admin
Date Changed	1/21/2013 10:45:19 AM
Who Changed	Admin

**Unit Bonuses**

Minimum Units:

Bonus Amt:

Excess Per Unit Amt:

Add Clear Remove

Min Units	Bonus Amt	Excess Per Unit Amt
-----------	-----------	---------------------

Incentive Bonus: 1 of 1

**Figure 18.6** – Incentive Bonuses Window

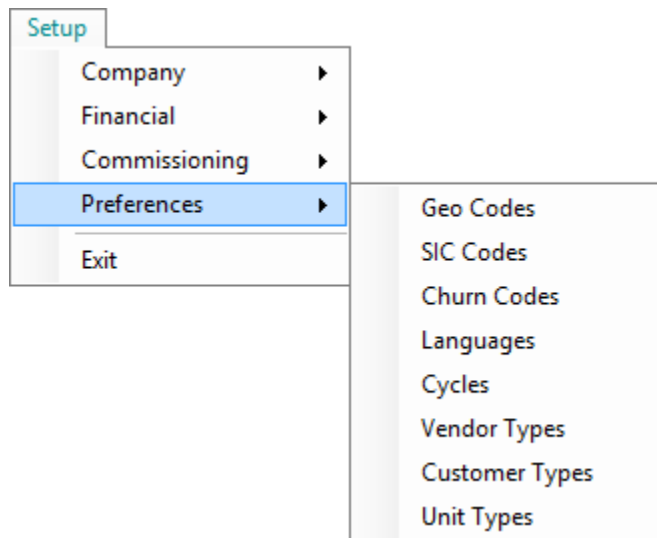
This chapter provides an overview of the windows accessible primarily from the **Setup→Preferences** submenu.

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.



**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.

**Figure 19.2** – Geo Codes Window

## SIC Codes

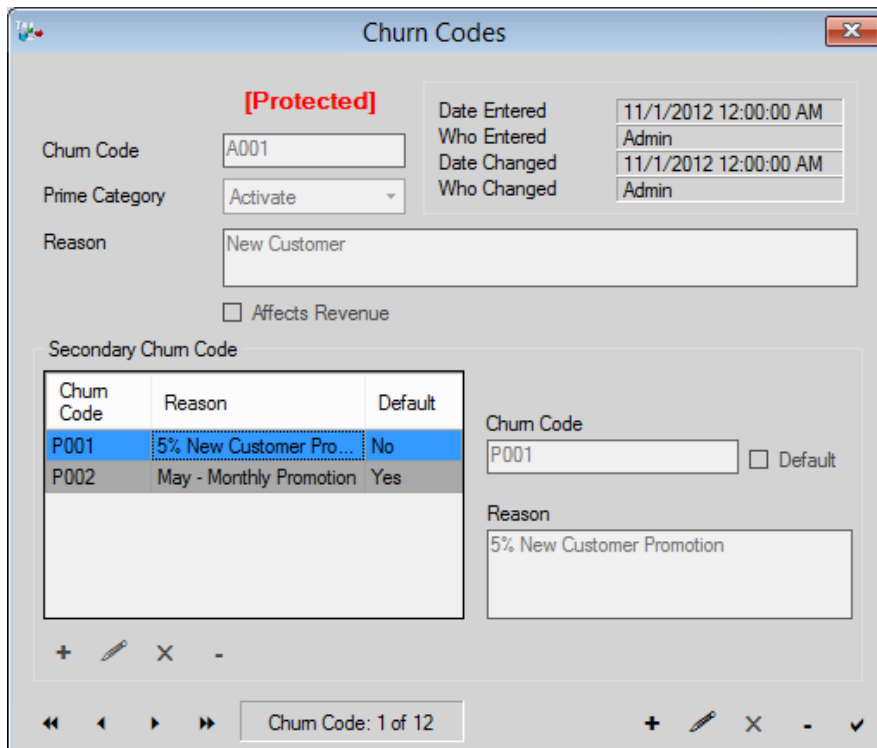
SIC (Standard Industrial Classification) Codes is a standard list of codes defining types of businesses and companies. SIC Codes can be assigned to customers and other entities in Trio from a user-defined list of SIC Codes. These SIC Codes are defined and managed using the *Setup SIC Codes* window (Figure 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.

**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.



The screenshot shows the 'Churn Codes' window. At the top, it is marked as '[Protected]'. The main section contains fields for 'Churn Code' (A001), 'Prime Category' (Activate), and 'Reason' (New Customer). To the right, a metadata table shows 'Date Entered' and 'Who Entered' as 'Admin' on '11/1/2012 12:00:00 AM'. Below these is a checkbox for 'Affects Revenue'. The 'Secondary Churn Code' section features a table with columns 'Churn Code', 'Reason', and 'Default'. It lists two secondary codes: P001 (5% New Customer Pro... with Default 'No') and P002 (May - Monthly Promotion with Default 'Yes'). To the right of this table, there are input fields for a selected secondary code (P001) and its reason (5% New Customer Promotion), with a 'Default' checkbox. At the bottom, there are navigation icons and a status bar indicating 'Churn Code: 1 of 12'.

Date Entered	11/1/2012 12:00:00 AM
Who Entered	Admin
Date Changed	11/1/2012 12:00:00 AM
Who Changed	Admin

Churn Code	Reason	Default
P001	5% New Customer Pro...	No
P002	May - Monthly Promotion	Yes

**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.

The screenshot shows a window titled "Languages" with a lock icon in the top left. It contains several input fields and a table of audit data.

