OmniCRM Operations Guide

OmniCRM is Omnitouch's comprehensive BSS/OSS solution for mobile and fixed-line service providers. A complete platform that handles everything from customer onboarding to billing, provisioning, and support - all in one integrated system.

Getting Started

For Customer Service Staff

Your first steps:

1. **Learn the interface** - Get familiar with navigation and search
2. **Create a customer** - Step-by-step customer creation
3. **Add a service** - Provision your first service
4. **Process a payment** - Handle customer payments
5. **Top-up services** - Add credit to customer accounts

Daily tasks:

- **Service management** - Manage customer services
- **View usage** - Check balances and usage
- **View call records** - Inspect call, SMS, and data records (CDRs)
- **Modify services** - Change service configurations
- **Generate invoices** - Create and send invoices

For System Administrators

Setup and configuration:

1. **Understand the architecture** - System overview
2. **Configure the system** - System settings
3. **Create products** - Build your catalog
4. **Write playbooks** - Automate provisioning
5. **Set up users** - Create accounts and assign roles

Advanced topics:

- **Inventory management** - Manage assets
- **API integration** - Connect external systems
- **Security setup** - Configure 2FA and permissions

For Customers

Using the Self-Care Portal:

- **Access your account** - Log in and navigate
- **View services** - See your active services
- **Check usage** - Monitor data and balances
- **Pay invoices** - Make payments online
- **Top-up services** - Add credit instantly

Quick Task Reference

I want to...	Documentation
Create a new customer	Create Customer
Add a service to a customer	Add Service
View service usage and balances	Service Usage
View a service's call/SMS/data records	Call Detail Records
Process a payment	Process Payment
Generate an invoice	Invoice Management
Top-up a service	Top-Up & Recharge
Manage inventory	Inventory System
Create a product	Product Lifecycle
Write a provisioning playbook	Ansible Playbooks
Set up user accounts	RBAC
Enable 2FA	Two-Factor Authentication
Search for anything	Global Search
Understand the system	System Architecture
Use the API	API Documentation

Documentation Library

Essential Reading

- **System Architecture** - Complete technical overview with diagrams
- **Product Lifecycle Guide** - End-to-end product management
- **Ansible Playbooks Guide** - Master provisioning automation

Customer Management

- Customers, Contacts & Sites - Data model and relationships
- Creating Customers - Step-by-step guide
- Customer Tags - Organize with tags
- Customer Attributes - Custom metadata
- Activity Log - Track all changes

Support

- Support Ticket System - Manage customer support tickets
- FAQ Knowledge Base - Self-service answers for common issues

Work Management

- Boards - Kanban-style work management

Service Operations

- Service Management - Overview
- Adding Services - Provisioning workflow
- Assigning Plans - Plan assignment
- Modifying Services - Making changes
- Service Usage & Balances - Monitor usage
- Call Detail Records (CDRs) - View call, SMS & data records
- Top-Up & Recharge - Add credits

Billing & Finance

- Billing Overview - Complete billing guide
- Payment System Guide - Payment system architecture
- Payment Methods - Managing payment methods
- Transactions - Charges and credits
- Processing Payments - Payment workflows
- Invoice Management - Generate and manage invoices

Administration

- System Configuration - Configure OmniCRM
- Inventory Management - Asset tracking
- SIM Card Provisioning - SIM lifecycle management
- eSIM Inventory Management - eSIM tracking and assignment
- API Keys - API access management
- Monitoring & Metrics - System health and observability

Security & Access

- Authentication Flows - How authentication works
- Two-Factor Authentication - Set up 2FA
- Role-Based Access Control - Users, roles, and permissions

Integrations

- Email & SMS Campaigns (EDM) - Bulk communication campaigns
- Mailjet Integration - Email service
- Notification API - Outbound notification integration
- API Documentation - REST API reference

Customer-Facing

- Self-Care Portal - Customer portal guide
- Customer Care - Self-service features

- Cell Broadcast System - Emergency alerts

Reference

- Changelog - Version history
- Glossary of Terms - Terminology reference

What Makes OmniCRM Special?

OmniCRM brings together all the tools you need to run a modern telecommunications business:

Automated Service Provisioning

Forget manual configuration - OmniCRM uses **Ansible automation** to provision services in seconds. Whether you're activating a SIM card, configuring customer equipment, or setting up a complex bundle, the system handles it automatically.

What it does:

- Provisions services with a single click
- Configures network equipment automatically
- Creates billing accounts in real-time
- Sends welcome emails and SMS notifications
- Rolls back automatically if something fails

Learn more about Provisioning | **See Ansible Playbooks Guide**

Smart Billing & Payments

Built-in integration with **CGRateS** provides real-time rating and charging, while Stripe handles payment processing seamlessly.

What it does:

- Real-time usage tracking and rating
- Automatic invoice generation
- Credit card processing via Stripe
- Prepaid and postpaid billing models
- Flexible pricing and promotional codes
- Tax calculation and reporting

Explore Billing Features | **Payment Processing** | **Invoice Management**

Complete Customer Management

Manage customers, contacts, multiple sites, and services with a comprehensive relationship model.

What it does:

- Track customers, contacts, and service locations
- Manage multiple services per customer
- Store custom attributes and metadata
- Tag customers for organization
- Complete activity history and audit logs
- Google Maps integration for site geocoding

Customer Management Guide | **Create a Customer** | **Customer Tags**

Inventory Management

Track and manage all your physical and virtual assets - from SIM cards to routers to IP address blocks.

What it does:

- Track SIM cards, equipment, and accessories
- Manage phone numbers and IP address blocks
- Automated assignment during provisioning
- Batch import and export capabilities

- Equipment configuration storage
- Custom inventory templates

Inventory System Documentation

Customer Self-Care Portal

Empower your customers with a **self-service portal** where they can manage their own services.

What customers can do:

- View services and usage
- Check balances and data allowances
- Pay invoices online
- Download invoices as PDFs
- Update contact information
- **Top-up their services** instantly

Self-Care Portal Guide | **Customer Care Features**

Enterprise Security

Built with security at its core, featuring comprehensive authentication and authorization.

Security features:

- **JWT-based authentication**
- **Two-factor authentication (2FA)** with TOTP and backup codes
- **Role-based access control (RBAC)** with granular permissions
- Email verification for account changes
- Complete audit logging via activity log
- Session management and timeout controls

Authentication Guide | **RBAC Documentation** | **2FA Setup**

Powerful Integrations

OmniCRM integrates seamlessly with industry-leading services:

- **CGRateS** - Real-time billing and rating engine for telecom-grade charging
- **Stripe** - Secure payment processing and card storage
- **Mailjet** - Professional email delivery with templates
- **Google Maps** - Address validation and geocoding for accurate site locations
- **RESTful API** - Integrate with your existing systems

API Documentation | **Mailjet Integration**

Flexible Product Catalog

Create any type of product offering - from simple standalone services to complex bundles with multiple components.

Product types supported:

- **Standalone** - Single services (mobile plans, internet packages)
- **Bundles** - Combined offerings (internet + TV + phone)
- **Addons** - Supplementary services (data topups, international calling)
- **Promotions** - Special offers and discounts

Each product can have its own provisioning automation, pricing rules, and business logic.

Product Lifecycle Guide | **Products & Services Concepts**

Emergency Broadcast System

For mobile operators, OmniCRM includes a **Cell Broadcast System** for public safety alerts.

What it does:

- Send emergency alerts to geographic areas

- Multi-language message support
- Targeting by mobile network operator
- Compliance with government alert standards

Cell Broadcast Documentation

Powerful Search & Navigation

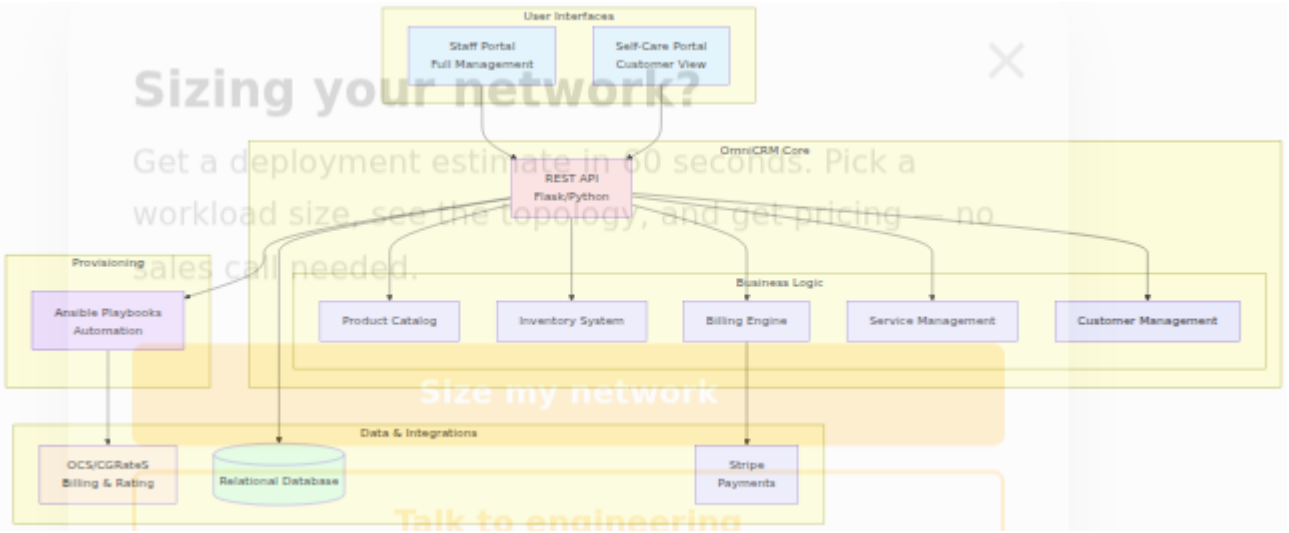
Find anything instantly with **global search** across customers, services, invoices, and more.

Search features:

- Search across all entities
- Filter and sort results
- Quick navigation shortcuts
- Smart suggestions

Navigation Guide | **Global Search**

System Architecture



View Complete Architecture Documentation

Key Concepts

Understanding Products vs Services

This is one of the most important concepts in OmniCRM:

- **Product** = A template or offering in your catalog (e.g., "Unlimited Mobile Plan")
- **Service** = An active instance of a product for a specific customer (e.g., "John Smith's Unlimited Mobile Plan")

When you provision a product, the system uses **Ansible automation** to create the actual service(s). One product can create multiple services, no services (configuration only), or modify existing services.

Learn more about Products & Services

The Provisioning Magic

OmniCRM's secret sauce is its **automated provisioning system**:



The playbook handles everything - from creating accounts in CGRateS to configuring routers to sending welcome emails. And if anything fails, it automatically rolls back.

Deep Dive: Ansible Playbooks | **Provisioning System**

Billing Made Simple



Every service generates **transactions** (charges or credits). These are grouped into **invoices** and sent to customers. With Stripe integration, payments can be processed automatically.

Billing Overview | **Payment Processing**

Customer Hierarchy

```
Customer (ABC Company)
├── Contacts (John Smith - Billing, Jane Doe - Technical)
├── Sites (Head Office, Branch Office)
└── Services
    ├── Internet - Head Office
    ├── Mobile Plan - John Smith
    └── VoIP - Branch Office
```

Everything is organized hierarchically, making it easy to manage customers with multiple locations and services.

Customers, Contacts & Sites

Why Choose OmniCRM?

All-in-One Platform

Everything you need in a single integrated system - no need to juggle multiple tools or vendors.

Automation First

Ansible-powered provisioning means services are deployed in seconds, not hours. Reduce errors, save time, increase customer satisfaction.

Flexible & Customizable

From product definitions to provisioning playbooks to custom attributes - tailor OmniCRM to match your exact business processes.

Built for Telecom

Designed specifically for service providers with features like CGRateS integration, inventory management, and real-time rating.

Enterprise Security

JWT authentication, 2FA, RBAC, and complete audit logging ensure your data is secure and compliant.

API-Driven

A comprehensive REST API means you can integrate OmniCRM with any existing systems or build custom tools.

Get Support

Documentation Resources

- Start with **System Architecture** for a technical overview
- See **Getting Started guides** for role-specific onboarding
- Check the **Quick Task Reference** for common operations
- Consult the glossary for terminology

Need More Help?

Browse the complete documentation library above or use the **global search** to find specific topics.

OmniCRM - Complete BSS/OSS for Modern Service Providers

Last Updated: 2025-12-23

Two-Factor Authentication (2FA)

Enhanced Security with Time-Based One-Time Passwords

OmniCRM supports **two-factor authentication (2FA)** using time-based one-time passwords (TOTP). This adds an extra layer of security by requiring users to provide both their password and a time-sensitive code from an authenticator app.

See also: `RBAC <rbac>` for 2FA management permissions, `Authentication Flows <authentication_flows>` for login process details.

Purpose

2FA provides:

1. **Enhanced Security** — Protects accounts even if passwords are compromised.
2. **Compliance** — Meets security requirements for regulated industries.
3. **User Choice** — Optional for users, can be enforced per role or globally.
4. **Industry Standard** — Uses TOTP protocol compatible with Google Authenticator, Authy, Microsoft Authenticator, and other standard apps.

How 2FA Works

When 2FA is enabled for a user:

1. **Setup** — User scans a QR code with their authenticator app during enrollment.

2. **Login** — After entering username/password, user provides the 6-digit code from their app.
3. **Verification** — System validates the time-based code matches the expected value.
4. **Access** — User gains access only after both factors are verified.

Enabling 2FA

For Individual Users

Users can enable 2FA for their own account:

1. Navigate to **User Settings** or **Profile**
2. Select **Enable Two-Factor Authentication**
3. Scan the QR code with an authenticator app
4. Enter the verification code to confirm setup
5. Save backup codes in a secure location

Backup & Recovery

Backup Codes

When enabling 2FA, users receive backup codes that can be used if their device is unavailable:

- Each code is single-use
- Store codes securely offline
- Generate new codes if all are used

Admin Reset

If a user loses access to their authenticator and all backup codes are exhausted, an administrator with database access can manually reset the user's 2FA by clearing the totp_secret field in the database. The user can then re-enable 2FA.

API Integration

Enable 2FA for a user

POST /2fa/enable/user/{user_id}

```
{
  "password": "current_password"
}
```

Response includes provisioning URI (for QR code) and backup codes.

Verify 2FA setup

POST /2fa/verify-setup/user/{user_id}

```
{
  "code": "123456"
}
```

Verify 2FA during login

POST /2fa/verify/user/{user_id}

```
{
  "code": "123456"
}
```

Returns access token, refresh token, and user data upon successful verification.

Regenerate backup codes

POST /2fa/backup-codes/regenerate/user/{user_id}

Requires authentication. Returns new set of backup codes.

Best Practices

- **Backup codes first.** Always save backup codes before completing 2FA setup.
- **Educate users.** Provide clear instructions for setup and recovery.
- **Secure reset process.** Verify user identity before manually resetting 2FA in the database.

FAQ

What authenticator apps are supported? Any TOTP-compatible app (Google Authenticator, Authy, Microsoft Authenticator, 1Password, etc.).

What if I lose my phone? Use a backup code or contact an administrator to reset 2FA.

Can I use SMS instead of an app? Currently, only TOTP authenticator apps are supported.

Is 2FA required? It depends on your organization's policy. 2FA is typically required for administrative and support staff roles but is optional for customer users. The system does not enforce 2FA for customer accounts (customer role users do not see 2FA enrollment prompts).

How long are TOTP codes valid? Codes refresh every 30 seconds and have a small time window for validation (typically accepts codes from current 30-second window plus previous/next windows for clock skew tolerance).

API Key Management

The API Key Management interface provides a **web-based UI** for creating, monitoring, and managing API keys used for programmatic access to the OmniCRM API.

Note

For general API authentication concepts and usage examples, see `concepts_api`.

Overview

API keys enable **secure, long-lived authentication** for:

- Server-to-server integrations
- Automation scripts
- Third-party applications
- Scheduled tasks and cron jobs
- External monitoring systems

Unlike JWT tokens (which expire after minutes/hours), API keys remain valid until manually revoked or until their expiry date.

Accessing API Key Management

Navigate to:

Or directly:

Required Permission: `MANAGE_API_KEYS` (admin role)

API Key List View

The main page displays all API keys in a table format:

Columns:

- **Name** - Descriptive label for the API key (e.g., "Provisioning System", "Monitoring Tool")
- **Created By** - Username of the person who created the key
- **API Key** - The actual key string (partially masked for security)
- **Status** - Active, Expired, or Revoked
- **Created Date** - When the key was generated
- **Expiry Date** - When the key will automatically expire
- **Actions** - Edit, Delete, Regenerate buttons

Example Display:

Dashboard Widgets

At the top of the page, summary statistics are displayed:

- **Total API Keys** - Count of all API keys (active and inactive)
- **Active Keys** - Currently valid keys
- **Expiring Soon** - Keys expiring in the next 30 days
- **Expired Keys** - Keys past their expiry date

Creating an API Key

Step 1: Click "Add API Key"

Click the **+ Add** button at the top right of the API Key list.

Step 2: Fill in Details

A modal form appears requesting:

> Name: _____
> (e.g., "Provisioning System")
>
> Description: _____
> (Optional - purpose of this key)
>
> Expiry Date: [Date Picker]
> (Optional - leave blank for no expiry)
>
> Permissions: ☐ View Customers ☐ Create Customers ☐ View Services ☐ Create Services ☐ Provisioning ☐ View Inventory ☑ Admin (all permissions)
>
> [Cancel] [Generate Key]

Field Guidelines:

Name (required)

- Short, descriptive identifier
- Examples: "Provisioning System", "Billing Integration", "Monitoring"
- Used in audit logs and displayed in the list

Description (optional)

- More detailed explanation
- Examples: "Used by Ansible provisioning server", "Third-party billing sync"
- Helps future administrators understand the key's purpose

Expiry Date (optional)

- If blank: Key never expires (not recommended)
- If set: Key automatically becomes invalid after this date
- Recommended: Set expiry for security (90 days to 1 year)

Permissions

- Select specific permissions or check "Admin" for full access
- Follows same role-based permission model as user accounts
- **Best Practice:** Assign minimum necessary permissions

Step 3: Generate and Copy Key

After clicking **"Generate Key"**, the system displays the newly created API key:

> ⚠ Copy this key now - it will not be shown again!
>
> sk_live_a1b2c3d4e5f6g7h8i9j0k1l2m3n4o5p6q7r8s9t0
>
> [Copy to Clipboard]
>
> [Close]

Warning

Save the API key immediately!

Once you close this dialog, the full key cannot be retrieved again. You'll only see a masked version (`sk_live_...XYZ`) in the list view.

If you lose the key, you must **regenerate** it, which invalidates the old key and may break existing integrations.

Step 4: Configure Your Application

Use the API key in your application's requests:

```
curl -X GET "https://yourcrm.com/crm/customers" \
  -H "X-API-KEY: sk_live_a1b2c3d4e5f6g7h8i9j0k1l2m3n4o5p6q7r8s9t0"
```

Or in environment variables:

```
export
CRM_API_KEY="sk_live_a1b2c3d4e5f6g7h8i9j0k1l2m3n4o5p6q7r8s9t0"
```

Managing Existing Keys

Viewing Key Details

Click on any API key name to view full details:

- Full key name and description
- Creation timestamp
- Creator username
- Associated permissions
- Usage statistics (if implemented)
- Recent access logs

Regenerating an API Key

If an API key is compromised or lost, regenerate it:

1. Click the ⋮ **(three dots)** in the Actions column
2. Select **"Regenerate Key"**
3. Confirm the action

Warning

Regenerating invalidates the old key immediately.

Any applications using the old key will stop working. Update all integrations with the new key before regenerating.

What Happens:

- Old key is revoked
- New key with same permissions is generated
- New key is displayed (copy it immediately)
- Name, description, and permissions remain unchanged

Revoking (Deleting) an API Key

To permanently remove an API key:

1. Click the ⋮ **(three dots)** in the Actions column
2. Select **"Delete"**
3. Confirm deletion

What Happens:

- Key is immediately revoked
- All requests using this key return `401 Unauthorized`
- Key is removed from the database
- **Cannot be undone** - key cannot be recovered

When to Revoke:

- Integration is no longer needed
- Key has been compromised
- System using the key has been decommissioned
- Replacing with a new key with different permissions

Editing API Key Details

To modify an API key's details:

1. Click the ⋮ **(three dots)** in the Actions column
2. Select **"Edit"**
3. Update name, description, expiry, or permissions
4. Click **"Save Changes"**

Editable Fields:

- Name
- Description
- Expiry date
- Permissions

Non-Editable:

- The key value itself (use Regenerate to change)
- Created date
- Created by user

API Key Status

API keys can have several statuses:

Active

- Key is valid and can be used
- Within expiry date (or no expiry set)
- Not manually revoked
- Displayed with green badge

Expiring Soon

- Active but will expire in the next 30 days
- Displayed with orange/warning badge
- Consider rotating before expiry

Expired

- Past the expiry date
- No longer accepts authentication
- Displayed with red badge
- Can be deleted or expiry extended

Revoked

- Manually deleted/disabled
- Permanently invalid
- No longer shown in active list

Filtering and Searching

The API Key list supports:

Search:

Search by name, description, or partial key:

Filter by Status:

Filter dropdown to show:

- All Keys
- Active Only
- Expiring Soon (next 30 days)
- Expired

Sort:

Click column headers to sort by:

- Name
- Created Date
- Expiry Date
- Created By

Security Best Practices

API Key Generation

- **Length:** Keys should be at least 32 characters (system enforces this)
- **Randomness:** Generated using cryptographically secure random number generators
- **Format:** Typically prefixed (e.g., `sk_live_`) for identification

API Key Storage

In the CRM:

- Keys are hashed before storage (like passwords)
- Full key only shown once during creation
- Database stores hash for verification
- Even administrators cannot retrieve the full key later

In Your Application:

- Store in environment variables, not code
- Use secret management systems (AWS Secrets Manager, HashiCorp Vault)
- Never commit keys to version control
- Rotate keys periodically (90-365 days)

Permission Management

- **Principle of Least Privilege** - Only grant necessary permissions
- Avoid creating admin keys unless absolutely required
- Use separate keys for different systems/purposes
- Review permissions regularly

Monitoring and Auditing

- Monitor API key usage via activity logs
- Set up alerts for unusual access patterns
- Review "last used" timestamps regularly
- Remove unused keys

Key Rotation

Establish a key rotation policy:

1. **Create new key** with same permissions
2. **Update applications** to use new key

3. **Monitor** to ensure old key is no longer used
4. **Revoke old key** after grace period

Troubleshooting

"401 Unauthorized" when using API key

- **Cause:** Key invalid, expired, or incorrect
- **Fix:**
  - Verify key is copied correctly (no extra spaces)
  - Check key status (Active vs. Expired)
  - Confirm key has required permissions
  - Ensure using `X-API-KEY` header (not `Authorization`)

"API key not found" after creation

- **Cause:** Key may have been created but not properly stored
- **Fix:**
  - Check API key list for the new entry
  - If missing, create a new key
  - Report issue to administrator

API key expiring soon

- **Cause:** Expiry date approaching (within 30 days)
- **Fix:**
  - Create new key with extended expiry
  - Update applications to use new key
  - Revoke old key after migration

Cannot delete API key

- **Cause:** May be protected or in use
- **Fix:**
  - Ensure you have admin permissions
  - Check if key is locked/protected

- Contact administrator if issue persists

API Endpoints (for Programmatic Management)

API keys can also be managed via API (requires admin permissions):

List API Keys

```
GET /crm/api-keys
Authorization: Bearer <admin-token>
```

Create API Key

```
POST /crm/api-keys
Authorization: Bearer <admin-token>
Content-Type: application/json

{
  "name": "New Integration",
  "description": "Third-party billing sync",
  "expiry_date": "2026-01-10",
  "permissions": ["view_customer", "view_service"]
}
```

Response:

```
{
  "api_key_id": 123,
  "name": "New Integration",
  "api_key": "sk_live_a1b2c3d4e5f6g7h8i9j0",
  "status": "active",
  "created": "2025-01-10T10:00:00Z",
  "expiry_date": "2026-01-10T23:59:59Z"
}
```

Revoke API Key

```
DELETE /crm/api-keys/{api_key_id}
Authorization: Bearer <admin-token>
```

Update API Key

```
PATCH /crm/api-keys/{api_key_id}
Authorization: Bearer <admin-token>
Content-Type: application/json

{
  "name": "Updated Name",
  "expiry_date": "2026-12-31"
}
```

Common Use Cases

Use Case 1: Provisioning System Integration

Create an API key for your Ansible provisioning server:

1. Navigate to API Keys → Add
2. Name: "Ansible Provisioning Server"
3. Description: "Used by provisioning automation"
4. Permissions: Provisioning, View/Create Services, View/Update Inventory
5. Expiry: 1 year
6. Copy key and add to Ansible `crm_config.yaml`

Use Case 2: Third-Party Billing Integration

Create a read-only key for billing export:

1. Name: "Billing Sync - QuickBooks"
2. Permissions: View Customers, View Transactions, View Invoices
3. Expiry: 90 days (rotate quarterly)
4. Use in scheduled export script

Use Case 3: Monitoring and Alerting

Create a key for Prometheus/Grafana metrics collection:

1. Name: "Monitoring - Grafana"
2. Permissions: View Services, View Provisioning
3. Expiry: Never (monitoring needs continuous access)
4. Configure in Grafana datasource

Use Case 4: Customer Portal API

Create a key for customer self-service portal:

1. Name: "Customer Portal Backend"
2. Permissions: View Own Customer, View Own Services, Create Payments
3. Expiry: 180 days
4. Use in portal backend API calls

Related Documentation

- `concepts_api` - API authentication concepts and examples
- `rbac` - Role-based access control and permissions
- `2fa` - Two-factor authentication for additional security

Customer Attributes

Customer Attributes are flexible key-value pairs that can be attached to any customer record to store custom metadata, configuration settings, or business-specific information that doesn't fit into standard customer fields.

For visual customer categorization and clickable links, see `Customer Tags <administration_tags>`. For basic customer information, see `Customers, Contacts, Sites & Services <basics_customers>`.

Unlike fixed database fields, attributes allow you to dynamically extend customer records without modifying the database schema. This makes them ideal for storing deployment-specific data, integration parameters, or custom business logic flags.

Purpose and Use Cases

Common use cases for Customer Attributes include:

1. Integration Data

Store external system identifiers or API keys specific to this customer:

- `external_crm_id` = "SF-12345" (Salesforce customer ID)
- `legacy_system_id` = "OLD-CRM-789" (Migration reference)
- `hubspot_contact_id` = "12345678" (HubSpot integration)

2. Custom Business Logic

Store flags or settings that control customer-specific behavior:

- `billing_method` = "quarterly" (Override default monthly billing)
- `auto_provision` = "true" (Enable automatic service provisioning)
- `support_tier` = "premium" (Custom support level)
- `credit_limit` = "10000" (Customer-specific credit limit)

3. Compliance and Regulatory Data

Track compliance-related metadata:

- `gdpr_consent_date` = "2025-01-01" (Data processing consent)
- `tax_exempt` = "true" (Tax exemption status)
- `regulatory_entity` = "FCC-123456" (Regulatory identifier)

4. Operational Metadata

Store operational information:

- `preferred_contact_method` = "email" (Communication preference)
- `account_manager` = "<john.smith@company.com>" (Assigned account manager)
- `onboarding_date` = "2025-01-15" (Customer lifecycle tracking)
- `churn_risk_score` = "0.23" (Predictive analytics)

5. Provisioning Parameters

Store provisioning-specific configuration:

- `radius_username_format` = "email" (Custom RADIUS format)
- `vlan_id` = "100" (Network configuration)
- `ipv6_enabled` = "true" (Feature flags)

Attributes vs. Standard Fields

Use Attributes When:

- Data is deployment-specific or varies by installation
- Requirements change frequently
- Storing integration-specific metadata
- Prototyping new features before adding database fields
- Data doesn't need complex querying or joins

Use Standard Fields When:

- Data is core to the customer model (name, email, address)
- Frequent searching, filtering, or reporting required
- Data has referential integrity constraints
- Performance is critical for large-scale queries

Managing Attributes via the UI

Viewing Customer Attributes

To view attributes for a customer:

1. Navigate to the customer's overview page
2. Click on the **Attributes** tab
3. You will see a table of all attributes for this customer, showing:
    - Attribute Name (key)
    - Attribute Value
    - Created date
    - Last Modified date

Creating a New Attribute

To create a new attribute for a customer:

1. Navigate to the customer's overview page
2. Click on the **Attributes** tab
3. Click the **Add Attribute** button
4. Fill in the required fields:
    - **Attribute Name** (required): The key/name for this attribute (e.g., `external_crm_id`)
    - **Attribute Value** (required): The value to store (e.g., `SF-12345`)
5. Click **Create Attribute**

Naming Conventions:

- Use lowercase with underscores: `external_system_id` ✓

- Avoid spaces: `external system id` ✗
- Keep names descriptive but concise
- Use consistent naming across customers for same attribute types

Editing an Attribute

To edit an existing attribute:

1. Navigate to the customer's overview page
2. Click on the **Attributes** tab
3. Find the attribute you want to edit in the table
4. Click the **Edit** (pencil) button
5. Modify the attribute name or value
6. Click **Update Attribute**

Note

Changing an attribute name creates a new key-value pair. Ensure this doesn't break integrations that depend on the original attribute name.

Deleting an Attribute

To delete an attribute:

1. Navigate to the customer's overview page
2. Click on the **Attributes** tab
3. Find the attribute you want to delete in the table
4. Click the **Delete** (trash) button
5. Confirm the deletion in the popup

Warning

Deleting attributes used by integrations, provisioning workflows, or billing logic may cause failures. Verify dependencies before deletion.

Attribute Field Reference

API Integration

Attributes can be managed programmatically via the API:

Create or Update an Attribute

Endpoint: `PUT /crm/attribute/`

Required Permission: `create_customer_attribute`

Request Body:

```
{
  "customer_id": 123,
  "attribute_name": "external_crm_id",
  "attribute_value": "SF-12345"
}
```

Response:

```
{
  "attribute_id": 456,
  "customer_id": 123,
  "attribute_name": "external_crm_id",
  "attribute_value": "SF-12345",
  "created": "2025-01-04 10:30:00",
  "last_modified": "2025-01-04 10:30:00"
}
```

Update an Existing Attribute

Endpoint: `PATCH /crm/attribute/attribute_id/{attribute_id}`

Required Permission: `update_customer_attribute`

Request Body:

```
{
  "attribute_value": "SF-54321"
}
```

Get Attribute by ID

Endpoint: `GET /crm/attribute/attribute_id/{attribute_id}`

Required Permission: `view_customer_attribute`

Response:

```
{
  "attribute_id": 456,
  "customer_id": 123,
  "attribute_name": "external_crm_id",
  "attribute_value": "SF-12345",
  "created": "2025-01-04 10:30:00",
  "last_modified": "2025-01-04 10:30:00"
}
```

Get All Attributes by Customer ID

Endpoint: `GET /crm/attribute/customer_id/{customer_id}`

Required Permission: `view_customer_attribute`

Response:

```
[
  {
    "attribute_id": 456,
    "customer_id": 123,
    "attribute_name": "external_crm_id",
    "attribute_value": "SF-12345",
    "created": "2025-01-04 10:30:00",
    "last_modified": "2025-01-04 10:30:00"
  },
  {
    "attribute_id": 457,
    "customer_id": 123,
    "attribute_name": "billing_method",
    "attribute_value": "quarterly",
    "created": "2025-01-04 10:35:00",
    "last_modified": "2025-01-04 10:35:00"
  }
]
```


Delete an Attribute

Endpoint: `DELETE /crm/attribute/attribute_id/{attribute_id}`

Required Permission: `delete_customer_attribute`

Response:


```
{
  "result": "success"
}
```


Bulk Attribute Operations

Managing Multiple Attributes

To set multiple attributes for a customer at once (e.g., during onboarding or integration sync):

```
import requests

customer_id = 123
attributes = [
    {"attribute_name": "external_crm_id", "attribute_value": "SF-
12345"},
    {"attribute_name": "billing_method", "attribute_value":
"quarterly"},
    {"attribute_name": "support_tier", "attribute_value":
"premium"}
]

for attr in attributes:
    attr["customer_id"] = customer_id
    requests.put(
        "https://api.example.com/crm/attribute/",
        json=attr,
        headers={"Authorization": "Bearer YOUR_TOKEN"}
    )
```

Querying Customers by Attribute

While attributes don't have built-in search endpoints, you can filter customers by attribute using the customer search API with custom filtering:

```
# Get all customers, then filter by attribute in application code
customers = requests.get("https://api.example.com/crm/customer/").jso

for customer in customers:
    attributes = requests.get(

f"https://api.example.com/crm/attribute/customer_id/{customer['custom
    ).json()

    # Find customers with specific attribute
    for attr in attributes:
        if attr['attribute_name'] == 'support_tier' and
attr['attribute_value'] == 'premium':
            print(f"Premium customer: {customer['customer_name']}")
```

Note

For frequent attribute-based queries, consider adding indexed database fields or implementing a dedicated search endpoint.

Best Practices

1. Naming Conventions

- Use snake_case: `external_system_id` ✓
- Be descriptive: `billing_method` ✓ vs `method` ✗
- Avoid reserved keywords or special characters
- Document attribute meanings in your deployment guide

2. Data Types

- Attributes store values as strings (max 150 characters)
- For booleans, use "true"/"false" (lowercase)
- For dates, use ISO 8601 format: "2025-01-04 10:30:00"
- For large JSON data, consider dedicated database fields instead

3. Validation

- Validate attribute values in application code before saving
- Use consistent value formats across customers
- Document expected values for each attribute name

4. Documentation

- Maintain a registry of attribute names and purposes
- Document which systems/integrations depend on specific attributes
- Include examples of valid values

5. Migration and Cleanup

- Regularly audit unused attributes
- Remove obsolete attributes after system migrations

- Version attribute names when changing schemas (e.g., `api_key_v2`)

Example Workflows

Onboarding Integration

When migrating customers from a legacy system:

```
# Store legacy system reference for debugging
PUT /crm/attribute/
{
  "customer_id": 123,
  "attribute_name": "legacy_crm_id",
  "attribute_value": "OLD-12345"
}

# Track migration date
PUT /crm/attribute/
{
  "customer_id": 123,
  "attribute_name": "migrated_date",
  "attribute_value": "2025-01-04"
}
```

Custom Billing Rules

Override default billing cycle for specific customer:

```
# Set quarterly billing
PUT /crm/attribute/
{
  "customer_id": 123,
  "attribute_name": "billing_cycle",
  "attribute_value": "quarterly"
}

# Then in billing code, check for attribute before processing
attributes = GET /crm/attribute/customer_id/123
billing_cycle = next(
    (a['attribute_value'] for a in attributes if
a['attribute_name'] == 'billing_cycle'),
    'monthly'  # default
)
```

Feature Flags

Enable beta features for specific customers:

```
# Enable IPv6 provisioning
PUT /crm/attribute/
{
  "customer_id": 123,
  "attribute_name": "feature_ipv6_enabled",
  "attribute_value": "true"
}
```

Permissions

Attribute operations require the following permissions:

- `view_customer_attribute` - View attributes
- `create_customer_attribute` - Create new attributes
- `update_customer_attribute` - Modify existing attributes
- `delete_customer_attribute` - Remove attributes

See `rbac` for role-based access control configuration.

Troubleshooting

Attribute Not Appearing in UI

- Verify attribute was created (check API response)
- Refresh the page to reload customer data
- Check user has `view_customer_attribute` permission

Cannot Update Attribute

- Ensure you have `update_customer_attribute` permission
- Verify attribute_id is correct
- Check attribute belongs to specified customer

Integration Failing After Attribute Deletion

- Restore attribute with previous value
- Update integration code to handle missing attributes gracefully
- Audit attribute dependencies before deletion

Attribute Value Truncated

- Attribute values have 150 character limit
- For longer data, split into multiple attributes or use customer notes field
- Consider storing large data in dedicated database fields

Configuration and Customization Guide

This comprehensive guide covers all configuration and customization options for OmniCRM, including backend settings, frontend branding, visual customization, and deployment best practices.

Overview

OmniCRM uses two main configuration systems:

Backend Configuration:

- **File:** `OmniCRM-API/crm_config.yaml`
- **Format:** YAML
- **Requires:** API restart after changes
- **Used for:** Database, integrations, security, provisioning

Frontend Configuration:

- **File:** `OmniCRM-UI/.env`
- **Format:** Environment variables
- **Requires:** UI rebuild after changes
- **Used for:** Branding, features, external services

Backend Configuration (crm_config.yaml)

The `crm_config.yaml` file contains all backend system settings.

Location: `/OmniCRM/OmniCRM-API/crm_config.yaml`

Database Configuration

```yaml
database:
  username: omnitouch
  password: omnitouch2024
  server: localhost
```

Fields:

- `username` - MySQL database username
- `password` - MySQL database password
- `server` - Database server hostname or IP (default: localhost)

Database Connection:

- Database name is hardcoded as `omnicrm`
- Default port: 3306 (MySQL default)
- Connection string: `mysql+pymysql://username:password@server/omnicrm`

Security Note: Never commit this file with real credentials to version control. Use environment-specific configuration or secrets management.

