

# OneBill: Adding Products to Customers

## Scope

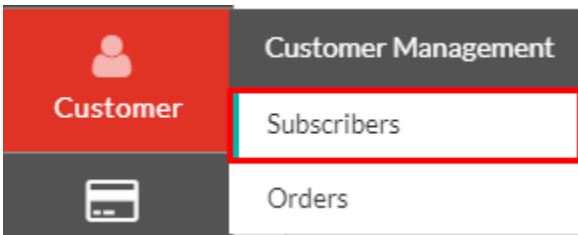
 This document outlines how to add products to customers. OneBill calls this creating an order

## Items Needed

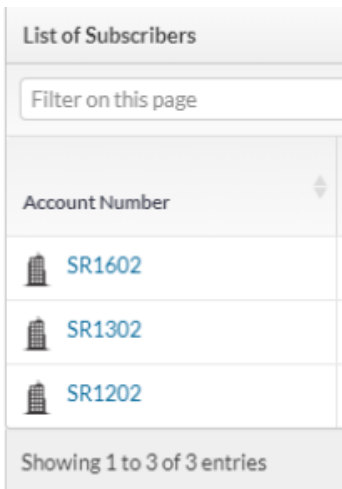
- Access to the [OneBill Portal](#).
- Product Information

## Enter the Customer's Page

- Hover over the **Customer** tab on the left side of the screen and click **Subscribers**



- Click on the account number of the customer you wish to add the recurring product to.



## Add Product

- Click **Create Order** on the right side of the **Products Owned** window

Subscriptions Report

Create Order

Include Closed Products

- To view the different products, change the **Category** dropdown to the desired type

## Product

Category :

TEST

PHONE

TEST

VOICE

▶ TEST

Adhoc Ch

- To add a product to the order, click **Add** on the right. A green circle with the number 1 will appear

## Price Plan List

Priceplan Name (Priceplan Code)		Unit Price	Quantity	
Adhoc Plan	1	\$0.00	1	Add
Simple MRC	1	\$10.00	1	Add
Simple MRC without Tax	1	\$10.00	1	Add
Simple MRC without Tax		\$19.00	1	Add

- Click **Review**

Cancel

Review →

## Adding an Add-On

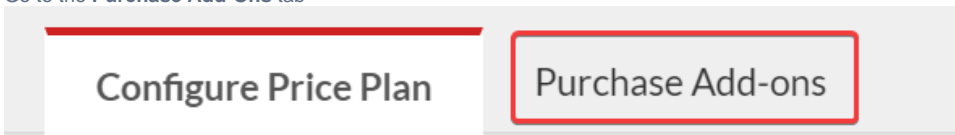
If you want to add a toll free package, voicemail transcription, or other add-on, you can do so in the review section

- Select the item you wish to add on to  
**NOTE: For toll free or other usage based packages, select usage. For voicemail transcription, select bundled seat**

[Usage Products](#) / [Domain Usage Plan](#)

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- Go to the **Purchase Add-ons** tab



- Change the search type to **Product Name** and enter the product you wish to add

Search for Add-on

Product Name  Search

Search result for **toll free** [Clear Filter](#)

Priceplan Name (Priceplan Code)	Unit Price
1000 Minutes w/ \$0.035 overages UCAAS - Recurring Telco / Toll Free Minutes Package (PROD2404)	\$35.00 <a href="#">Add</a>

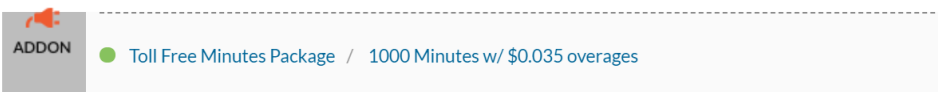
- Click **Add** on the product you wish to add, then select the checkmark on the left to close the tab

- The Add-On will now appear on your product

Product / Price Plan - Identifier

[Usage Products](#) / [Netsapiens Usage Plan](#)

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## Place the Order

- Review to confirm everything is correct and select **Place Order**  
**NOTE: DO NOT SELECT BILL THIS ORDER**



## Activating the Order


- Once your order has been placed, navigate to the **Orders** tab

Products Owned **Orders** Quotes Tickets

Q Go

Order Number

- Your order should be in **Pending Billing** status. Select the cog icon and click **Activate**

Amount	Status	
\$0.00	Pending Billing	⋮ 
\$0.00	Pending	
\$184.04	Billing A	

View

Send Alert


**Activate**

Discard

Submit

Edit

- Select all the products you wish to activate and update the activation date, then click **Start Billing** Order x

Order Activation		Order Number: OR12713	
	Product / Price Plan - Identifier	Identifier	Activation Date
<input checked="" type="checkbox"/>	Usage Products / Domain Usage Plan	oitdemo.20463.service	04/01/2020 

Start Billing

- The product status will update to **Partially Fulfilled**. Once the activation date has passed, it will change to **Billing Active**

**Future Activation Date** ~~\$0.00~~ → Partially Fulfilled

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**Not Activated** ~~\$0.00~~ → Pending Billing

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**Past Activation Date** ~~\$184.04~~ → Billing Active