Company ID	GEN
Genesis	Genesis
Language Code	ENG
Language	English (United States)

Date Entered	1/21/2013 7:51:24 AM
Who Entered	admin
Date Changed	1/21/2013 7:51:24 AM
Who Changed	admin

Welcome Letter Template	<input type="text"/>	Browse...
Contract Letter Template	<input type="text"/>	Browse...
Contract End Notice	<input type="text"/>	Browse...

At the bottom, there are navigation arrows, a status bar showing "Language: 1 of 1", and icons for edit, delete, and save.

**Figure 19.5** – Languages Window

## Cycles

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)

The screenshot shows the 'Cycles' window with the following details:

- Frequency:** Monthly
- Cycle:** Week 1
- Invoice Cycle Date Options:**
  - ☒ X day of the month (set to 1)
  - ☐ X weekday of the month
  - ☐ X day of the week of the month
- Metadata:**
  - Date Entered: 4/10/2015 2:46:44 PM
  - Who Entered: Admin
  - Date Changed: 4/10/2015 2:46:44 PM
  - Who Changed: Admin
- Invoice Dates Table:**

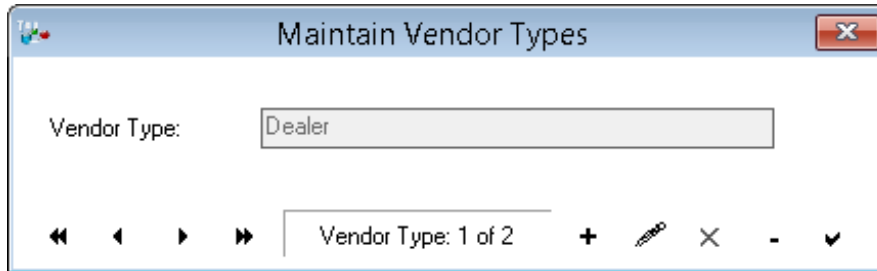
	Weekday	Date
1	Saturday	8/1/2015
2	Tuesday	9/1/2015
3	Thursday	10/1/2015
4	Sunday	11/1/2015
5	Tuesday	12/1/2015
6	Friday	1/1/2016

At the bottom, there is a 'Reset Dates' button and a status bar showing 'Cycle: 1 of 4'.

**Figure 19.6 – Cycles Window**

## Vendor Types

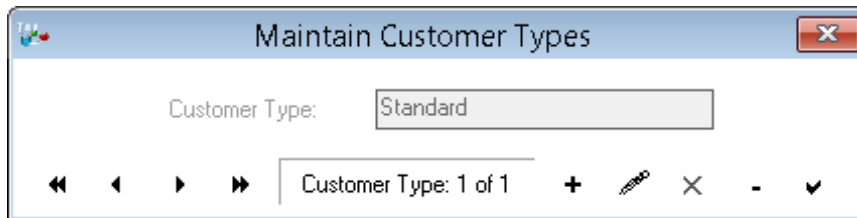
The *Maintain Vendor Types* window (Figure 19.7) allows the user to create and manage vendor types that can be used to categorize vendors created in the *Vendors* window.



**Figure 19.7** – Maintain Vendor Types Window

## Customer Types

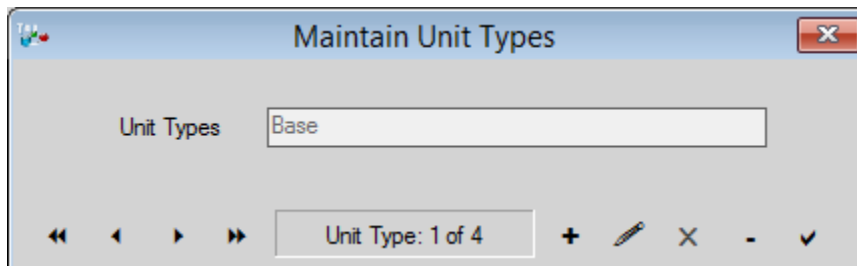
Each customer in Trio is assigned a customer type. These customer types can be created and managed in the *Maintain Customer Types* window (Figure 19.8). Customer Types can be selected from the *Details 2* tab of the *Customers* window.



**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.



**Figure 19.9** – Maintain Unit Types Window



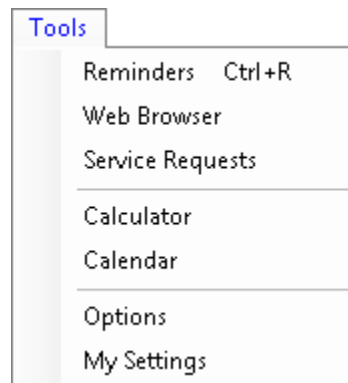
This chapter provides an overview of the windows accessible primarily from the Trio *Tools* menu that have not been covered elsewhere.

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.

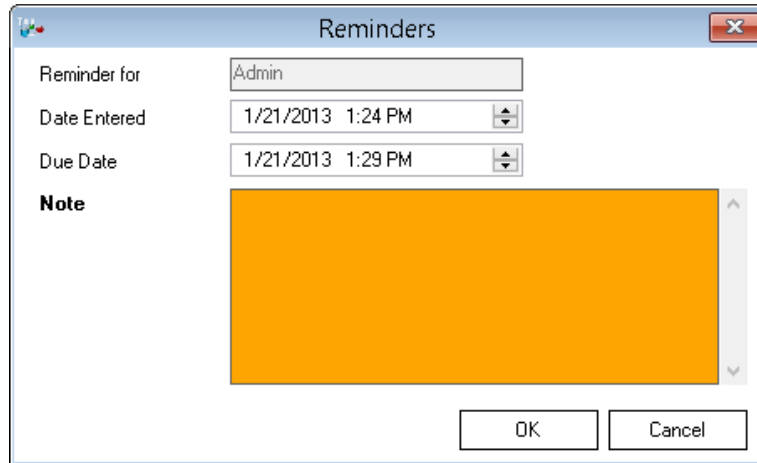


**Figure 20.1** – Tools Menu

- **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**.