Note: This should match your `.env` database credentials.

Service Types

```yaml
service_types:
  - omnicharge
  - mobile
  - fixed
  - fixed-voice
  - hotspot
  - dongle
```

Purpose: Defines valid service types for your deployment.

These are used throughout the system for:

- Product categorization
- Addon filtering (addons match service types)
- Provisioning workflows
- Reporting and analytics

Add custom service types here for your specific use cases.

HSS Integration (Home Subscriber Server)

For mobile network operators with HSS integration:

```yaml
hss:
  hss_peers:
    - 'http://10.179.2.140:8080'
  apn_list: "1,2,3,4,5,6"
```

Configuration:

- `hss_peers` - List of HSS endpoints for subscriber provisioning
- `apn_list` - Comma-separated list of APN IDs available for provisioning

Used for: Mobile network provisioning and subscriber authentication.

Mailjet Email Template Configuration

OmniCRM uses Mailjet for transactional emails. Each email type has its own template configuration:

```yaml
mailjet:
  api_key: your_mailjet_api_key
  api_secret: your_mailjet_api_secret

  # Customer Welcome Email
  api_crmCommunicationCustomerWelcome:
    from_email: "support@yourcompany.com"
    from_name: "Your Company Support"
    template_id: 5977509
    subject: "Welcome to YourCompany"

  # Customer Invoice Email
  api_crmCommunicationCustomerInvoice:
    from_email: "billing@yourcompany.com"
    from_name: "Your Company Billing"
    template_id: 6759851
    subject: "Your Invoice - "

  # Invoice Reminder
  api_crmCommunicationCustomerInvoiceReminder:
    from_email: "billing@yourcompany.com"
    from_name: "Your Company Billing"
    template_id: 5977570
    subject: "Invoice Payment Reminder"

  # User Welcome Email (Staff/Admin)
  api_crmCommunicationUserWelcome:
    from_email: "admin@yourcompany.com"
    from_name: "Your Company Admin"
    template_id: 6118112
    subject: "Welcome to the Team"

  # Password Reset Request
  api_crmCommunicationUserPasswordReset:
    from_email: "security@yourcompany.com"
    from_name: "Your Company Security"
    template_id: 6735666
    subject: "Password Reset Request"

  # Password Reset Success Confirmation
  api_crmCommunicationUserPasswordResetSuccess:
    from_email: "security@yourcompany.com"
    from_name: "Your Company Security"
```

```
    template_id: 6118378
    subject: "Password Reset Successful"

  # Password Change Notification
  api_crmCommunicationUserPasswordChange:
    from_email: "security@yourcompany.com"
    from_name: "Your Company Security"
    template_id: 6118423
    subject: "Password Changed"

  # Email Verification
  api_crmCommunicationEmailVerification:
    from_email: "verify@yourcompany.com"
    from_name: "Your Company Verification"
    template_id: 6267350
    subject: "Verify Your Email Address"

  # Balance Expired Notification
  api_crmCommunicationsBalanceExpired:
    from_email: "alerts@yourcompany.com"
    from_name: "Your Company Alerts"
    template_id: 7238252
    subject: "Service Balance Expired"

  # Low Balance Warning
  api_crmCommunicationsBalanceLow:
    from_email: "alerts@yourcompany.com"
    from_name: "Your Company Alerts"
    template_id: 7238263
    subject: "Low Balance Warning"

  # eSIM Delivery Email
  # Set template_id to a valid Mailjet template to use a custom
template,
  # or leave as 0 to use the built-in branded HTML email
  api_crmCommunicationEsimDelivery:
    from_email: "support@yourcompany.com"
    from_name: "Your Company Support"
    template_id: 0
    subject: "Your eSIM is Ready"
```

eSIM Delivery Email

Sent when an eSIM is provisioned and ready for activation.

```
api_crmCommunicationEsimDelivery:
  from_email: "support@yourcompany.com"
  from_name: "Your Company Support"
  template_id: 0
  subject: "Your eSIM is Ready"
```

When Sent:

- eSIM provisioned during self-signup
- eSIM assigned to a customer service

Template Variables Available (when using a Mailjet template):

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:iccid }}` - eSIM ICCID
- `{{ var:activation_code }}` - LPA activation code string
- `{{ var:has_qr_code }}` - Boolean, true if QR code image is attached
- `{{ var:has_activation_code }}` - Boolean, true if activation code is available

Built-in Fallback:

When `template_id` is set to `0`, OmniCRM sends a built-in branded HTML email with the eSIM QR code inline. The branding for this email is controlled by the `branding` section (see below).

Branding (Built-in Email Templates)

When OmniCRM sends emails using its built-in HTML templates (rather than Mailjet templates), the `branding` section controls the visual appearance.

```yaml
branding:
  brand_name: 'YourCompany'
  primary_dark: '#594712'
  dark_color: '#32280B'
  accent_bg: '#f5f0e0'
```

Fields:

Key	Description	Default	Example
`brand_name`	Company name shown in email subject, greeting, and sign-off	Derived from `from_name`	`'Norfone'`
`primary_dark`	Primary brand colour used for headings and accent borders	`#594712`	`'#1a73e8'`
`dark_color`	Dark colour used in the email header gradient	`#32280B`	`'#0d47a1'`
`accent_bg`	Light background colour for info callout boxes	`#f5f0e0`	`'#e3f2fd'`

Currently Used By:

- eSIM delivery email (when `api_crmCommunicationEsimDelivery.template_id` is `0`)

Creating Mailjet Templates:

1. Log in to Mailjet dashboard (<https://app.mailjet.com>)
2. Navigate to **Transactional** → **Templates**
3. Create a new template or clone an existing one
4. Note the **Template ID** (numeric value)
5. Add template variables matching the OmniCRM data structure
6. Update `crm_config.yaml` with the template ID

Available Template Variables:

Each email type receives specific variables. Common examples:

- `{{customer_name}}` - Customer or user name
- `{{service_name}}` - Service or product name
- `{{invoice_id}}` - Invoice number
- `{{invoice_amount}}` - Total invoice amount
- `{{due_date}}` - Payment due date
- `{{reset_link}}` - Password reset URL
- `{{verification_link}}` - Email verification URL
- `{{balance}}` - Current account balance
- `{{expiry_date}}` - Balance or service expiry date

Provisioning Configuration

```
provisioning:
  failure_list: ['admin@yourcompany.com', 'ops@yourcompany.com']
```

Purpose:

- `failure_list` - Email addresses notified when Ansible provisioning fails
- Notifications include playbook name, error details, and customer information
- Allows ops team to quickly respond to provisioning issues

Invoice Configuration

```
invoice:
  template_filename: 'yourcompany_invoice_template.html'
```

Purpose:

Specifies which Jinja2 HTML template to use for PDF invoice generation.

Template Location: `/OmniCRM-API/invoice_templates/`

See **Invoice PDF Generation** section below for details on creating custom templates.

CRM Base URL

```
crm:
  base_url: 'http://localhost:5000'
```

Purpose:

- Used by Ansible playbooks to make API callbacks
- Used in email templates for generating links to the CRM
- Should be the publicly accessible URL of your API

Examples:

- Development: `http://localhost:5000`
- Production: `https://api.yourcompany.com`

Important:

- Do NOT include trailing slash
- Use publicly accessible URL if playbooks run on different servers
- Update when deploying to production

OCS and CGRates Configuration

```
ocs:
  ocsApi: 'http://10.179.2.142:8080/api'
  ocsTenant: 'mnc380.mcc313.3gppnetwork.org'
  cgrates: 'localhost:2080'
```

Configuration:

- `ocsApi` - OCS API endpoint for subscriber management

- `ocsTenant` - Tenant identifier for multi-tenant OCS deployments
- `cgrates` - CGRates JSON-RPC API endpoint (host:port)

Used for: Real-time charging, balance management, usage tracking.

SMSC Configuration (SMS Gateway)

```
smsc:
  source_msisdn: 'YourCompany'
  smsc_url: 'http://10.179.2.216/SMSc/'
  api_key: 'your_smsc_api_key'
```

Purpose:

- Send SMS notifications to customers (low balance, service alerts, 2FA codes)
- `source_msisdn` - Sender ID displayed to recipients (alphanumeric or phone number)
- `smsc_url` - SMSC gateway API endpoint
- `api_key` - Authentication for SMSC API

Cell Broadcast Configuration

```
cbc_url: 'http://10.179.1.113:8080'
```

Purpose: Cell Broadcast Center (CBC) API endpoint for emergency alerts.

See `features_cell_broadcast` for usage details.

JWT Secret Key

```
jwt_secret: 'CHANGE_ME_ON_DEPLOYMENT'  # Auto-generated by Ansible
```

Security:

- Used to sign and verify authentication tokens (JWT)
- **Critical for authentication security** - treat like a password
- Each deployment/environment MUST have a unique secret
- Never share or commit to version control

Automated Secret Management (Ansible Deployment):

When deploying with Ansible, the JWT secret is automatically managed:

1. **First deployment:** Ansible generates a random 64-character hex string (256 bits of entropy)
2. **Subsequent deployments:** Ansible preserves the existing secret from the server
3. **Each server gets its own unique secret** - sessions don't work across environments

This ensures:

- No hardcoded secrets in git repositories
- Each environment is cryptographically isolated
- Secrets persist across deployments (sessions aren't invalidated on redeploy)
- Rebuilding a server generates a new secret (sessions are correctly invalidated)

Manual Secret Generation (Non-Ansible Deployments):

If deploying without Ansible, you MUST manually generate a unique secret:

```
# Generate a cryptographically secure random key
python3 -c "import secrets; print(secrets.token_hex(32))"
# or
openssl rand -hex 32
```

Then update `crm_config.yaml`:

```
jwt_secret: 'your_generated_secret_here'
```

Important:

- **Never use the default placeholder value** `CHANGE_ME_ON_DEPLOYMENT` in production
- **Never share publicly** - anyone with the secret can forge authentication tokens
- Changing this invalidates all existing user sessions (users must re-login)
- Each environment (dev, staging, prod) MUST have different secrets

Stripe Payment Configuration

```
stripe:
  secret_key: 'sk_live_xxxxxxxxxx'
  publishable_key: 'pk_live_xxxxxxxxxx'
  currency: 'aud'
  statement_descriptor_suffix: 'YOURCOMPANY'
```

Configuration:

- `secret_key` - Stripe secret API key (server-side, keep confidential)
- `publishable_key` - Stripe publishable key (client-side, safe to expose)
- `currency` - ISO 4217 currency code (aud, usd, gbp, eur, etc.)
- `statement_descriptor_suffix` - Appears on customer credit card statements

Key Types:

- Test keys: `sk_test_...` and `pk_test_...` (for development)
- Live keys: `sk_live_...` and `pk_live_...` (for production)

Statement Descriptor Usage:

- Shown on customer bank statements as "YOURCOMPANY"
- Maximum 22 characters
- Helps customers identify charges
- Also used in invoice PDF filenames (e.g., `YOURCOMPANY_12345.pdf`)

See `Payment Vendor Integrations <integrations_payment_vendors>` for setup details.

API Keys and IP Whitelisting

Define API keys with role-based access and IP restrictions:

```
api_keys:
  "YOUR_API_KEY_1":
    roles: ["admin"]
    ips: ["127.0.0.1", "::1"]
  "YOUR_API_KEY_2":
    roles: ["customer_service_agent_1"]
    ips: ["127.0.0.1", "::1", "10.0.1.0/24"]

# IP Whitelist (standalone, without API key)
ip_whitelist:
  "10.179.2.142":
    roles: ["admin"]
```

Purpose:

- Allow external systems to authenticate via API key
- Restrict access by IP address
- Grant specific roles to API consumers
- Useful for integrations (billing systems, monitoring, automation)

Generating API Keys:

```
openssl rand -base64 48
```

Roles:

- `admin` - Full access to all endpoints
- Custom roles defined in RBAC system

Security Best Practices:

- Use long, random API keys (minimum 32 characters)
- Restrict IPs to known sources only
- Grant minimum necessary roles
- Rotate API keys regularly
- Monitor API key usage in logs

Security Warning:

- Only use IP whitelist for trusted internal networks
- Must NOT use localhost IPs (127.0.0.1, ::1)
- Use API keys instead for external access
- Consider firewall rules as additional protection

See `administration_api_keys` and `concepts_api` for details.

Frontend Configuration (.env)

The React UI is configured via environment variables in `OmniCRM-UI/.env`.

Location: `/OmniCRM/OmniCRM-UI/.env`

API Keys and External Services

```
# Google Maps API (for address autocomplete and geocoding)
VITE_GOOGLE_API_KEY=your_google_api_key

# Disable browser auto-launch on npm start
BROWSER=none
```

Payment Vendor Configuration

```
# Enabled payment vendors (comma-separated): stripe, paypal, or
both
VITE_PAYMENT_VENDORS="stripe,paypal"

# Stripe publishable key (required if Stripe is enabled)
VITE_STRIPE_PUBLISHABLE_KEY=pk_test_xxxxx

# PayPal client ID (required if PayPal is enabled)
VITE_PAYPAL_CLIENT_ID=YOUR_PAYPAL_CLIENT_ID
```

Must Match Backend:

- `VITE_STRIPE_PUBLISHABLE_KEY` must match `stripe.publishable_key` in `crm_config.yaml`
- `VITE_PAYPAL_CLIENT_ID` must match `paypal.client_id` in `crm_config.yaml`

Important: These are **build-time** variables. Changing any `VITE_*` value requires rebuilding and restarting the UI. See Payment System Guide - Vendor Configuration for the full setup procedure including backend configuration.

Branding and Company Information

```
# Company Branding
VITE_COMPANY_NAME="ShellFone"
VITE_PORTAL_NAME="ShellManager"
VITE_SELF_CARE_NAME="ShellCare"
VITE_COMPANY_TAGLINE="Phones with Shells"
```

These values appear throughout the UI:

- `COMPANY_NAME` - Displayed in page titles, emails, and customer communications
- `PORTAL_NAME` - Name of the admin/staff portal (e.g., "ShellManager")
- `SELF_CARE_NAME` - Name of the customer self-service portal (e.g., "ShellCare")

- `COMPANY_TAGLINE` - Appears in login screens and marketing materials

Localization and Regional Settings

```
# Language and Locale
# Supported languages: ar, ch, en, fr, gr, it, ru, sp
VITE_DEFAULT_LANGUAGE=en
VITE_LOCALE="en-GB"

# Default Location (for address autocomplete)
VITE_DEFAULT_LOCATION="Sydney, Australia"
VITE_DEFAULT_COUNTRY="Australia"

# Currency Settings
VITE_CURRENCY_CODE="GBP"
VITE_CURRENCY_SYMBOL="£"
```

Supported Languages:

- `ar` - Arabic
- `ch` - Chinese
- `en` - English (default)
- `fr` - French
- `gr` - Greek
- `it` - Italian
- `ru` - Russian
- `sp` - Spanish

Common Currencies:

- USD - $ (US Dollar)
- GBP - £ (British Pound)
- EUR - € (Euro)
- AUD - $ (Australian Dollar)
- CAD - $ (Canadian Dollar)

Note: Must match `stripe.currency` in `crm_config.yaml`.

Color Theme Configuration

```
# Primary Color (main brand color)
VITE_PRIMARY_COLOR=#405189

# Additional Color Options (commented examples)
# VITE_SECONDARY_COLOR=#2bFFcf
# VITE_TERTIARY_COLOR=#1a9fbf
# VITE_SUCCESS_COLOR=#28a745
# VITE_INFO_COLOR=#17a2b8
# VITE_WARNING_COLOR=#ffc107
# VITE_DANGER_COLOR=#dc3545
```

Available Colors:

- `VITE_PRIMARY_COLOR` - Main brand color (buttons, links, highlights)
- `VITE_SECONDARY_COLOR` - Accent color
- `VITE_TERTIARY_COLOR` - Additional accent
- `VITE_SUCCESS_COLOR` - Success messages (#28a745)
- `VITE_INFO_COLOR` - Info messages (#17a2b8)
- `VITE_WARNING_COLOR` - Warnings (#ffc107)
- `VITE_DANGER_COLOR` - Errors (#dc3545)
- `VITE_LIGHT_COLOR` - Light backgrounds (#f8f9fa)
- `VITE_DARK_COLOR` - Dark text (#343a40)
- `VITE_PRIMARY_DARK_COLOR` - Dark variant of primary color

Format: Hexadecimal color codes (#RRGGBB)

The primary color is applied to:

- Navigation headers
- Action buttons
- Links and highlights
- Active states
- Brand elements

Font Configuration

```
# Font Family Configuration
# Sans-Serif: Inter, Roboto, Open Sans, Lato, Quicksand, Poppins,
Nunito, Montserrat, Work Sans, Source Sans Pro, Raleway, Ubuntu,
Josefin Sans, HKGrotesk
# Serif: Merriweather, Lora, Playfair Display
# System: System (native device fonts)
# Default: Quicksand
VITE_FONT_FAMILY=Quicksand
```

Important: All fonts are **self-hosted locally** within the OmniCRM-UI application. This means:

- **No external font loading** - Fonts are bundled with the application
- **Walled garden compatible** - No internet access required for fonts to work
- **Offline operation** - Full functionality in air-gapped or restricted network environments
- **Privacy** - No external requests to Google Fonts, Adobe Fonts, or other CDNs
- **Performance** - Faster loading without external dependencies
- **Security** - No third-party tracking or data leakage through font requests

Available Options:

Sans-Serif Fonts:

- Inter, Roboto, Open Sans, Lato, Quicksand (default), Poppins, Nunito, Montserrat, Work Sans, Source Sans Pro, Raleway, Ubuntu, Josefin Sans, HKGrotesk

Serif Fonts:

- Merriweather, Lora, Playfair Display

System Fonts:

- System - Uses native device fonts for best performance and smallest bundle size

Adding Custom Fonts:

Yes, you can add additional fonts! All fonts are stored locally in the application.

To add a new custom font:

1. **Add font files** to `OmniCRM-UI/src/assets/fonts/your-font-name/`
    - Use WOFF2 format for best compression and browser support
    - Include multiple weights (300, 400, 500, 600, 700) for proper rendering
    - Name files: `your-font-name-300.woff2`, `your-font-name-400.woff2`, etc.
2. **Define @font-face rules** in `OmniCRM-UI/src/assets/scss/fonts/_google-fonts.scss`

```
//
// Your Custom Font - Description
//

@font-face {
  font-family: 'Your Font Name';
  font-style: normal;
  font-weight: 400;
  font-display: swap;
  src: url("../../fonts/your-font-name/your-font-name-
400.woff2") format('woff2');
}

@font-face {
  font-family: 'Your Font Name';
  font-style: normal;
  font-weight: 700;
  font-display: swap;
  src: url("../../fonts/your-font-name/your-font-name-
700.woff2") format('woff2');
}
```

3. **Set in .env file:**

```
VITE_FONT_FAMILY=Your Font Name
```

Font Weight Guidelines:

- 300 - Light (optional, for subtle headings)
- 400 - Regular (required, default text)
- 500 - Medium (optional, emphasis)
- 600 - Semi-Bold (optional, subheadings)
- 700 - Bold (required, headings and strong text)

Web App Quick Links

Configure up to 6 quick-access web applications that appear in the admin dashboard:

```
# Web App 1: GitHub
VITE_WEB_APP_1_NAME="GitHub"
VITE_WEB_APP_1_URL="https://github.com"
VITE_WEB_APP_1_ICON_PATH="resources/webapp_icons/github.png"

# Web App 2: Xero
VITE_WEB_APP_2_NAME="Xero"
VITE_WEB_APP_2_URL="https://go.xero.com/"
VITE_WEB_APP_2_ICON_PATH="resources/webapp_icons/xero.png"

# Web App 3-6: Additional integrations
# (Configure similarly with NAME, URL, and ICON_PATH)
```

Pattern:

- `VITE_WEB_APP_N_NAME` - Display name
- `VITE_WEB_APP_N_URL` - Target URL
- `VITE_WEB_APP_N_ICON_PATH` - Icon file path (relative to public/)

Example Icons: GitHub, Xero, Monday.com, Gmail, MailJet, Slack

Grafana Dashboard Integration

OmniCRM integrates with Grafana to provide analytics dashboards. Users with the `grafana_access` permission can access Grafana at `/grafana` to create custom dashboards, and those dashboards can be embedded in the OmniCRM interface.

```
# Grafana Dashboard Integration
# Dashboard IDs (comma-separated) - get these from
/grafana/d/ID/name URLs
VITE_GRAFANA_DASHBOARD_IDS=abc123,def456,ghi789

# Dashboard Labels (comma-separated, must match order of IDs)
VITE_GRAFANA_DASHBOARD_LABELS=System Metrics,User
Analytics,Network Performance
```

Fields:

- `VITE_GRAFANA_DASHBOARD_IDS` - Comma-separated list of Grafana dashboard IDs from the URL path
- `VITE_GRAFANA_DASHBOARD_LABELS` - Comma-separated list of dashboard display names (must match the order of IDs)

How to Find Dashboard IDs:

When viewing a dashboard in Grafana, the URL will look like `/grafana/d/abc123/dashboard-name`. The dashboard ID is the part after `/d/` and before the name (in this example, `abc123`).

Usage:

Once configured, dashboards automatically appear in the OmniCRM sidebar under the "Dashboards" menu. Users can click to view embedded dashboards while keeping the OmniCRM navigation visible.

Example:

If your dashboard URL is `http://your-server/grafana/d/system-overview-123/system-metrics`, then:

- Dashboard ID: `system-overview-123`
- Dashboard Label: Choose any friendly name like "System Overview"

Important:

- The number of IDs must match the number of labels
- Dashboards appear in the sidebar in the order they are defined
- Only users with the `grafana_access` permission can view dashboards
- Changes require rebuilding the frontend UI

Support and Documentation URLs

```
# FAQs and Support URLs
VITE_FAQS_URL=https://support.yourcompany.com/faqs
VITE_SUPPORT_URL=https://support.yourcompany.com
```

Purpose: Links to external support resources shown in the UI.

Social Logins

```
# Allow Social Logins (yes|no)
VITE_ALLOW_SOCIAL_LOGINS=yes
```

Options:

- `yes` - Enable social login buttons (Google, Facebook, etc.)
- `no` - Disable social logins

Note: Social login providers must be configured separately.

Analytics and Tracking

```
# Google Analytics 4 or Google Tag Manager (optional)
# For GA4, use format: G-XXXXXXXXXX
# For GTM, use format: GTM-XXXXXXX
VITE_GOOGLE_TAG_ID=G-XXXXXXXXXX
```

Purpose: Enable Google Analytics 4 (GA4) or Google Tag Manager (GTM) tracking to monitor user behavior and application usage.

Supported Formats:

- **GA4 Measurement ID:** `G-XXXXXXXXXX` - For Google Analytics 4 tracking
- **GTM Container ID:** `GTM-XXXXXXX` - For Google Tag Manager
- **Disabled:** Leave empty or omit to disable tracking

How It Works:

The system automatically detects the tracking service based on the ID format:

- IDs starting with `G-` initialize Google Analytics 4
- IDs starting with `GTM-` initialize Google Tag Manager
- Empty or missing value disables all tracking

Features:

- **Automatic Page Tracking** - Every route change is tracked as a page view
- **Custom Event Tracking** - Track user interactions, button clicks, form submissions
- **No Code Changes Required** - Just set the environment variable and rebuild the UI

Setup Instructions:

1. **Obtain Your Tracking ID:**

   For Google Analytics 4:

   - Log in to Google Analytics

- Create or select a GA4 property
- Go to **Admin** → **Data Streams**
- Select your web stream
- Copy the **Measurement ID** (format: `G-XXXXXXXXXX`)

For Google Tag Manager:

- Log in to Google Tag Manager
- Create or select a container
- Copy the **Container ID** (format: `GTM-XXXXXXX`)

2. **Add to .env File:**

```
VITE_GOOGLE_TAG_ID=G-XXXXXXXXXX
```

3. **Rebuild the UI:**

```
cd OmniCRM-UI
npm run build
```

4. **Verify Tracking:**

- Open your application in a browser
- Check browser console for initialization messages
- Use Google Analytics Real-Time reports to see active users

Advanced Usage - Custom Event Tracking:

The integration provides utility functions for tracking custom events throughout your application.

Example - Track Button Clicks:

```
import { trackEvent } from './utils/googleAnalytics';

// In your component
const handleCheckout = () => {
  trackEvent('checkout_initiated', {
    cart_value: 99.99,
    item_count: 3,
    page: '/cart'
  });
  // Continue with checkout logic
};
```

Example - Track Form Submissions:

```
import { trackEvent } from './utils/googleAnalytics';

const handleFormSubmit = (formType) => {
  trackEvent('form_submission', {
    form_type: formType,
    timestamp: new Date().toISOString()
  });
};
```

Example - Track Custom Page Views:

```
import { trackPageView } from './utils/googleAnalytics';

// Manually track a page view (useful for modal dialogs, tabs,
etc.)
trackPageView('/virtual/page-path', 'Page Title');
```

Available Tracking Functions:

Function	Purpose	Parameters
`initializeGoogleTracking()`	Initialize tracking on app start	None (called automatically)
`trackEvent(eventName, eventParams)`	Track custom events	Event name (string), parameters (object)
`trackPageView(path, title)`	Track page views manually	Path (string), title (string)

Privacy and Compliance:

Google Analytics tracking collects user behavior data. Ensure compliance with data protection regulations:

- **GDPR (Europe)** - Obtain user consent before tracking, provide opt-out mechanism
- **CCPA (California)** - Allow users to opt-out of data collection
- **Privacy Policy** - Disclose use of Google Analytics in your privacy policy
- **Cookie Consent** - Implement cookie consent banner if required by local laws
- **Data Retention** - Configure appropriate data retention periods in Google Analytics settings

Troubleshooting:

Issue	Possible Cause	Solution
No data in GA dashboard	Tracking ID incorrect	Verify ID format matches G-XXXXXXXXXX or GTM-XXXXXXX
Console errors on page load	Invalid tracking ID	Check for typos in .env file
Page views not tracking	UI not rebuilt after .env change	Run `npm run build` and restart UI
Events not appearing	Ad blocker enabled	Test with ad blocker disabled
Delayed data	Normal GA behavior	Use Real-Time reports for immediate verification

Performance Considerations:

- Tracking scripts load asynchronously and do not block page rendering
- Minimal performance impact (< 50KB additional payload)
- Scripts are cached by browsers after first load
- No tracking occurs if `VITE_GOOGLE_TAG_ID` is empty

Implementation Details:

- Tracking code: `OmniCRM-UI/src/utils/googleAnalytics.js`
- Page tracking hook: `OmniCRM-UI/src/utils/usePageTracking.js`
- Initialization: Automatic on app startup in `App.js` or `index.js`

Top-Up and Recharge Configuration

```
VITE_TOPUP_PRICE_PER_DAY=10
```

Purpose: Sets the price per day for top-up/recharge services in the self-care portal.

Fields:

- `VITE_TOPUP_PRICE_PER_DAY` - Daily price for recharge services (numeric value)

Example: If set to `10` and currency is USD, customers pay $10 per day of service.

Note: This value must match the backend pricing configuration. See `features_topup_recharge` for complete setup details.

Branding and Visual Customization

OmniCRM allows you to replace default branding images with your company's logo and splash screens without modifying code.

Logo Files and Fallback System

Logos are stored in `/OmniCRM-UI/src/assets/images/omnitouch/` and use a fallback system:

Default Logos (always present):

- `DefaultLogoDark.png` - Dark theme logo (used on light backgrounds)
- `DefaultLogoLight.png` - Light theme logo (used on dark backgrounds)

Custom Logos (optional, take precedence when present):

- `logoSm.png` - Small logo for collapsed sidebar (recommended: 100x100px)
- `logoDark.png` - Full-size dark logo for headers (recommended: 200x50px)
- `logoLight.png` - Full-size light logo for authentication screens (recommended: 200x50px)

How Logo Fallback Works:

The system attempts to load custom logos first. If a custom logo file doesn't exist, it falls back to the default:

```
// From Header.js
const tryImport = (filename) => {
    try {
        return require(`../assets/images/omnitouch/${filename}`);
    } catch (err) {
        return null; // Falls back to default
    }
};

const userLogoSm = tryImport("logoSm.png");
const userLogoDark = tryImport("logoDark.png");
const userLogoLight = tryImport("logoLight.png");
```

Where Logos Appear:

- **logoSm.png** - Collapsed sidebar, mobile navigation, small header displays
- **logoDark.png** - Main header bar (light mode), admin dashboard header
- **logoLight.png** - Login/registration screens, dark backgrounds, authentication carousel

Replacing Logos:

1. **Create Your Logo Files:**
    - Use PNG format for transparency support
    - Match the recommended dimensions above
    - Ensure logos are clear at both regular and retina resolutions
2. **Add to OmniCRM:**

```
# Copy your logo files to the omnitouch images directory
cp /path/to/your/logoSm.png OmniCRM-
UI/src/assets/images/omnitouch/
cp /path/to/your/logoDark.png OmniCRM-
UI/src/assets/images/omnitouch/
cp /path/to/your/logoLight.png OmniCRM-
UI/src/assets/images/omnitouch/
```

3. **Rebuild the UI:**

```
cd OmniCRM-UI
npm run build
```

4. **Verify Changes:**
    - Check light mode header (should show `logoDark.png`)
    - Check dark mode header (should show `logoLight.png`)
    - Check collapsed sidebar (should show `logoSm.png`)
    - Check login screen (should show `logoLight.png`)

Logo Design Best Practices:

- **Contrast** - Ensure logos are visible on both light and dark backgrounds
- **Simplicity** - Logos should be recognizable at small sizes
- **Format** - Use PNG with transparent backgrounds
- **Retina** - Provide 2x resolution for high-DPI displays
- **Consistency** - Use the same brand colors across all logo variants

Splash Screens and Authentication Backgrounds

The authentication screens (login, registration, password reset) use a carousel background with customizable images.

Location: `/OmniCRM-UI/src/pages/AuthenticationInner/authCarousel.js`

Default Configuration:

```
import logoLight from "../../assets/images/logo-light.png";

// Logo displayed on authentication screens
<img src={logoLight} alt="" height="18" />
```

Customizing Authentication Screens:

1. Replace `logo-light.png` in `/OmniCRM-UI/src/assets/images/`
2. Add custom background CSS to `.auth-one-bg` class

3. Modify carousel quotes in `authCarousel.js` to match your brand voice

Example Customization:

```
/* Add to your custom CSS */
.auth-one-bg {
    background-image: url('/assets/images/custom-auth-bg.jpg');
    background-size: cover;
    background-position: center;
}
```

Invoice PDF Generation

OmniCRM generates professional PDF invoices using Jinja2 HTML templates and WeasyPrint PDF rendering.

How PDF Generation Works

1. **Template Selection:**
    - Template filename is specified in `crm_config.yaml` under `invoice.template_filename`
    - Template is loaded from `/OmniCRM-API/invoice_templates/` directory
2. **Data Preparation:**
    - Invoice data (ID, dates, amounts, status) is fetched from database
    - Customer information (name, address) is retrieved
    - Transaction list is compiled (all charges/credits on the invoice)
3. **Template Rendering:**
    - Jinja2 renders the HTML template with invoice data
    - Variables like `{{ invoice_number }}`, `{{ total_amount }}`, etc. are replaced

- Rendered HTML is saved to `invoice_templates/rendered/` for debugging

4. **PDF Generation:**
   - WeasyPrint converts rendered HTML to PDF
   - PDF supports CSS styling, images, page breaks, headers/footers
   - PDF binary data is generated in memory
5. **Caching:**
   - PDF is Base64-encoded and stored in `Invoice_PDF_Cache` table
   - SHA256 hash is calculated for integrity verification
   - Subsequent requests return cached PDF (instant delivery)
6. **Cache Invalidation:**
   - Cache is invalidated when invoice is modified, voided, or refunded
   - Template changes do not automatically invalidate existing caches

Invoice Template Structure

Invoice templates are Jinja2 HTML files with embedded variables and logic.

Template Location: `/OmniCRM-API/invoice_templates/yourcompany_invoice_template.html`

Available Variables:

```
{
    'invoice_number': 12345,
    'date': '2025-01-04',
    'client': {
        'name': 'John Smith',
        'address': {
            'address_line_1': '123 Main St',
            'city': 'Sydney',
            'state': 'NSW',
            'zip_code': '2000',
            'country': 'Australia'
        }
    },
    'transaction_list': [
        [
            {
                'transaction_id': 1,
                'title': 'Mobile Service - Monthly Fee',
                'retail_cost': 30.00,
                'wholesale_cost': 10.00,
                'created': '2025-01-01'
            },
            {
                'transaction_id': 2,
                'title': 'Data Addon - 5GB',
                'retail_cost': 15.00,
                'wholesale_cost': 5.00,
                'created': '2025-01-15'
            }
        ]
    ],
    'total_amount': 45.00,
    'due_date': '2025-01-31',
    'start_date': '2025-01-01',
    'end_date': '2025-01-31',
    'paid': False,
    'void': False
}
```

Example Template Snippet:

```
<!DOCTYPE html>
<html>
<head>
    <meta charset="UTF-8">
    <title>Invoice {{ invoice_number }}</title>
    <style>
        body {
            font-family: Arial, sans-serif;
            margin: 40px;
        }
        .header {
            text-align: center;
            margin-bottom: 30px;
        }
        .invoice-details {
            margin-bottom: 20px;
        }
        table {
            width: 100%;
            border-collapse: collapse;
        }
        th, td {
            border: 1px solid #ddd;
            padding: 12px;
            text-align: left;
        }
        th {
            background-color: #405189;
            color: white;
        }
        .total {
            text-align: right;
            font-size: 18px;
            font-weight: bold;
            margin-top: 20px;
        }
    </style>
</head>
<body>
    <div class="header">
        <h1>INVOICE</h1>
    </div>
```

```
    <div class="invoice-details">
        <p><strong>Invoice Number:</strong> {{ invoice_number }}
</p>
        <p><strong>Date:</strong> {{ date }}</p>
        <p><strong>Due Date:</strong> {{ due_date }}</p>
        <p><strong>Billing Period:</strong> {{ start_date }} to {{
end_date }}</p>
    </div>

    <div class="customer-details">
        <h3>Bill To:</h3>
        <p>{{ client.name }}</p>
        <p>{{ client.address.address_line_1 }}</p>
        <p>{{ client.address.city }}, {{ client.address.state }}
{{ client.address.zip_code }}</p>
        <p>{{ client.address.country }}</p>
    </div>

    <table>
        <thead>
            <tr>
                <th>Description</th>
                <th>Date</th>
                <th>Amount</th>
            </tr>
        </thead>
        <tbody>
            {% for transaction in transaction_list[0] %}
            <tr>
                <td>{{ transaction.title }}</td>
                <td>{{ transaction.created }}</td>
                <td>${{ "%.2f"|format(transaction.retail_cost) }}
</td>
            </tr>
            {% endfor %}
        </tbody>
    </table>

    <div class="total">
        <p>Total Amount Due: ${{ "%.2f"|format(total_amount) }}
</p>
    </div>

    {% if paid %}
```

```
    <div style="text-align: center; color: green; font-weight:
bold;">
        PAID
    </div>
    {% endif %}

    {% if void %}
    <div style="text-align: center; color: red; font-weight:
bold;">
        VOID
    </div>
    {% endif %}
</body>
</html>
```

Template Best Practices:

- **Use absolute paths for images** - `file:///absolute/path/to/image.png`
- **Inline CSS** - WeasyPrint doesn't load external stylesheets reliably
- **Test with sample data** - Use `invoice_templates/rendered/` to inspect HTML
- **Page breaks** - Use `<div style="page-break-after: always;"></div>` for multi-page invoices
- **Headers and footers** - Use `@page` CSS rules for repeating elements
- **Currency formatting** - Use Jinja2 filters: `{{ "%.2f"|format(amount) }}`

Creating a Custom Invoice Template

1. **Copy Example Template:**

   ```
   cd /OmniCRM/OmniCRM-API/invoice_templates
   cp norfone_invoice_template.html
   yourcompany_invoice_template.html
   ```

2. **Edit Template:**

   - Replace company name, logo, contact information
   - Adjust styling (colors, fonts, layout) to match brand

- Add or remove sections as needed (tax breakdowns, payment instructions, etc.)

