

Ordering Fundamentals

Overview

This article explains the fundamentals needed to create and manage orders.

Ordering

An order is a request for a service subscription to be created. When an order is *finalised* it results in the service being created in the *pre-active* state. You can think of orders as the first step along the path to activating a service.

Definitions

Term	Meaning
VOIP	Voice Over Internet Protocol

Service Types

Orders are made for a variety of service types, some of these types are listed below

Type	Description
Simple Plans	This is a catch all type for services that don't meter usage. The cost of the service will be the same each billing period. Some examples include internet domains and online storage.
Data	Services that provide internet access. These are metered based on the amount of data used.
Telephony	Telephony services are phone or VOIP services.

Order Types

All orders take one of the following types. The transfer of services between accounts and suppliers is handled via the following order types supported via Emersion.

Type	Description
New Orders	This order type represents a request to create a new service.
Port	Also known as a 'churn' in some industries. These orders enable customers to transition their service to a new provider.
CHOWN	These orders will move the service from one customer to another while keeping the same provider.
Package Subscription Migration	Migrates a customer from one plan to another within a specific package pool. This is the correct option to choose when all you need is to swap plans. Migrating to a new plan does not involve churning the service and the owner of the service remains the same.
Upgrade	This is a more extensive version of a migration. In addition to a straight migration, upgrades can utilise advanced ordering features such as a credit check or a 100-point identity check. It also supports a change to a plan that has products, enabling the customer to upgrade to a plan with hardware, handsets or other mapped items. When upgrading a package subscription by using the Upgrade button and an active contract exists on the source package subscription, please be aware that this action will be considered a <i>Breakout</i> and as such the contract will be terminated - just as if the package subscription was cancelled outright. If you wish to upgrade a customers plan and want to utilise all the existing contract rules, you should perform a regular package subscription migration.
Service Cancellation	This is a request to cancel a service.

Order Statuses

Most orders will be in the *order incomplete* or *order complete* state. More information about order statuses can be [found here](#).

The Order Process

When ordering services for customers, the process and steps to complete an order from start to finish may vary. It can depend on several factors including but not limited to:

- The order type.
- The optional modules you are subscribed to.
- The service types you use and their requirements.
- Custom business rules specific to your organisation that Emerson has implemented on your behalf.
- Whether the service type is automatically or manually provisioned.



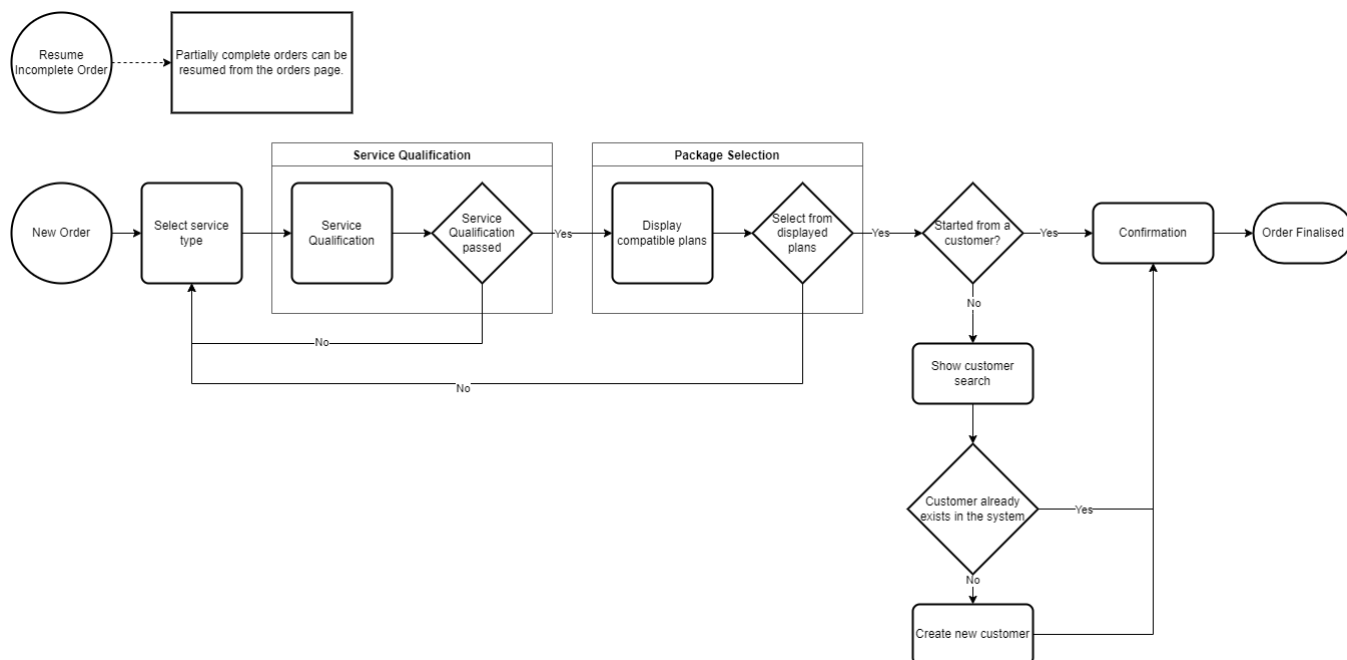
CHOWN orders will skip the package selection stage shown in the following diagrams, as the package doesn't change through a CHOWN order.