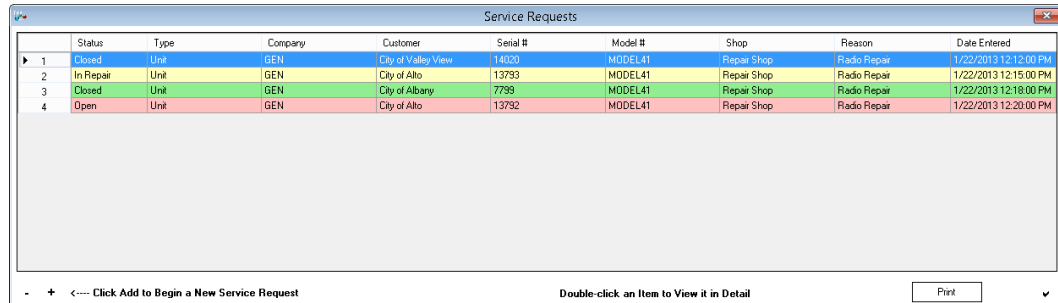
The image shows a Windows-style dialog box titled "Reminders". It has a standard title bar with a close button (X). Inside the dialog, there are three input fields: "Reminder for" with the text "Admin", "Date Entered" with the value "1/21/2013 1:24 PM", and "Due Date" with the value "1/21/2013 1:29 PM". Below these fields is a large orange rectangular area labeled "Note". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Field	Value
Reminder for	Admin
Date Entered	1/21/2013 1:24 PM
Due Date	1/21/2013 1:29 PM

**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.

The image shows a Windows-style window titled "Service Requests". It contains a table with 10 columns: Status, Type, Company, Customer, Serial #, Model #, Shop, Reason, and Date Entered. There are four rows of data. Below the table is a large empty rectangular area. At the bottom of the window, there is a status bar with a minus sign, a plus sign, and the text "Click Add to Begin a New Service Request". To the right of this is the text "Double-click an Item to View it in Detail". Further right is a "Print" button and a small icon.

	Status	Type	Company	Customer	Serial #	Model #	Shop	Reason	Date Entered
1	Closed	Unit	GEN	City of Valley View	14020	MODEL41	Repair Shop	Radio Repair	1/22/2013 12:12:00 PM
2	In Repair	Unit	GEN	City of Alto	13793	MODEL41	Repair Shop	Radio Repair	1/22/2013 12:15:00 PM
3	Closed	Unit	GEN	City of Albany	7799	MODEL41	Repair Shop	Radio Repair	1/22/2013 12:18:00 PM
4	Open	Unit	GEN	City of Alto	13792	MODEL41	Repair Shop	Radio Repair	1/22/2013 12:20:00 PM

**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.

The screenshot shows the 'Service Item' window with a blue title bar and a green header bar indicating the status is 'Closed'. Below the header, there are two radio buttons: 'Radio Request' (selected) and 'System Request'. The window is divided into three main sections: 'Opening Stage', 'In Repair Stage', and 'Close-out Stage'.

**Opening Stage:**

- Company: gen
- Customer: 003
- Serial Number: 3002
- Model Number: DIGITALRADIO1
- Repair Shop: GENREP
- Estimate: 35.00
- Reason: Radio Repair
- Comments: (empty text area)
- Date Entered: 2/11/2013 2:10:00 PM
- Who Entered: Admin
- Service Request #: 2
- Warrantable?: ☐
- Serviced Before?: ☐
- Update Inventory Item's Usage Type?: ☐

**In Repair Stage:**

- Temporary Fix: Parts
- Serial Number: (empty text field)
- Model Number: (empty text field)
- Diagnosis: (empty text area)
- Deposit Amount: 0.00
- Due Back: 2/16/2013
- Update Inventory Item's Usage Type?: ☐

**Close-out Stage:**

- Resolution: Replaced Parts
- Actual Amount Due: 28.93
- Comments: (empty text area)
- Date Closed: 2/11/2013 2:13:00 PM
- Who Closed: Admin
- Update Inventory Item's Usage Type?: ☐

At the bottom left, there is a 'Change Status' button. At the bottom right, there are icons for edit, delete, and save.

**Figure 20.4 – Service Item Window**



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.

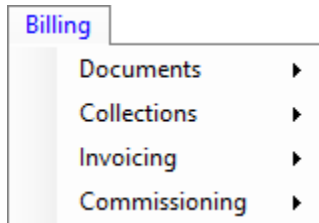


Figure 21.1 – Billing Menu

## Documents

The *Documents* submenu (Figure 21.2) gives the user access to the main documents available in Trio.