3. **Update Configuration:**

   Edit `crm_config.yaml`:

   ```
   invoice:
     template_filename: 'yourcompany_invoice_template.html'
   ```

4. **Test Invoice Generation:**

   - Create a test invoice in the CRM
   - Download the PDF and verify formatting
   - Check `invoice_templates/rendered/{invoice_id}.html` for debugging

5. **Invalidate Old Caches (if needed):**

   If you've changed the template and want to regenerate existing invoices:

   ```
   -- Clear all cached PDFs (forces regeneration)
   DELETE FROM Invoice_PDF_Cache;
   ```

PDF Caching System

To improve performance, OmniCRM caches generated PDFs:

Cache Behavior:

- **First Request** - PDF is generated, cached, and returned
- **Subsequent Requests** - Cached PDF is returned immediately (no regeneration)
- **Cache Invalidation** - Occurs when invoice is modified, voided, or refunded
- **Cache Cleanup** - Old caches are automatically purged after 30 days of inactivity

Cache Storage:

- Base64-encoded PDF stored in `Invoice_PDF_Cache` table
- SHA256 content hash for integrity verification
- Includes filename, creation timestamp, last accessed timestamp

Manual Cache Management:

```
# In OmniCRM API or Python shell
from services.invoice_service import cleanup_old_pdf_cache,
invalidate_invoice_cache
from utils.db_helpers import get_db_session

session = get_db_session()

# Clean up caches older than 30 days
result = cleanup_old_pdf_cache(session, days_old=30)
print(result)  # {'status': 'success', 'deleted_count': 15}

# Invalidate specific invoice cache
invalidate_invoice_cache(session, invoice_id='12345')
```

API Endpoints:

Generate/download invoice PDF:

GET /invoice/pdf/{invoice_id}

Response: PDF file download with filename from Stripe statement descriptor

Cache Headers:

- First request: Slower response (generation time)
- Cached requests: Instant response
- Cache hit/miss is transparent to the user

Applying Configuration Changes

Backend (crm_config.yaml)

1. Edit `OmniCRM-API/crm_config.yaml`
2. Save changes
3. Restart the API service:

```
cd OmniCRM-API
sudo systemctl restart omnicrm-api
# or
./restart_api.sh
```

Changes take effect immediately after restart.

Frontend (.env)

1. Edit `OmniCRM-UI/.env`
2. Save changes
3. Rebuild the UI:

```
cd OmniCRM-UI
npm run build
```

4. Restart the UI service or web server

Development Mode:

During development with `npm start`, restart the dev server to apply changes.

Configuration Best Practices

Security

- **Never commit secrets** - Use `.gitignore` for config files with credentials
- **Use strong passwords** - Minimum 16 characters with mixed case, numbers, and symbols
- **Rotate credentials regularly** - Especially for production deployments
- **Restrict database access** - Use IP whitelisting and firewall rules
- **Use environment-specific configs** - Separate dev/staging/production configs
- **Limit API key permissions** - Assign minimal necessary roles
- **Use IP whitelisting sparingly** - Prefer API keys for better security

Maintenance

- **Document changes** - Keep changelog of configuration modifications
- **Backup configs** - Store copies before major changes
- **Test in staging** - Verify config changes before production deployment
- **Version control** - Track config templates (without secrets) in git

Performance

- **Use local database** - Avoid remote database for better performance
- **Configure caching** - Enable OCS caching if available
- **Optimize Grafana** - Limit number of embedded dashboards

Branding

- **Match colors** - Ensure UI colors complement your logo
- **Test contrast** - Verify text readability on colored backgrounds
- **Mobile testing** - Check branding on mobile devices
- **Logo placement** - Use appropriate logo sizes for different contexts

---

Troubleshooting

Common Issues

Changes not applied

- **Cause:** Service not restarted or UI not rebuilt
- **Fix:** Restart API/UI services after config changes

YAML syntax errors

- **Cause:** Invalid YAML formatting (indentation, quotes, etc.)
- **Fix:** Validate YAML online or use `yamllint crm_config.yaml`

Database connection failed

- **Cause:** Wrong credentials or server unreachable
- **Fix:** Verify database is running, credentials are correct

Stripe payments not working

- **Cause:** Mismatched keys between backend and frontend
- **Fix:** Ensure `publishable_key` matches in both files

Emails not sending

- **Cause:** Invalid Mailjet credentials or template IDs
- **Fix:** Verify Mailjet API key/secret, check template IDs exist

PDF Generation Fails:

- Check that WeasyPrint is installed: `pip install weasyprint`
- Verify template filename matches `crm_config.yaml`
- Check `invoice_templates/rendered/` for HTML rendering errors
- Review API logs for Jinja2 template errors

Images Not Appearing in PDF:

- Use absolute file paths: `file:///full/path/to/image.png`
- Ensure image files exist and are readable
- Check image format (PNG and JPEG work best)
- Verify image paths don't contain special characters

Styling Issues:

- Inline all CSS (external stylesheets not supported)
- Avoid complex CSS features (flexbox, grid may not render correctly)
- Test with simple layouts first, add complexity gradually
- Use tables for layout instead of divs where possible

Cache Not Invalidating:

- Verify `invalidate_invoice_cache()` is called when invoice is modified
- Check that transaction updates trigger cache invalidation
- Manually delete from `Invoice_PDF_Cache` table if needed

Configuration Checklist

Use this checklist when deploying OmniCRM:

Backend Configuration

- [ ] Copy `.env.example` to `.env`
- [ ] Set strong database passwords
- [ ] Configure CGRates credentials
- [ ] Update `crm_config.yaml` with your settings:
  - [ ] Database connection
  - [ ] Service types
  - [ ] Mailjet API keys and template IDs
  - [ ] Provisioning failure notification emails
  - [ ] Invoice template filename
  - [ ] CRM base URL (publicly accessible)

- [ ] OCS/CGRates endpoints
- [ ] SMSC configuration
- [ ] Generate new JWT secret key
- [ ] Stripe keys (live, not test)
- [ ] API keys and IP whitelisting

Frontend Configuration

- [ ] Copy `OmniCRM-UI/.env.example` to `OmniCRM-UI/.env`
- [ ] Set Google Maps API key
- [ ] Set Stripe publishable key
- [ ] Update company branding:
  - [ ] Company name
  - [ ] Portal name
  - [ ] Self-care name
  - [ ] Company tagline
- [ ] Configure localization:
  - [ ] Default language
  - [ ] Locale
  - [ ] Default location and country
  - [ ] Currency code and symbol
- [ ] Set primary brand color
- [ ] Configure web app integrations (optional)
- [ ] Add support and FAQ URLs (optional)
- [ ] Set Google Analytics/Tag Manager tracking ID (optional)

Branding Assets

- [ ] Create logo files (logoSm.png, logoDark.png, logoLight.png)
- [ ] Upload logos to `OmniCRM-UI/src/assets/images/omnitouch/`
- [ ] Create custom invoice template HTML
- [ ] Upload invoice template to `OmniCRM-API/invoice_templates/`
- [ ] Update `crm_config.yaml` with invoice template filename
- [ ] Test invoice PDF generation

- [ ] Rebuild UI: `npm run build`

Security

- [ ] Change all default passwords
- [ ] Generate unique JWT secret
- [ ] Use production Stripe keys (not test keys)
- [ ] Rotate Mailjet API keys
- [ ] Enable firewall rules
- [ ] Configure IP whitelisting for API access
- [ ] Set up SSL/TLS certificates
- [ ] Enable HTTPS for all endpoints
- [ ] Review CORS settings
- [ ] Implement rate limiting
- [ ] Configure backup and recovery procedures

Testing

- [ ] Test customer registration flow
- [ ] Test service provisioning end-to-end
- [ ] Verify email notifications are sent correctly
- [ ] Test invoice generation and PDF download
- [ ] Verify payment processing (Stripe)
- [ ] Check user authentication and 2FA
- [ ] Test impersonation and audit logging
- [ ] Verify usage data syncs from OCS
- [ ] Test ActionPlan creation and renewal
- [ ] Confirm inventory allocation works correctly

Deployment

- [ ] Start database (MySQL)
- [ ] Start CGRates
- [ ] Start OmniCRM API

- [ ] Start OmniCRM UI
- [ ] Configure reverse proxy (nginx, traefik)
- [ ] Set up monitoring (Grafana, Prometheus)
- [ ] Configure log aggregation
- [ ] Set up automated backups
- [ ] Train staff on system usage

Related Documentation

- `RBAC and User Management </rbac>`
- `Products and Services </concepts_products_and_services>`
- `Ansible Provisioning </concepts_ansible>`
- `Inventory Management </administration_inventory>`
- `Customer Invoices </payments_invoices>`
- `Two-Factor Authentication </2fa>`
- `Customer Care and Impersonation </customer_care>`
- `Payment Vendor Integrations <integrations_payment_vendors>`
- `administration_api_keys` - API key management
- `integrations_mailjet` - Email integration
- `concepts_api` - API authentication

Inventory Overview in OmniCRM

The **Inventory** system in OmniCRM is designed to manage and track both physical and virtual items used by network operators and customers.

This means we can track all sorts of items, such as modems, phone numbers, IP address blocks, or even physical hardware like GPON ONTs or Fixed Wireless CPEs.

See also: `Customer Attributes <administration_attributes>` for storing custom metadata, and `Customer Tags <administration_tags>` for visual categorization.

To support customers with a fixed network footprint, the inventory system can also track homes passed for a given service, allowing operators to do service qualification remotely, and for those operating a fixed wireless network, we can track the CPEs deployed in the field with their locations.

Note

Inventory items are linked to products during provisioning through the `inventory_items_list` field. For a complete walkthrough of how inventory integrates with product provisioning, including the inventory picker UI and Ansible playbook integration, see `Complete Product Lifecycle Guide - Inventory Requirements <guide_product_lifecycle>`.

Purpose

The OmniCRM Inventory serves several key purposes:

1. **Provisioning Services**: When a customer signs up for a service, items like modems, SIM cards, or phone numbers may need to be allocated. The inventory system tracks these items and associates them with customers.

2. **Stock Management**: For physical stock, such as hardware or other equipment, the inventory helps operators maintain visibility into what is available, where it is stored, and what has been allocated or sold to customers.
3. **Customer Allocation**: The system allows for items to be allocated to customers, whether for use in a service (e.g., assigning a modem to a customer's internet account) or for direct sale.
4. **Service Qualification / Network Footprint**: By storing information about network footprint, such as each home passed for a GPON service, or each Fixed Wireless CPE deployed, allows staff to do service qualification remoteley and see if there is a netowrk footprint in a specific area.

Example Inventory Lifecycle

To illustrate how the Inventory system works, consider the following examples

SIM Card Example

A batch of 1000 SIM cards are ordered from Omnitouch. Firstly an Inventory Template is created for SIM cards (if it doesn't already exist) and the ordered SIMs are loaded into the Inventory in the state In Transit.

Once the SIMs are received, they are marked as In Stock, and can be allocated out to different retail stores, with the Location of the inventory item updated to reflect which retail store each SIM card is at - This is useful for tracking stock levels at each store and ensuring that each store has enough stock to meet customer demand.

When a customer signs up for a mobile service in-store, a SIM card is allocated to the customer and the status is changed to Allocated. The SIM card inventory item is then assigned to the customer, and the status is updated to In Use.

If the customer cancels the service or the service goes dormant, the SIM card is marked as Decommissioned.

GPON Homes Passed Example

For a GPON network, the inventory system can track each home passed for a given service.

When a new area is built out, each address passed can be added to the inventory.

This allows operators to see which homes are passed for a given service, and which homes are not yet passed.

When a customer signs up for a service, OmniCRM can automatically run a service qualification against the customer's address, to see if the address is in the homes passed inventory and what services can be offered.

Inventory Templates

The **InventoryTemplate** feature enables the creation of any number of item types with predefined fields. These templates act as blueprints that define the essential characteristics of different items, such as:

- **Modems** with a MAC address (`itemtext1`) and a serial number (`itemtext2`).
- **Homes Passed** for a given service, with a location and status (e.g., passed or not passed).
- **Phone Numbers** with a primary number (`itemtext1`) and a geographic location (`itemtext2`).
- **Virtual Resources** like IP address blocks, with identifiers mapped through the template.

Each inventory template defines up to 20 customizable text fields (`itemtext1` through `itemtext20`) with corresponding labels (`itemtext1_label` through `itemtext20_label`) that describe what each field represents. For example, a Modem template might set `itemtext1_label` to "MAC Address" and `itemtext2_label` to "Serial Number".

Operators can customize the fields for each item type using **InventoryTemplates**. These templates allow items to be categorized and

managed in a structured way, ensuring consistency in how items are tracked.

Linking to Products:

Inventory template names are referenced in product definitions via the `inventory_items_list` field. When provisioning a product, the system displays an inventory picker showing only items matching the required template types.

Example: A product with `inventory_items_list: "['SIM Card', 'Mobile Number']"` requires two inventory templates named exactly "SIM Card" and "Mobile Number" to exist. Template names are case-sensitive.

For complete details on how inventory templates connect to product provisioning, see `Product Lifecycle - Inventory Requirements <guide_product_lifecycle>`.

Creating Inventory Templates via the UI

To create a new inventory template:

1. Navigate to **Inventory** → **Templates** from the main menu
2. Click the **Add Template** button
3. Fill in the required fields:

   Basic Information:

- **Icon** (optional): Icon class name for visual identification (e.g., `fa-solid fa-sim-card`)
- **Item** (required): The template name (must match exactly what's used in `inventory_items_list` for products)

Cost Information (Required):

- **Wholesale Cost** (required): Your cost to purchase or provision this item type
- **Retail Cost** (required): Standard retail price if sold separately to customers

Note

Wholesale and retail costs set here serve as default values when creating new inventory items from this template. Individual inventory items can have different costs if needed.

Field Labels:

- **Item Text 1 Label** (required): Label for the first customizable field (defaults to "Model Number")
  - Common examples: "ICCID" for SIM cards, "MAC Address" for modems, "Phone Number" for numbers
- **Item Text 2 Label** (required): Label for the second customizable field (defaults to "Serial Number")
  - Common examples: "IMSI" for SIM cards, "Serial Number" for hardware, "Geographic Region" for numbers
- **Item Text 3-20 Labels** (optional): Additional field labels as needed
  - Click **Add Field** to add more custom fields
  - Only add fields you will actually use for this item type

Visibility Settings:

- **Allow Dropdown Staff**: Enable staff to select this inventory type in dropdowns
- **Allow Dropdown Customer**: Enable customers to see/select this inventory type (customer portal)

4. Click **Save** to create the template

Editing Inventory Templates

To edit an existing template:

1. Navigate to **Inventory** → **Templates**
2. Find the template in the list
3. Click the **Edit** button
4. Modify fields as needed
5. Click **Save**

Warning

Changing field labels (e.g., `itemtext1_label`) only affects new items created after the change. Existing inventory items keep their data but will display with the new label names.

Caution

Template names referenced in product `inventory_items_list` fields are case-sensitive. Renaming a template will break the link to products using the old name.

Common Template Examples

SIM Card Template:

- Item: "SIM Card"
- Wholesale Cost: 2.50
- Retail Cost: 10.00
- Item Text 1 Label: "ICCID"
- Item Text 2 Label: "IMSI"
- Item Text 3 Label: "SIM Type" (Physical/eSIM)

Mobile Number Template:

- Item: "Mobile Number"
- Wholesale Cost: 1.00
- Retail Cost: 0.00

- Item Text 1 Label: "Phone Number"
- Item Text 2 Label: "Geographic Region"
- Item Text 3 Label: "Number Type" (Mobile/Landline)

Fixed Wireless CPE Template:

- Item: "Fixed Wireless CPE"
- Wholesale Cost: 250.00
- Retail Cost: 450.00
- Item Text 1 Label: "MAC Address"
- Item Text 2 Label: "Serial Number"
- Item Text 3 Label: "Firmware Version"
- Item Text 4 Label: "Manufacturer"
- Item Text 5 Label: "Model"

GPON ONT Template:

- Item: "GPON ONT"
- Wholesale Cost: 45.00
- Retail Cost: 0.00 (included with service)
- Item Text 1 Label: "Serial Number"
- Item Text 2 Label: "MAC Address"
- Item Text 3 Label: "PON Location"
- Item Text 4 Label: "Model"

Creating and Managing Inventory Items

Once an **InventoryTemplate** is defined, individual **Inventory** items can be created. Each inventory item represents a specific instance of an item type (e.g., a specific modem or phone number) that can be:

- **Allocated to Customers**: Items are linked to customers for service provisioning (e.g., assigning hardware for an internet connection).
- **Tracked for Stock**: Operators can monitor available inventory, such as unsold or unassigned items.
- **Sold or Decommissioned**: Once sold, items are marked with relevant timestamps (e.g., `sold_date`) and can no longer be considered available stock.

Through this system, OmniCRM facilitates efficient stock management, helps allocate resources to customers, and provides detailed visibility into the status and history of every item.

Services can be linked to a given **Inventory** item, allowing for easy tracking of which items are associated with which customers or services.

Once an inventory item has been assigned to a customer, the Ansible plays can update the item's status and history to reflect the allocation. This ensures that operators have an accurate record of which items are in use and which are available for allocation, as well as knowing which customer is using which item.

We can view items allocated to a customer from the customer's profile page in the **Inventory** tab.

For Inventory items linked to a **Service**, we can see that by editing the service, to see the linked Inventory items.

Inventory Item Fields

Each inventory item contains comprehensive information organized into several categories:

Basic Item Information

- **inventory_id** - Unique identifier for the inventory item (auto-generated)
- **item** - Type of item (matches Inventory Template name, e.g., "SIM Card", "Modem", "Phone Number")
- **inventory_template_id** - Link to the Inventory Template that defines this item type
- **customer_id** - If assigned to a customer, the customer's ID (nullable)
- **service_id** - If linked to a specific service, the service ID (nullable)
- **item_location** - Physical or logical location of the item:
  - For physical items: building, warehouse, shelf location, store name, etc.
  - For virtual items: geographic location, IP block location, number range region, etc.
- **item_state** - Current state of the inventory item (enumerated values):
  - **New** - Brand new, unused item
  - **Used** - Previously used but functional
  - **Internal Use** - Allocated for internal testing or staff use
  - **Assigned** - Currently assigned to a customer or service
  - **Damaged** - Non-functional, requires repair or disposal
  - **Out Of Service** - Temporarily unavailable
  - **Lost** - Item cannot be located
  - **Stolen** - Item was stolen

Customizable Item Fields (from Template)

The inventory system supports up to 20 customizable text fields whose meaning is defined by the Inventory Template:

- **itemtext1** - First customizable field (required, label defined by template's `itemtext1_label`)
  - Example: For modems, might be "MAC Address"

    - Example: For SIM cards, might be "ICCID"
    - Example: For phone numbers, might be "Phone Number"
- **itemtext2** through **itemtext20** - Additional customizable fields (optional, labels defined by template)
    - Example: itemtext2 for modems might be "Serial Number"
    - Example: itemtext2 for SIM cards might be "IMSI"
    - Example: itemtext3 for modems might be "Firmware Version"

Each Inventory Template defines which of these fields are used and what they represent via the corresponding label fields (`itemtext1_label`, `itemtext2_label`, etc.).

Cost Information

- **wholesale_cost** - Your cost to purchase/provision this item (float)
- **retail_cost** - Price charged to customer if sold separately (float)
- **sold_date** - Timestamp when item was sold or assigned to customer

Physical Address (for Network Equipment and Sites)

Used for tracking physical deployment locations, particularly for fixed network equipment (CPEs, ONTs, modems) or homes passed:

- **address_line_1** - Street address, building number, unit number
- **address_line_2** - Additional address information (suite, apartment, floor)
- **city** - City or town
- **state** - State, province, or region
- **zip_code** - Postal/ZIP code
- **country** - Country name

Geographic Location (Auto-populated from Web UI)

When creating inventory items via the Web UI with address autocomplete, these fields are automatically populated:

- **google_maps_place_id** - Google Maps Place ID for the address
- **plus_code** - Google Maps Plus Code (Open Location Code) for precise location

- **latitude** - Geographic latitude (decimal degrees)
- **longitude** - Geographic longitude (decimal degrees)

These fields enable:

- Mapping inventory locations on a map view
- Proximity calculations for service qualification
- Coverage analysis for network planning
- Route optimization for field technician dispatching

Device Management and Access URLs

The `management_url` field provides quick access to device interfaces and provisioning URLs:

- **management_url** - Access URL for the inventory item
  - **Network Equipment**: Web interface URL (e.g., `https://192.168.1.1` for routers, switches, ONTs, CPEs)
  - **eSIM Profiles**: LPA (Local Profile Assistant) address for eSIM activation (e.g., `LPA:1$smdp.example.com$ACTIVATION-CODE-HERE`)
  - **Other Use Cases**: Any URL that needs to be easily accessible via mobile device

  QR Code Generation

  When viewing inventory items with a `management_url`, the system automatically generates a **scannable QR code**:

  - **Inventory item detail view**: 128x128 QR code displayed alongside the URL
  - **Service inventory table**: 64x64 QR code shown for assigned items
  - **Format**: Both QR code and clickable hyperlink displayed together

  Common Use Cases

  - **Network Technicians**: Scan QR code to access device management interface without typing IP addresses

    - **eSIM Activation**: Customers scan QR code from the CRM to install eSIM profile on their device
    - **Customer Self-Service**: Provide easy access to device configuration or customer portals

- **management_username** - Admin username for device access

- **management_password** - Admin password for device access (encrypted at rest)

Configuration Management

For devices with configuration files:

- **config_content** - Complete configuration file content (stored as text)
    - Useful for backup, versioning, and disaster recovery
    - Can store router configs, switch configs, CPE configs, etc.
- **config_file_path** - Path to external configuration file if stored separately
    - Alternative to storing full config in database
    - Path to network share, version control repository, or config management system

Notes and Metadata

- **inventory_notes** - Free-form notes about the inventory item
    - Installation notes
    - Maintenance history
    - Quirks or special handling requirements
    - Vendor information
    - Warranty details
- **created** - Timestamp when inventory item was created in the system (auto-set)
- **last_modified** - Timestamp of last update to the inventory item (auto-updated)

Field Usage Examples

Example 1: Mobile SIM Card

```
{
  "inventory_id": 1001,
  "item": "SIM Card",
  "inventory_template_id": 5,
  "itemtext1": "89612345678901234 56",
  "itemtext2": "310120123456789",
  "itemtext3": "Physical",
  "item_location": "Warehouse A, Shelf 3",
  "item_state": "Assigned",
  "customer_id": 456,
  "service_id": 789,
  "wholesale_cost": 2.50,
  "retail_cost": 10.00,
  "sold_date": "2025-01-15T10:30:00Z",
  "inventory_notes": "Activated on 2025-01-15"
}
```


Example 2: Mobile eSIM Profile


```
{
  "inventory_id": 1002,
  "item": "eSIM",
  "inventory_template_id": 6,
  "itemtext1": "89612345678901234 57",
  "itemtext2": "310120123456790",
  "itemtext3": "eSIM",
  "item_location": "Virtual Inventory",
  "item_state": "Assigned",
  "customer_id": 457,
  "service_id": 790,
  "management_url": "LPA:1$smdp.example.com$ACTIVATION-CODE-
ABC123XYZ",
  "wholesale_cost": 0.00,
  "retail_cost": 0.00,
  "sold_date": "2025-01-16T14:20:00Z",
  "inventory_notes": "eSIM profile ready for activation"
}
```


When viewing this eSIM inventory item, the UI displays a QR code containing the LPA address. Customers scan this QR code with their mobile device to

install the eSIM profile.

Example 3: Customer Premises Equipment (CPE) - Fixed Wireless


```
{
  "inventory_id": 2001,
  "item": "Fixed Wireless CPE",
  "inventory_template_id": 10,
  "itemtext1": "AA:BB:CC:DD:EE:FF",
  "itemtext2": "FW2024-12345",
  "itemtext3": "v2.4.1",
  "itemtext4": "Ubiquiti",
  "itemtext5": "LiteBeam AC Gen2",
  "item_location": "Customer Site",
  "item_state": "Assigned",
  "customer_id": 789,
  "service_id": 1234,
  "address_line_1": "123 Main Street",
  "address_line_2": "Apt 4B",
  "city": "Sydney",
  "state": "NSW",
  "zip_code": "2000",
  "country": "Australia",
  "latitude": "-33.8688",
  "longitude": "151.2093",
  "management_url": "https://192.168.100.1",
  "management_username": "admin",
  "management_password": "encrypted_password_here",
  "config_file_path": "/configs/cpe/fw2024-12345.conf",
  "inventory_notes": "Installed 2025-01-10. Customer reports
excellent signal. Pointing: Azimuth 45°, Elevation 15°"
}
```


Example 3: GPON ONT with Full Address

```
{
  "inventory_id": 3001,
  "item": "GPON ONT",
  "inventory_template_id": 15,
  "itemtext1": "ALCL12345678",
  "itemtext2": "AA:BB:CC:DD:EE:FF",
  "itemtext3": "OLT-1, PON 3, ONT 42",
  "itemtext4": "Nokia G-010G-A",
  "item_location": "Customer Premises",
  "item_state": "Assigned",
  "customer_id": 321,
  "service_id": 654,
  "address_line_1": "456 Fiber Lane",
  "city": "Melbourne",
  "state": "VIC",
  "zip_code": "3000",
  "country": "Australia",
  "google_maps_place_id": "ChIJ1234567890",
  "plus_code": "4RRH+2C Melbourne VIC",
  "latitude": "-37.8136",
  "longitude": "144.9631",
  "management_url": "https://192.168.1.1",
  "management_username": "admin",
  "config_content": "# ONT Configuration\nwlan-ssid:
HomeNetwork\nwlan-password: encrypted...",
  "wholesale_cost": 45.00,
  "retail_cost": 0.00,
  "inventory_notes": "Provisioned 2025-01-20. Optical power:
-22dBm"
}
```


Note

When viewing inventory items with a `management_url` (like Examples 2, 3, and 4 above), the UI automatically displays:

- A scannable QR code containing the URL or LPA address
- A clickable hyperlink (for web URLs)

Use Cases:

- **eSIM Activation** (Example 2): Customers scan the QR code to install the eSIM profile on their device
- **Network Equipment Access** (Examples 3 & 4): Technicians scan to access device management interfaces without manually typing IP addresses

Example 5: Phone Number (Virtual Inventory)


```
{
  "inventory_id": 4001,
  "item": "Phone Number",
  "inventory_template_id": 20,
  "itemtext1": "+61412345678",
  "itemtext2": "Melbourne",
  "itemtext3": "Mobile",
  "item_location": "Australia - VIC",
  "item_state": "Assigned",
  "customer_id": 555,
  "service_id": 888,
  "wholesale_cost": 1.00,
  "retail_cost": 0.00,
  "inventory_notes": "Ported from Telstra on 2025-01-05"
}
```


Inventory Item States Explained

The `item_state` field tracks the lifecycle of inventory items:

- **New** → **Assigned** - Normal flow when provisioning to a customer
- **Assigned** → **Used** - After service deactivation, item can be reused
- **New** → **Internal Use** - Allocated for testing, demos, or staff use
- **Assigned** → **Damaged** - Item failed, requires RMA or disposal
- **Any State** → **Lost** - Item cannot be located (triggers audit)
- **Any State** → **Stolen** - Item was stolen (triggers security report)
- **Damaged/Used** → **New** - After refurbishment or repair

Filtering and searching inventory by state allows operators to:

- Track available stock (New items)
- Identify items assigned to customers (Assigned)

- Find items available for reuse (Used)
- Monitor equipment issues (Damaged, Out Of Service)
- Audit missing items (Lost, Stolen)

Customer Tags

Tags are handy colour-coded links that can be added to a customer to help categorize them, for example, a customer might have a tag for "Open Support Ticket" or "Super Late Invoice" or "Jerk".

For storing structured metadata and custom key-value data, see `Customer Attributes <administration_attributes>`.

The tags are displayed as pills on the customer's profile page, and the colour of the pill is customizable along with the link.

One common use case is to tag customers who have an open support ticket, so that the support team can easily jump to the open ticket from the customer's profile page.

Tags can be created in the system by an administrator through the UI or by 3rd party systems via the API and can have start and end dates, so they can be automatically removed after a certain period.

Managing Tags via the UI

Viewing Customer Tags

To view tags for a customer:

1. Navigate to the customer's overview page
2. Click on the **Tags** tab
3. You will see a list of all active tags for the customer, showing:
    - Tag preview with the configured color
    - Tag text
    - Active date (when the tag becomes visible)
    - Deactivate date (when the tag will be hidden)
    - Link (if configured)

Creating a New Tag

To create a new tag for a customer:

1. Navigate to the customer's overview page
2. Click on the **Tags** tab
3. Click the **Add Tag** button
4. Fill in the required fields:
    - **Tag Text** (required): The text that will be displayed on the tag
    - **Tag Color** (required): Choose a color using the color picker or enter a hex code
    - **Tag Link** (optional): URL that will open when the tag is clicked
    - **Active Date** (required): Date when the tag should start being displayed
    - **Deactivate Date** (required): Date when the tag should stop being displayed (defaults to 2099-01-01)
5. Preview your tag in the preview section
6. Click **Create Tag**

Editing a Tag

To edit an existing tag:

1. Navigate to the customer's overview page
2. Click on the **Tags** tab
3. Find the tag you want to edit in the list
4. Click the **Edit** (pencil) button
5. Modify the fields as needed
6. Click **Update Tag**

Deleting a Tag

To delete a tag:

1. Navigate to the customer's overview page
2. Click on the **Tags** tab
3. Find the tag you want to delete in the list
4. Click the **Delete** (trash) button
5. Confirm the deletion in the popup

Tag Field Reference

API Integration

Tags can also be managed programmatically via the API:

Create a Tag:

```
PUT /crm/tag/
{
  "tag_text": "VIP Customer",
  "tag_hex_color": "FFD700",
  "tag_link": "https://example.com/vip",
  "tag_active_date": "2025-01-01 00:00:00",
  "tag_deactivate_date": "2099-12-31 23:59:59",
  "customer_id": 12
}
```

Update a Tag:

```
PATCH /crm/tag/tag_id/{tag_id}
{
  "tag_text": "Updated Tag Text",
  "tag_hex_color": "FF0000"
}
```

Get Tags by Customer:

```
GET /crm/tag/customer_id/{customer_id}
```

Delete a Tag:

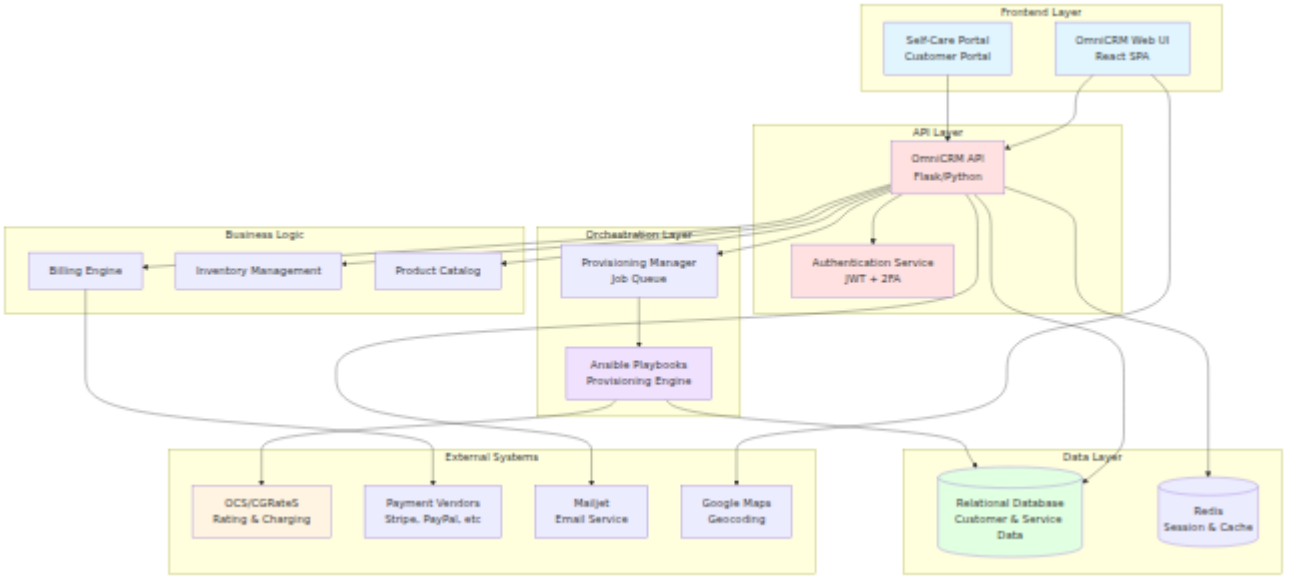
```
DELETE /crm/tag/tag_id/{tag_id}
```

OmniCRM System Architecture

This document provides an overview of the OmniCRM system architecture, including component relationships and data flow.

High-Level System Overview

OmniCRM is a comprehensive BSS/OSS platform that integrates several key components to provide complete service management for telecom providers.



Core Components

1. Frontend Applications

OmniCRM Web UI

- React single-page application
- Staff interface for customer management, service provisioning, billing
- Real-time provisioning status updates

- Role-based access control

Self-Care Portal

- Customer-facing portal
- Service management and usage tracking
- Invoice viewing and payment
- Shared codebase with staff UI, different views

2. API Layer

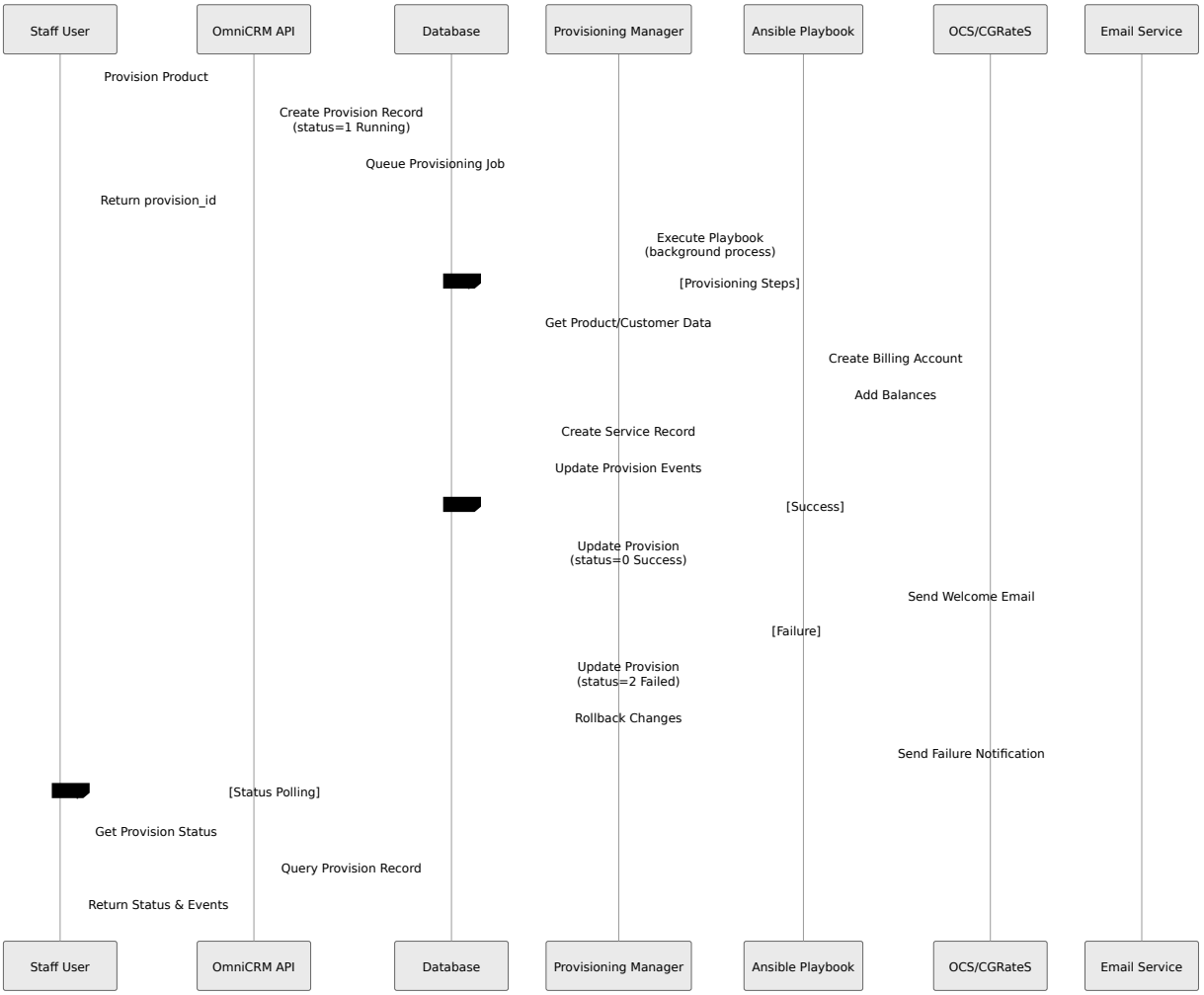
OmniCRM API (Flask/Python)

- RESTful API for all operations
- OpenAPI/Swagger documentation
- JWT-based authentication
- Rate limiting and caching
- WebSocket support for real-time updates

Key API Routes:

- `/crm/customer/*` - Customer management
- `/crm/service/*` - Service operations
- `/crm/product/*` - Product catalog
- `/crm/provision/*` - Provisioning operations
- `/crm/transaction/*` - Billing transactions
- `/crm/invoice/*` - Invoice management

3. Provisioning System

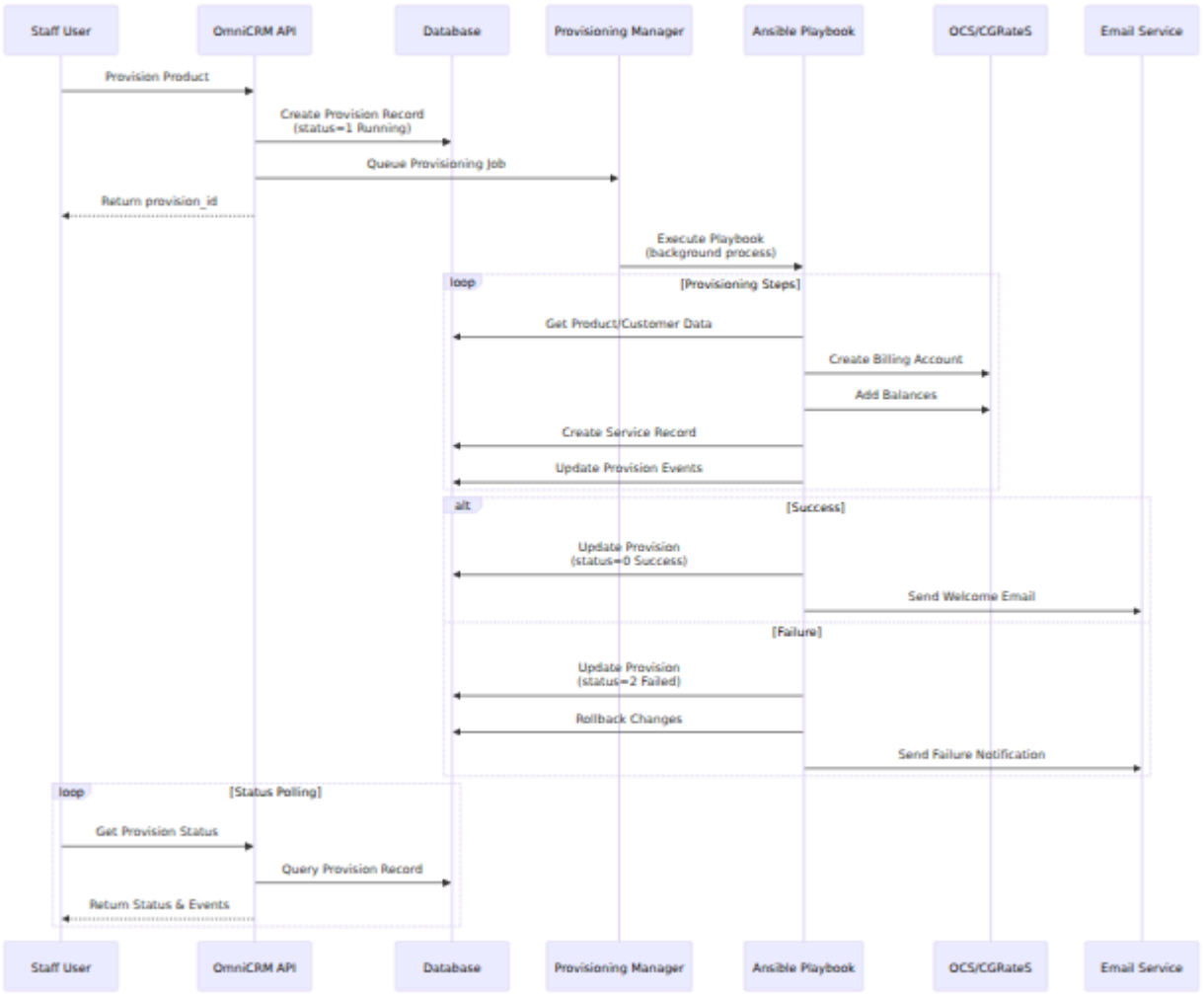


4. Billing & Rating

OCS/CGRateS Integration

- Real-time charging and rating
- Account management
- Balance tracking (monetary, data, voice, SMS)
- Action plans for recurring charges
- Threshold-based notifications

Billing Workflow:



5. Data Model

OmniCRM uses a relational database with the following core models. For visual entity relationship diagrams, see Customers, Contacts, Sites & Services.

