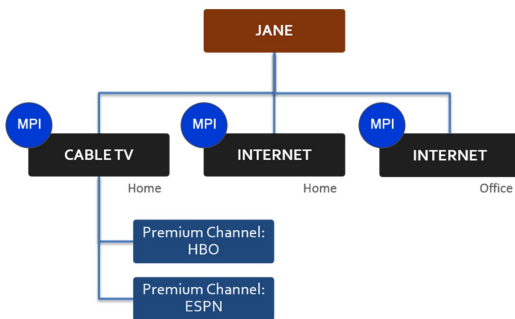


Tour of a Single Account



Introduction

This module introduces you to single accounts in Aria, where to find account information, and how account plans are structured. Concepts are illustrated using the example “Jane’s Account” as shown below:

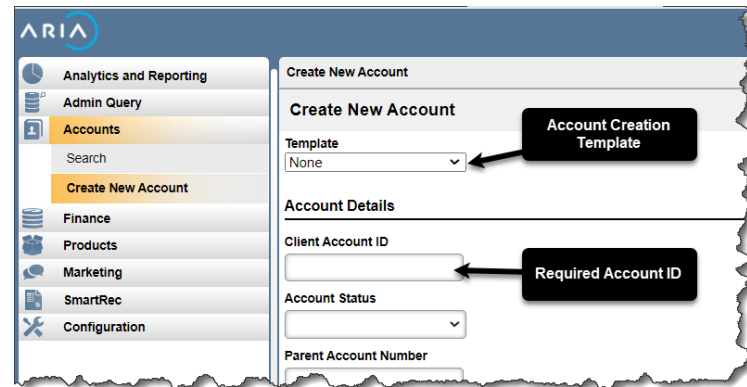


Key Terms & Concepts

MPIs and SPIs	Master Plan Instances and Supplemental Plan Instances. MPIs contain SPI sub-plans or add-on services. These plans can have parent-child relationships.
Plan Hierarchy	The tiered structure of a plan or multiple sets of plans for an individual or group. See Plans screen.
Plan Status	Indicates if plan service charges will be billed, “active” or “inactive”.
Billing Group	Assigned to plans to ensure payment with one or more payment methods or terms.
Dunning Group	Assigns a specific dunning process to be applied to a plan or group of plans as a penalty or warning for late payment. Plans are usually suspended when dunning ends.

Creating New Accounts

Accounts > Create New Account



In the **Create New Account** screen, enter values into the relevant fields. Some fields, like Client Account ID, are required. After account creation, use **Plans** to associate MPIs, SPIs, and Promo Codes to the account.

You can select a custom **Template** to use pre-saved account fields and structure. You also have the option to enter values in a custom account field to capture additional info. Custom account fields are defined in **Configuration > Client Settings > Account Fields**.

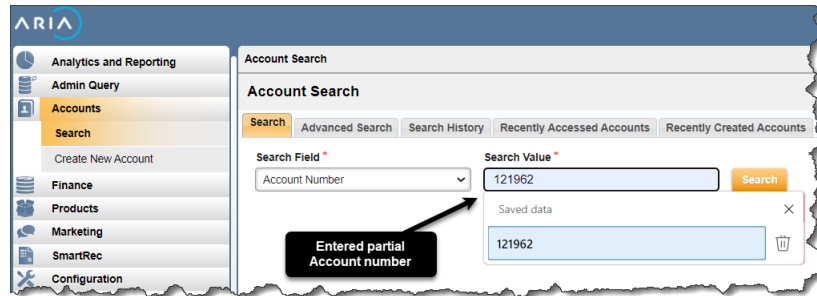


Quick Tip: A single account is an account that serves individuals, as opposed to organization or group accounts.

Tour of a Single Account

Finding Accounts

Accounts > Search



1 In the main **Search** tab, choose a search criterion in the **Search Field**. Enter a value in the **Search Value** to look for the selected Search Field for that value.

Note: Values can be partial, like a partial account number. Entering % will return all accounts.

2 The **Advanced Search** tab allows you to do conditional searches based on “Equals”, “Does Not Equal”, “Contains”, and “Is Empty” operators.

3 The **Search History** tab, **Recently Accessed Accounts** tab, and **Recently Created Accounts** tab provide an easy way to revisit accounts.