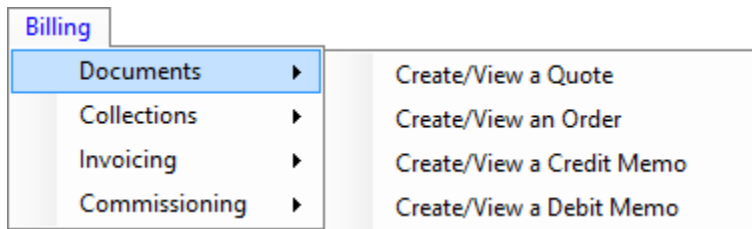
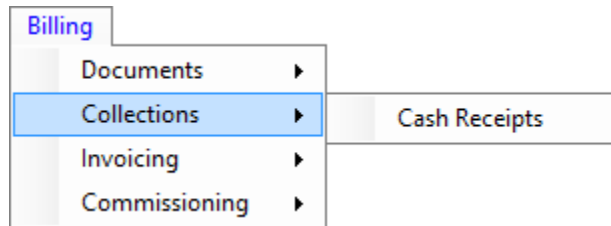


Figure 21.2 – Documents Submenu

- **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.

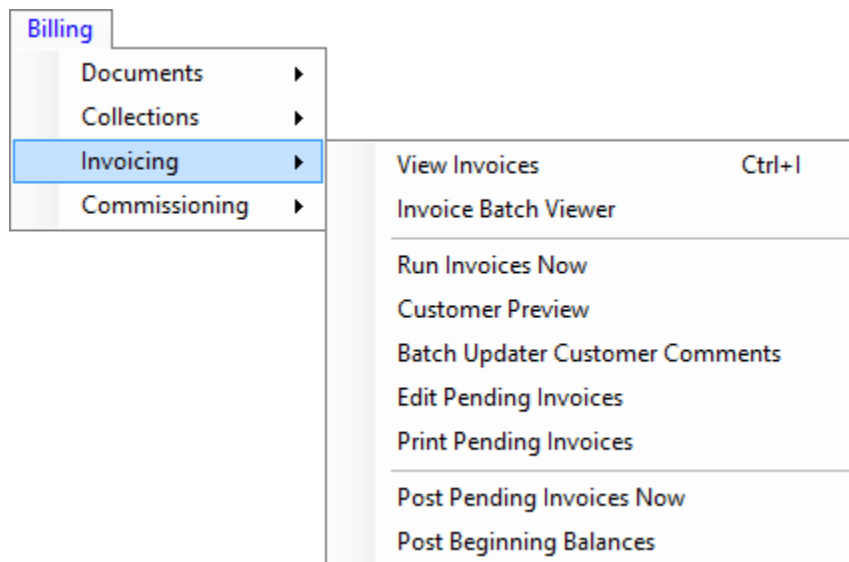


**Figure 21.3** – Collections Submenu

**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

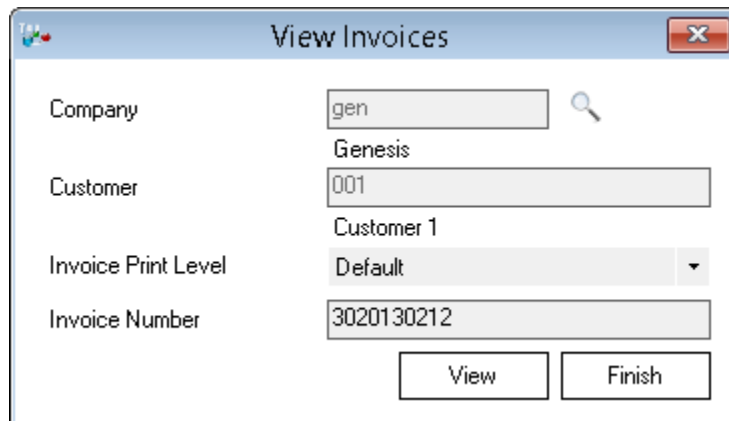
The *Invoicing* submenu (Figure 21.4) gives the user access to several invoicing related windows and features. These are described in the following sections.



**Figure 21.4** – Invoicing Submenu

## View Invoices

The *View Invoices* window (Figure 21.5) allows the user to select and view an individual invoice.