Customer & Related Entities

Customer - Central entity representing a company or individual

Field	Type	Description
customer_id	Integer (PK)	Unique identifier
customer_name	String	Company or individual name
customer_account_type	Enum	'Individual' or 'Business'
customer_status	Enum	'Open', 'Closed', 'Suspended', 'Archived'
customer_payment_type	String	'prepaid' or 'postpaid'
customer_enabled	Boolean	Is account active
tax_identifier	String	VAT/GST number
contract_start_date	DateTime	Contract start
contract_end_date	DateTime	Contract end

Contact - People associated with a customer

Field	Type	Description
contact_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Parent customer
contact_firstname	String	First name
contact_lastname	String	Last name
contact_email	String	Email address
contact_phone	String	Phone number
contact_types	String	'Primary', 'Billing', 'Technical'

Site - Physical service delivery locations

Field	Type	Description
site_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Parent customer
site_name	String	Location name
address_line_1	String	Street address
city, state, zip_code	String	Location details
latitude, longitude	Float	GPS coordinates
google_maps_place_id	String	Google Maps reference
plus_code	String	Open Location Code

Service & Product Models

Service - Active service instances

Field	Type	Description
service_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Parent customer
product_id	Integer (FK)	Product template
site_id	Integer (FK)	Service location
service_name	String	Display name
service_uuid	String	Billing system identifier
service_status	Enum	Current status
service_billed	Boolean	Generate transactions
wholesale_cost	Float	Provider cost
retail_cost	Float	Customer price
bundled_parent	Integer (FK)	Parent service for bundles

Product - Service offering templates

Field	Type	Description
product_id	Integer (PK)	Unique identifier
product_name	String	Display name
product_slug	String	URL-friendly name
category	Enum	'standalone', 'bundle', 'addon', 'promo'
provisioning_play	String	Ansible playbook name
provisioning_json_vars	JSON	Playbook variables
inventory_items_list	String	Required inventory
retail_cost	Float	Monthly price
retail_setup_cost	Float	One-time fee
enabled	Boolean	Available for sale

Billing Models

Transaction - Individual charges/credits

Field	Type	Description
transaction_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Parent customer
invoice_id	Integer (FK)	Parent invoice (optional)
service_id	Integer (FK)	Related service
title	String	Transaction description
retail_cost	Float	Amount (negative = credit/payment)
payment_type	String	e.g. `wallet_topup_card`, `wallet_invoice`, `postpaid_deferred_charge`
wallet_ledger_id	Integer (FK)	Links to wallet_ledger when row mirrors wallet movement
void	Boolean	Cancelled transaction

Invoice - Grouped transactions for billing

Field	Type	Description
invoice_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Parent customer
paid	Boolean	Payment received
void	Boolean	Cancelled invoice
payment_reference	String	Stripe transaction ID
start_date, end_date	Date	Billing period
due_date	Date	Payment deadline
retail_cost	Float	Total amount

Inventory Models

Inventory - Physical and virtual assets

Field	Type	Description
inventory_id	Integer (PK)	Unique identifier
customer_id	Integer (FK)	Assigned customer
service_id	Integer (FK)	Linked service
inventory_template_id	Integer (FK)	Item type template
item	String	Item type (SIM Card, Router, etc.)
item_state	Enum	'New', 'Assigned', 'Used', etc.
itemtext1-20	String	Flexible fields
management_url	String	Equipment admin URL
config_content	Text	Configuration file

Inventory_Template - Defines inventory item structure

Field	Type	Description
inventory_template_id	Integer (PK)	Unique identifier
item	String	Template name
itemtext1_label	String	Label for itemtext1 field
itemtext2_label	String	Label for itemtext2 field

Provisioning Models

Provision - Provisioning job tracking

Field	Type	Description
provision_id	Integer (PK)	Unique identifier
product_id	Integer (FK)	Product being provisioned
customer_id	Integer (FK)	Target customer
service_id	Integer (FK)	Created/modified service
provisioning_play	String	Ansible playbook name
provisioning_status	Integer	0=Success, 1=Running, 2=Failed

Provision_Event - Individual provisioning steps

Field	Type	Description
provision_event_id	Integer (PK)	Unique identifier
provision_id	Integer (FK)	Parent provision job
event_name	String	Task name
event_number	Integer	Sequence number
provisioning_status	Integer	0=Success, 1=Running, 2=Failed
provisioning_result_json	JSON	Full task output

User & Security Models

User - User accounts

Field	Type	Description
id	Integer (PK)	Unique identifier
username	String	Login username
email	String	Email address
email_verified	Boolean	Email confirmed
is_2fa_enabled	Boolean	Two-factor auth enabled
totp_secret	String	TOTP secret key

Role - User roles

Field	Type	Description
id	Integer (PK)	Unique identifier
name	String	Role name
description	String	Role description

Permission - Granular permissions

Field	Type	Description
id	Integer (PK)	Unique identifier
name	String	Permission name (resource.action)
description	String	Permission description

Relationships:

- Users have many Roles (many-to-many)
- Roles have many Permissions (many-to-many)
- Users can link to one Contact (for customer portal access)

Integration Points

Stripe Payment Gateway

- Tokenized payment methods
- PCI-compliant card storage
- Automated invoice payment
- Refund processing
- Expiring card notifications

Mailjet Email Service

- Transactional emails (invoices, welcome, notifications)
- Contact synchronization
- Template management
- Delivery tracking

Google Maps

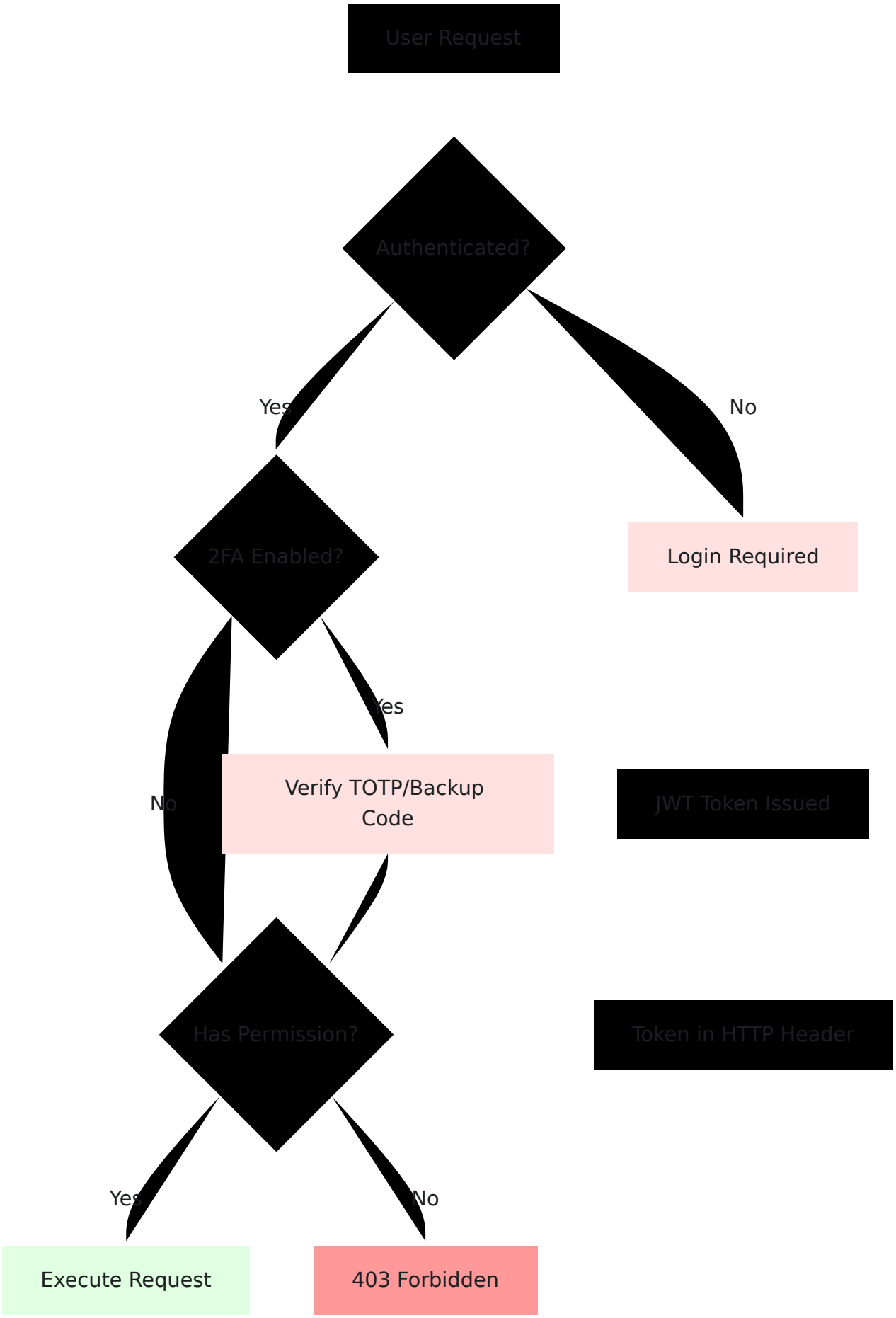
- Address autocomplete
- Geocoding and reverse geocoding
- Plus Code generation
- Site location mapping

OCS/CGRateS

- Account provisioning
- Real-time rating
- Balance management
- CDR processing

- Action plans and schedules

Security Architecture

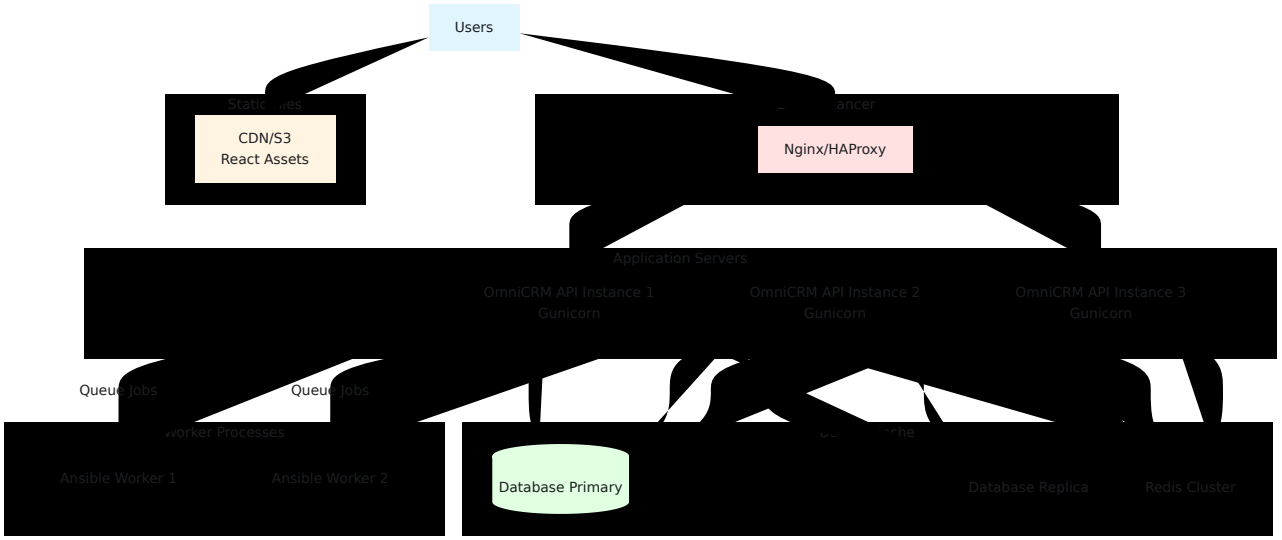


Security Features:

- JWT-based authentication
- Two-factor authentication (TOTP)
- Role-based access control (RBAC)
- Permission-based resource access
- Session management with Redis
- Password hashing (bcrypt)
- Email verification
- Audit logging via Activity Log

Deployment Architecture

Recommended Production Setup:



Technology Stack

Backend:

- Python 3.x
- Flask web framework
- SQLAlchemy ORM
- Alembic migrations
- Ansible for automation

Frontend:

- React
- State management
- React Router
- Axios for API calls

Database:

- Relational database (primary data store)
- Redis (caching & sessions)

External Services:

- CGRateS (billing/rating)
- Stripe (payments)
- Mailjet (email)
- Google Maps (geocoding)

Scalability Considerations

Horizontal Scaling:

- Stateless API design allows multiple instances
- Load balancer distributes requests
- Redis for shared session state

Database Scaling:

- Read replicas for reporting queries
- Connection pooling
- Query optimization and indexing

Provisioning at Scale:

- Background job processing
- Multiple Ansible workers

- Job queue management
- Retry logic for failed provisions

Monitoring & Observability

OmniCRM provides comprehensive Prometheus-based metrics for monitoring all aspects of the system. For complete details, see Monitoring & Metrics.

Key Metrics:

- API response times and request rates
- Provisioning success/failure rates and job duration
- Database query performance and connection pool usage
- External integration health (OCS, Stripe, Mailjet)
- Background job execution and errors

Logging:

- Application logs (Flask)
- Provisioning logs (Ansible output)
- Activity log (audit trail)
- Error tracking and alerts

Metrics Endpoint: All metrics are exposed at `/crm/metrics` in Prometheus format. See Monitoring & Metrics for scrape configuration, alerting rules, and dashboard examples.

Related Documentation

- Ansible Playbooks - Provisioning automation
- Provisioning System - Workflow details
- Products and Services - Product architecture
- API Documentation - API reference
- RBAC - Security and permissions

Authentication Flows and Admin Controls

OmniCRM provides comprehensive authentication features including login, two-factor authentication (2FA), password management, and admin controls for managing user security. This guide focuses on the UI workflows for both end users and administrators.

See also: `Self-Care Portal <self_care_portal>` for customer login and portal access, `RBAC <rbac>` for staff permissions.

Overview

OmniCRM authentication includes:

- **Email/Password Login** - Standard credential-based authentication
- **Two-Factor Authentication (2FA)** - Optional TOTP-based second factor
- **Remember Me** - Extended session up to 30 days
- **Password Reset** - Self-service password recovery via email
- **Admin Controls** - Administrative tools for resetting 2FA and passwords
- **Social Logins** - Optional Google, Apple, Facebook integration (if enabled)
- **Role-Based Navigation** - Automatic routing based on user roles

Login Flow

The login page is the entry point for all users (staff and customers).

Standard Login

Login Process:

1. Enter **email address** (staff or customer email)
2. Enter **password**
3. Optional: Check **"Remember me for 30 days"** for extended session
4. Click **"Login"**

What Happens Next:

- **Without 2FA:** User logged in immediately, navigated based on role:
  - **Customers** → Self-Care portal (`/self-care`)
  - **Staff/Admins** → Customers dashboard (`/customers`)
  - **CBC Mode** → Cell Broadcast interface (`/create-cell-broadcast`)
- **With 2FA Enabled:** Redirected to 2FA verification screen

Remember Me Feature:

When enabled, session persists for **30 days** instead of expiring when browser closes. Uses secure HTTP-only cookies.

Show/Hide Password:

Click the **eye icon (□)** to toggle password visibility.

Login with 2FA

If user has 2FA enabled, after entering email/password, the 2FA challenge screen appears:

Using Authenticator Code:

1. Open authenticator app (Google Authenticator, Authy, etc.)
2. Find OmniCRM entry
3. Enter the 6-digit code
4. Code auto-submits when all 6 digits entered
5. If valid, user logged in and navigated to appropriate dashboard

Using Recovery Code:

If authenticator app unavailable:

1. Click **"Recovery Code"** tab
2. Enter one of your saved backup codes (e.g., `3fa5b9c2`)
3. Click **"Verify"**
4. Code is consumed (can only be used once)

Cancel:

Click **"Cancel"** to return to login page.

Social Logins (Optional)

If enabled (`VITE_ALLOW_SOCIAL_LOGINS=yes`), social login buttons appear:

> [Sign in with Google] [• Sign in with Apple] [Sign in with Facebook]

Click any button to authenticate via that provider. Currently displays "coming soon" message (social login implementation in progress).

Forgot Password Link

Click **"Forgot password?"** link to initiate password reset flow.

Two-Factor Authentication (2FA) Setup

Users can enable 2FA for enhanced account security. 2FA uses TOTP (Time-Based One-Time Password) compatible with standard authenticator apps.

Accessing 2FA Setup

From user profile or settings:

Note for Customers:

Customer role users do not see 2FA prompts. 2FA is typically required only for staff and administrative users.

Step 1: Confirm Password

> Current Password
>
> [Cancel] [Continue]

Enter your current password to proceed. This verifies your identity before enabling 2FA.

Step 2: Scan QR Code

> [Cancel] [Confirm]

Setup Instructions:

1. **Download Authenticator App** (if you don't have one):
   - iOS: Apple App Store → "Google Authenticator"
   - Android: Google Play → "Google Authenticator"
   - Alternatives: Authy, Microsoft Authenticator, 1Password
2. **Scan QR Code:**
   - Open authenticator app
   - Tap "+" or "Add account"
   - Choose "Scan QR code"
   - Point camera at QR code on screen
   - App adds "OmniCRM" entry with 6-digit code
3. **Save Backup Codes:**
   - **CRITICAL:** Write down or copy these 8 codes
   - Store in secure location (password manager, safe, etc.)
   - Each code single-use only
   - Used if you lose access to authenticator app
   - Click **"Copy Codes"** to copy all codes to clipboard
4. **Verify Setup:**
   - Enter current 6-digit code from authenticator app
   - Click **"Confirm"**
   - If valid, 2FA is now enabled

Step 3: 2FA Enabled

Success message appears:

From now on, login requires both password and 2FA code.

Password Reset Flow (Self-Service)

Users who forget their password can reset it via email.

Step 1: Request Reset Link

From login page, click **"Forgot password?"**

1. Enter **email address**
2. Click **"Send Reset Link"**

What Happens:

- System checks if email exists in database
- If found, sends password reset email via Mailjet
- Email contains time-limited reset link (typically 1 hour expiry)
- Success message appears: "Reset instructions have been sent to your email"

If Email Not Found:

Error message: "No account found with that email address"

Step 2: Check Email

User receives email with subject like:

> Hi [Name],
>
> You requested a password reset for your OmniCRM account.
>
> Click the link below to reset your password:
> <https://yourcompany.com/reset-password/abc123token456>
>
> This link expires in 1 hour.
>
> If you didn't request this, ignore this email.

Click the reset link to proceed.

Step 3: Set New Password

Reset link opens password creation page:

> □ (lock icon)
>
> Password
>
> Confirm Password
>
> [Reset Password]

1. Enter **new password**
2. Re-enter in **Confirm Password** field
3. Click **"Reset Password"**

Password Requirements:

- Minimum length (typically 8+ characters)
- Passwords must match

Success:

- Success message: "Password has been reset successfully"
- Automatically redirected to login page
- User can now login with new password

Expired/Invalid Token:

If reset link is expired or invalid:

> [Request New Reset Link]

Admin Controls for User Management

Administrators with appropriate permissions can manage user authentication settings from the User Management interface.

Accessing User Management

Displays table of all users with action buttons.

> Name Email Phone Actions John Smith <john@example.com> +44 123... ✏ □ □ □ Jane Doe <jane@example.com> +44 456... ✏ □ □ Bob Wilson <bob@example.com> +44 789... ✏ □ □ □ ✉

Action Icons:

- ✏ **Edit** - Modify user details, roles, permissions
- □ **Delete** - Remove user account
- □ **Reset Password** - Generate temporary password
- □ **Reset 2FA** - Disable 2FA for user (only shown if 2FA enabled)
- ✉ **Send Welcome Email** - Resend welcome email (only shown if user never logged in)

Admin: Reset User Password

When user forgets password and admin needs to help:

Step 1: Click Reset Password Icon (□)

Confirmation modal appears:

> Are you sure you want to reset the password for:
>
> User: John Smith (<john@example.com>)
>
> A temporary password will be generated and displayed. The user must change this password on next login.
>
> [Cancel] [Reset Password]

Step 2: Confirm Reset

Click **"Reset Password"**. System generates secure temporary password.

Step 3: Temporary Password Displayed

> Temporary password for John Smith:
>
> [Copy Password]
>
> ⚠ IMPORTANT: • Send this password to the user via secure channel • Do not send via email or unsecured messaging • User will be forced to change password on next login
>
> [Close]

Admin Action:

- Copy temporary password
- Call user or communicate via secure method
- Provide temporary password verbally
- Instruct user to login and change password

User Experience:

When user logs in with temporary password:

1. Login succeeds
2. Immediately redirected to "Change Password" screen
3. Must set new password before accessing system
4. Cannot skip password change

Admin: Reset User 2FA

When user loses access to authenticator app and all backup codes:

Step 1: Click Reset 2FA Icon (□)

Only appears for users with 2FA currently enabled.

Confirmation modal appears:

Step 2: Confirm Reset

Click "**Reset 2FA**"

Step 3: Confirmation

Success message:

> John Smith can now login with just their password. They can re-enable 2FA from their user settings.

User Experience:

- User can now login with password only (no 2FA code required)
- 2FA shield icon (□) disappears from user's row in admin table
- User can voluntarily re-enable 2FA from their settings

Important Security Note:

Before resetting 2FA, admin should:

1. Verify user identity through alternative means:
    - Government ID verification
    - Security questions
    - Recent transaction verification
    - In-person verification (if applicable)
2. Document the reset in customer notes
3. Inform user to re-enable 2FA after regaining access

Admin: Send Welcome Email

For users who haven't received or lost their welcome email:

When Available:

Paper plane icon (✉) only appears for users who have **never logged in** (`login_count = 0`).

Click Send Welcome Email Icon (✉)

> Send welcome email to:
>
> User: Bob Wilson (<bob@example.com>)
>
> Email will include: • Welcome message • Login instructions • Link to set initial password (if applicable) • Support contact information
>
> [Cancel] [Send Email]

Click **"Send Email"**

Success message:

Email Sent via Mailjet:

Uses template: `api_crmCommunicationUserWelcome`

Admin: Edit User

Click **Edit icon (✏)** to modify user details:

> First Name
>
> Last Name
>
> Email
>
> Phone Number
>
> Roles ☑ admin ☐ customer_service_agent_1 ☐ customer
>
> [Cancel] [Save Changes]

Editable Fields:

- Name, email, phone
- **Roles** - Assign/remove roles (affects permissions)
- Active/inactive status

Admin: Delete User

Click **Delete icon (🗑)** to remove user:

> Are you sure you want to delete:
>
> User: John Smith (<john@example.com>)
>
> ⚠ WARNING: This action cannot be undone.
>
> This will permanently delete: • User account and credentials • 2FA settings • Session history
>
> Customer data and transactions will NOT be deleted.
>
> [Cancel] [Delete User]

Click **"Delete User"** to confirm.

Success message:

Best Practices

For End Users

Login Security:

- Use strong, unique passwords
- Enable "Remember me" only on personal devices
- Always logout on shared computers
- Enable 2FA for additional security

2FA Management:

- Save backup codes immediately after enabling 2FA
- Store codes in password manager or secure location
- Test a backup code to ensure they work
- Re-generate backup codes if you use several
- Contact admin if you lose both authenticator and backup codes

Password Management:

- Use password manager to generate and store passwords
- Never share passwords via email or messaging
- Change password if you suspect compromise
- Use unique password for OmniCRM (don't reuse passwords)

For Administrators

User Security Management:

- Verify user identity before resetting 2FA or passwords
- Never send temporary passwords via email
- Document all security resets in user notes

- Encourage staff to enable 2FA
- Monitor for unusual login patterns

Password Resets:

- Communicate temporary passwords via phone or in-person only
- Generate strong temporary passwords (system does this automatically)
- Ensure user changes password on first login
- Don't reset passwords unnecessarily - use email reset flow when possible

2FA Resets:

- Treat 2FA resets as high-security actions
- Verify identity through multiple channels before resetting
- Document reason for reset
- Encourage user to re-enable 2FA immediately after regaining access
- Consider requiring 2FA for all administrative users

User Management:

- Regularly review user list for inactive accounts
- Remove users who have left organization
- Ensure appropriate role assignments
- Monitor users who have never logged in
- Audit user permissions quarterly

Troubleshooting

"Invalid email or password" error

- **Cause:** Incorrect credentials
- **Fix:**
  - Verify email address is correct
  - Check caps lock is off
  - Try password reset if forgotten
  - Contact admin if account locked

2FA code not accepted

- **Cause:** Time sync issue or incorrect code
- **Fix:**
  - Ensure device time is correct (Settings → Date & Time → Automatic)
  - Wait for code to refresh (codes change every 30 seconds)
  - Try next code that appears
  - Use backup code if authenticator not working
  - Contact admin to reset 2FA if all else fails

"Remember me" not working

- **Cause:** Cookies disabled or cleared
- **Fix:**
  - Enable cookies in browser settings
  - Don't clear cookies when closing browser
  - Disable privacy extensions for OmniCRM domain
  - Try different browser

Password reset email not received

- **Cause:** Email not sent, spam filter, or wrong email
- **Fix:**
  - Check spam/junk folder
  - Verify email address is correct
  - Wait 5-10 minutes (email delivery can be delayed)
  - Check Mailjet integration is working (admin)
  - Contact admin for manual password reset

Password reset link expired

- **Cause:** Token expired (typically 1 hour)
- **Fix:**
  - Request new password reset
  - Check email and click link promptly
  - Contact admin if repeated issues

Cannot enable 2FA (incorrect password)

- **Cause:** Current password entered incorrectly
- **Fix:**
  - Verify current password
  - Reset password first if uncertain
  - Contact admin for assistance

Lost authenticator app and backup codes

- **Cause:** Phone lost/reset, backup codes not saved
- **Fix:**
  - Contact administrator immediately
  - Admin will verify identity and reset 2FA
  - Login with password only after reset
  - Re-enable 2FA and SAVE backup codes this time

Admin: "Failed to reset 2FA" error

- **Cause:** Insufficient permissions
- **Fix:**
  - Ensure you have admin role
  - Check API permissions
  - Contact system administrator

Admin: Temporary password not generated

- **Cause:** API error or permissions issue
- **Fix:**
  - Refresh page and try again
  - Verify admin permissions
  - Check API logs for errors
  - Ensure database is accessible

Security Considerations

Session Management:

- Sessions expire after inactivity period
- "Remember me" extends session to 30 days
- Sessions stored as HTTP-only cookies (not accessible to JavaScript)
- Secure flag ensures cookies only sent over HTTPS

Password Security:

- Passwords hashed using industry-standard algorithms
- Plain text passwords never stored
- Temporary passwords automatically expired after first use
- Failed login attempts tracked (potential rate limiting)

2FA Security:

- TOTP secrets encrypted in database
- QR codes generated client-side when possible
- Backup codes hashed before storage
- Each backup code single-use only

Admin Actions:

- 2FA resets logged in activity log
- Password resets create audit trail
- Admin actions require appropriate role permissions
- IP addresses logged for security events

Related Documentation

- `2fa` - Detailed 2FA API reference (API-focused)
- `rbac` - Role-based access control and permissions
- `administration_configuration` - Mailjet email configuration for password reset

- `integrations_mailjet` - Email template configuration
- `customer_care` - Self-Care portal for customers

Create a Customer

0fT52ZvoZBE

Customers, Contacts, Sites & Services

We have a simple model of a **Customer** under this Customer, can have multiple **Contacts** and multiple **Sites**, **Services**, etc.

A **Customer** is a company or individual who has a relationship with us, to who we send an invoice / bill.

A **Contact** is a person who works with the customer, for an individual, it's probably the same as the customer themselves, a single person, but we might have family members or other contacts, and each contact has a type, for example a billing contact, a technical contact, etc, which influences how we handle the contact.

A **Site** is a physical location where we deliver services, it could be a home, office, or other location. This allows us to have multiple sites for a single customer, for example, a customer with multiple offices, and know which services are associated with which site.

A **Service** is something we bill a customer for, it could be a home internet service, mobile service, or even abstract services like leasing a subnet or providing metered electricity to a rack. Each service is linked to a customer and a site, and can have multiple charges associated with it.

Customers also have an `Activity Log <csa_activity_log>`, which is a record of all the changes made, `Tags <administration_tags>`, `Attributes <administration_attributes>` for storing custom metadata, `Inventory Items <administration_inventory>` and financial information like `Transactions <payments_transaction>`, `Invoices <payments_invoices>` & `Payment Methods <basics_payment>`.

Once we've created a customer we can then `add a service <csa_add_service>` to that customer, which is the thing we bill them for.

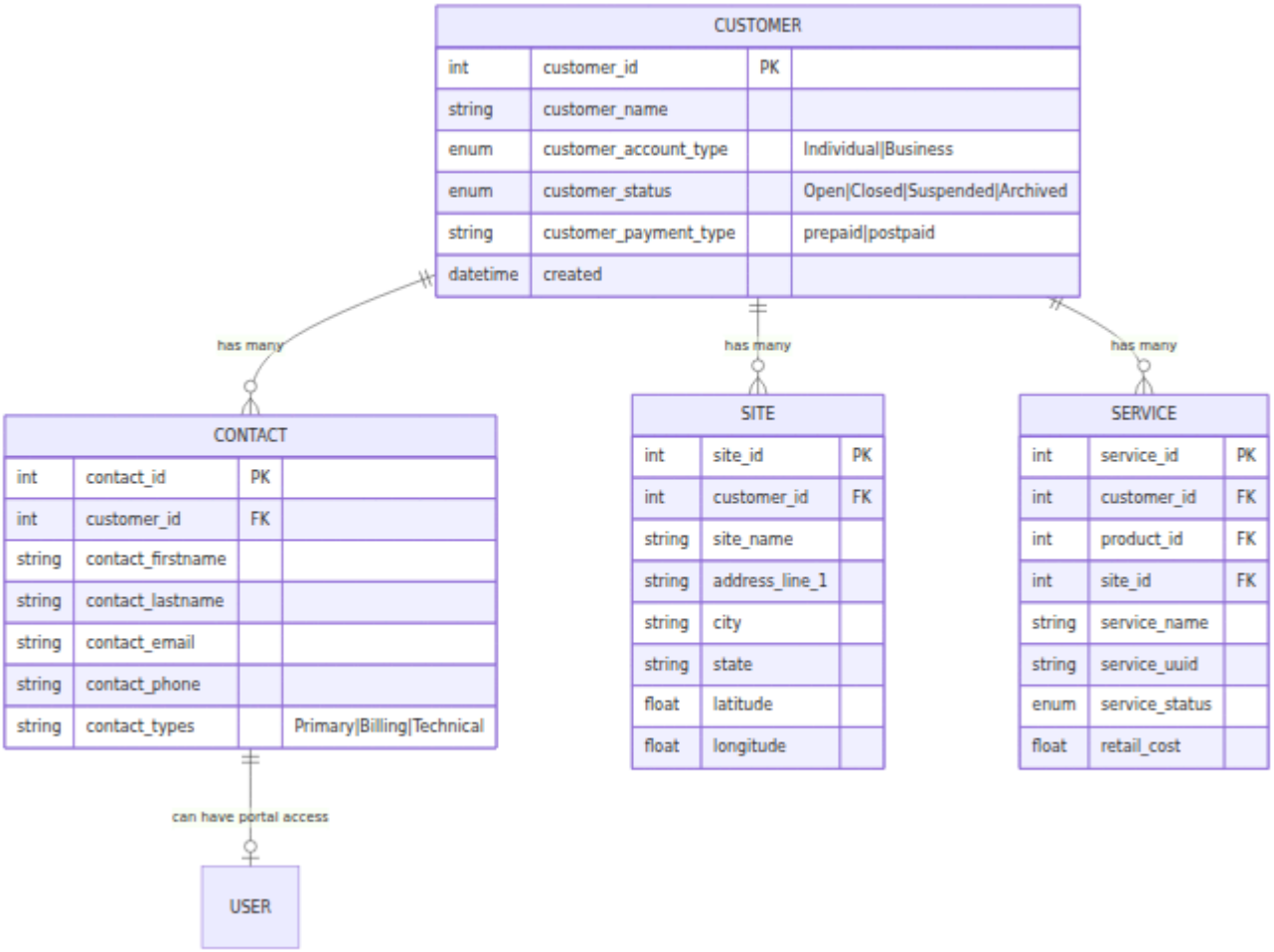
For information on creating a customer, see Create a Customer.

Data Model Overview

OmniCRM uses a relational data model organized around customers and their services. The model is broken down into focused sections below.

Customer Core Relationships

The customer is the central entity, with related contacts, sites, and services.