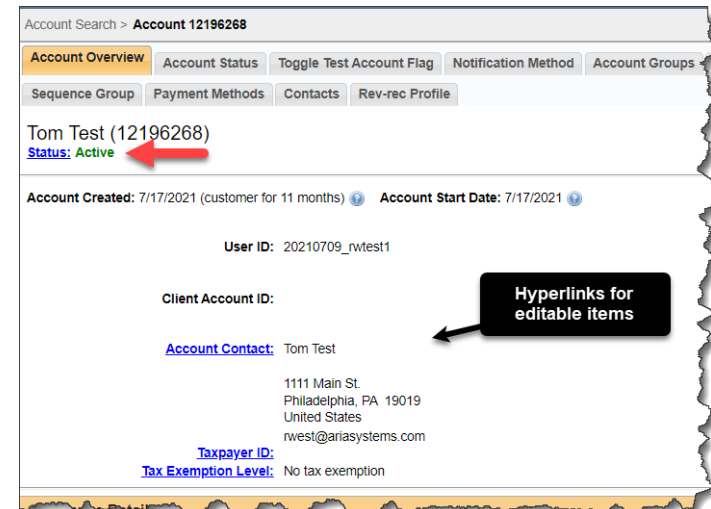


Quick Tip: Once an account is created, it cannot be deleted. Accounts statuses can be switched to non-active, non-billable, archived or test.

Viewing & Editing Accounts

Accounts > [select Account] > **Account Overview**

From the **Account Overview** screen you can view Account Details, Balance Details, Recent Invoices, Recent Payments, and much more.



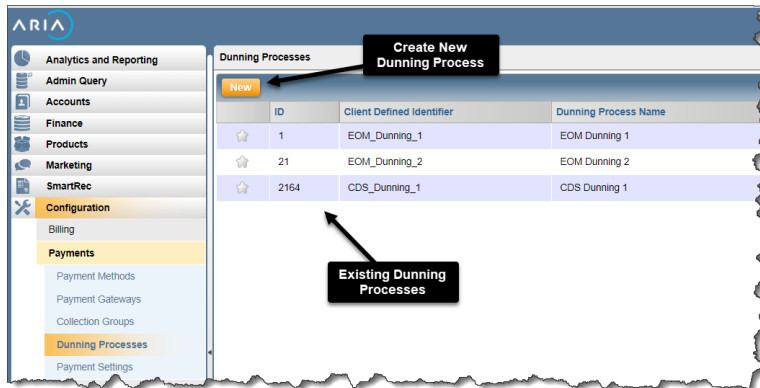
You can also edit things like:

- An account's **Status**, **Account Contact**, **Payment Method**, **Taxpayer ID**, and **Tax Exemption Level** from the Account Overview tab or by clicking through the various tabs at the top.

Note: Not everything can be readily edited on an account without certain privileges.

Creating Dunning Processes

Configuration > Payments > Dunning Processes



About Dunning processes:

- **Dunning Default:** a dunning group is automatically created for each MPI assigned to an account, so they will dun separately unless specified differently.
- **Associations:** Assign dunning processes to one or more payment methods/plans, or directly to a dunning group. Dunning group settings override individual MPI dunning processes.

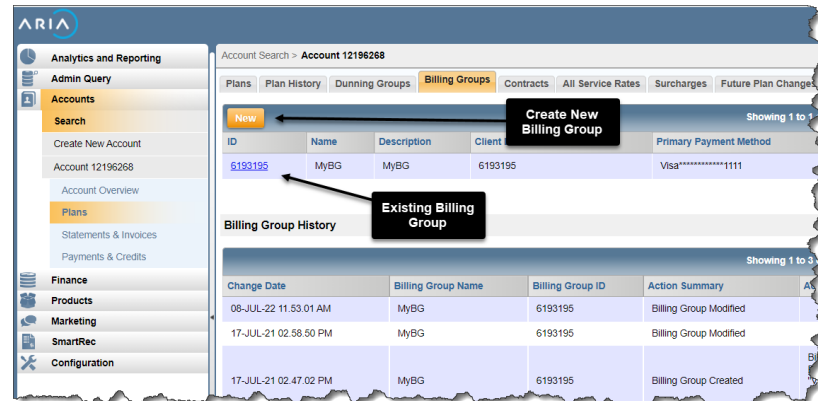
Creating Dunning Groups

Accounts > [select Account] > Plans > Dunning Groups

Dunning Groups can be created, assigned to MPIs, edited, and deleted from the Dunning Groups screen.

Billing Groups

Accounts > [select Account] > Billing Groups



MPIs are mapped to payment methods via Billing Groups.

To create a Billing Group:

- 1 In **Billing Group** tab, enter values in all relevant fields. Billing Group Name is required.
- 2 Select a Payment Method or Payment Term. You can also define a Secondary payment method for backup.
- 3 (Optional) Choose a Collection Group to assign the Billing group to a payment gateway or merchant account.



Quick Tip: Assign collection groups to a billing group to process payments through a preferred payment gateway.