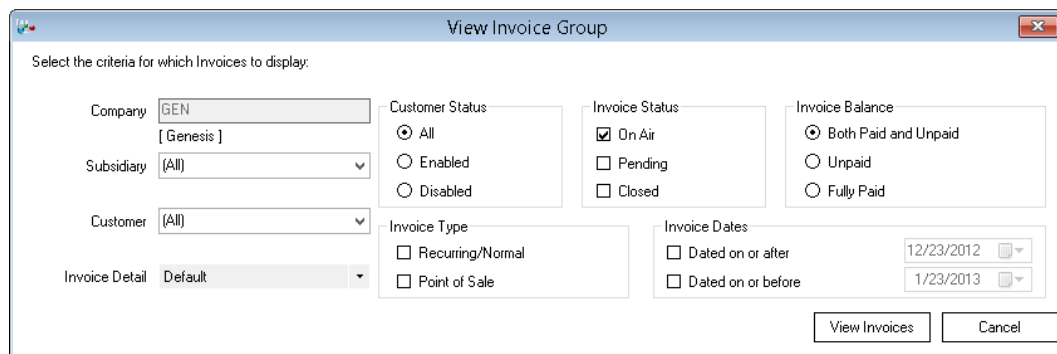
**Figure 21.5** – View Invoices Window

## 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.

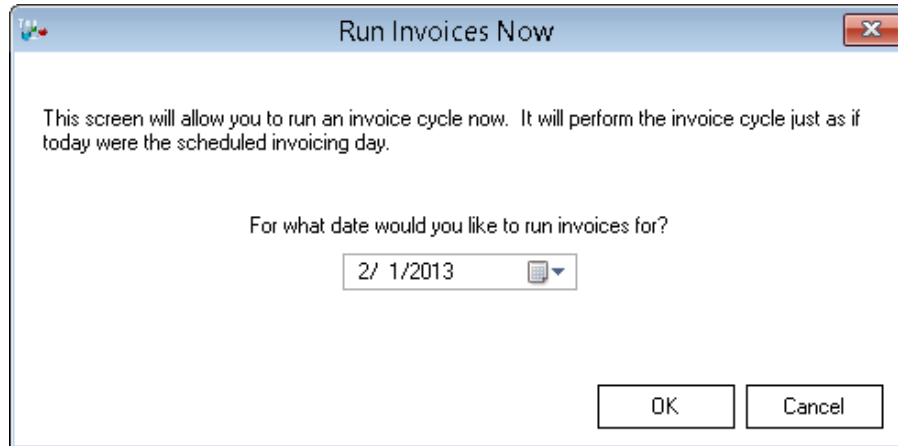


**Figure 21.6** – View Invoice Group Window



## 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*.

The 'Run Invoices Now' window is a standard Windows-style dialog box. It has a title bar with a close button (X). The main text area contains an explanatory message and a date selection prompt. Below the prompt is a text box containing '2/ 1/2013' and a small calendar icon. At the bottom right are 'OK' and 'Cancel' buttons.

Run Invoices Now

This screen will allow you to run an invoice cycle now. It will perform the invoice cycle just as if today were the scheduled invoicing day.

For what date would you like to run invoices for?

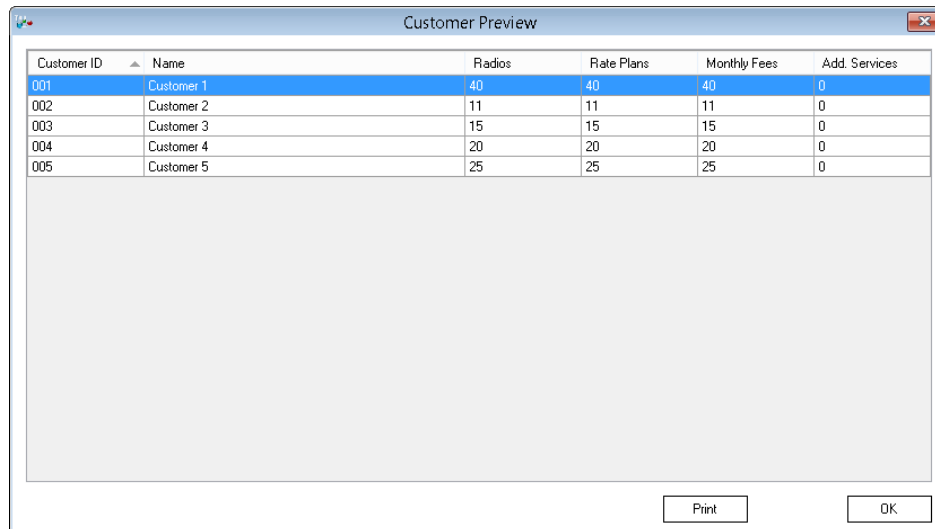
2/ 1/2013

OK Cancel

**Figure 21.7** – Run Invoices Now Window

## 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.

The 'Customer Preview' window displays a table of customer billing information. The table has six columns: Customer ID, Name, Radios, Rate Plans, Monthly Fees, and Add. Services. There are five rows of data. Below the table is a large empty rectangular area, and at the bottom right are 'Print' and 'OK' buttons.

Customer ID	Name	Radios	Rate Plans	Monthly Fees	Add. Services
001	Customer 1	40	40	40	0
002	Customer 2	11	11	11	0
003	Customer 3	15	15	15	0
004	Customer 4	20	20	20	0
005	Customer 5	25	25	25	0

Print OK

**Figure 21.8** – Customer Preview Window

## 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.

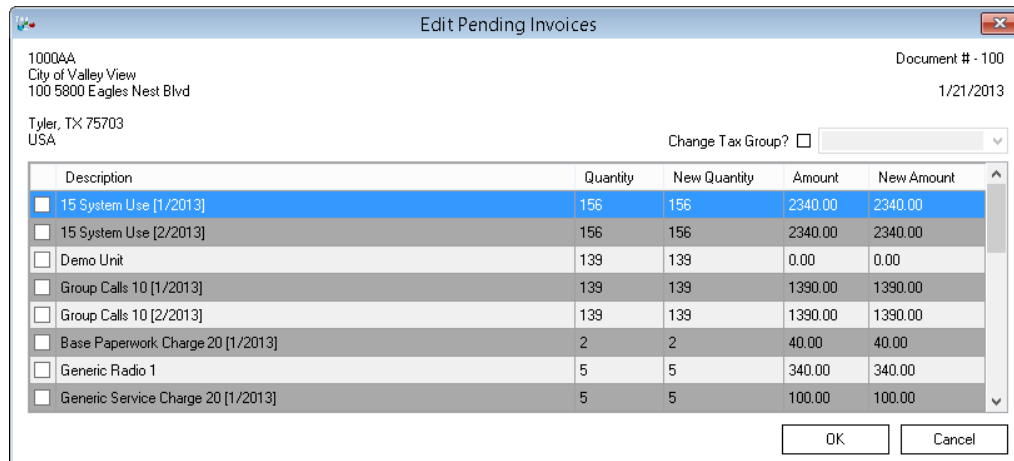
**Figure 21.9** – Batch Update Customer Comments Window

- 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.
  - 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.
  - 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.
  - 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.
  - 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.
  - 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.
  - 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.