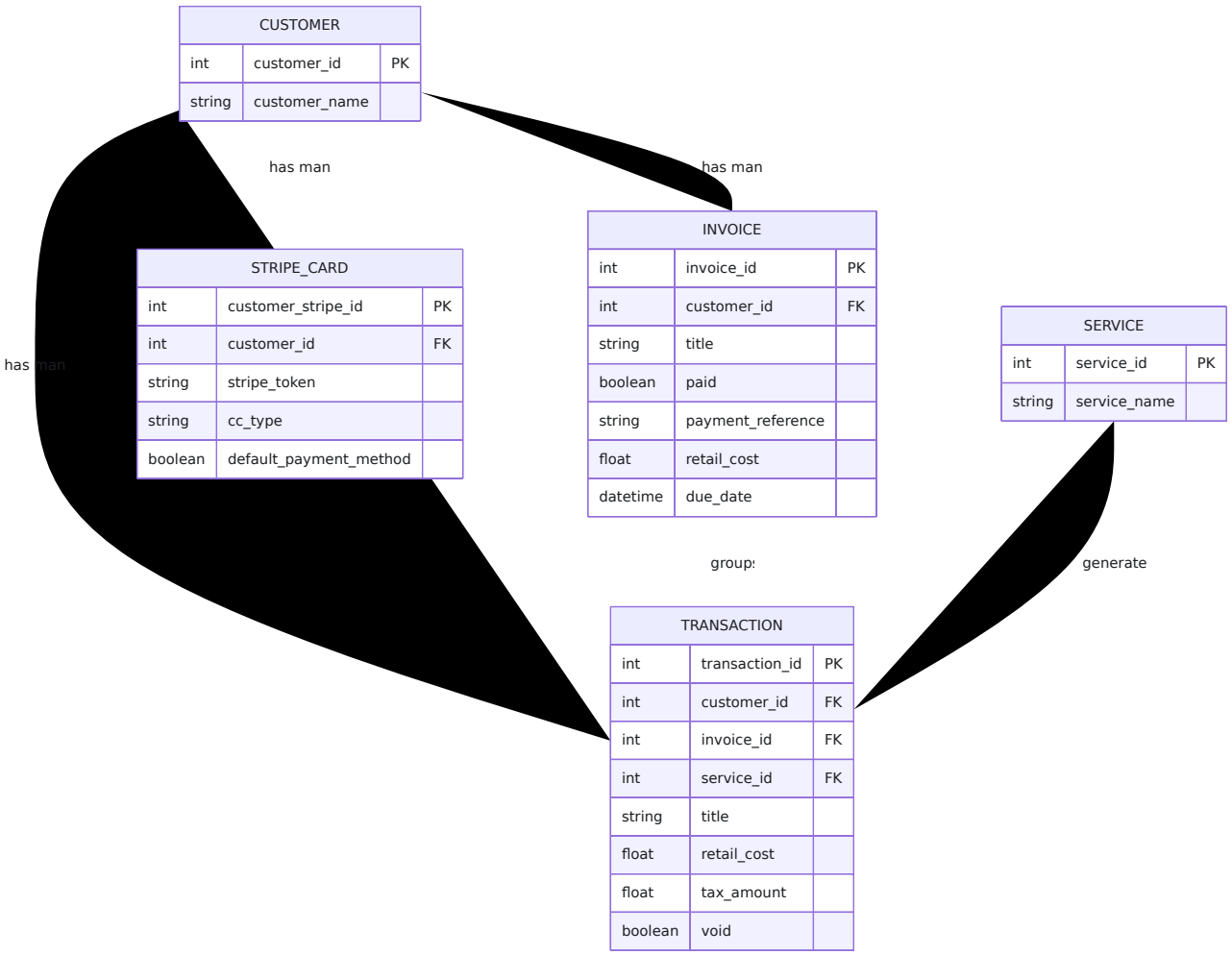


Key Points:

- One customer can have multiple contacts (billing, technical, etc.)
- One customer can have multiple sites (branch offices, locations)
- Services are delivered to sites
- Contacts can have portal access via linked user accounts

Billing & Financial Data

Transactions and invoices track all financial activity.

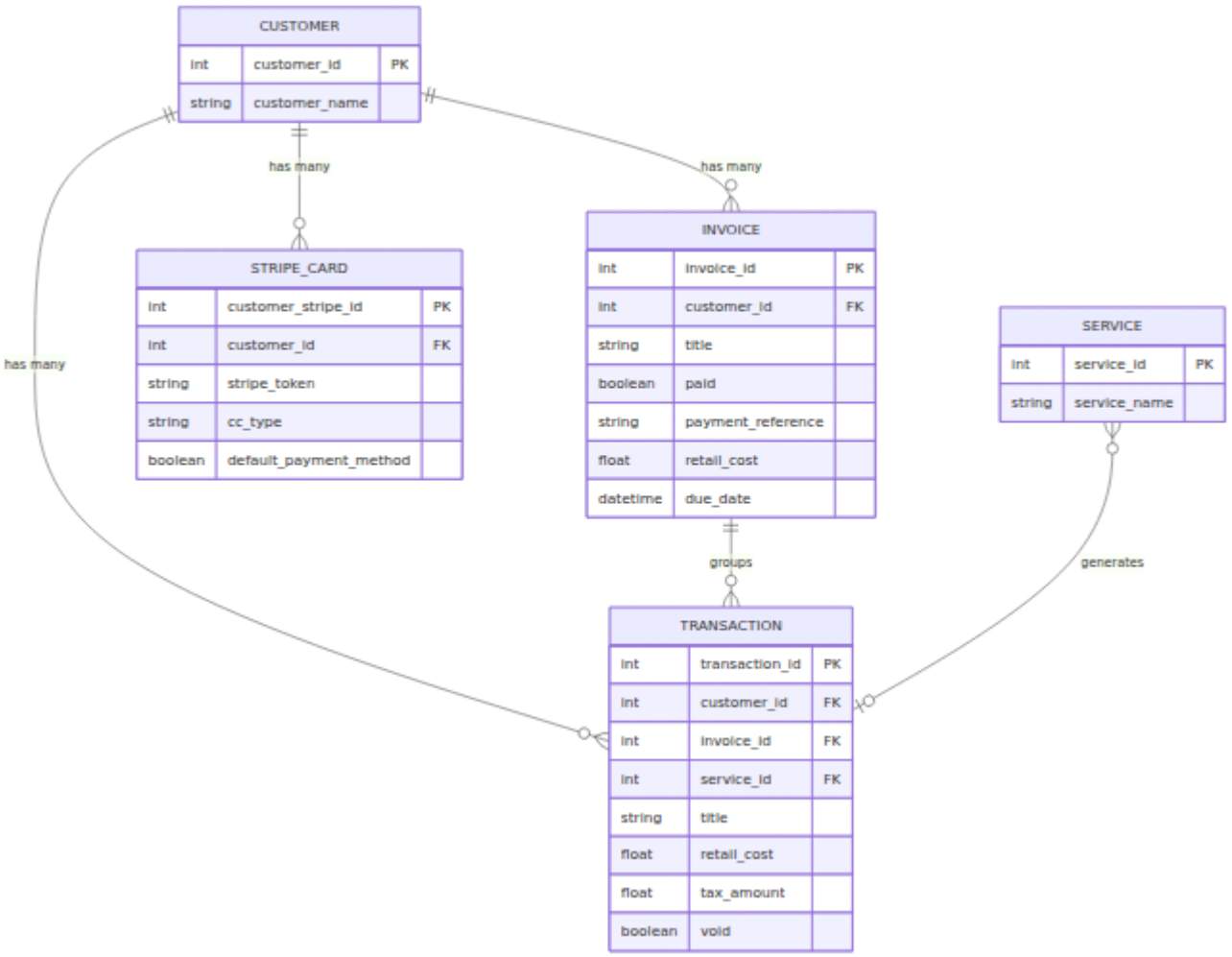


Key Points:

- Transactions can be standalone or grouped into invoices
- Services automatically generate monthly transactions
- Stripe cards are tokenized and stored securely
- Invoices group multiple transactions for billing

Product & Provisioning

Products define service offerings; provisioning creates actual services.

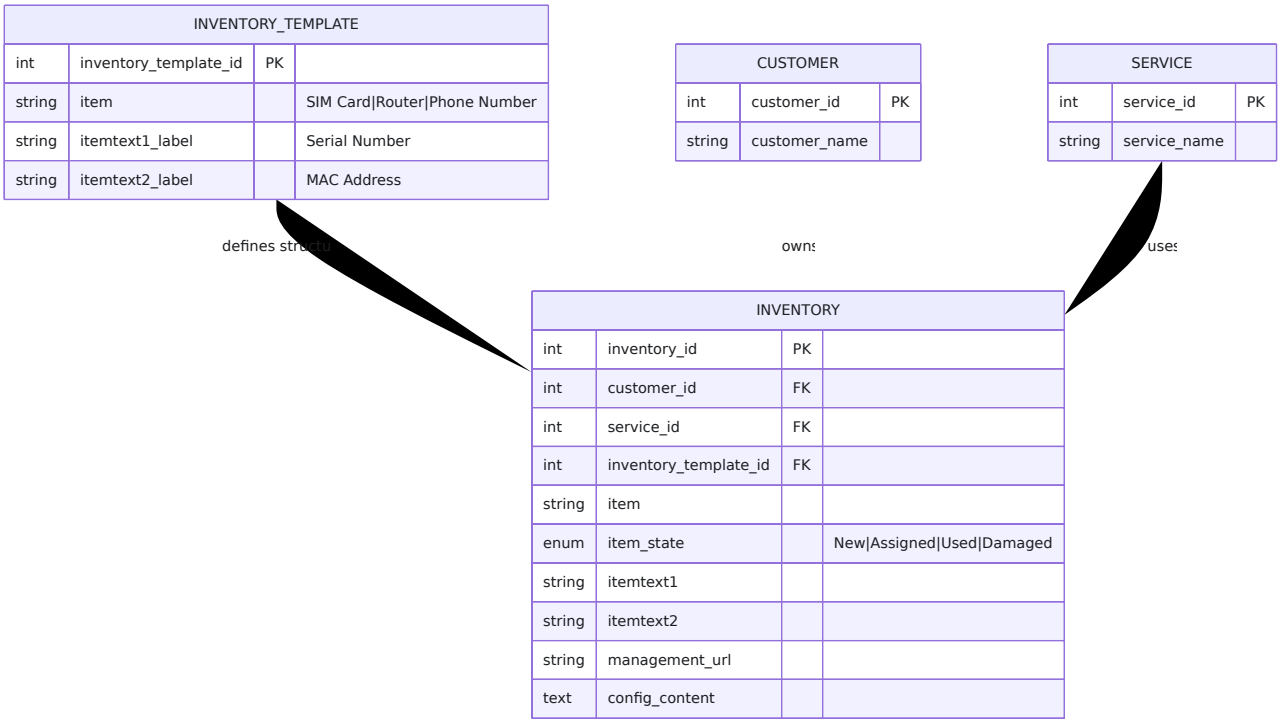


Key Points:

- Products are templates; services are active instances
- Provisioning creates or modifies services via Ansible playbooks
- Each provision job has multiple events for tracking progress
- One product provision can create multiple services (bundles)

Inventory System

Track physical and virtual assets assigned to customers.

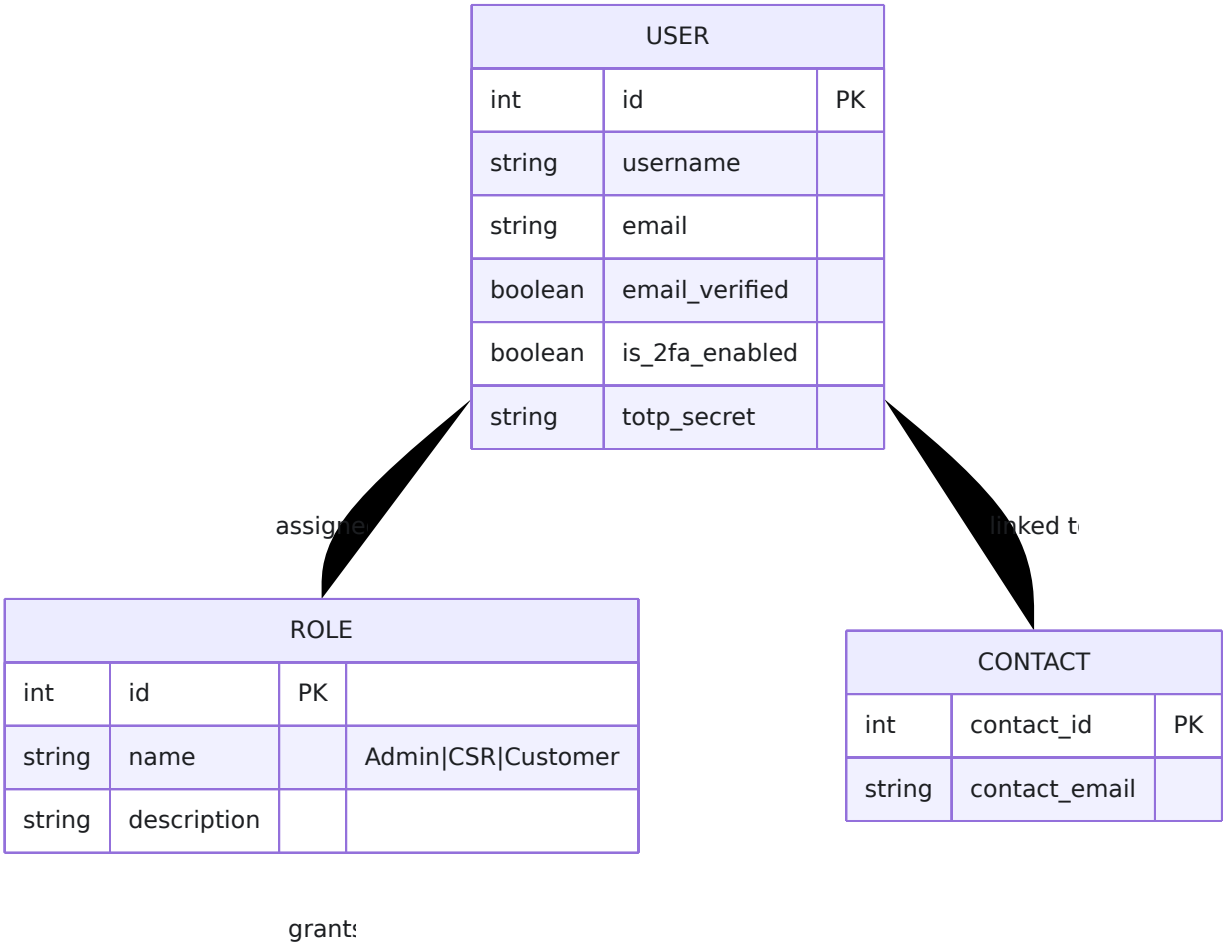


Key Points:

- Inventory templates define the structure (fields) for each item type
- Flexible itemtext1-20 fields adapt to different inventory types
- Items can be assigned to customers and linked to services
- Stores equipment configurations and management credentials

User & Security

User accounts with role-based access control.



Key Points:

- Users can have multiple roles; roles have multiple permissions
- Two-factor authentication (2FA) is optional per user
- Staff users are standalone; customer users link to contacts
- Granular permissions control access to resources

Customer List

The customer list provides a searchable, filterable table of all customers in the system.

Features:

- **Search** - Filter customers by name or ID
- **Bulk Actions** - Select multiple customers for batch operations
- **Pagination** - Navigate through large customer lists
- **Quick Actions** - View or delete customers directly from the list

Customer - Detail

The customer object itself does not contain much information, it's just a name and a reference to the contacts and sites.

Your specific deployment may include additional fields or customizations, but the basic customer object is very simple.

On the overview page is also a graph showing the Average Revenue Per User (`ARPU`) for the customer, which is the total revenue divided by the number of services, and a comparison as to how this customer compares to the average ARPU for all customers in the system.

The Customer Status options are tailored based on the specific needs of your business, but typically include options like Active, Inactive, Pending, etc, with different rules in each that control the behavior of the customer in the system in that state.

Deleting a customer can only be done if the customer has no active services, unpaid invoices or uninvoiced transactions. If the customer has any of these, you will need to close the active services and ensure the payments are made before you can delete the customer, which in turn will archive the customer and all associated data, which can later be restored if needed.

Site - Detail

Sites are physical locations where services are delivered, and can have multiple services associated with them.

They are predominantly used for business customers, where a single customer might have multiple sites, for example, a customer with multiple offices.

Having multiple sites allows us to track which services are associated with which site, for example if a customer orders a new service for a new office, we need to make sure that we deliver the correct service to the correct location. This allows us to track services by site and to bill them separately if needed.

Google Maps Integration and Geocoding

Each site is integrated with **Google Maps** to ensure accurate address data and geolocation. The UI automatically geocodes addresses and generates location data.

How Address Geocoding Works:

When adding or editing a site, the interface provides two methods for setting location:

1. **Address Search (Recommended)**
   - Use the search bar at the top of the form
   - Type an address and Google Maps Autocomplete suggests matches
   - Select the correct address from the dropdown
   - The system automatically populates:
     - **Site Name** - Place name from Google Maps
     - **Address Line 1** - Street number and name
     - **Address Line 2** - Subpremise (unit/suite number)
     - **City** - Locality
     - **State/Region** - Administrative area
     - **Post Code** - Postal code
     - **Country** - Country name
     - **Latitude & Longitude** - Precise coordinates
     - **Plus Code** - 11-character Open Location Code (e.g., `8C3MFJV8+2F`)
     - **Google Maps Place ID** - Unique place identifier
2. **Draggable Map Marker (Manual)**
   - Drag the pin on the map to the exact location
   - System performs **reverse geocoding** to get address from coordinates
   - Same fields auto-populate based on pin location
   - Useful for rural areas or when address is imprecise

Plus Code Generation:

Plus Codes are automatically generated from latitude/longitude using the Open Location Code library. A Plus Code is a short code (11 characters) that represents a precise location anywhere in the world.

Example:

> Auto-populated fields: ✓ Site Name: "123 Main Street" ✓ Address Line 1: "123 Main Street" ✓ City: "London" ✓ State: "Greater London" ✓ Country: "United Kingdom" ✓ Post Code: "SW1A 1AA" ✓ Latitude: 51.5074 ✓

> Longitude: -0.1278 ✓ Plus Code: "9C3XGPHC+3Q" ✓ Google Place ID: "ChIJdd4hrwug2EcRmSrV3Vo6llI"

Validation Requirements:

Before saving a site, the system validates:

- **Latitude & Longitude** must be set (either via search or dragging marker)
- **Country** must be populated (defaults to `VITE_DEFAULT_COUNTRY` if not set)
- **Plus Code** must be 12 characters (11 + 1 for padding)

If validation fails, you'll see an error:

Visual Feedback:

The interface shows real-time feedback:

or

How Location Data is Used

The geocoded location data (latitude, longitude, Plus Code) is used throughout OmniCRM for:

1. Service Delivery and Installation

- **Field Technicians** - Access Plus Code to navigate to exact site location
- **Installation Scheduling** - Assign techs based on geographic proximity
- **Equipment Deployment** - Ensure correct equipment delivered to correct site

2. Outage Notifications

- **Geofenced Alerts** - If network outage in specific area, query sites by lat/long radius
- **Targeted Communications** - Send outage notifications only to affected customers via `Mailjet <integrations_mailjet>`
- **Status Pages** - Display outage map with affected sites

Example:

> Query: SELECT * FROM Customer_Site
> WHERE distance(latitude, longitude, 51.5074, -0.1278) < 5
>
> Result: 47 affected sites Action: Send outage notification to 47 customers

3. Reporting and Analytics

- **Geographic Revenue** - Revenue by city, state, region
- **Service Density Maps** - Heatmap of service locations
- **Expansion Planning** - Identify underserved areas

4. Multi-Site Business Customers

- **Site Management** - Track which services at which locations
- **Separate Billing** - Invoice by site if required
- **Service Assignment** - Link services to specific sites during provisioning

Rural and Remote Sites

For customers in rural areas where street addresses may not exist or be inaccurate:

1. **Use Map Drag**
   - Zoom into the approximate area
   - Drag the pin to the exact property/building
   - System generates Plus Code for that precise location
2. **Plus Code Sharing**
   - Share Plus Code with customer (e.g., `8C3MFJV8+2F`)
   - Customer can enter this in Google Maps to see exact location
   - Field techs use Plus Code for navigation
3. **Address Notes**
   - Use "Address Note" field for additional directions
   - Example: "Turn left at red barn, 500m past cattle grid"
   - Notes visible to installation teams

Tip

You can drag the pin on the map to the correct location if the address is not accurate. The system will reverse-geocode the location and populate all address fields automatically.

Contact - Detail

The Contacts are people associated with the customer. They can be billing contacts, technical contacts, or other types, and each contact has a type that influences how we handle the contact.

We can have multiple contacts for a single customer, for example, a customer with multiple billing contacts, or a customer with multiple technical contacts.

A good example would be a company with a managed service provider, who handles the technical side of things, and a separate billing contact who handles the financial side of things, or a family where each member has their own contact but not all are authorized to make changes.

Likewise we may only want to send outage notifications to the technical contact, or only send invoices to the billing contact, and the contact type allows us to control this.

The exact logic of how contact types are used is up to your business, but the basic idea is that each contact has a type that influences how we handle them, and that each person who is associated with the customer is a contact.

Contacts are synced with the `Mailjet <integrations_mailjet>` integration, allowing us to send targeted email campaigns based on the contact type, location, monthly spend, or purchased services, and to manage all email templates used for transactional communications.

Navigation

OmniCRM is designed from the ground up to be responsive and intuitive.

This guide will help you navigate the system and find the information you need.

Once logged in, the navbar on the left side of the screen will show you the main sections of the system, and the sub-sections within each.

In the top right of the screen, you will see the user menu, which allows you to log out, change your password, or access your user settings.

You've got links to all of your organization's most commonly used webapps in the WebApp bar (this can be tailored to your organization's needs).

Any alerts you have outstanding are visible in the top right of the screen, and you can click on the alert to view more information.

We can change the language of the system by clicking on the language dropdown in the top right of the screen.

If you're a prince of darkness, you can switch to dark mode by clicking on the moon icon in the top right of the screen.

Payments, Invoices and Transactions

Customer Transactions

Anything that costs money in the system is recorded as a transaction under the customer.

Every transaction has a monetary amount for wholesale cost and retail cost, and a description of what the transaction is for.

Transactions can be automatically generated by the system, for example, when a service is provisioned, a transaction is created for the setup cost, and when a service is billed, a transaction is created for the retail cost.

Transactions can also be manually created, for example, if a customer is given a credit, a transaction is created for the credit amount, or an installation fee is charged, a transaction is created for the installation fee.

Transactions are grouped together to form `Invoices <payments_invoices>`, which is sent to the customer for payment.

Accessing Transactions

Transactions can be viewed at the system level or per-customer:

Per-Customer View:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. View transactions list in the first card

System-Wide View:

1. Navigate to **Billing → Transactions** (from main menu)
2. View all transactions across all customers

Transaction Statistics Widgets

At the top of the transactions page, four statistics cards display financial summaries:

Widget Descriptions:

- **Total Transactions** - Sum of all transaction retail costs (all time)

- **Total Uninvoiced Transactions** - Sum of transactions not yet included in an invoice
- **Total Transactions This Month** - Sum of transactions created this calendar month
- **Total Transactions Last Month** - Sum of transactions created last calendar month

Value Formatting:

- Values over 1,000: Display as "k" suffix (e.g., $1.5k)
- Values over 1,000,000: Display as "M" suffix (e.g., $2.3M)
- Values over 1,000,000,000: Display as "B" suffix (e.g., $1.1B)

Transactions List

The transactions table displays all transactions with the following columns:

Column Descriptions:

- **ID** - Unique transaction ID
- **Date** - Transaction creation date
- **Title** - Short transaction name
- **Description** - Detailed description of what the transaction is for
- **Amount** - Retail cost (positive for charges, negative for credits)
- **Invoice** - Invoice ID if transaction has been invoiced (clickable link)
- **Status** - Checkmark if invoiced, dash if not yet invoiced

Actions Per Row:

Each row has an actions menu (⋮) with options:

- **View Details** - Opens transaction detail modal
- **Download Invoice PDF** - Download PDF (only if invoiced)
- **Void Transaction** - Mark transaction as void (only if not invoiced)

Transaction Types

Transactions fall into two main categories:

Debit Transactions (Charges)

Positive amounts that increase customer balance owed:

- **Service Setup Fees** - One-time charges when service provisioned
- **Monthly Service Fees** - Recurring charges for services
- **Installation Fees** - Charges for field technician visits
- **Equipment Charges** - Charges for modems, routers, SIM cards
- **Late Payment Fees** - Penalties for overdue invoices
- **Manual Charges** - Custom charges added by staff

Credit Transactions (Payments/Refunds)

Negative amounts that decrease customer balance owed:

- **Cash Payments** - Customer paid by cash
- **Card Payments** - Customer paid by credit/debit card
- **Bank Transfer Payments** - Customer paid via bank transfer
- **Account Credits** - Goodwill credits, compensation
- **Refunds** - Money returned to customer
- **Discounts** - Promotional or loyalty discounts

Adding a Transaction Manually

Click **"+ Add Transaction"** to open the add transaction modal.

Debit Transaction (Charge):

Credit Transaction (Payment/Refund):

Field Descriptions:

- **Transaction Type** - Select Debit (charge) or Credit (payment/refund)
- **Credit Type** - If Credit selected, choose payment method (Cash, Card, Bank Transfer)
- **Title** - Short name for transaction (required)
- **Description** - Detailed explanation (optional)
- **Retail Cost** - Amount customer pays (required, positive number)
- **Wholesale Cost** - Your cost (optional, for margin tracking)

- **Tax Percentage** - Tax rate applied to this transaction (optional, defaults to product tax or 0%)
- **Service** - Link transaction to specific service (optional)
- **Site** - Link transaction to specific site (optional)
- **Transaction Date** - Date of transaction (defaults to today)

Validation:

- Title and retail cost are required
- Retail cost must be a positive number
- If Credit type selected, a credit type must be chosen

What Happens:

1. Transaction created in database
2. Appears in customer's transactions list
3. Included in "Uninvoiced Transactions" count
4. Available for inclusion in next invoice generation
5. Activity log entry created

Searching and Filtering Transactions

Search

Use the search bar to find transactions. Searches across:

- Transaction ID
- Title
- Description
- Invoice ID

Filters

Apply filters to narrow transaction list:

Available Filters:

- **Void Status** - All, Void, Not Void
- **Invoice Status** - All, Invoiced, Not Invoiced

Filter Actions:

- **Apply Filters** - Apply selected filters to list
- **Reset Filters** - Clear all filters and show all transactions

Sorting

Click any column header to sort:

- **ID** - Sort by transaction ID (newest/oldest)
- **Date** - Sort by transaction date
- **Title** - Sort alphabetically
- **Amount** - Sort by retail cost (highest/lowest)
- **Invoice** - Sort by invoice ID

Click again to reverse sort direction (ascending ↔ descending).

Voiding Transactions

Transactions added in error can be **voided** (marked as deleted).

Requirements:

- Transaction must NOT be invoiced
- Once invoiced, transactions cannot be voided (must be refunded instead)

How to Void:

1. Locate transaction in list
2. Click actions menu (⋮)
3. Select "**Void Transaction**"
4. Confirm in modal

What Happens:

- Transaction marked as `void = true`
- No longer appears in default transaction list
- Excluded from invoice generation
- Can be viewed by filtering for "Void" transactions
- Deducted from "Uninvoiced Transactions" total

Wallet-linked transactions (`wallet_ledger_id` set):

- Wallet balance is reversed before void (debit to undo a credit, credit to undo a debit)
- **Add Funds card top-up** (`payment_type=wallet_topup_card`): wallet debited and card refunded
- **Cash top-up / wallet invoice payment / other wallet lines:** wallet adjusted only; **no card refund**
- **Insufficient wallet:** void fails if topped-up funds were already spent (transaction stays active)

Service / provisioning charges from hybrid capture usually have **no** `wallet_ledger_id` on the billing line. Voiding those lines only sets `void=true` today; full wallet credit for service voids is planned on the financial-documents branch.

API: `DELETE /crm/transaction/transaction_id/{transaction_id}` — see payment_system_guide.md — Void Transaction.

Note: Voiding is NOT the same as refunding. Void means "this transaction should never have existed." Refund means "reverse a valid transaction."

Tax on Transactions

Transactions can include tax, which is automatically calculated based on the product's tax configuration or manually specified per transaction.

Tax Behavior:

- **Debit Transactions (Charges)** - Tax is applied to charges based on:
  - **Product Tax Percentage** - If the transaction is linked to a product, the product's tax percentage is automatically applied
  - **Manual Override** - Staff can override the tax percentage when creating a transaction
  - **Tax Amount** - Calculated as: `retail_cost × (tax_percentage / 100)`
  - **Display Format** - Shown as: `$10.00 (10%)` in transaction lists
- **Credit Transactions (Payments/Refunds)** - No tax is applied to credits
  - Tax percentage field is hidden for credit transactions
  - Tax is automatically set to 0% for all payments and refunds

    - Credits reduce the customer's outstanding balance without tax implications

Tax Calculation Example:

- Product: Mobile Plan with 10% tax, $50.00 retail cost
- Automatic Tax Calculation: $50.00 × 0.10 = $5.00
- Display: $5.00 (10%)

Zero Tax (NIL/Exempt):

- Products can be tax-exempt by setting tax percentage to 0
- Tax defaults to 0% if not specified
- Tax-exempt transactions show "-" in the Tax column

Transaction Details View

Click a transaction to view full details:

Invoiced vs Uninvoiced Transactions

Uninvoiced Transactions:

- Not yet included in any invoice
- Available for next invoice generation
- Can be voided
- Count toward "Uninvoiced Transactions" total
- Status shows dash (-)

Invoiced Transactions:

- Included in an invoice
- Cannot be voided (must refund if needed)
- Invoice ID clickable (links to invoice details)
- Status shows checkmark (✓)
- Cannot be modified

Invoice Generation:

When you generate an invoice for a customer:

1. System finds all uninvoiced transactions for that customer
2. Optionally filter by date range
3. Transactions included in new invoice
4. Transaction `invoice_id` field populated
5. Transaction now marked as "invoiced"

See `payments_invoices` for invoice generation details.

Common Workflows

Workflow 1: Manual Credit for Service Outage

1. Customer calls: "Service was down for 2 days"
2. Staff decides to credit £10
3. Navigate to customer **Billing** tab
4. Click **"+ Add Transaction"**
5. Select **Credit** transaction type

6. Select **Cash Payment** credit type
7. Enter title: "Service Outage Credit"
8. Enter description: "Compensation for 2-day outage 8-9 Jan"
9. Enter retail cost: 10.00
10. Select affected service from dropdown
11. Click **"Add Transaction"**
12. Transaction appears with -£10.00 amount
13. Will be included in next invoice as credit

Workflow 2: Manual Installation Fee

1. Field tech installs service
2. Staff needs to charge £75 installation fee
3. Navigate to customer **Billing** tab
4. Click **"+ Add Transaction"**
5. Select **Debit** transaction type
6. Enter title: "Installation Fee"
7. Enter description: "Field technician visit for fiber installation"
8. Enter retail cost: 75.00
9. Enter wholesale cost: 45.00 (optional, for margin tracking)
10. Select service installed
11. Select site where installed
12. Click **"Add Transaction"**
13. Transaction appears in uninvoiced list
14. Will be included in next invoice

Workflow 3: Voiding Duplicate Transaction

1. Staff notices duplicate transaction
2. Verify transaction NOT yet invoiced
3. Click actions menu (⋮) on duplicate transaction
4. Select **"Void Transaction"**
5. Confirm in modal

6. Transaction removed from list
7. Uninvoiced total decreases accordingly

Workflow 4: Finding Transactions for Invoice

1. Need to generate monthly invoice
2. Click **Invoice filter: "Not Invoiced"**
3. Click **Apply Filters**
4. View all uninvoiced transactions
5. Note total amount from widgets
6. Navigate to generate invoice
7. Select date range (e.g., 1-31 Jan)
8. Transactions in range included in invoice

Troubleshooting

Cannot void transaction

- **Cause:** Transaction already invoiced
- **Fix:** Transaction is part of invoice history. If refund needed, create a Credit transaction instead.
- **Cause:** Wallet top-up reversal failed (insufficient wallet balance)
- **Fix:** Customer already spent the topped-up funds. Use a manual wallet debit/adjustment or financial-docs reversal flows; cannot void the top-up line until the wallet covers the amount.
- **Cause:** Card refund failed (Add Funds top-up only)
- **Fix:** Wallet reversal is rolled back automatically. Resolve the payment vendor issue and retry void.

Duplicate transactions appearing

- **Cause:** Service charged multiple times or provisioning error

- **Fix:** Void the duplicate transaction(s) if not invoiced. If invoiced, issue credit.

Transaction not appearing in list

- **Cause:** Filters applied or transaction voided
- **Fix:** Click "Reset Filters" to show all transactions. To see voided transactions, filter by "Void: Void".

Uninvoiced total doesn't match expected

- **Cause:** Some transactions already invoiced, or voided transactions excluded
- **Fix:** Apply filter "Invoice: Not Invoiced" to see only uninvoiced. Check voided transactions separately.

Cannot add transaction (customer field disabled)

- **Cause:** Viewing customer-specific transactions page
- **Fix:** Customer is pre-selected. If you need to add transaction for different customer, go to system-wide Transactions page.

Related Documentation

- `payments_invoices` - Invoice generation and management
- `payments_process` - Processing payments against invoices
- `basics_payment` - Payment methods overview
- `csa_activity_log` - Viewing transaction history in activity log

Customer Invoices

`Transactions </payments_transaction>` are grouped together to form an invoice, which is sent to the customer for payment.

Invoices have a start and end date, which is the period the invoice covers, and a due date, which is the date the invoice is due for payment.

Invoices can be automatically generated by the system, for example, when a service is billed, an invoice is created for the retail cost, or they can be manually created, for example, if a customer requests a copy of an invoice, or if a customer is billed for a one-time charge.

Customer invoices are fully templated with `Mailjet <integrations_mailjet>` and can be customized to include the company logo, address, and payment details, and can be sent to the customer via email, or downloaded as a PDF.

Customizing Invoice Templates

OmniCRM uses HTML templates with Jinja2 templating to generate invoices. You can fully customize the invoice design, branding, colors, and layout.

Invoice Template Location

Invoice templates are stored in `OmniCRM-API/invoice_templates/`

Default Templates:

- `norfone_invoice_template.html` - Sample invoice template
- `cifi_invoice_template.html` - Alternative template example

Configuration:

The active invoice template is specified in `OmniCRM-API/crm_config.yaml`:

```
invoice:
  template_filename: 'norfone_invoice_template.html'
```

Available Template Variables

Invoice templates have access to the following Jinja2 variables:

Invoice Information:

- `{{ invoice_number }}` - Unique invoice ID (e.g., `INV-2025-001234`)
- `{{ date }}` - Invoice issue date (ISO format: `2025-01-10T12:00:00`)
- `{{ due_date }}` - Payment due date (e.g., `2025-02-10`)
- `{{ start_date }}` - Billing period start date
- `{{ end_date }}` - Billing period end date
- `{{ total_amount }}` - Total invoice amount before tax (numeric)
- `{{ total_tax }}` - Total tax amount calculated from all transactions (numeric)

Customer Information:

- `{{ client.name }}` - Customer's full name or company name
- `{{ client.address.address_line_1 }}` - Address line 1
- `{{ client.address.address_line_2 }}` - Address line 2
- `{{ client.address.city }}` - City
- `{{ client.address.state }}` - State/province
- `{{ client.address.zip_code }}` - Postal/ZIP code
- `{{ client.address.country }}` - Country

Transaction Line Items:

Loop through transactions using:

```
{% for sub_transaction in transactions %}
    <tr>
        <td>{{ sub_transaction.transaction_id }}</td>
        <td>{{ sub_transaction.created.split("T")[0] }}</td>
        <td>{{ sub_transaction.title }}</td>
        <td>{{ sub_transaction.description }}</td>
        <td>${{ "%.2f"|format(sub_transaction.retail_cost) }}</td>
    </tr>
{% endfor %}
```

Transaction Fields:

- `sub_transaction.transaction_id` - Transaction ID
- `sub_transaction.created` - Transaction date/time
- `sub_transaction.title` - Transaction title
- `sub_transaction.description` - Detailed description
- `sub_transaction.retail_cost` - Line item amount
- `sub_transaction.tax_percentage` - Tax percentage applied (e.g., 10 for 10%)
- `sub_transaction.tax_amount` - Calculated tax amount in dollars

Displaying Tax in Templates:

```
<td>
    {% if sub_transaction.tax_amount and
sub_transaction.tax_amount > 0 %}
        ${{ "%.2f"|format(sub_transaction.tax_amount) }} ({{
sub_transaction.tax_percentage }}%)
    {% else %}
        -
    {% endif %}
</td>
```

Creating a Custom Invoice Template

Step 1: Copy Existing Template

```
cd OmniCRM-API/invoice_templates/
cp norfone_invoice_template.html
your_company_invoice_template.html
```

Step 2: Customize HTML/CSS

Edit `your_company_invoice_template.html` to match your branding:

Key Customization Areas:

1. **Company Logo and Branding**

```
<!-- Replace with your logo URL -->
![Your Company](https://yourcompany.com/logo.png)

<!-- Update company name -->
<h1>Your Company Name</h1>
```

2. **Color Scheme**

```
<style>
    /* Primary brand color */
    .navbar {
        background: linear-gradient(to bottom right, #your-
color-1, #your-color-2);
    }

    /* Table headers */
    .table thead th {
        background-color: #your-brand-color !important;
        color: white !important;
    }

    /* Buttons and links */
    .btn-primary {
        background-color: #your-brand-color;
    }
</style>
```

3. **Company Information Footer**

```
<footer>
    <p>Your Company Name</p>
    <p>123 Business Street, City, Country</p>
    <p>Phone: +1-555-123-4567 | Email:
billing@yourcompany.com</p>
    <p>ABN/Tax ID: 12345678900</p>
</footer>
```

4. **Payment Instructions**

```
<div class="payment-info">
    <h3>Payment Methods</h3>
    <p><strong>Online:</strong> Pay at
https://yourcompany.com/pay</p>
    <p><strong>Bank Transfer:</strong></p>
    <ul>
        <li>Account Name: Your Company Ltd</li>
        <li>BSB: 123-456</li>
        <li>Account Number: 987654321</li>
        <li>Reference: {{ invoice_number }}</li>
    </ul>
</div>
```

5. **Terms and Conditions**

```
<div class="terms">
    <h4>Payment Terms</h4>
    <p>Payment due within 30 days of invoice date.</p>
    <p>Late payment fees: 2% per month on overdue balances.</p>
    <p>For billing inquiries: billing@yourcompany.com</p>
</div>
```

Step 3: Update Configuration

Edit `OmniCRM-API/crm_config.yaml`:

```
invoice:
  template_filename: 'your_company_invoice_template.html'
```

Step 4: Restart API

```
cd OmniCRM-API
sudo systemctl restart omnicrm-api
```

Step 5: Test Invoice Generation

1. Navigate to a customer with transactions
2. Generate a test invoice
3. Download PDF to verify formatting
4. Email invoice to yourself to test email delivery

Advanced Customization

Conditional Content:

Use Jinja2 conditionals to show/hide content:

```
{% if total_amount > 1000 %}
    <div class="high-value-notice">
        <p><strong>Note:</strong> Large balance - Payment plan
available upon request.</p>
    </div>
{% endif %}

{% if client.address.country == "Australia" %}
    <p>GST Included: ${{ "%.2f"|format(total_amount * 0.10) }}</p>
{% endif %}
```

Multi-Language Support:

Create language-specific templates:

```
invoice_template_en.html
invoice_template_es.html
invoice_template_fr.html
```

Configure based on customer's language preference.

