

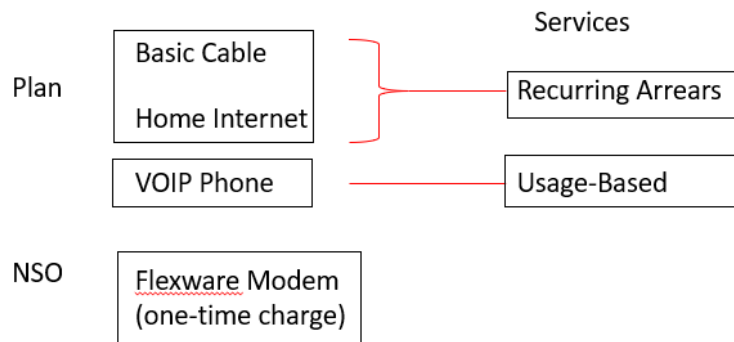


# Introduction to Plans

## Introduction


This module introduces Plans, which are collections of one or more services or products that you sell to a customer.

A sample plan is presented below:



In the above example:

- A plan offering consists of Basic Cable, Home Internet and VOIP Phone products from your product catalog offered to your subscribers.
- The Basic Cable and Home Internet products are billed as recurring charges.
- The VOIP Phone product is billed based on usage units allocated for your customer.
- The Flexware Modem is a one-time non-subscription offering (or NSO) available upon account activation.

 **Quick Tip:** This describes tabs 1-3 of the Create New Plan wizard. The remaining tabs in the Create New Plan wizard are described in the Set Up Your Plan Instance Quick Tips guide.

## Key Terms & Concepts

Item	Description
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 Relationships	Define child/supplemental plans at this tab; you may also select from plan groups including selected plans for plan assignment.
Billing and Invoicing	Choose Proration Invoice timing and/or select a statement associated with your master plan instance or accept the default template at this tab.

## Prerequisites:

It is recommended that the following tasks be completed before you create Plans:

- Create a Service
- Create a Usage Type (if applicable for a usage-based service)

You may also wish to create any or all of the following:

- Product Fields
- Product Field Categories
- Account Fields
- General Ledger (GL) Codes
- Tax Configurations