The screenshot shows the 'Edit Pending Invoices' window. At the top left, it displays the address: 1000AA, City of Valley View, 100 5800 Eagles Nest Blvd, Tyler, TX 75703, USA. At the top right, it shows 'Document # - 100' and the date '1/21/2013'. Below the address is a 'Change Tax Group?' checkbox and a dropdown menu. The main part of the window is a table with the following data:

Description	Quantity	New Quantity	Amount	New Amount
15 System Use [1/2013]	156	156	2340.00	2340.00
15 System Use [2/2013]	156	156	2340.00	2340.00
Demo Unit	139	139	0.00	0.00
Group Calls 10 [1/2013]	139	139	1390.00	1390.00
Group Calls 10 [2/2013]	139	139	1390.00	1390.00
Base Paperwork Charge 20 [1/2013]	2	2	40.00	40.00
Generic Radio 1	5	5	340.00	340.00
Generic Service Charge 20 [1/2013]	5	5	100.00	100.00

At the bottom right of the window are 'OK' and 'Cancel' buttons.

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 invoice batch.

If desired, invoices with a credit balance or whose customer has a credit outstanding balance can be displayed in a separate set of batches first. Just check the **Print Credit Balances Separately** checkbox before starting the process.

## Email Pending Invoices

The *Email Pending Invoices* menu options allow the user to easily export and email all invoices currently marked as *Pending* to their respective customers. This window allows the user to specify a subject and body with placeholders for the emails to be sent. It also lists all *Pending* invoices and basic details about each. When sending the emails, each invoice is exported as a PDF and saved under the path specified by the *Paperless Billing Path* option in the *Trio Options* window. The subfolder used will be *Batch* and then additional subfolders for the Invoice Date and Email Time. The Email Time is the date and time at which the batch of

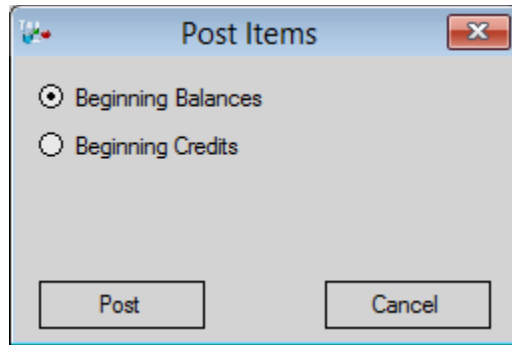
invoices began to be emailed. The *Email Invoices Status* report in the GW\_Reports module can be used to view the log and status of the process after the fact.

## **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.



**Figure 21.11** – Post Items Window

## Commissioning

The *Commissioning* submenu (Figure 21.12) gives the user ability to post any pending commissions.



**Figure 21.12** – Commissioning Submenu

For more information on Commissioning see *Chapter 18 – Commissioning*.

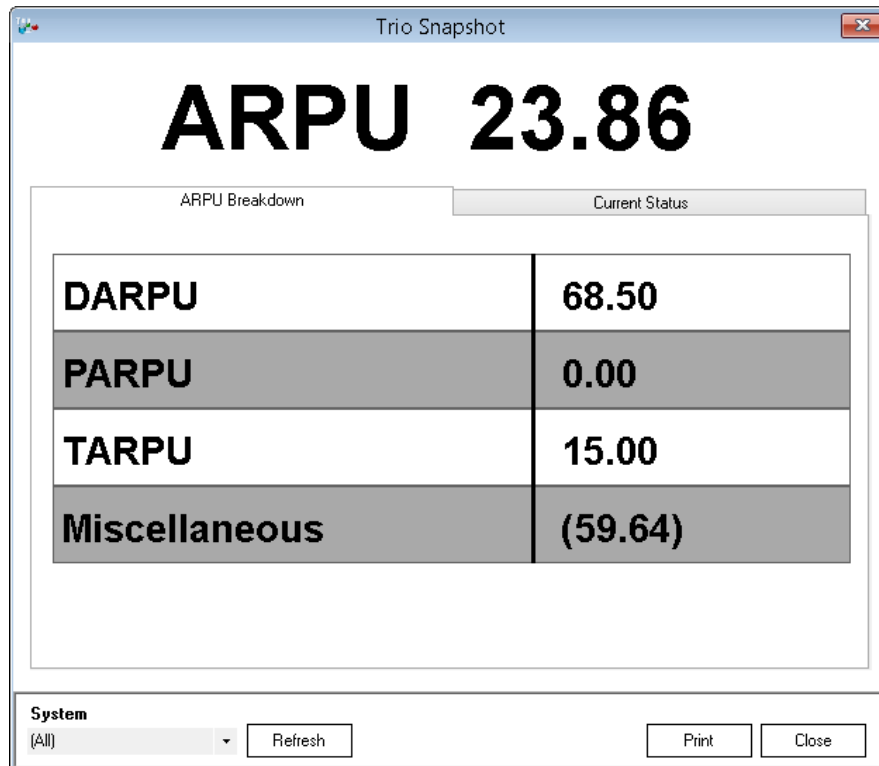
This chapter provides an overview of other windows not described in other chapters.