Custom Calculations:

```
<!-- Display subtotal and tax breakdown -->
<tr>
    <td colspan="4" class="text-right"><strong>Subtotal:</strong>
</td>
    <td>${{ "%.2f"|format(total_amount) }}</td>
</tr>
<tr>
    <td colspan="4" class="text-right"><strong>Tax:</strong></td>
    <td>${{ "%.2f"|format(total_tax) }}</td>
</tr>
<tr>
    <td colspan="4" class="text-right"><strong>Total:</strong>
</td>
    <td>${{ "%.2f"|format(total_amount + total_tax) }}</td>
</tr>
```

Note: The `total_tax` variable is automatically calculated by summing the `tax_amount` from all transactions in the invoice. Each transaction's tax is calculated based on its `tax_percentage` field, which defaults to the product's `tax_percentage` or 0% if not specified.

QR Code for Payment:

Generate QR code for mobile payment:

```
<div class="qr-payment">
    ![Scan to Pay](https://api.qrserver.com/v1/create-qr-code/?
size=150x150&data={{ payment_url }})
    <p>Scan with your phone to pay instantly</p>
</div>
```

PDF Styling Best Practices

OmniCRM uses **WeasyPrint** to convert HTML to PDF. Follow these guidelines:

Supported CSS:

- Most CSS 2.1 properties
- Limited CSS3 (flexbox, some transforms)
- Web fonts via `@font-face`

Not Supported:

- JavaScript
- CSS Grid (use tables instead)
- Complex animations
- Some modern CSS properties

Page Size and Margins:

```
@page {
    size: A4;
    margin: 1cm;
}

body {
    font-family: Arial, sans-serif;
    font-size: 10pt;
}
```

Print-Specific Styling:

```
@media print {
    .no-print {
        display: none;
    }

    .page-break {
        page-break-after: always;
    }
}
```

Table Layout:

```
.table {
    table-layout: fixed;
    width: 100%;
}

.table th, .table td {
    word-wrap: break-word;
    padding: 4px;
}
```

Font Embedding:

For custom fonts, use web-safe fonts or embed:

```
@font-face {
    font-family: 'YourFont';
    src: url('https://yourcompany.com/fonts/yourfont.woff2')
format('woff2');
}

body {
    font-family: 'YourFont', Arial, sans-serif;
}
```

Testing Invoice Templates

Test Checklist:

1. **Visual Inspection:**
   - Logo displays correctly
   - Colors match brand guidelines
   - Text is readable (not too small)
   - Tables align properly
   - All sections present
2. **Data Accuracy:**
   - Customer details correct
   - Transaction amounts sum correctly
   - Dates formatted properly
   - All variables substituting correctly
3. **PDF Quality:**
   - File size reasonable (<5MB)
   - Images sharp and clear
   - No text cutoff or overflow
   - Page breaks in appropriate places
4. **Multi-Page Invoices:**
   - Headers repeat on each page
   - Page numbers display
   - Long transaction lists paginate correctly
5. **Email Delivery:**
   - PDF attaches to email
   - File size under Mailjet limit (15MB)
   - Renders in Gmail, Outlook, Apple Mail

Test Command (Manual Generation):

You can test invoice generation via API:

```
curl -X GET "http://localhost:5000/crm/invoice/{invoice_id}/pdf" \
     -H "Authorization: Bearer YOUR_TOKEN" \
     --output test_invoice.pdf
```

Common Template Issues

Variables not substituting:

- **Cause:** Typo in variable name or missing data
- **Fix:** Check spelling exactly (case-sensitive), verify data exists in database

PDF styling broken:

- **Cause:** Unsupported CSS property
- **Fix:** Use CSS 2.1 properties, test with WeasyPrint-compatible CSS

Images not showing:

- **Cause:** Relative URLs or blocked external resources
- **Fix:** Use absolute HTTPS URLs, ensure images publicly accessible

Tables overflowing page:

- **Cause:** Fixed column widths too wide
- **Fix:** Use percentage widths, `table-layout: fixed`

Fonts not rendering:

- **Cause:** Font not embedded or unavailable
- **Fix:** Use web-safe fonts (Arial, Times New Roman, etc.) or properly embed custom fonts

PDF generation fails:

- **Cause:** HTML syntax errors or WeasyPrint crash
- **Fix:** Validate HTML, check WeasyPrint logs, simplify complex layouts

Invoice PDF Caching

To improve performance and reduce redundant PDF generation, OmniCRM includes an Invoice PDF caching system. When an invoice PDF is first generated, it is cached in the database for subsequent requests.

How PDF Caching Works:

1. **First Request** - When an invoice PDF is requested (download or email), the system:
   - Generates the PDF from the invoice template
   - Encodes the PDF as Base64
   - Calculates a SHA256 hash of the PDF content
   - Stores in `Invoice_PDF_Cache` table with:
     - Invoice ID reference
     - PDF data (Base64-encoded)
     - Filename
     - Content hash (for integrity verification)
     - Creation timestamp
2. **Subsequent Requests** - When the same invoice is requested again:
   - System checks for cached PDF by invoice_id
   - If cache exists and is valid, returns cached PDF immediately
   - Updates `last_accessed` timestamp to track cache usage
3. **Cache Invalidation** - Cached PDFs are invalidated when:
   - Invoice is modified (transactions added/removed, details changed)
   - Invoice template is updated
   - Manual cache clearing is triggered

Benefits:

- **Performance** - Instant PDF delivery for repeat requests (no regeneration delay)
- **Consistency** - Same PDF for all downloads of an invoice (unless invoice is modified)
- **Server Load** - Reduces CPU usage from PDF generation
- **User Experience** - Loading indicator appears during initial generation, subsequent requests are instant

Cache Management:

The Invoice PDF Cache is automatically managed by the system. Old or unused cache entries can be purged periodically based on:

- Age (e.g., remove cache entries older than 90 days)
- Access patterns (remove entries not accessed in 30 days)
- Storage limits (implement cache size limits if needed)

API Behavior:

When downloading an invoice via API or UI:

- First request: Shows loading indicator while PDF generates, then caches
- Subsequent requests: Immediate download from cache
- Cache hit/miss is transparent to the user

Important: When you update your invoice template, clear the cache to ensure new invoices use the updated design:

```
-- Clear all cached invoice PDFs (run in MySQL)
DELETE FROM Invoice_PDF_Cache;
```

Or update `crm_config.yaml` to automatically invalidate cache on template change.

Accessing Invoices

Invoices can be viewed at the system level or per-customer:

Per-Customer View:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. View invoices list in the third card

System-Wide View:

1. Navigate to **Billing → Invoices** (from main menu)
2. View all invoices across all customers

Invoice Statistics Widgets

At the top of the invoices page, four statistics cards display financial summaries.

Widget Descriptions:

- **Total Invoices** - Sum of all invoice retail costs (all time) and count of invoices sent
- **Unpaid Invoices** - Sum of invoices not yet paid and count of unpaid invoices
- **Invoices This Month** - Sum of invoices created this calendar month with count
- **Invoices Last Month** - Sum of invoices created last calendar month with count

Value Formatting:

- Values over 1,000: Display as "k" suffix (e.g., $1.5k)
- Values over 1,000,000: Display as "M" suffix (e.g., $2.3M)
- Values over 1,000,000,000: Display as "B" suffix (e.g., $1.1B)

Trend Indicators:

- Widgets for "This Month" and "Last Month" show percentage change

- Green arrow up: Increase from previous period
- Red arrow down: Decrease from previous period
- Gray arrow right: No change

Invoices List

The invoices table displays all invoices with the following columns:

Column Descriptions:

- **ID** - Unique invoice ID
- **Title** - Invoice title/description
- **Period** - Billing period (start date - end date) or "N/A" for one-time invoices
- **Due Date** - Payment due date
- **Created** - Invoice creation date
- **Amount** - Total invoice amount (retail cost)
- **Status** - Paid, Unpaid, or Refunded
- **Actions** - Available actions (varies by status)

Action Icons:

- ⬇ **(Download)** - Download invoice PDF
- 🗑 **(Delete)** - Void invoice (only if not paid)
- 💳 **(Pay)** - Pay invoice online (only if unpaid)
- ✉ **(Email)** - Send invoice email to customer
- 💸 **(Refund)** - Refund Stripe payment (only for paid Stripe invoices)

Generating an Invoice

Click **"+ Generate Proforma Invoice"** to create a new invoice.

Field Descriptions:

- **Search Customers** - Select customer (only shown in system-wide view, pre-filled in customer view)
- **Title** - Invoice title/name (optional, defaults to "Invoice for [Period]")
- **Start Date** - Beginning of billing period (defaults to 14 days ago)
- **End Date** - End of billing period (defaults to today)
- **Due Date** - Payment deadline (defaults to today)
- **Transaction Preview** - Shows all uninvoiced transactions in date range with ability to include/exclude specific transactions

Transaction Selection:

- ✓ **(Green Plus)** - Click to exclude a transaction from the invoice
- × **(Red X)** - Click to include a previously excluded transaction
- **Select All** - Include all displayed transactions
- **Clear All** - Exclude all transactions
- Excluded transactions appear grayed out with strikethrough text
- Real-time totals update as you select/deselect transactions

What Happens:

1. System finds all uninvoiced transactions for customer within date range
2. Displays transaction preview with ability to include/exclude individual transactions
3. Shows real-time calculation of subtotal, tax, and total based on selected transactions
4. Only selected (included) transactions are added to the invoice
5. Generates invoice PDF and caches it
6. Marks selected transactions as invoiced (`invoice_id` field populated)
7. Excluded transactions remain uninvoiced and available for future invoices
8. Invoice appears in list with "Unpaid" status

Example Use Cases:

Monthly Billing: Set start date to first of month, end date to last day of month, preview shows all uninvoiced transactions from that period. Select all or manually exclude specific ones.

Service-Specific Invoice: Use same date range, then manually exclude unwanted transactions (e.g., exclude non-mobile transactions to create mobile-only invoice).

One-Time Invoice: Set both start and end date to the same day, preview shows only transactions from that date. Exclude any charges not relevant to this specific invoice.

Viewing Invoice Details

Click on any invoice row in the table to view full invoice details including all transactions, totals, and available actions.

Invoice Details Modal:

- **Invoice Information** - Shows invoice ID, title, dates, payment status, and void status
- **Transactions List** - Displays all transactions included in the invoice with:
  - Transaction date
  - Title and description
  - Retail cost
  - Tax amount and percentage (formatted as `$10.00 (10%)`)
  - Tax-exempt transactions show "-" in Tax column
- **Totals Summary** - Real-time calculation showing:
  - Transaction count
  - Subtotal (sum of all retail costs)
  - Tax (sum of all tax amounts)
  - Invoice Total (subtotal + tax)
- **Action Buttons** - Same actions available as in the table:
  - **Download PDF** - Download invoice PDF (always available)
  - **Send Email** - Email invoice to customer (non-voided invoices)

- **Pay Invoice** - Process payment (unpaid, non-voided invoices only)
- **Refund** - Refund Stripe payment (paid Stripe invoices only)
- **Delete** - Void invoice (unpaid, non-voided invoices only)

Downloading Invoice PDFs

Click the **download icon (⬇)** in the table or **"Download PDF"** button in the invoice details modal to download an invoice as PDF.

Download Process:

1. Click download icon next to invoice
2. Loading spinner appears during generation (first time only)
3. Browser prompts to save file: `Invoice_01234.pdf`
4. PDF opens or saves to Downloads folder

PDF Caching Behavior:

- **First Download** - PDF generated from template, cached in database (may take 2-3 seconds)
- **Subsequent Downloads** - Instant download from cache
- **Cache Invalidation** - Cache cleared if invoice modified or template updated

Troubleshooting Download Issues:

- **Spinner never stops** - Check browser console, API may be down
- **PDF blank or corrupted** - Check invoice template for syntax errors
- **Download fails** - Check popup blocker settings, try different browser

Paying Invoices

Click the **pay icon (□)** to pay an invoice online.

Payment Process:

1. Click pay icon on unpaid invoice
2. Payment modal opens showing invoice details
3. Select payment method:
    - **Stripe Transaction** - Charge saved credit card (available to all users)
    - **Cash** - Manual cash payment (staff only)
    - **Refund** - Apply refund as payment (staff only)
    - **POS Transaction** - Point-of-sale terminal (staff only)
    - **Bank Transfer** - Manual bank transfer (staff only)
4. If Stripe selected:
    - Select card from saved payment methods
    - Default card pre-selected
    - Click to select different card
5. If other method selected:
    - Enter reference number (optional)
6. Click **"Pay Invoice"** to process
7. System processes payment:
    - **Stripe** - Charges card via Stripe API
    - **Other methods** - Creates negative transaction for payment amount
8. Invoice status changes to "Paid"
9. Success notification displayed

Self-Care vs Staff Payment:

:doc:`Self-Care Portal <self_care_portal>` (Customers):

- Only Stripe payment available
- Must have saved payment method
- Warning shown if no payment methods exist
- Link to add payment method provided

Staff Portal (Admins):

- All payment methods available
- Can mark invoice paid manually (cash, POS, bank transfer)
- Can enter reference numbers for tracking

Payment Method Warning:

If customer has no saved payment methods, a warning is displayed prompting them to add a payment method before they can pay invoices.

Emailing Invoices

Click the **email icon (✉)** to send invoice to customer.

What Happens:

1. Click email icon next to invoice

2. System retrieves invoice PDF from cache (or generates if not cached)
3. Sends email via `Mailjet <integrations_mailjet>` using `api_crmCommunicationCustomerInvoice` template
4. Email includes:
    - Invoice PDF as attachment
    - Customer name
    - Invoice number and due date
    - Total amount due
    - Link to pay invoice online
    - Link to view/download invoice
5. Success notification: "Invoice email successfully sent"

Email Recipients:

Email sent to all customer contacts with type "billing" or primary contact if no billing contact exists.

Email Template Variables:

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:invoice_number }}` - Invoice ID
- `{{ var:invoice_date }}` - Invoice issue date
- `{{ var:due_date }}` - Payment due date
- `{{ var:total_amount }}` - Total amount due
- `{{ var:invoice_url }}` - Link to view/download PDF
- `{{ var:pay_url }}` - Link to pay invoice online

Troubleshooting Email Issues:

- **Email not sent** - Check Mailjet API credentials in `crm_config.yaml`
- **Customer not receiving** - Verify customer contact email addresses
- **PDF not attaching** - Check PDF generation succeeded (try downloading first)

Voiding Invoices

Click the **delete icon (🗑)** to void an invoice.

Requirements:

- Invoice must be **Unpaid**
- Paid invoices cannot be voided (must be refunded instead)

How to Void:

1. Locate unpaid invoice in list
2. Click delete icon (🗑)
3. Confirm in modal:

What Happens:

- Invoice marked as `void = true`
- All transactions unlinked from invoice (`invoice_id` set to null)
- Transactions become "uninvoiced" again
- Transactions can be included in new invoice
- Invoice appears in list with "Void:" prefix in title
- Invoice actions disabled (no download, pay, or email)
- Can be viewed by filtering for "Void" invoices

Important Notes:

- Voiding is NOT the same as refunding
- **Void** = "This invoice should never have existed" (billing error, duplicate)
- **Refund** = "Reverse a valid paid invoice" (return money to customer)

Refunding Invoices

Click the **refund icon (□)** to refund a paid invoice.

Requirements:

- Invoice must be **Paid**
- Invoice must be paid via **Stripe**
- Invoice must have a valid `payment_reference` (Stripe payment intent ID)
- Only available to staff users (not Self-Care)

How to Refund:

1. Locate paid Stripe invoice
2. Click refund icon (□)
3. Refund confirmation modal opens:

4. Click **"Confirm Refund"**
5. System processes Stripe refund:

    - Calls Stripe API to refund payment
    - Creates refund transaction in Stripe
    - Updates invoice with `refund_reference`
6. Invoice status changes to "Refunded"
7. Success notification displayed

What Happens After Refund:

- Invoice remains in system (not voided)
- Status shows "Refunded"
- Transactions remain linked to invoice
- Customer receives refund to original payment method (3-7 business days)
- Stripe dashboard shows refund transaction

Refund Restrictions:

- Cannot refund invoices paid via cash, POS, or bank transfer (manual reversal required)
- Cannot partial refund (full invoice amount only)
- Cannot refund twice

Searching and Filtering Invoices

Search

Use the search bar to find invoices. Searches across:

- Invoice ID
- Invoice title
- Customer name (system-wide view only)

Filters

Apply filters to narrow invoice list:

Available Filters:

- **Void Status** - All, Void, Not Void
- **Paid Status** - All, Paid, Not yet Paid

Filter Actions:

- **Apply Filters** - Apply selected filters to list
- **Reset Filters** - Clear all filters and show all invoices

Sorting

Click any column header to sort:

- **ID** - Sort by invoice ID (newest/oldest)
- **Title** - Sort alphabetically
- **Due Date** - Sort by due date
- **Created** - Sort by creation date
- **Amount** - Sort by retail cost (highest/lowest)
- **Status** - Sort by paid status (paid first or unpaid first)

Click again to reverse sort direction (ascending ↔ descending).

Pagination

Navigate through large invoice lists with page controls showing current page, total pages, and items per page selector (10, 25, 50, or 100 items).

Common Invoice Workflows

Workflow 1: Monthly Billing with Transaction Preview

1. End of month arrives (e.g., January 31)
2. Navigate to **Billing → Invoices**
3. Click **"+ Generate Proforma Invoice"**
4. Select customer (or do per-customer if billing many customers)

5. Set dates:
    - Start Date: 2025-01-01
    - End Date: 2025-01-31
    - Due Date: 2025-02-15 (15 days from now)
    - Title: "January 2025 Services" (optional)
6. **Transaction Preview** section appears showing all uninvoiced transactions from January
7. Review the preview:
    - All transactions are included by default
    - Check totals: Subtotal, Tax, and Invoice Total
    - Verify all charges are correct
8. Click **"Generate Invoice"** (button shows transaction count, e.g., "Generate Invoice (15)")
9. Invoice created with all selected transactions
10. Click invoice row to view details and verify
11. Click **"Send Email"** button in details modal or email icon in table
12. Customer receives invoice email with PDF and pay link

Workflow 2: Selective Transaction Invoicing

1. Customer has multiple services (Mobile + Internet) and misc charges
2. Wants separate invoices for each service
3. **Generate first invoice (Mobile Services):**
    - Click **"+ Generate Proforma Invoice"**
    - Title: "Mobile Services - January 2025"
    - Start/End: Jan 1-31
    - Due Date: Feb 15
    - In transaction preview, **exclude** all non-mobile transactions:
        - Click **X** button next to Internet transactions
        - Click **X** button next to miscellaneous charges
        - Only Mobile service transactions remain selected
    - Verify totals reflect only mobile services
    - Click **"Generate Invoice"** (shows count of mobile transactions)
4. **Generate second invoice (Internet Services):**

- Click **"+ Generate Proforma Invoice"** again
- Title: "Internet Services - January 2025"
- Start/End: Jan 1-31 (same period)
- In transaction preview:
  - Mobile transactions already invoiced (don't appear)
  - Exclude miscellaneous charges using **X** button
  - Only Internet service transactions remain
- Click **"Generate Invoice"**

5. **Generate third invoice (Additional Charges):**
   - Click **"+ Generate Proforma Invoice"** again
   - Title: "Additional Charges - January 2025"
   - Only uninvoiced misc charges appear in preview
   - Click **"Select All"** to include all
   - Click **"Generate Invoice"**
6. Email all three invoices to customer

Workflow 3: Excluding Disputed or Pending Transactions

1. End of billing period arrives
2. Navigate to customer **Billing** tab
3. Click **"+ Generate Proforma Invoice"**
4. Set billing period dates
5. Transaction preview shows 20 transactions
6. Customer has disputed one charge and another is pending investigation
7. In transaction preview:
   - Locate disputed transaction (e.g., "Data overage charge")
   - Click **X** button to exclude it
   - Locate pending transaction (e.g., "Installation fee")
   - Click **X** button to exclude it
   - Transaction count updates: "18 Transactions selected"
   - Totals recalculate automatically
8. Review updated totals (excludes disputed amounts)

9. Click **"Generate Invoice (18)"**
10. Invoice generated with only approved transactions
11. Disputed/pending transactions remain uninvoiced for next billing cycle

Workflow 4: Quick Invoice Review and Adjustment

1. Staff generates monthly invoice
2. Transaction preview shows unexpected high total
3. Review each transaction in the preview:
    - Notice duplicate charge for same service
    - Click **X** to exclude the duplicate
    - Notice test transaction that shouldn't be billed
    - Click **X** to exclude test transaction
4. Totals update in real-time
5. Verify new total matches expected amount
6. Click **"Generate Invoice"** with corrected transactions
7. Go back and void/delete the excluded transactions if needed
8. Email invoice to customer with confidence

Workflow 5: One-Time Installation Invoice

1. Field tech completes installation
2. Staff adds installation transaction manually
3. Navigate to customer **Billing** tab
4. Click **"+ Generate Proforma Invoice"**
5. Set dates:
    - Start Date: today
    - End Date: today
    - Due Date: today + 7 days
    - Title: "Installation Services"
6. Transaction preview shows only today's transactions
7. Verify installation charge appears
8. Exclude any recurring charges using **X** button (if present)

9. Click **"Generate Invoice"**
10. Email to customer immediately
11. Customer pays online via Stripe

Workflow 6: Reviewing Invoice Before Customer Contact

1. Customer calls with billing question
2. Staff navigates to customer's invoice list
3. **Click on invoice row** to open Invoice Details modal
4. Review invoice information:
    - Invoice ID, dates, status
    - All transactions included with descriptions
    - Tax breakdown per transaction
    - Subtotal, Tax, and Total amounts
5. Answer customer's questions with exact details
6. If customer requests PDF, click **"Download PDF"** button in modal
7. If customer requests email resend, click **"Send Email"** button
8. Close modal when done

Workflow 7: Correcting Billing Error

1. Customer reports incorrect charge
2. Staff clicks on invoice row to view details
3. Reviews transaction list in Invoice Details modal
4. Identifies incorrect transaction
5. Invoice is unpaid, so can be voided
6. Click **"Delete"** button in modal footer
7. Confirm void
8. Transactions become uninvoiced again
9. Staff modifies or removes incorrect transaction from transaction list
10. Generate new invoice with corrected transactions:
    - Use transaction preview to exclude corrected transaction if needed
    - Include only valid charges

11. Email corrected invoice to customer

Workflow 8: Processing Multiple Payments

1. Customer brings cash to pay multiple invoices
2. Navigate to customer **Billing** tab
3. View unpaid invoices
4. Click on first invoice row to view details
5. Verify amount and transactions
6. Click **"Pay Invoice"** button in modal footer
7. Select **"Cash"** payment method
8. Enter reference: "Cash paid 2025-01-15"
9. Click **"Pay Invoice"**
10. Modal closes, invoice marked as "Paid"
11. Repeat for remaining invoices
12. All invoices now marked as "Paid"

Workflow 9: Handling Refund Request

1. Customer requests refund for overpayment
2. Staff verifies invoice was paid via Stripe
3. Navigate to invoice in list
4. Click on invoice row to view details
5. Verify payment information and amount
6. Click **"Refund"** button in modal footer (only appears for Stripe invoices)
7. Confirm refund
8. System processes Stripe refund
9. Invoice status changes to "Refunded"
10. Customer receives refund in 3-7 business days
11. Staff follows up with customer to confirm receipt

Troubleshooting

Cannot generate invoice - No transactions found

- **Cause:** No uninvoiced transactions in specified date range
- **Fix:** Check transaction list, verify transactions exist and are not already invoiced. Adjust date range or remove filter.

Invoice PDF generation fails

- **Cause:** Template syntax error, WeasyPrint crash, or missing customer data
- **Fix:** Check invoice template HTML for errors, verify customer address fields populated, review API logs.

Payment fails with Stripe error

- **Cause:** Card declined, insufficient funds, expired card, or Stripe API issue
- **Fix:** Try different payment method, verify card valid, check Stripe dashboard for decline reason.

Cannot void invoice

- **Cause:** Invoice already paid
- **Fix:** Paid invoices cannot be voided. If refund needed, use refund function for Stripe invoices or create credit transaction manually.

Invoice email not sending

- **Cause:** Mailjet API credentials invalid, customer has no billing contact, or email template missing
- **Fix:** Verify Mailjet configuration in `crm_config.yaml`, check customer contacts, verify invoice email template exists.

Refund button not appearing

- **Cause:** Invoice paid via cash/POS/bank transfer (not Stripe), or invoice not paid
- **Fix:** Refund button only appears for Stripe payments. For other payment methods, create manual credit transaction.

Download PDF shows old template design

- **Cause:** PDF cached before template update
- **Fix:** Clear invoice PDF cache: `DELETE FROM Invoice_PDF_Cache WHERE invoice_id = X;`

Customer cannot pay invoice (no payment methods)

- **Cause:** No saved payment methods in Self-Care portal
- **Fix:** Customer must add credit card at **Payment Methods** page before paying invoices.

Multiple invoices generated for same period

- **Cause:** Staff generated invoice twice, or date ranges overlap
- **Fix:** Void duplicate invoice. Adjust date ranges to prevent overlap. Use transaction preview to ensure unique transaction sets.

Transaction preview shows no transactions

- **Cause:** All transactions in date range are already invoiced or no transactions exist
- **Fix:** Verify date range is correct. Check transaction list to confirm transactions exist. Filter invoices to see which invoice contains the transactions.

Cannot exclude transaction from invoice generation

- **Cause:** Transaction already invoiced or browser issue
- **Fix:** Verify transaction shows in preview with checkmark. Refresh page and try again. Clear browser cache if issue persists.

Invoice total doesn't match expected amount

- **Cause:** Unexpected transactions included, tax not calculated, or excluded transactions still counted
- **Fix:** Review transaction preview carefully. Check each transaction's retail cost and tax. Verify excluded transactions are grayed out. Check transaction count badge on Generate Invoice button.

Generate Invoice button is disabled

- **Cause:** No transactions selected or invalid date range
- **Fix:** Ensure at least one transaction is included (not excluded). Verify Start Date is before End Date. Check that Due Date is set.

Invoice Details modal not opening

- **Cause:** JavaScript error or page not fully loaded
- **Fix:** Refresh page. Check browser console for errors. Try different browser. Verify internet connection.

Transaction tax not displaying in Invoice Details

- **Cause:** Transaction has 0% tax or tax_amount is null
- **Fix:** Verify transaction has tax_percentage set. Check that tax_amount was calculated when transaction was created. Update transaction if needed.

Action buttons missing in Invoice Details modal

- **Cause:** Invoice is voided or user lacks permissions
- **Fix:** Voided invoices only show Download PDF button. Verify invoice status. Check user role and permissions.

Related Documentation

- `integrations_mailjet` - Email invoice delivery and templates
- `administration_configuration` - Invoice template configuration
- `payments_transaction` - Creating transactions that appear on invoices
- `payments_process` - Processing invoice payments
- `payment_system_guide` - Payment API reference and vendor configuration

Payment Methods Management

OmniCRM's Payment Methods system allows customers and staff to securely manage payment cards using **multi-vendor payment processing** (Stripe, PayPal, etc.). Payment methods enable automatic billing for services, one-time payments, and recurring charges without storing sensitive card data in OmniCRM.

See also: `Payment System Guide <payment_system_guide>`, `Billing Overview <billing_overview>`, `Payment Processing <payments_process>`, `Invoices <payments_invoices>`.

Overview

The payment methods system provides:

- **Secure Card Storage** - Cards tokenized by payment vendors (Stripe, PayPal), never stored in OmniCRM
- **Multi-Vendor Support** - Stripe and PayPal payment methods supported
- **Multiple Cards** - Customers can store multiple payment methods
- **Default Selection** - Designate preferred payment method for automatic charges
- **Expiry Tracking** - Monitor and update expiring cards
- **Self-Service** - Customers can manage their own cards via `Self-Care Portal <self_care_portal>`
- **Staff Management** - Support staff can add/remove cards on behalf of customers

Supported Payment Methods:

- Credit Cards (Visa, Mastercard, American Express, Discover)
- Debit Cards
- Prepaid Cards (if supported by card network)

Not Stored in OmniCRM:

Card details are tokenized by payment vendors and stored securely. OmniCRM only stores:

- Payment vendor (stripe, paypal)
- Card brand (Visa, Mastercard, etc.)
- Last 4 digits
- Expiry month/year
- Cardholder name/nickname
- Vendor-specific payment method token

Accessing Payment Methods

From Customer Page:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. Scroll to **Payment Methods** section

Or directly:

From Expiring Cards Dashboard:

View all customers with expiring cards:

This shows a system-wide list of cards expiring within the next 60 days.

Payment Methods List

The payment methods table displays all stored cards for a customer:

Column Descriptions:

- **Nickname** - Friendly name for the card (e.g., "Personal Card", "Work Visa")
- **Issuer** - Card brand and last 4 digits
- **Expiry** - Expiration month/year (MM/YYYY format)
- **Added** - Date card was added to account
- **Default** - Checkmark indicates default payment method for automatic charges

Actions Per Card:

Each row has an actions menu (⋮) with options:

- **Set as Default** - Make this the default payment method
- **Delete** - Remove card from account

Adding a Payment Method

Click **"Add Payment Method"** to open the secure payment modal.

Step 1: Enter Card Details

The secure payment form appears (powered by Stripe Elements or PayPal SDK):

Required Fields:

- **Card Information** - Card number, expiry, CVC (validated by Stripe)
- **Cardholder Name** - Name on the card
- **Country/Region** - Billing country

Optional Fields:

- **Card Nickname** - Friendly label to distinguish between cards

Security:

- Card details entered directly into vendor-hosted secure iframe (Stripe Elements / PayPal SDK)
- OmniCRM never sees or stores full card numbers
- PCI DSS compliance handled by payment vendor
- Real-time validation prevents invalid card numbers

Step 2: Submit and Tokenize

When you click **"Add Payment Method"**:

1. **Client-Side Validation:**
    - Payment vendor validates card number format
    - Checks expiry date is in the future

    - Verifies CVC format
2. **Tokenization:**
    - Card details sent directly to payment vendor (not OmniCRM)
    - Vendor creates a secure token (e.g., `pm_1A2B3C4D` for Stripe)
    - Token returned to OmniCRM
3. **Server Processing:**
    - OmniCRM saves token to customer record with vendor identifier
    - Stores last 4 digits, brand, expiry, and vendor name for display
    - No full card number ever touches OmniCRM servers

Step 3: Confirmation

Success message appears:

> Your Visa ending in 1234 has been added to your account.

The new card appears in the payment methods table.

Automatic Default Selection:

- If this is the customer's first card, it's automatically set as default
- If customer already has cards, new card is added as non-default
- Customer can change default after adding

Setting Default Payment Method

The default payment method is used for:

- Automatic recurring service charges
- Invoice payments
- Top-ups and recharges
- One-time transactions (unless specified otherwise)

To Change Default:

1. Locate the card you want to set as default in the payment methods table

2. Click the **actions menu (⋮)** next to the card
3. Select **"Set as Default"**
4. Confirmation appears

   Visa ending in 5678 is now your default payment method.

The checkmark moves to the newly selected card.

Visual Indicator:

Default cards show:

in the Default column, typically with a green checkmark badge.

Deleting a Payment Method

Remove cards that are expired, lost, or no longer needed.

Step 1: Initiate Deletion

1. Find the card to delete in the payment methods table
2. Click the **actions menu (⋮)**
3. Select **"Delete"**

Step 2: Confirm Deletion

A confirmation modal appears:

> Are you sure you want to delete this payment method?
>
> Card: Visa ending in 1234 Expiry: 12/2026
>
> ⚠ Warning: If this is your only payment method, you will need to add a new one to continue using services that require automatic billing.
>
> [Cancel] [Delete Payment Method]

Click **"Delete Payment Method"** to confirm.

Step 3: Deletion Complete

Success message:

The card is removed from the table and deleted from Stripe.

Important Restrictions:

- **Cannot delete default if other cards exist** - Set a different card as default first
- **Warning if deleting last card** - Services requiring payment may be suspended
- **No undo** - Deletion is permanent; customer must re-add card if needed

Managing Expiring Cards

OmniCRM tracks card expiry dates and provides tools to proactively update expiring cards.

Expiring Cards Dashboard

Navigate to **Billing → Expiring Cards** to see a system-wide list:

> Customer Card Expiry Days Until Action John Smith Visa **1234 02/2025 12 days Update Acme Corp MC5678 03/2025 45 days Update Jane Doe Amex**9012 01/2025 EXPIRED Update

Filters:

- **Expiry Range** - Next 30/60/90 days or already expired
- **Customer Type** - Individual vs Business
- **Service Type** - Filter by service requiring payment method

Actions:

- **Update** - Opens customer's payment methods page to add new card
- **Notify** - Send email reminder to customer (if Mailjet configured)

Expiry Notifications

If Mailjet is configured, automatic emails are sent:

- **60 days before expiry** - First reminder
- **30 days before expiry** - Second reminder
- **7 days before expiry** - Final warning
- **At expiry** - Card has expired notice

Customers can click a link in the email to update their payment method via the Self-Care portal.

Email Template Variables:

Mailjet templates receive:

- Customer name
- Card brand and last 4 digits
- Expiry date
- Link to Self-Care payment methods page

See `integrations_mailjet` for email template configuration.

Updating an Expiring Card

Recommended Workflow:

1. Customer receives expiry notification email
2. Customer logs into Self-Care portal
3. Navigates to **Billing → Payment Methods**
4. Clicks **"Add Payment Method"**
5. Enters new card details (same card with updated expiry, or replacement card)
6. Sets new card as default
7. Deletes old/expired card

Staff Workflow:

If customer calls support:

1. Staff opens customer account
2. Navigates to **Billing → Payment Methods**
3. Adds new card on customer's behalf (customer provides details over phone)
4. Sets new card as default
5. Deletes expired card
6. Confirms with customer

Warning

Never ask customers to email or text card details. Always use:

- Secure Self-Care portal for self-service
- Phone with staff entering details directly into system
- In-person at retail location

What Happens When Cards Expire

When a payment card reaches its expiry date and is not updated:

Immediate Effects:

1. **Automatic Payments Fail**
   - Payment vendor rejects transactions with expired cards
   - Monthly service renewals fail to process
   - Auto-top-ups fail
   - Invoice auto-payments fail
2. **Customer Notifications**
   - System attempts to charge card
   - Payment failure notification sent
   - "Update Payment Method" email sent with link to Self-Care portal
3. **Service Status Changes**
   - **Postpaid Services** - May continue temporarily with outstanding balance
   - **Prepaid Services** - Service suspension when balance depletes
   - **Auto-Renew Services** - Renewal fails, service may expire

Subsequent Actions:

Day 1-3 (Grace Period):

- Service continues normally
- Customer receives first payment failure notice
- System attempts retry (depending on configuration)

Day 4-7:

- Second payment attempt (if configured)
- Warning email sent
- Customer service may contact customer

Day 8-14:

- Service may be suspended for non-payment
- Suspended status prevents usage but preserves account
- Customer can restore by updating payment method and paying outstanding balance

Day 15+:

- Service may be terminated for non-payment
- Inventory (SIM cards, equipment) marked for return
- Final notice sent
- Account referred to collections (if applicable)

Preventing Service Interruption:

To avoid service disruption:

- Update cards **30 days before expiry**
- Add multiple payment methods for redundancy
- Enable payment failure alerts
- Monitor Expiring Cards dashboard weekly

Restoring Service After Expiry:

If service suspended due to expired card:

1. Add new valid payment method
2. Set as default
3. Pay outstanding balance (if any)
4. Contact support to reactivate service
5. Service restored within minutes to hours

Payment Method Security

Tokenization

OmniCRM uses vendor tokenization to ensure security:

1. **Customer enters card** → Sent directly to payment vendor servers
2. **Vendor validates and tokenizes** → Creates unique token
3. **Token stored in OmniCRM** → Full card number never stored
4. **Payment processing** → Token sent to vendor, vendor charges card

What OmniCRM Stores:

```
{
  "vendor": "stripe",
  "vendor_payment_method_id": "pm_1A2B3C4D5E6F",
  "payment_type": "card",
  "brand": "visa",
  "last4": "1234",
  "exp_month": 12,
  "exp_year": 2026,
  "name": "John Smith",
  "nickname": "Personal Card",
  "is_default": true
}
```

What OmniCRM Does NOT Store:

- Full card number
- CVV/CVC code
- Magnetic stripe data
- PIN numbers

PCI Compliance

By using vendor-hosted payment forms:

- **Reduced PCI scope** - Card data never touches OmniCRM servers

- **Vendor-hosted fields** - Card entry happens in vendor's secure iframe
- **No card storage** - Tokens used instead of raw card data
- **Secure transmission** - All communication over HTTPS/TLS

See `Payment System Guide <payment_system_guide>` for payment vendor security details.