All orders will go through the following high-level steps:

1. Choosing a type of service(s) to be ordered.
2. Choosing a [package plan](#).
3. Capturing the customer's information.
4. Capturing the information for the service (service configuration).
5. Order finalisation and confirmation.

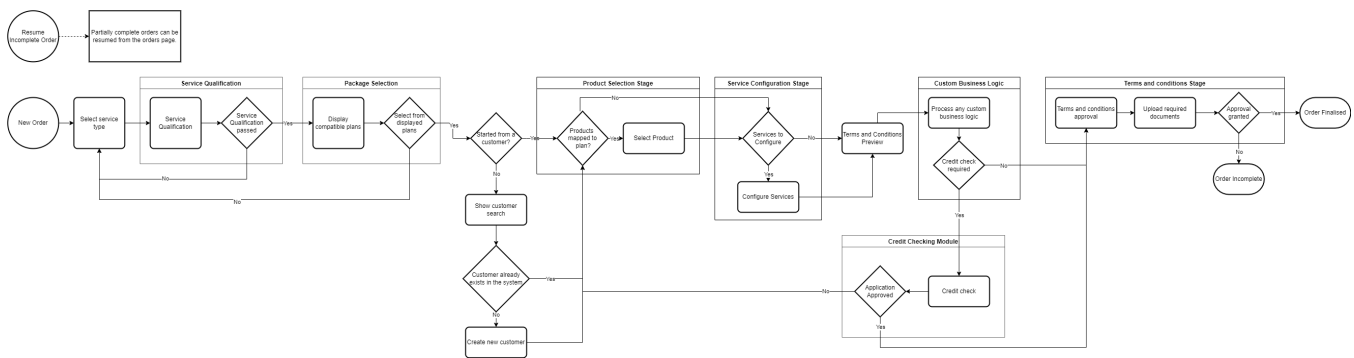
Basic Orders

The diagram below shows the basic ordering process. Orders that are abandoned before completion will be left in the *order incomplete* status and can be resumed by following the [instructions here](#).



Advanced Order Process

The diagram below shows the advanced ordering process, this includes all the additional steps that might be added by optional modules.



Not all steps are required for all orders. For example:

- If your company does not subscribe to the **terms and conditions** module, then this step and the **terms and conditions preview**, will be omitted when you place an order.
- If your company does not require customers submit to a credit check, then this step will not be included when placing an order.

New Order Wizard

The [new order wizard](#) is used to create new subscription-based orders.

The wizard can be closed at any time, leaving the order in the *order incomplete* status. The order will resume from the point where it was closed. When an order reaches the end of the wizard it is set to the *order completed* status.

Related Events

- [New Package Subscription](#)
- [New Package Subscription Migration](#)
- [Service Type Migration Commenced](#)

Related Reports

- [Orders by Status and Org Unit Code for Credit Checking](#) (id: 971)

- [Place an Order](#)
- [Orders](#)
- [Resume an Incomplete Order](#)
- [View or Search for an Order](#)
- [Order Statuses](#)
- [Service and Subscription Management](#)
- [Ordering Fundamentals](#)
- [Product Order Map](#)
- [Training Session Guide: Orders and Provisioning](#)
- [Unable to Migrate](#)
- [Orders and Subscriptions for Microsoft CSP Rhipes](#)
- [Sign Up Portal Settings](#)