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

## 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.

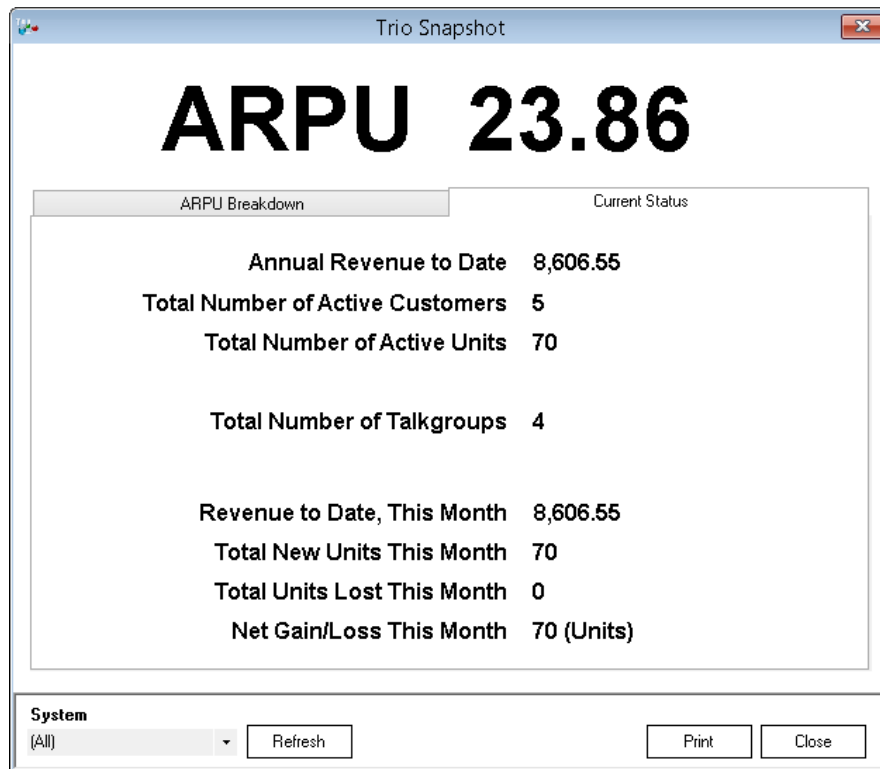
## Current Status

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.

The screenshot shows a window titled "Limit Reached" with a close button in the top right corner. The window contains the following elements:

- Type of Alert:** A text field containing "Variable Usage Cap".
- Customer ID:** A text field containing "100AA".
- Alert Order(s):** A table with one row:

Order Number
11020180706
- Alert Unit(s):** A table with two columns and one row:

System ID	Unit ID
1404	1608
- Disable Mode:** A text field containing "Manual".
- Action Buttons:** Three buttons labeled "Generate Report", "Disable Radios", and "Acknowledge".
- Footer:** Navigation arrows on the left, a status bar showing "Alert: 1 of 2", and a refresh/confirm icon on the right.

**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.

---

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.