Common Workflows

Workflow 1: Customer Adds First Payment Method

Scenario: New customer signing up for service

1. Customer creates account
2. Selects service plan
3. Prompted to add payment method during checkout
4. Enters card details in Stripe modal
5. Card tokenized and saved
6. Automatically set as default
7. Service provisioned
8. First charge processed

Workflow 2: Customer Updates Expiring Card

Scenario: Credit card about to expire

1. Customer receives email notification (60 days before expiry)
2. Logs into Self-Care portal
3. Navigates to **Billing → Payment Methods**
4. Reviews current card expiring 12/2025
5. Clicks **"Add Payment Method"**
6. Enters replacement card with expiry 12/2028
7. Sets new card as default

8. Deletes old card
9. Confirmation email sent

Workflow 3: Staff Helps Customer Over Phone

Scenario: Customer calls: "My card was declined"

1. Customer calls support
2. Staff verifies identity (security questions)
3. Staff checks payment methods: Card expired 01/2025
4. Staff: "Your card has expired. Do you have a new card?"
5. Customer provides new card details over phone
6. Staff navigates to **Customers → [Customer] → Billing**
7. Clicks **"Add Payment Method"**
8. Enters card details as customer reads them
9. Sets new card as default
10. Deletes expired card
11. Retries failed payment
12. Confirms with customer: "Payment successful, service restored"

Workflow 4: Business Customer with Multiple Cards

Scenario: Company wants different cards for different purposes

1. Business customer adds primary card (Visa ending 1111)
2. Sets as default for monthly service charges
3. Adds backup card (Mastercard ending 2222) for top-ups
4. Adds purchasing card (Amex ending 3333) for equipment purchases
5. When making top-up, selects Mastercard manually at checkout
6. Default Visa still used for automatic monthly billing

Workflow 5: Managing Expiring Cards (Admin)

Scenario: Proactive expiry management

1. Admin navigates to **Billing → Expiring Cards**
2. Filters: "Next 30 days"
3. Sees 15 customers with expiring cards
4. Selects all → **"Send Reminder Emails"**
5. Mailjet sends personalized emails to each customer
6. Customers update cards via Self-Care
7. Admin reviews list 1 week later
8. Calls remaining customers who haven't updated
9. Assists with card updates over phone

Troubleshooting

"Card declined" when adding payment method

- **Cause:** Stripe rejected card (insufficient funds, fraud prevention, issuer decline)
- **Fix:**
  - Try a different card
  - Contact card issuer to authorize transaction
  - Ensure card supports online purchases
  - Check billing address matches card on file

"Error adding payment method" (generic error)

- **Cause:** Payment vendor API error or network issue
- **Fix:**
  - Refresh page and try again
  - Check internet connection
  - Verify payment vendor configuration is correct in system settings
  - Check browser console for specific error message
  - Try different browser (disable ad blockers)

Cannot delete payment method (button disabled)

- **Cause:** Trying to delete the default card, or it's the only card

- **Fix:**
  - Set a different card as default first
  - If it's the only card, add a new card before deleting

Card shows as expired but not in "Expiring Cards" list

- **Cause:** Card expired recently, cache not refreshed
- **Fix:**
  - Refresh the page
  - Check filters on Expiring Cards dashboard
  - Expired cards may move to different view

New card not appearing immediately

- **Cause:** Page hasn't refreshed after adding card
- **Fix:**
  - Payment methods table should auto-refresh
  - If not, manually refresh browser
  - Check if error occurred during add process

Payment modal won't load

- **Cause:** Payment vendor SDK not loading, API key issue, or browser extension blocking
- **Fix:**
  - Check browser console for errors
  - Disable ad blockers and tracking protection
  - Verify payment vendor configuration in system settings
  - Ensure vendor SDK script loads (check Network tab)
  - Try incognito/private browsing mode

Customer doesn't receive expiry notifications

- **Cause:** Mailjet not configured or email template missing
- **Fix:**
  - Verify Mailjet credentials in crm_config.yaml
  - Check email template exists for card expiry

- Confirm customer email address is valid
- Check Mailjet logs for delivery failures

Best Practices

For Customers:

- Add payment method before service activation to avoid delays
- Keep at least 2 cards on file for redundancy
- Update expiring cards 30+ days before expiry
- Delete old/expired cards to avoid confusion
- Use descriptive nicknames ("Personal Visa", "Work Amex")
- Verify default payment method is correct for automatic billing

For Support Staff:

- Verify customer identity before accessing payment methods
- Never ask customers to send card details via email/SMS/chat
- Process card additions immediately during calls (don't defer)
- Confirm new card is set as default after adding
- Delete old cards only after confirming new card works
- Test payment after updating expired card (process £0.01 authorization)

For Administrators:

- Monitor Expiring Cards dashboard weekly
- Send reminder emails 60/30/7 days before expiry
- Keep payment vendor test/live keys separate for dev vs production
- Ensure Mailjet templates are configured for expiry notifications
- Review failed payment reports to identify expired cards
- Train staff on secure card handling procedures

Security Best Practices:

- Only use vendor publishable keys (never secret keys in frontend)
- Ensure all payment pages load over HTTPS

- Regularly review payment vendor dashboard for suspicious activity
- Enable vendor fraud prevention rules
- Require CVC for all card-not-present transactions
- Log payment method changes in activity log

Related Documentation

- `Payment System Guide <payment_system_guide>` - Payment vendor integration setup and configuration
- `payments_process` - Processing payments with stored payment methods
- `payments_invoices` - Automatic invoice payment using default card
- `features_topup_recharge` - Top-up system using payment methods
- `basics_payment` - General payment and billing concepts
- `customer_care` - Self-Care portal for customers to manage their own cards

Process Payments

The majority of payments will be processed automatically by the system, but there are times when you may need to process a payment manually.

To pay an invoice, select the unpaid invoice, and click on the "Pay" button.

This will open a payment form, where you can enter the payment method, and click "Submit" to process the payment.

The customer will automatically receive a receipt for the payment, and the invoice will be marked as paid.

For bank transfers, you can enter the Payment reference and the date the payment was made (if different from the current date).

Billing Tab Overview

The Billing tab provides a unified view of all financial information for a customer, combining payment methods, transactions, and invoices into a single interface for efficient billing management.

Related documentation: `Payment Methods <payment_methods>`, `Transactions <payments_transaction>`, `Invoices <payments_invoices>`, `Payment Processing <payments_process>`, `Wallet vs customer_transaction ledger <billing_wallet_ledger>`.

Accessing the Billing Tab

Per-Customer View:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. View all three sections: Payment Methods, Transactions, and Invoices

System-Wide Views:

System-wide billing data can be accessed separately:

- **Billing → Transactions** - All transactions across all customers
- **Billing → Invoices** - All invoices across all customers

Self-Care Portal:

Customers accessing the `Self-Care Portal <self_care_portal>` see the same Billing tab structure:

- View and manage their payment methods
- View transaction history
- View and pay invoices online

Billing Tab Structure

The Billing tab is organized into three main sections, displayed as cards:

Section 1: Payment Methods

Purpose: Manage how customer pays for services

Key Features:

- View all saved credit cards
- Set default payment method
- Add new payment methods (via Stripe)
- Remove expired or unused cards

Documentation: `basics_payment`

Section 2: Transactions

Purpose: Track all charges and credits for customer

Key Features:

- View transaction statistics (Total, Uninvoiced, This Month, Last Month)
- List all transactions with filtering by void/invoice status
- Add manual transactions (charges or credits)
- Void incorrect transactions
- See which transactions are invoiced vs uninvoiced

Documentation: `payments_transaction`

Section 3: Invoices

Purpose: Group transactions into bills for customer to pay

Key Features:

- View invoice statistics (Total, Unpaid, This Month, Last Month)
- List all invoices with filtering by paid/void status
- Generate new invoices from uninvoiced transactions

- Download invoice PDFs
- Email invoices to customers
- Pay invoices online (Stripe or manual payment methods)

- Void or refund invoices

Documentation: `payments_invoices`

Data Flow Between Sections

Understanding how data flows between the three sections is crucial for effective billing management.

Flow Diagram

Transaction → Invoice Relationship

1. Transaction Creation:

When a service is provisioned or a manual charge is added:

- Transaction created in **Transactions** section

- Transaction status: **Uninvoiced**
- Transaction's `invoice_id` field is `null`

Example:

2. Invoice Generation:

When staff generates an invoice:

- Invoice created in **Invoices** section
- All uninvoiced transactions within date range grouped into invoice
- Transaction's `invoice_id` field populated
- Transaction status changes to: **Invoiced**

Example:

3. Transaction Statistics Update:

- **Uninvoiced Transactions** total decreases
- **Total Invoices** statistic increases
- **Unpaid Invoices** total increases

Invoice → Payment Relationship

1. Invoice Payment:

When customer pays invoice:

- Payment processed using saved **Payment Method** (Stripe card)
- Or manual payment method selected (cash, POS, bank transfer)
- Invoice status changes to: **Paid**

2. Payment Transaction Created:

For manual payments (non-Stripe):

- Negative transaction created automatically
- Transaction title: "Payment for Invoice #1234"

- Transaction amount: -$45.00 (negative, credits customer)
- Transaction's `invoice_id` field: Links to paid invoice

Example:

3. Statistics Update:

- **Unpaid Invoices** total decreases
- **Total Invoices This Month** unchanged (invoice already existed)

Payment Method → Invoice Relationship

Stripe Payment Flow:

1. Customer adds credit card in **Payment Methods**
2. Card tokenized via Stripe, stored securely
3. When paying invoice, customer selects saved card
4. Stripe charges card
5. Invoice marked as paid
6. `payment_reference` field populated with Stripe payment intent ID

Manual Payment Flow:

1. Customer pays via cash/POS/bank transfer (no payment method needed)
2. Staff selects payment method in Pay Invoice modal
3. Staff enters reference number (optional)
4. Negative transaction created for payment amount
5. Invoice marked as paid

Complete Billing Workflows

These workflows demonstrate how the three sections work together to accomplish common tasks.

Workflow 1: New Customer Setup and First Invoice

Goal: Set up billing for new customer and collect first payment

1. **Add Payment Method:**
   - Navigate to customer → **Billing** tab
   - **Payment Methods** section → Click **"Add Payment Method"**
   - Customer adds credit card via Stripe
   - Card saved as default payment method
2. **Verify Transactions:**
   - **Transactions** section shows uninvoiced transactions:
     - Service setup fee: $50.00
     - First month service: $45.00
     - Total Uninvoiced: $95.00
3. **Generate Invoice:**
   - **Invoices** section → Click **"Generate Proforma Invoice"**
   - Set date range to include setup and first month
   - Click **"Generate Invoice"**
   - Invoice #INV-2025-001234 created for $95.00
4. **Transactions Update:**
   - Both transactions now show: Invoice #INV-2025-001234
   - **Uninvoiced Transactions** total now $0.00
5. **Email Invoice:**
   - Click email icon next to invoice
   - Customer receives invoice email with PDF and pay link
6. **Customer Pays Online:**
   - Customer clicks pay link in email
   - Redirected to Self-Care portal
   - Click **"Pay Invoice"** button
   - Select default payment method
   - Click **"Pay Invoice"**
   - Stripe charges card
7. **Invoice Update:**

- Invoice status changes to **"Paid"**
- **Unpaid Invoices** total decreases by $95.00

Result: Customer fully set up with payment method, first invoice paid.

Workflow 2: Monthly Recurring Billing

Goal: Bill all customers for monthly service at end of month

1. **Services Auto-Charge:**
   - End of month arrives (January 31)
   - Billing system automatically creates transactions for all recurring services
   - **Transactions** section shows new uninvoiced transactions
2. **Review Uninvoiced Transactions:**
   - Navigate to **Transactions** section
   - Filter: **Invoice Status: Not Invoiced**
   - Review list of all transactions ready for billing
   - Verify amounts and descriptions correct
3. **Generate Invoices:**
   - Navigate to **Billing → Invoices** (system-wide)
   - For each customer (or use batch process):
     - Click **"Generate Proforma Invoice"**
     - Select customer
     - Start Date: 2025-01-01
     - End Date: 2025-01-31
     - Due Date: 2025-02-15
     - Click **"Generate Invoice"**
4. **Transactions Update:**
   - All transactions now linked to invoices
   - **Uninvoiced Transactions** totals reset to $0.00
5. **Email All Invoices:**
   - For each invoice, click email icon
   - All customers receive monthly invoices
6. **Customers Pay:**

- Customers with saved payment methods pay online via Self-Care
- Staff processes cash/POS payments for customers who pay in person
- **Unpaid Invoices** total decreases as payments received

Result: All customers billed for January, invoices sent, payments processed.

Workflow 3: Handling Service Issue Credit

Goal: Credit customer for service outage, apply to unpaid invoice

1. **Customer Reports Issue:**
   - Service was down for 2 days
   - Customer deserves $10 credit
2. **Add Credit Transaction:**
   - Navigate to customer → **Billing** tab → **Transactions** section
   - Click **"+ Add Transaction"**
   - Transaction Type: **Credit**
   - Credit Type: **Cash Payment** (or appropriate type)
   - Title: "Service Outage Credit"
   - Description: "Compensation for 2-day outage 8-9 Jan"
   - Retail Cost: 10.00
   - Click **"Add Transaction"**
3. **Transaction Created:**
   - Transaction appears in list with amount: **-$10.00**
   - Transaction status: **Uninvoiced**
   - **Uninvoiced Transactions** total now includes -$10.00
4. **Apply to Invoice:**
   - If customer already has unpaid invoice:
     - Invoice remains unpaid with original amount
     - Credit will be applied to next invoice generation
   - If generating new invoice:
     - **Invoices** section → Click **"Generate Proforma Invoice"**
     - Include date range with credit transaction
     - Invoice generated with credit applied:
5. **Customer Pays:**

- Customer pays reduced amount: $35.00
- Invoice marked as paid

Result: Customer credited for outage, credit applied to next invoice, lower payment collected.

Workflow 4: Payment Method Expired - Update and Retry

Goal: Customer's card expired, causing payment failure - update card and retry payment

1. **Payment Failure Notification:**
   - Customer attempts to pay invoice
   - Stripe returns error: "Card expired"
   - Payment fails, invoice remains unpaid
2. **Update Payment Method:**
   - Customer navigates to **Billing** tab
   - **Payment Methods** section → Click **"Add Payment Method"**
   - Enter new card details (updated expiry date)
   - New card saved
3. **Set as Default:**
   - Customer clicks **"Set as Default"** on new card
   - Old card removed automatically (if desired)
4. **Retry Payment:**
   - Navigate to **Invoices** section
   - Locate unpaid invoice
   - Click **"Pay"** icon
   - Payment modal opens with new default card pre-selected
   - Click **"Pay Invoice"**
   - Stripe charges new card successfully
5. **Invoice Update:**
   - Invoice status changes to **"Paid"**
   - `payment_reference` field populated with new Stripe payment intent ID

Result: Customer updated payment method, invoice successfully paid with new card.

Workflow 5: Voiding Incorrect Invoice and Re-Billing

Goal: Staff generated invoice with wrong transactions - void and regenerate correctly

1. **Error Discovered:**
   - Invoice #INV-2025-001234 generated with wrong date range
   - Included transactions from wrong month
   - Invoice is unpaid
2. **Void Invoice:**
   - Navigate to **Billing** tab → **Invoices** section
   - Locate incorrect invoice
   - Click delete icon (🗑)
   - Confirm void
   - Invoice voided
3. **Transactions Released:**
   - Navigate to **Transactions** section
   - All transactions from voided invoice now show: **Uninvoiced**
   - **Uninvoiced Transactions** total increases
   - Transactions available for new invoice
4. **Generate Correct Invoice:**
   - **Invoices** section → Click **"Generate Proforma Invoice"**
   - Set correct date range
   - Apply filter if needed (e.g., "Mobile" for mobile-only invoice)
   - Click **"Generate Invoice"**
   - New invoice created with correct transactions
5. **Verify and Email:**
   - Review new invoice details
   - Verify correct transactions included
   - Click email icon to send to customer

Result: Incorrect invoice voided, transactions re-invoiced correctly, customer receives corrected invoice.

Workflow 6: Processing Cash Payment for Multiple Invoices

Goal: Customer pays multiple unpaid invoices with single cash payment

1. **Customer Arrives with Cash:**
    - Customer brings $300 cash to pay outstanding invoices
    - Navigate to customer → **Billing** tab
2. **Review Unpaid Invoices:**
    - **Invoices** section → Filter: **Paid: Not yet Paid**
    - View unpaid invoices:
3. **Pay First Invoice:**
    - Click pay icon on invoice #1234
    - Payment modal opens
    - Select **"Cash"** payment method
    - Enter reference: "Cash paid 2025-02-10 - Receipt #001"
    - Click **"Pay Invoice"**
    - Invoice #1234 marked as **"Paid"**
4. **Pay Remaining Invoices:**
    - Repeat process for invoice #1235:
        - Reference: "Cash paid 2025-02-10 - Receipt #001"
    - Repeat for invoice #1236:
        - Reference: "Cash paid 2025-02-10 - Receipt #001"
5. **Verify Transactions:**
    - Navigate to **Transactions** section
    - Three new payment transactions created:
    - All linked to respective invoices
6. **Update Statistics:**
    - **Invoices** section → **Unpaid Invoices** total decreased by $300.00
    - All invoices now show **"Paid"** status

Result: Customer paid all outstanding invoices with cash, payment transactions recorded with receipt reference.

Best Practices

For Staff Users

Transaction Management:

- Add manual transactions immediately (don't delay)
- Use descriptive titles and descriptions for clarity
- Link transactions to services and sites when applicable
- Void incorrect transactions before they're invoiced

Invoice Generation:

- Generate invoices at consistent intervals (e.g., monthly on 1st of month)
- Use date ranges carefully to avoid overlap or gaps
- Use filters to create service-specific invoices when needed
- Email invoices immediately after generation
- Review invoice PDFs before sending to customers

Payment Processing:

- Verify payment method valid before attempting charge
- Always enter reference numbers for manual payments (cash, POS, bank transfer)
- Mark invoices as paid immediately after receiving payment
- Refund via Stripe only (create manual credit for other payment methods)

Data Hygiene:

- Regularly review uninvoiced transactions
- Investigate void transactions to understand billing errors
- Monitor unpaid invoices and follow up with customers
- Keep payment methods current (remove expired cards)

For Customers (Self-Care Portal)

Payment Methods:

- Keep at least one valid payment method on file
- Update payment methods before cards expire
- Set your preferred card as default

Invoice Payments:

- Pay invoices before due date to avoid late fees
- Review invoice details and transactions before paying
- Download invoice PDFs for your records
- Contact support immediately if invoice appears incorrect

Transaction Review:

- Regularly review transaction history
- Report any unexpected charges immediately
- Understand which transactions are invoiced vs uninvoiced

For Administrators

System Configuration:

- Configure Mailjet email templates for professional invoice delivery
- Customize invoice PDF templates to match branding
- Set up payment vendor integration (Stripe, PayPal) for secure payment processing
- Configure payment terms and due dates

Monitoring and Reporting:

- Use statistics widgets to monitor billing health
- Track **Uninvoiced Transactions** total - should decrease after billing cycle
- Monitor **Unpaid Invoices** total - follow up on overdue payments
- Review **This Month** vs **Last Month** statistics for trends

Automation:

- Automate recurring service charges via product configuration
- Set up automatic invoice generation for recurring billing (if available)
- Configure email reminders for overdue invoices

Common Issues and Solutions

Issue: Customer Cannot Pay Invoice

Symptoms:

- Customer clicks pay button but nothing happens
- Error message: "No payment methods found"

Diagnosis:

1. Navigate to customer → **Billing** tab → **Payment Methods** section
2. Check if customer has any saved payment methods
3. Check if saved cards are expired

Solution:

- Customer must add valid payment method before paying invoices
- Guide customer to **Payment Methods** page to add credit card
- Verify card accepted (Visa, Mastercard, Amex, etc.)
- Retry payment after card added

Issue: Invoice Generated with Wrong Transactions

Symptoms:

- Invoice includes transactions from wrong period
- Invoice missing expected transactions
- Invoice total incorrect

Diagnosis:

1. Open invoice in **Invoices** section
2. Review transactions included in invoice
3. Check transaction dates vs invoice date range
4. Check if filter was applied during generation

Solution:

- **If invoice unpaid:** Void invoice, verify transactions uninvoiced, regenerate with correct date range
- **If invoice paid:** Cannot void - create credit transaction for incorrect amount, generate corrected invoice
- **Prevention:** Always review **Transactions** section before generating invoice to verify correct transactions will be included

Issue: Uninvoiced Transactions Total Not Decreasing

Symptoms:

- **Uninvoiced Transactions** widget shows high amount
- Transactions list shows many uninvoiced transactions
- Monthly invoices already generated

Diagnosis:

1. Filter transactions by **Invoice Status: Not Invoiced**
2. Review list of uninvoiced transactions
3. Check transaction dates - may be recent charges after last invoice generation
4. Check if some transactions are voided (should not count toward uninvoiced total)

Solution:

- **Expected behavior:** Transactions created after last invoice generation remain uninvoiced until next billing cycle

- **If old transactions uninvoiced:** Generate invoice for those transactions with appropriate date range
- **If voided transactions counted:** System should exclude voided transactions automatically - report bug if not

Issue: Payment Method Keeps Declining

Symptoms:

- Stripe payment fails with "Card declined"
- Customer reports card should work
- Multiple retry attempts fail

Diagnosis:

1. Check Stripe dashboard for decline reason
2. Common decline reasons:
    - Insufficient funds
    - Card expired
    - Card reported lost/stolen
    - Bank fraud prevention
    - International card blocked

Solution:

- Ask customer to contact their bank to authorize payment
- Try different payment method (different card)
- For staff: Process as manual payment (cash, POS) and mark invoice paid
- Verify billing address matches card billing address

Keyboard Shortcuts and Tips

Navigation:

- Access billing tab quickly: Customer page → **B** key (if keyboard shortcuts enabled)

Filtering:

- **Transactions:** Click **"Not Invoiced"** filter before generating invoices to see exactly what will be included
- **Invoices:** Click **"Not yet Paid"** filter to see all outstanding invoices requiring follow-up

Bulk Operations:

- Select multiple invoices (checkbox) to delete/void multiple at once (staff only)
- Use search bar to quickly find specific transaction or invoice by ID

Quick Actions:

- Click transaction/invoice title to view full details in modal
- Right-click actions menu (⋮) for quick access to download/email/pay options

Related Documentation

- `basics_payment` - Payment methods and multi-vendor payment integration
- `payment_system_guide` - Payment API reference and vendor configuration
- `payments_transaction` - Transactions in detail
- `payments_invoices` - Invoices in detail
- `integrations_mailjet` - Email invoice delivery
- `csa_activity_log` - Viewing billing activity history
- Monitoring & Metrics - OCS/CGRateS billing system metrics and monitoring

Boards (Work Management)

OmniCRM **Boards** provide a flexible, kanban-style work management system for tracking tasks, installs, feature requests, and any other work your team needs to coordinate. Boards sit alongside the Support Ticket System, but where tickets are customer-issue driven, Boards are work-and-project driven — giving teams a visual way to organise items into groups, move them through statuses, assign owners, and collaborate.

See also: `Support Tickets <support_tickets>` for customer-issue tracking, `Users and Roles <rbac>` for permissions, `Customers, Contacts & Sites <basics_customers>` for the records you can link items to.

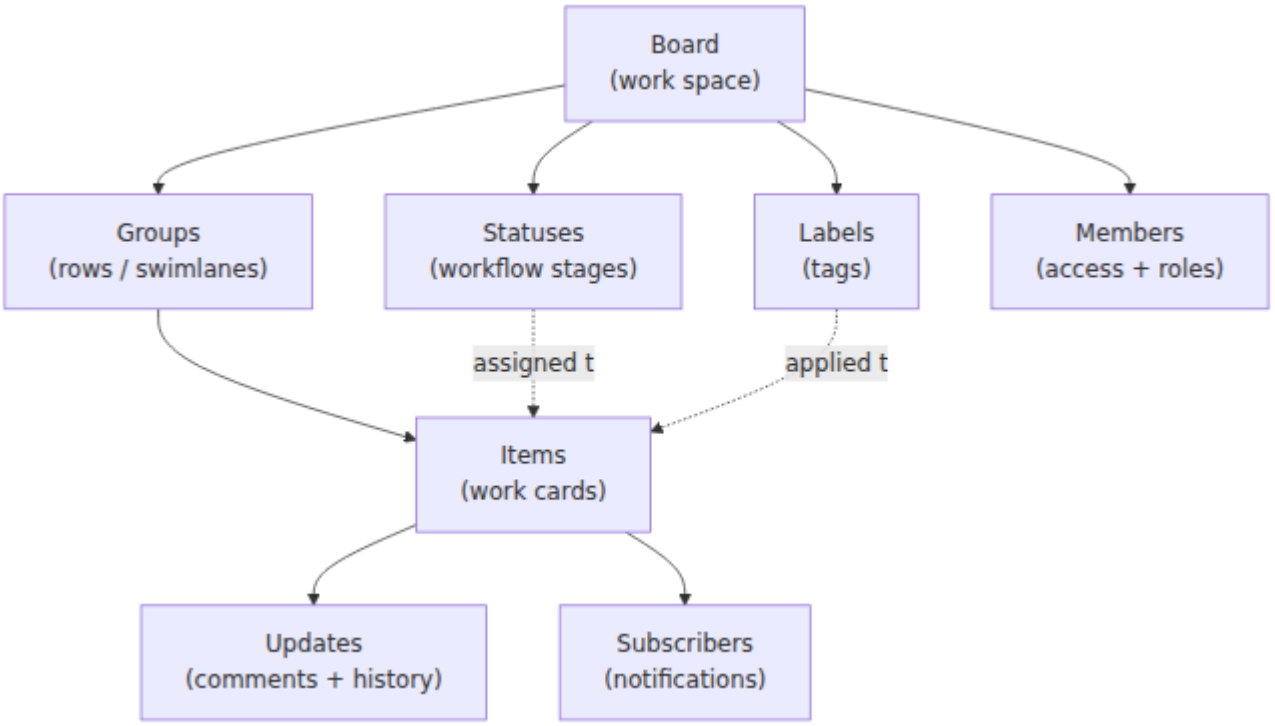
Overview

Boards enable:

1. **Visual Work Tracking** — Organise work into groups (rows) and statuses (workflow stages)
2. **Templates** — Start fast with pre-built layouts for to-do lists, installs, and feature requests
3. **Ownership** — Assign items to staff, record who requested them, and track due dates
4. **Linking** — Connect items to customers, services, and support tickets
5. **Collaboration** — Comments, change history, @mentions, and subscriptions
6. **Access Control** — Per-board membership with role-based permissions
7. **Public Sharing** — Optionally expose a read-only board via a secure link for embedding

Core Concepts

A board is built from a small set of building blocks. Understanding how they fit together makes the rest of this guide straightforward.

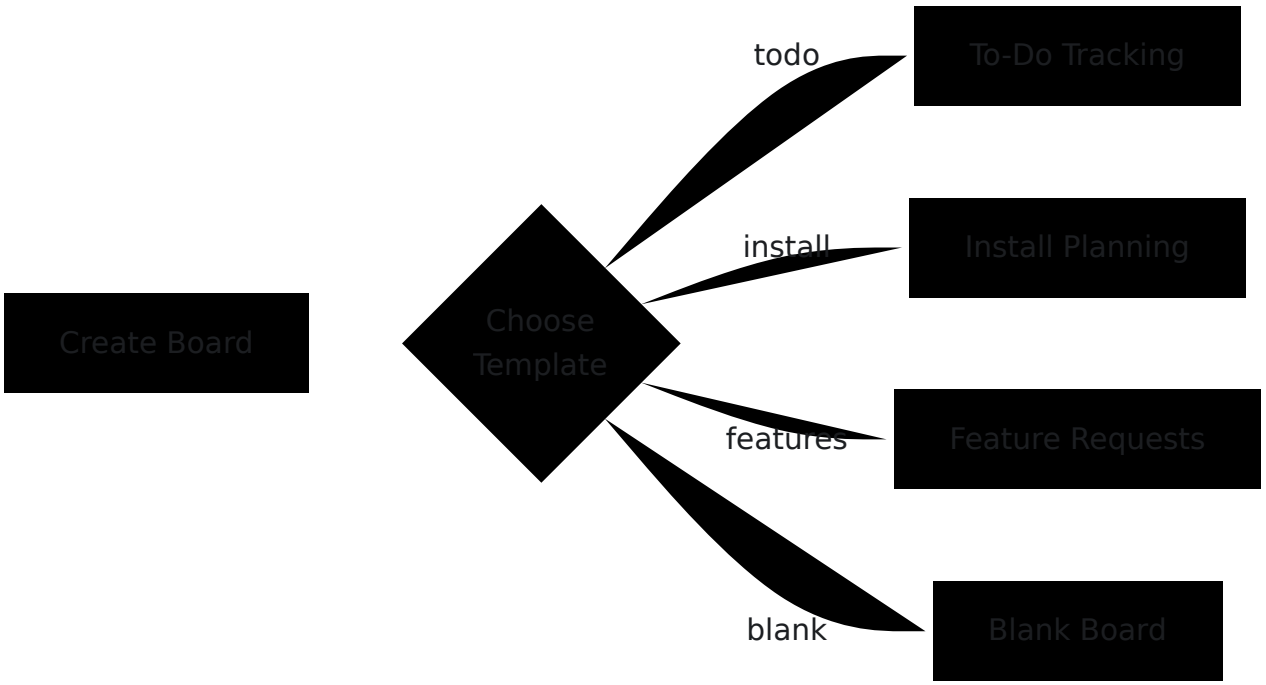


Concept	What it is
Board	The top-level workspace. Contains its own groups, statuses, labels, members, and items.
Group	A horizontal row (swimlane) that organises items into sections — for example *This Week*, *Next Week*, *Later*. Groups can be collapsed.
Status	The workflow stage of an item — for example *To Do*, *In Progress*, *Done*. One status is the default for new items; any status can be flagged as a "done" state.
Item	A single unit of work (a card). Has a title, description, priority, assignee, due date, labels, and a unique item number.
Label	A colour-coded tag applied to items for categorisation (for example *Bug*, *Feature*). An item can carry multiple labels.
Member	A user who has been granted access to the board, with a role that controls what they can do.

How the layout works: Groups are the rows of the board. Within each group, items are listed and show their current status, assignee, due date, and priority. Items move *between groups* to re-organise them, and *between statuses* to progress them through the workflow.

Board Templates

When creating a board you choose a template. The template pre-populates the board's statuses and groups so you can start working immediately. You can add, rename, recolour, or remove statuses and groups afterwards.



Template	Purpose	Statuses (default first)	Groups
To-Do Tracking (`todo`)	General task lists	To Do · In Progress · **Done**	Main
Install Planning (`install`)	Scheduling field/network installs	Scheduled · In Progress · **Completed** · On Hold	This Week · Next Week · Later
Feature Requests (`features`)	Product/feature pipeline	New · Under Review · Planned · In Development · **Released**	Feature Requests · In Progress · Completed
Blank Board (`blank`)	Minimal starting point	To Do · **Done**	Items

Statuses shown in **bold** are flagged as "done" states — items in those statuses count as completed. If no template is selected, the **Blank Board** layout is used.

Item Numbering

Every item is assigned a unique, human-readable number when it is created, so it can be referenced in conversations, tickets, and emails.

The format is:

```
{PREFIX}-{BOARD}-{SEQUENCE}
```

For example: **`BRD-001-00001`**

Segment	Meaning
`PREFIX`	The board's item prefix. Defaults to `BRD` and is configurable per board (up to 10 characters, for example `INST` for an install board).
`BOARD`	The board's ID, zero-padded to three digits.
`SEQUENCE`	The item sequence within the board, zero-padded to five digits.

You can open any item directly by its item number from the board view or via the API.

Creating and Managing Boards

Creating a Board

1. Navigate to **Work Management → Boards**
2. Click **Create Board**
3. Complete the board details:
   - **Board Name** (required)
   - **Description** (optional)

    - **Template** — *To-Do Tracking*, *Install Planning*, *Feature Requests*, or *Blank Board*
    - **Item Prefix** — used in item numbers (default `BRD`, up to 10 characters)
    - **Visibility** — *Staff Only* or *Public (API Embedding)*
4. Click **Create**

The user who creates a board becomes its **owner**.

Board Settings

Board owners and admins can edit a board to change its name, description, icon, colour, linked customer, item prefix, and visibility. Boards can also be **archived** to hide them from the active list without deleting their contents, and **deleted** (a soft delete that removes the board from view while retaining the underlying records).

Customising Statuses, Groups, and Labels

From within a board you can:

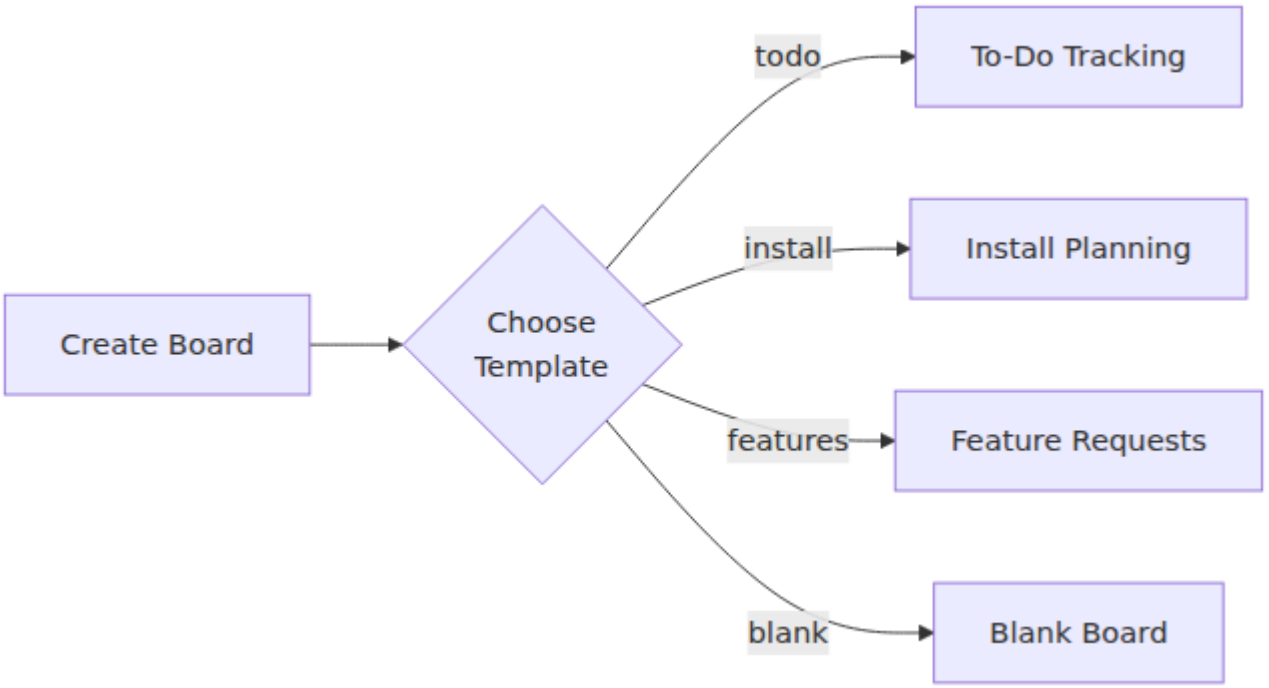
- **Statuses** — add, rename, recolour, reorder, set the default status for new items, and mark statuses as "done". Deleting a status leaves its items without a status (they are not deleted).
- **Groups** — add, rename, recolour, reorder, and collapse. Deleting a group leaves its items ungrouped (they are not deleted).
- **Labels** — add, rename, and recolour. Deleting a label removes it from all items.