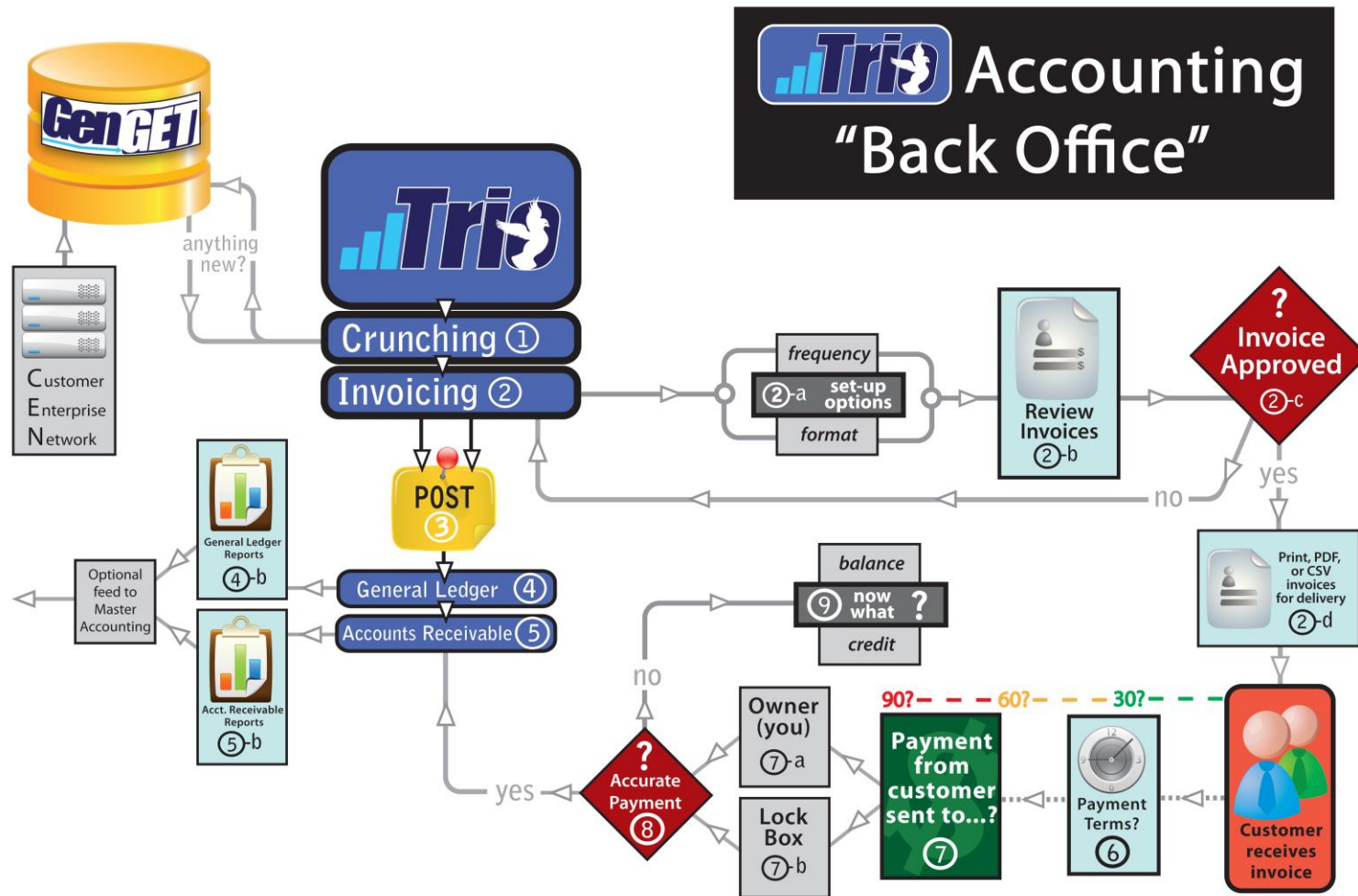


Figure A.1 – Accounting “Back Office”

## 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)**

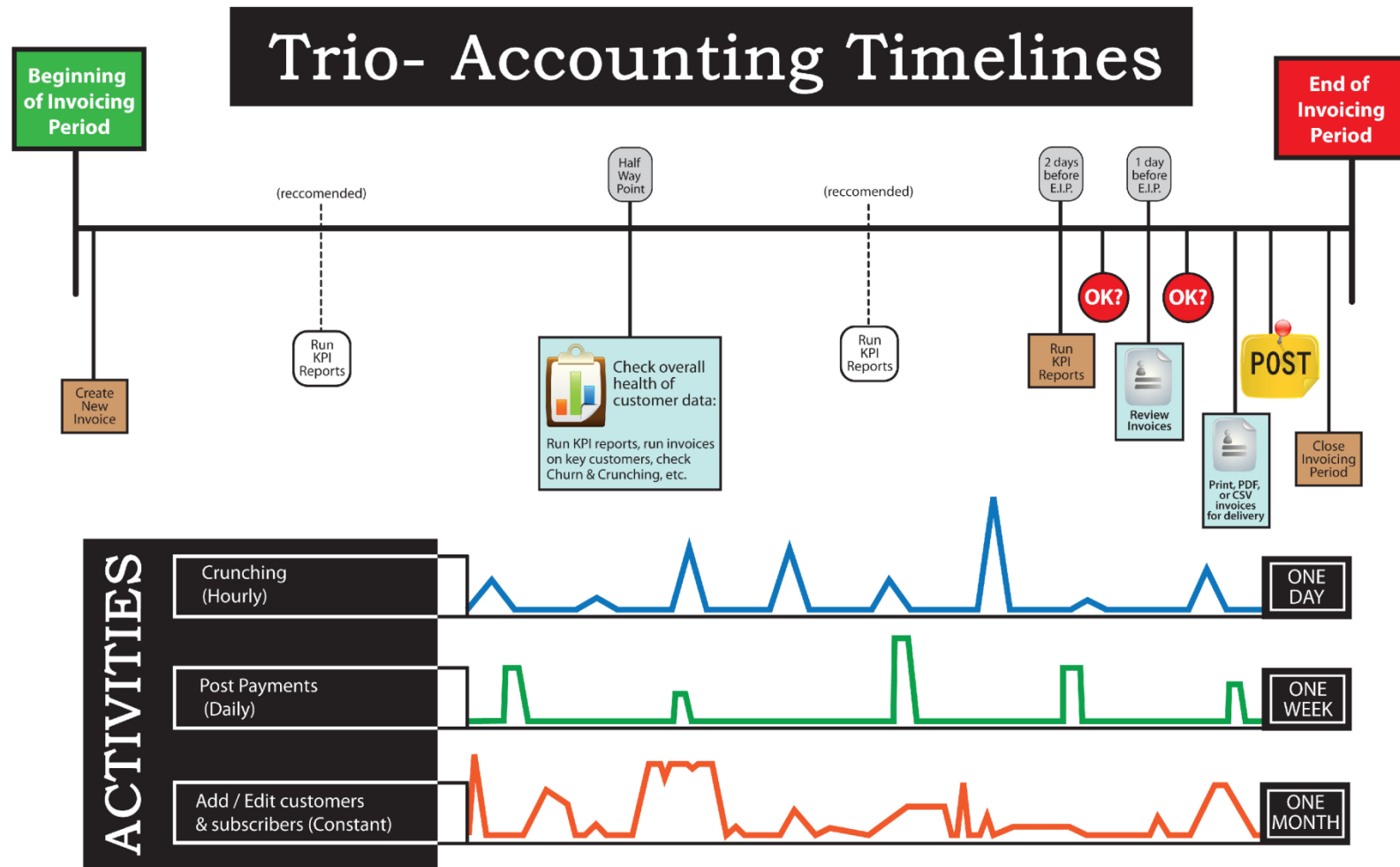
6. **PAYMENT TERMS** - During the set-up process, it must be decided how long the customer must return payment (30, 60, 90 days).
7. **PAYMENT PROCESSING** – One of the largest decisions that must be made is if the payments will be processed in-house, or through an outside service.
  - a. **Owner** - 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