Working with Items

The Board View

The board view shows each group as a section with a coloured header displaying the group name, the number of items, and completion progress (how many items are in a "done" status). Within each group, items are listed with

their title and number, assignee, status, due date, and priority. A quick-add row lets you create items inline.



The status names above are illustrative — each board defines its own statuses.

Creating an Item

Items can be created from the quick-add row in any group, or via the **Create Item** button. An item has:

Field	Description
Title	Required. Short summary of the work.
Description	Optional detail.
Group	The row the item belongs to. Defaults to the first group if not chosen.
Status	The workflow stage. Defaults to the board's default status.
Priority	*Low*, *Medium*, *High*, or *Urgent* (defaults to *Medium*).
Due Date	Optional deadline.
Assignee	The staff member responsible.
Requester	Who requested the work — a staff user or a customer contact.
Customer / Service / Ticket	Optional links to related records.
Labels	One or more category tags.

Moving Items

Items are moved to re-organise or progress them:

- **Change group** — move the item to a different row/swimlane
- **Change status** — progress the item through the workflow
- **Reorder** — change the item's position within its group

Every move is recorded in the item's history.

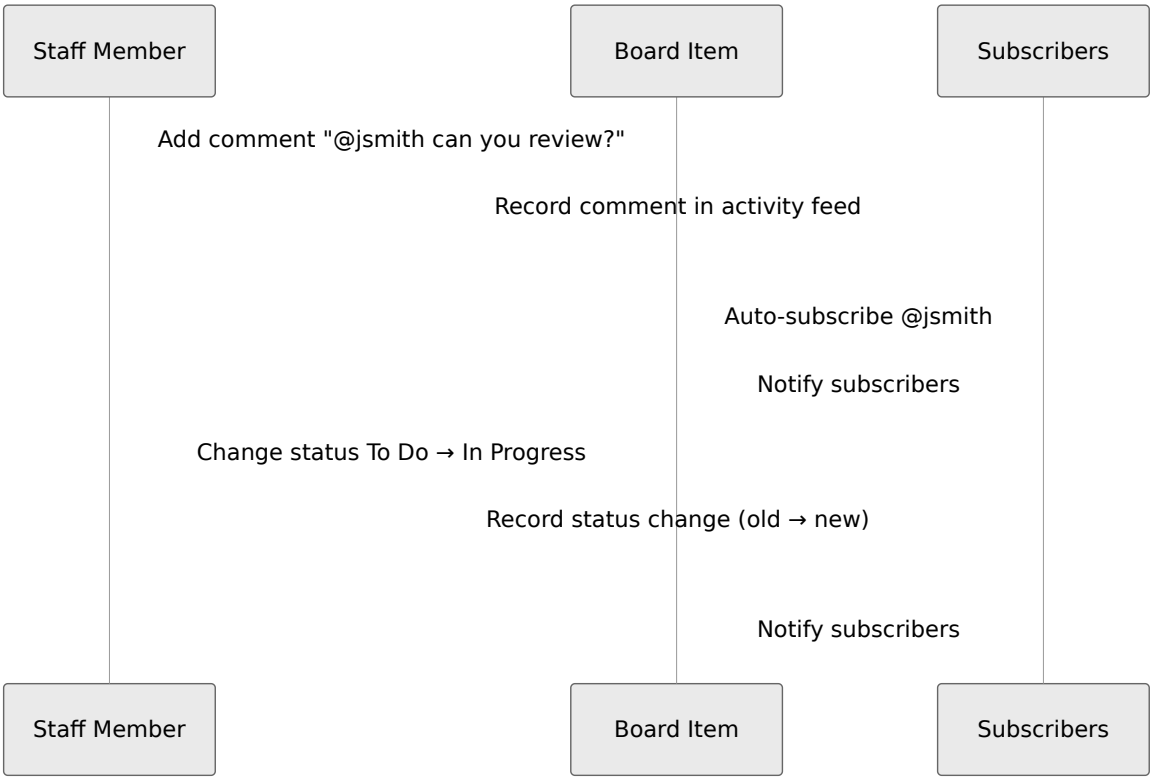
Priority Levels

Priority	Typical use
Urgent	Critical work requiring immediate attention
High	Important work, address soon
Medium	Standard work (default)
Low	Minor or nice-to-have work

Collaboration

Comments and Activity History

Each item has an activity feed combining manual **comments** with an automatic **change history**. The system records changes to status, assignee, title, priority, due date, and group — capturing the previous and new values — so the full story of an item is always visible.



Subscribers and Notifications

Subscribers receive notifications when an item changes. Subscriptions are managed automatically and manually:

- **Automatic** — the item's creator and assignee are subscribed automatically. When an item is reassigned, the new assignee is subscribed.
- **@Mentions** — mentioning a staff member with `@username` in a comment automatically subscribes them.
- **Manual** — staff or customer contacts can be subscribed to (and unsubscribed from) an item directly.

Automatically-added subscribers can still unsubscribe themselves.

Access Control and Roles

Boards are private to their members. Each member is granted a **role** that governs what they can do on that board.

Role	View	Create / Edit Items	Manage Settings (statuses, labels)	Manage Members	Delete Board
Owner	✓	✓	✓	✓	✓
Admin	✓	✓	✓	✗	✗
Member	✓	✓	✗	✗	✗
Viewer	✓	✗	✗	✗	✗

System administrators can access and manage all boards regardless of membership. Non-administrator users only see boards they are a member of.

> **Note:** Board actions are also governed by system-level permissions (see `Users and Roles <rbac>`). A user needs both the relevant system permission *and* an appropriate board role. A board must always retain at least one owner.

Board-Related Permissions

Permission	Grants the ability to
`VIEW_BOARD`	List and view boards
`CREATE_BOARD`	Create new boards
`UPDATE_BOARD`	Edit board details and manage groups
`DELETE_BOARD`	Delete a board
`MANAGE_BOARD_SETTINGS`	Create, edit, and delete statuses and labels
`MANAGE_BOARD_MEMBERS`	Add, update, and remove board members
`GENERATE_PUBLIC_TOKEN`	Generate a public sharing link
`VIEW_BOARD_ITEM`	View items, comments, and subscribers
`CREATE_BOARD_ITEM`	Create items
`UPDATE_BOARD_ITEM`	Edit items, move items, and add comments
`DELETE_BOARD_ITEM`	Delete items

Visibility and Public Sharing

Each board has a visibility setting:

Visibility	Behaviour
Staff Only	The default. Only board members (and system administrators) can access the board.
Public	In addition to member access, the board can be read via a secure public link without logging in.

Generating a **public access token** produces a unique, unguessable link and switches the board to *Public* visibility. The public link is **read-only** and is intended for embedding a board view — for example on an internal status page or wallboard. Regenerating the token invalidates the previous link. To stop public access, switch the board's visibility back to *Staff Only*.



Finding Items

Filtering and Search

The board view and item lists support filtering and search to focus on what matters:

Filter	Description
Search	Matches item title, description, and item number
Status	One or more statuses
Assignee	A specific staff member
Priority	One or more priority levels
Group	A specific group
Customer	Items linked to a specific customer
Labels	One or more labels
Overdue	Items whose due date has passed

Sorting

Items can be sorted by position (the manual board order), creation date, due date, priority, title, or last-modified date, in ascending or descending order. Long boards are paginated.

Best Practices

Board Setup

1. **Pick the closest template** — start from *Install Planning* or *Feature Requests* rather than *Blank* when they fit; you can still customise afterward.
2. **Use a meaningful item prefix** — for example `INST` for installs, so item numbers are self-describing.
3. **Keep statuses simple** — a small, clear set of workflow stages is easier to manage than many overlapping ones.

4. **Mark "done" statuses** — so completion progress shows correctly in group headers.

Day-to-Day Use

1. **Assign every item** — clear ownership prevents work from stalling.
2. **Set due dates** — so the *Overdue* filter is meaningful.
3. **Use @mentions** — to pull the right people into an item without manually managing subscriptions.
4. **Link related records** — connect items to the relevant customer, service, or ticket for context.
5. **Move, don't recreate** — progress items through statuses so the change history tells the full story.

Troubleshooting

Issue: A user cannot see a board

- Confirm the user has been added as a member of the board.
- Confirm the user has the `VIEW_BOARD` permission for their role.
- Remember non-administrators only see boards they belong to.

Issue: A user cannot change statuses or labels

- Managing statuses and labels requires the **Owner** or **Admin** board role plus the `MANAGE_BOARD_SETTINGS` permission.

Issue: Items disappeared after deleting a status or group

- The items are not deleted. Deleting a status leaves its items without a status; deleting a group leaves its items ungrouped. Assign a new status or group to bring them back into view.

Issue: The public link does not show the board

- Confirm the board's visibility is set to *Public*.

- Confirm the link is current — regenerating the token invalidates the previous link.

Issue: Cannot remove a member

- A board must always have at least one owner. Assign another owner before removing the last one.

CGRateS Actions and Topup Behaviors

This guide explains how CGRateS Actions work within OmniCRM, specifically focusing on balance management, topup behaviors, and how different action types affect addon products.

Overview

In OmniCRM's Online Charging System (CGRateS), **Actions** are the mechanism for adding, modifying, or removing balances on customer accounts.

When you provision an addon or topup product, you're actually executing a CGRateS Action that manipulates the account's balances. (You can totally take other approaches as well, such as manually adding balances to accounts from Playbooks - this is just a common pattern we use to keep things clean)

Key Concepts

Action - A set of operations to perform on an account (add balance, deduct balance, log CDR, etc.)

Balance - A quantity of a resource (data, voice, SMS, monetary) with an expiry time and weight

Balance ID - A unique identifier for a balance type (e.g., "Data Package", "Voice Minutes")

Weight - Priority for balance consumption (higher weight consumed first)

Expiry Time - When the balance expires (absolute date or relative like "+5 days")

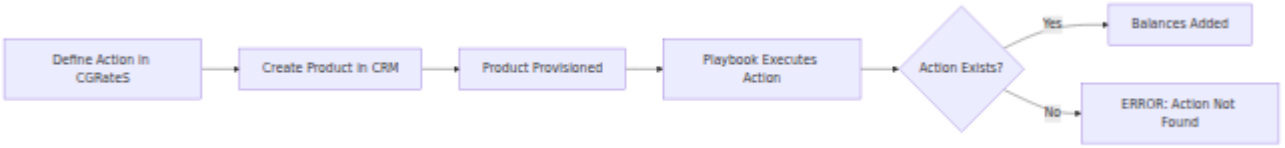
Blocker - A special balance flag that blocks all usage when the balance reaches zero, even if other balances exist (see Balance Blockers)

Critical: Actions Must Be Defined First

Before you can execute an Action in a playbook using `ExecuteAction`, that Action must already be defined in CGRateS. This is a critical prerequisite that's often overlooked.

When Actions Are Defined

Actions are typically defined during **initial system configuration** or **product setup**, NOT during provisioning. They are usually created via Python scripts that configure both the CRM and OCS simultaneously.



How Actions Link to Products

Actions are linked to products via a naming convention:

- **CGRateS Action:** `ActionsId = "Action_50gb-data-pack"`
- **CRM Product:** `product_slug = "50gb-data-pack"`
- **In Playbook:** `cgr_action_name = "Action_" + product_slug`

When the playbook runs, it constructs the Action name from the product_slug and calls `ExecuteAction`. If that Action doesn't exist in CGRateS, provisioning fails.

Where to Define Actions

Actions should be defined in your product configuration scripts, typically:

1. **During Initial Setup** - When first configuring your system
2. **When Creating New Products** - Define the Action before creating the product

3. **Via Configuration Scripts** - Python scripts that configure both OCS and CRM

Example: Defining an Action before creating the product

```
import cgrateshttpapi

OCS_Obj = cgrateshttpapi.CGRateS("ocs.example.com", "2080")
tenant = "your_tenant"

# Step 1: Define the Action in CGRateS FIRST
Action_50GB_Data_Pack = {
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_50gb-data-pack",
        "Tenant": tenant,
        "Actions": [
            {
                "Identifier": "*topup",
                "BalanceType": "*data",
                "Units": 50 * 1024 * 1024 * 1024,
                "ExpiryTime": "+720h",
                "Weight": 10
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_50GB_Data_Pack)
assert result['error'] is None or result['error'] == "EXISTS"

# Step 2: Now create the product in CRM
# (product_slug = "50gb-data-pack" will link to Action_50gb-data-pack)
```

What Happens If Action Doesn't Exist:

```
# In playbook
- name: Execute Action
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body:
      {
        "method": "APIerSv1.ExecuteAction",
        "params": [{
          "ActionsId": "Action_50gb-data-pack"
        }]
      }
  register: response

# Result if Action not defined:
# response.json.error = "SERVER_ERROR: Action not found"
# Provisioning fails, customer receives no balance
```

For complete details on defining Actions and linking them to products, see Defining Products.

Balance Independence

By default, addon products create **independent balances** that work separately from each other. This means:

- You can have multiple active addons simultaneously
- Each addon maintains its own balance and expiry
- Balances are consumed based on weight and expiry rules

Example: Multiple Independent Addons

```
# Customer has these active balances:
Balance 1:
  ID: "Data_5GB_5days_uuid_abc123"
  Type: *data
  Value: 5368709120  # 5GB in bytes
  Expiry: 2024-12-29
  Weight: 10

Balance 2:
  ID: "Data_10GB_30days_uuid_def456"
  Type: *data
  Value: 10737418240  # 10GB in bytes
  Expiry: 2025-01-24
  Weight: 10

# Both balances coexist independently
# System consumes based on weight; if equal weight, order is not
guaranteed
```

When balances have the same weight and match the same destination, CGRateS does not guarantee consumption order based on expiry - the order depends on how balances are stored and retrieved. **Use different weights to control consumption order**.

Action Types: *topup vs *topup_reset

The action type determines how new balances interact with existing balances of the same ID.

*topup - Additive Behavior

The `*topup` action **adds to existing balances** with the same Balance ID and **extends the expiry time**.

Behavior:

- Finds existing balance with matching ID
- Adds new value to existing value
- Updates expiry to new expiry time
- Preserves existing balance (rollover)

Example:

```
# Initial state:
Balance:
  ID: "Data_Package__5368709120"
  Value: 1073741824  # 1GB remaining
  Expiry: 2024-12-24 (1 day remaining)

# Run *topup action with:
Action:
  Identifier: "*topup"
  Balance:
    ID: "Data_Package__5368709120"  # Same ID - triggers rollover
    Value: 5368709120  # 5GB
    ExpiryTime: "+5d"

# Result after *topup:
Balance:
  ID: "Data_Package__5368709120"
  Value: 6442450944  # 6GB (1GB + 5GB rolled over)
  OriginalValue: 5368709120  # Still shows original 5GB
  Value_hr: "6 GB"
  OriginalValue_hr: "5 GB"
  Remaining_hr: "6 GB of 5 GB (1 GB rolled over)"
  Expiry: 2024-12-29 (5 days from now)
```

Use Cases:

- Loyalty rewards (add extra data to existing package)
- Compensation credits (add to customer's balance)
- Rollover data packages
- Grace period extensions

*topup_reset - Reset Behavior

The `*topup_reset` action **replaces existing balances** with the same Balance ID.

Behavior:

- Finds existing balance with matching ID
- Discards old value (no rollover)
- Sets balance to new value only
- Updates expiry to new expiry time

Example:

```
# Initial state:
Balance:
  ID: "Data_Package__5368709120"
  Value: 1073741824  # 1GB remaining
  Expiry: 2024-12-24 (1 day remaining)

# Run *topup_reset action with:
Action:
  Identifier: "*topup_reset"
  Balance:
    ID: "Data_Package__5368709120"  # Same ID - triggers reset
    Value: 5368709120  # 5GB
    ExpiryTime: "+5d"

# Result after *topup_reset:
Balance:
  ID: "Data_Package__5368709120"
  Value: 5368709120  # 5GB (old 1GB discarded)
  OriginalValue: 5368709120
  Value_hr: "5 GB"
  Remaining_hr: "5 GB of 5 GB"
  PercentUsed: 0
  Expiry: 2024-12-29 (5 days from now)
```

Use Cases:

- Monthly recurring packages (reset to full amount each month)
- Fixed-size topups (always receive exact amount)
- Plan changes (replace old plan balance with new plan)
- Prevent abuse (can't stack unlimited addons)

Controlling Balance Behavior with Balance IDs

The **Balance ID** is crucial for determining whether balances are independent or interact with each other.

Balance ID Naming Convention and Human-Readable Views

OmniCRM uses a specific naming convention for Balance IDs that encodes both the descriptive name and the original size. This allows the API to automatically generate human-readable fields for the web UI.

Balance ID Pattern:

```
{DescriptiveName}__{OriginalSizeInBaseUnits}
```

Example Balance IDs:

```
# Data balance: 100GB
"AU_Data_Domestic__107374182400"
# Breaks down to:
# - Descriptive part: "AU_Data_Domestic" (WHAT it is -
type/destination)
# - Separator: "__" (double underscore)
# - Original size: "107374182400" (100GB in bytes)
# - UI shows: "AU Data Domestic - 100 GB"

# Voice balance: 3000 minutes
"AU_Voice_Domestic__180000000000000"
# - Descriptive part: "AU_Voice_Domestic" (NOT
"AU_Voice_Domestic_3000min")
# - Original size: "180000000000000" (3000 minutes in nanoseconds)
# - UI shows: "AU Voice Domestic - 3000 min"

# SMS balance: 3000 messages
"AU_SMS_Domestic__3000"
# - Descriptive part: "AU_SMS_Domestic"
# - Original size: "3000" (count)
# - UI shows: "AU SMS Domestic - 3000 msgs"
```

Important: Don't include size information in the descriptive part - it's redundant since the size is encoded after `__` and the API converts it to human-readable format automatically.

How the API Creates Human-Readable Views:

When the OmniCRM API retrieves balance data from CGRateS, it automatically parses the Balance ID and generates `_hr` (human-readable) fields:

```
{
  "BalanceMap": {
    "*data": [
      {
        "ID": "AU_Data_Domestic__107374182400",
        "Value": 53687091200,
        "ExpiryTime": "2025-01-25T23:59:59Z",
        "Weight": 1200,

        // Auto-generated human-readable fields:
        "ID_hr": "AU Data Domestic",
        "OriginalValue": 107374182400,
        "OriginalValue_hr": "100 GB",
        "Value_hr": "50 GB",
        "Remaining_hr": "50 GB of 100 GB",
        "PercentUsed": 50,
        "ExpiryTime_hr": "25 Jan 2025 (22 days)"
      }
    ]
  }
}
```

API Processing Logic:

1. **Parse Balance ID:**

```
balance_id = "AU_Data_Domestic__107374182400"
parts = balance_id.split("__")

descriptive_name = parts[0]  # "AU_Data_Domestic"
original_size = int(parts[1]) if len(parts) > 1 else None  # 107374182400
```

2. **Generate Human-Readable Descriptive Name:**

```
# Replace underscores with spaces
id_hr = descriptive_name.replace("_", " ")  # "AU Data Domestic"
```

3. **Convert Original Size to Human Units:**

```
# For data balances (bytes)
if balance_type == "*data":
    original_value_hr = convert_bytes_to_gb(original_size)  #
"100 GB"

# For voice balances (nanoseconds)
elif balance_type == "*voice":
    original_value_hr = convert_ns_to_minutes(original_size)  #
"3000 min"

# For SMS balances (count)
elif balance_type == "*sms":
    original_value_hr = f"{original_size} msgs"  # "3000 msgs"
```

4. **Calculate Usage Percentage:**

```
if original_size and original_size > 0:
    percent_used = ((original_size - current_value) /
original_size) * 100
```

5. **Format Remaining Display:**

```
remaining_hr = f"{current_value_hr} of {original_value_hr}"
# "50 GB of 100 GB"
```

Web UI Display:

The frontend uses these `_hr` fields to display user-friendly balance information:

```
// Instead of showing raw values:
// ID: "AU_Data_Domestic__107374182400"
// Value: 53687091200

// Show human-readable:
<BalanceCard>
  <Title>{balance.ID_hr}</Title>           {/* "AU Data Domestic" */}
  <Progress value={balance.PercentUsed}>   {/* 50% */}
    {balance.Remaining_hr}                 {/* "50 GB of 100 GB" */}
  </Progress>
  <Expiry>{balance.ExpiryTime_hr}</Expiry> {/* "25 Jan 2025 (22 days)" */}
</BalanceCard>
```

Why This Matters:

1. **Original Size Tracking** - Even when balances are partially consumed, the UI can show "50 GB of 100 GB" instead of just "50 GB remaining"
2. **Progress Visualization** - Percentage calculations enable accurate progress bars
3. **Consistent Naming** - Descriptive names extracted from Balance IDs ensure consistency between backend and frontend
4. **Rollover Display** - When using `*topup` (rollover), if a customer has 70 GB remaining and tops up 100 GB:
   - Balance ID remains: `"AU_Data_Domestic__107374182400"` (original 100 GB)
   - Current value becomes: 170 GB
   - UI shows: "170 GB (70 GB rolled over + 100 GB new)"

Best Practice - Creating Balance IDs:

Always include the original size after `__` for proper UI display. Don't duplicate size info in the descriptive name:

```
# Good - descriptive name + size in base units
Action_Data_100GB = {
    "Actions": [
        {
            "BalanceId": f"AU_Data_Domestic__{100 * 1024 * 1024 *
1024}",
            "Units": 100 * 1024 * 1024 * 1024
        }
    ]
}

# Bad - redundant size in descriptive name
Action_Data_100GB = {
    "Actions": [
        {
            "BalanceId": f"AU_Data_Domestic_100GB__{100 * 1024 *
1024 * 1024}",  # Redundant!
            "Units": 100 * 1024 * 1024 * 1024
        }
    ]
}

# Bad - no size information (UI can't calculate percentage)
Action_Data_100GB = {
    "Actions": [
        {
            "BalanceId": "AU_Data_Domestic",  # Missing __size
            "Units": 100 * 1024 * 1024 * 1024
        }
    ]
}
```

Special Case - Monetary Balances:

Monetary balances don't typically include original size since they can be topped up to any amount:

```
# Monetary balance without size encoding
{
    "BalanceId": "PAYG_Monetary_Balance",
    "BalanceType": "*monetary",
    "Units": 5000  # $50.00
}

# UI simply shows current balance without percentage
# "Balance: $50.00"
```

Strategy 1: Unique IDs (Independent Balances)

Use unique IDs (e.g., with UUIDs) to create completely independent balances that never interact.

Example Implementation:

```
- name: Generate unique balance identifier
  set_fact:
    uuid: "{{ 99999999 | random | to_uuid }}"
    balance_id: "Data_5days__5368709120_{{ uuid[0:8] }}"

- name: Add independent balance with *topup
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "{{ balance_id }}",
            "Value": 5368709120,
            "ExpiryTime": "+5d",
            "Weight": 10
          }
        }]
      }
```

Result: Each addon creates a new, separate balance even if customer purchases the same addon multiple times.

```yaml
# Customer purchases "5 days data addon" three times:
Balance 1:
  ID: "Data_5days__5368709120_a1b2c3d4"
  Value: 5368709120
  Value_hr: "5 GB"
  OriginalValue_hr: "5 GB"
  Remaining_hr: "5 GB of 5 GB"
  Expiry: 2024-12-29

Balance 2:
  ID: "Data_5days__5368709120_e5f6g7h8"
  Value: 5368709120
  Value_hr: "5 GB"
  Remaining_hr: "5 GB of 5 GB"
  Expiry: 2024-12-30

Balance 3:
  ID: "Data_5days__5368709120_i9j0k1l2"
  Value: 5368709120
  Value_hr: "5 GB"
  Remaining_hr: "5 GB of 5 GB"
  Expiry: 2024-12-31

# Total available: 15GB across three separate balances
# Each shows individually in UI as "Data 5days - 5 GB of 5 GB"
```

Strategy 2: Shared IDs with *topup (Rollover)

Use the same Balance ID with `*topup` action to allow balance rollover and expiry extension.

Example Implementation:

```
- name: Set fixed balance ID
  set_fact:
    balance_id: "Data_5days__5368709120"

- name: Add balance with *topup (rollover)
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "Data_5days__5368709120",
            "Value": 5368709120,
            "ExpiryTime": "+5d",
            "Weight": 10
          }
        }]
      }
```

Result: Subsequent purchases add to existing balance and extend expiry.

```yaml
# Day 1: Customer purchases "5 days data addon":
Balance:
  ID: "Data_5days__5368709120"
  Value: 5368709120
  Value_hr: "5 GB"
  Remaining_hr: "5 GB of 5 GB"
  PercentUsed: 0
  Expiry: 2024-12-29

# Day 3: Customer uses 1GB, then purchases same addon again:
Balance:
  ID: "Data_5days__5368709120"
  Value: 9663676416  # 4GB remaining + 5GB new
  Value_hr: "9 GB"
  OriginalValue_hr: "5 GB"
  Remaining_hr: "9 GB (4 GB rolled over + 5 GB new)"
  PercentUsed: -80  # Negative indicates rollover
  Expiry: 2024-12-27 (new +5 days from today)
```

Strategy 3: Shared IDs with *topup_reset (Fixed Amount)

Use the same Balance ID with `*topup_reset` action to always reset to a fixed amount.

Example Implementation:

```
- name: Set fixed balance ID
  set_fact:
    balance_id: "Monthly_Plan__32212254720"

- name: Add balance with *topup_reset (no rollover)
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActions",
        "params": [{
          "ActionsId": "Action_Reset_Monthly_Plan",
          "Actions": [{
            "Identifier": "*topup_reset",
            "BalanceType": "*data",
            "Units": 32212254720,  # 30GB
            "ExpiryTime": "*monthly",
            "DestinationIds": "*any",
            "BalanceId": "Monthly_Plan__32212254720",
            "Weight": 10
          }]
        }]
      }
```

Result: Each month, balance resets to exactly 30GB regardless of how much was used.

```
# Month 1, Day 1:
Balance:
  ID: "Monthly_Plan__32212254720"
  Value: 32212254720
  Value_hr: "30 GB"
  Remaining_hr: "30 GB of 30 GB"
  PercentUsed: 0
  Expiry: 2024-12-31

# Month 1, Day 25: Customer used 28GB
Balance:
  ID: "Monthly_Plan__32212254720"
  Value: 2147483648
  Value_hr: "2 GB"
  Remaining_hr: "2 GB of 30 GB"
  PercentUsed: 93
  Expiry: 2024-12-31

# Month 2, Day 1: ActionPlan runs *topup_reset
Balance:
  ID: "Monthly_Plan__32212254720"
  Value: 32212254720  # Reset to full, unused 2GB lost
  Value_hr: "30 GB"
  Remaining_hr: "30 GB of 30 GB"
  PercentUsed: 0
  Expiry: 2025-01-31
```

Balance Blockers

Balance Blockers are a powerful CGRateS feature that allow you to **block or limit usage** even when balances exist. A blocker balance stops consumption when it reaches zero, preventing further usage regardless of other available balances.

How Blockers Work

When a balance has `Blocker: true`:

1. **While blocker has value** → Usage is allowed up to the blocker amount

2. **When blocker reaches zero** → All usage stops, even if other balances exist
3. **Error returned** → `INSUFFICIENT_CREDIT_BALANCE_BLOCKER` prevents the session

Key Characteristics:

- Blocker balances are **checked even when value is zero** (unlike normal balances which are skipped)
- When a blocker is encountered with remaining usage requested, CGRateS **stops processing** and returns an error
- Blockers work with all balance types: `*voice`, `*data`, `*sms`, `*monetary`

Use Cases for Blockers

1. Account Suspension

Block all usage when an account is suspended (e.g., payment failure):

```
Action_Suspend_Account = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_suspend-account",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            # Add zero-value blocker to prevent all usage
            {
                "Identifier": "*topup",
                "BalanceId": "Suspension_Blocker",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",
                "Units": 0,  # Zero value
                "BalanceWeight": 9999,  # Highest priority -
checked first
                "Blocker": True,  # Block all usage
                "Weight": 10
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_Suspend_Account)
```

Result: All calls/data/SMS blocked regardless of other balances.

2. Spending Limits

Limit maximum spending to prevent bill shock:

```
Action_Monthly_Plan_With_Cap = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_monthly-with-cap",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            # 10GB included data
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Included_Data__{10 * 1024 * 1024 *
1024}",
                "BalanceType": "*data",
                "DestinationIDs": "Dest_PLMN_OnNet",
                "Units": 10 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,  # Consumed first
                "Weight": 95
            },
            # $50 overage limit (blocker)
            {
                "Identifier": "*topup_reset",
                "BalanceId": "Overage_Cap",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",
                "Units": 5000,  # $50.00 maximum overage
                "ExpiryTime": "*month",
                "BalanceWeight": 1000,  # Consumed after included
                "Blocker": True,  # Stop when $50 spent
                "Weight": 90
            }
        ]
    }]
}
```

Flow:

1. Customer uses 10GB included → FREE (from Included_Data_10GB)
2. Customer uses additional 5GB → Charged from Overage_Cap (PAYG rates)

3. When Overage_Cap reaches $0 → **All usage blocked** (spending limit reached)

3. Time-Limited Free Trial

Provide limited free usage for trial accounts:

```
Action_Trial_Account = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_trial-100-minutes",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            # 100 free minutes (blocker - stops when exhausted)
            {
                "Identifier": "*topup",
                "BalanceId": f"Trial_Voice__{100 * 60 *
1000000000}",
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 100 * 60 * 1000000000,  # 100 minutes
                "ExpiryTime": "+720h",  # 30 days
                "BalanceWeight": 1200,
                "Blocker": True,  # No usage after 100 minutes
                "Weight": 10
            }
        ]
    }]
}
```

Result: Customer gets exactly 100 minutes free. After that, all calls blocked (no automatic charges).

4. Destination-Specific Blocking

Block specific destinations while allowing others:

```
Action_Block_Premium_Numbers = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_block-premium",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            # Regular usage allowed
            {
                "Identifier": "*topup_reset",
                "BalanceId": "Regular_Usage",
                "BalanceType": "*monetary",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 10000,  # $100
                "ExpiryTime": "*month",
                "BalanceWeight": 1000,
                "Weight": 20
            },
            # Block premium numbers (0900, etc.)
            {
                "Identifier": "*topup",
                "BalanceId": "Premium_Blocker",
                "BalanceType": "*monetary",
                "DestinationIDs": "Dest_Domestic_Premium",
                "Units": 0,  # Zero value
                "BalanceWeight": 2000,  # Higher weight - checked
first for premium
                "Blocker": True,
                "Weight": 10
            }
        ]
    }]
}
```

Flow:

- Domestic calls → Uses Regular_Usage balance
- Premium number calls → Matches Premium_Blocker (weight 2000 > 1000) → **BLOCKED**

Blocker vs Disabled Balances

Don't confuse `Blocker` with `Disabled`:

Feature	Blocker	Disabled
Purpose	Stop usage when balance is exhausted	Temporarily pause a balance
When value > 0	Balance is usable normally	Balance is skipped/ignored
When value = 0	**Blocks all further usage**	Balance is skipped (next balance tried)
Use Case	Spending limits, caps, trial limits	Temporarily suspend a specific balance

```
# Blocker: Allows 10GB, then blocks everything
{
    "BalanceId": f"Data_Cap__{10 * 1024 * 1024 * 1024}",
    "Units": 10 * 1024 * 1024 * 1024,
    "Blocker": True  # Stops usage at 10GB
}

# Disabled: Ignores this balance entirely (temporarily paused)
{
    "BalanceId": f"Bonus_Data__{5 * 1024 * 1024 * 1024}",
    "Units": 5 * 1024 * 1024 * 1024,
    "Disabled": True  # This balance won't be used at all
}
```

Practical Example: Hybrid Plan with Safety Cap

Combine unitary balances, monetary overflow, and a blocker cap:

```
Action_Safe_Hybrid_Plan = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_safe-hybrid-plan",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },
            # 500 domestic minutes included
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Domestic_Voice__{500 * 60 *
1000000000}",
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 500 * 60 * 1000000000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 95
            },
            # $20 overage allowance
            {
                "Identifier": "*topup_reset",
                "BalanceId": "Overage_Allowance",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",
                "Units": 2000,  # $20.00
                "ExpiryTime": "*month",
                "BalanceWeight": 1000,
                "Weight": 90
            },
            # $50 HARD LIMIT (blocker)
            {
                "Identifier": "*topup_reset",
                "BalanceId": "Hard_Spending_Cap",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",
                "Units": 5000,  # $50.00 absolute maximum
                "ExpiryTime": "*month",
```

```
                "BalanceWeight": 500,  # Lower than overage - used
last
                "Blocker": True,  # STOP when cap reached
                "Weight": 85
            }
        ]
    }]
}
```

Customer Journey:

1. **0-500 minutes:** Uses Domestic_Voice_500min (FREE)
2. **500-700 minutes:** Uses Overage_Allowance at $0.10/min = $20 (200 min)
3. **700-1200 minutes:** Uses Hard_Spending_Cap at $0.10/min = $50 (500 min)
4. **At 1200 minutes:** Hard_Spending_Cap exhausted → **ALL USAGE BLOCKED**

Customer gets 1200 minutes total, with spending capped at $50 overage maximum.

Best Practices with Blockers

1. **Use High Weight for Blockers**

   ```
   "BalanceWeight": 9999  # Ensure blocker is checked first
   ```

2. **Zero-Value Blockers for Immediate Blocking**

   ```
   "Units": 0,  # Block immediately
   "Blocker": True
   ```

3. **Notify Customers Before Blocker Exhaustion**

   - Use ActionTriggers to send notifications at 80%, 90%, 100% of blocker usage
   - Give customers option to increase cap before blocking occurs

4. **Remove Blockers When Unsuspending**

```
# Use *remove_balance to delete the blocker
{
    "Identifier": "*remove_balance",
    "BalanceId": "Suspension_Blocker"
}
```

5. **Test Blocker Behavior**
    - Verify blocker returns `INSUFFICIENT_CREDIT_BALANCE_BLOCKER` error
    - Confirm CDRs show cost = -1.0 when blocked
    - Test that other balances are NOT used after blocker exhaustion

Troubleshooting Blockers

Issue: Usage not blocked despite blocker at zero

Possible Causes:

1. Blocker weight too low (other balances checked first)
2. DestinationIDs don't match usage destination
3. Blocker field not set to `True`

Solution:

```
# Verify blocker configuration
OCS_Obj.SendData({
    'method': 'ApierV2.GetAccount',
    'params': [{"Tenant": tenant, "Account": "service_uuid"}]
})

# Check:
# - Blocker: true
# - BalanceWeight is highest (e.g., 9999)
# - DestinationIDs includes usage destination
# - Value = 0
```

Issue: Usage blocked unexpectedly

Possible Cause: Blocker balance created unintentionally with low value

Solution: Check all balances for `Blocker: true` and verify their values are appropriate for your use case.

Balance Consumption Rules

Rule 1: Destination Precision Priority

Balances with **higher destination precision** (more specific destination match) are consumed first. This is determined by prefix match length.

```
# Customer calls +44-20-1234-5678 (London, UK)

Balance 1:
  DestinationIDs: "Dest_UK_London"  # Prefix: "4420" (precision:
4)
  Value: 100 minutes
  Weight: 10

Balance 2:
  DestinationIDs: "Dest_UK_All"     # Prefix: "44" (precision: 2)
  Value: 200 minutes
  Weight: 10

# Balance 1 consumed first (precision 4 > precision 2)
# More specific destination match wins
```

Use Case: City-specific or region-specific balances take priority over country-wide balances.

Rule 2: Weight Priority (Same Precision)

When destination precision is equal, balances with **higher weight** are consumed first.

```
Balance 1:
  ID: "Premium_Data"
  Value: 5GB
  Weight: 20

Balance 2:
  ID: "Standard_Data"
  Value: 10GB
  Weight: 10

# Balance 1 consumed first (weight 20 > weight 10)
# Even though Balance 2 has more data
```

Use Case: Priority balances (bonus data consumed before regular data).

Rule 3: Oldest First

When weight matches the oldest balance is used first.

```
Balance 1:
  ID: "Data_Package_A"
  Value: 5GB
  Expiry: 2024-12-25
  Weight: 10

Balance 2:
  ID: "Data_Package_B"
  Value: 10GB
  Expiry: 2025-01-15
  Weight: 10
```

To control consumption order, use different weights:

```
# Correct approach: Use weight to prioritize soon-to-expire
balances
Balance 1:
  ID: "Data_Package_A"
  Value: 5GB
  Expiry: 2024-12-25
  Weight: 11  # Higher weight = consumed first

Balance 2:
  ID: "Data_Package_B"
  Value: 10GB
  Expiry: 2025-01-15
  Weight: 10  # Lower weight = consumed second

# Balance 1 consumed first (weight 11 > weight 10)
```

Best Practice: If you want to ensure soon-to-expire balances are consumed first, assign them higher weights when creating them.

Practical Examples

Example 1: Simple Data Addon (Independent)

Scenario: Customer can purchase "5GB 5 days" addon multiple times, each creating a separate balance.

Implementation:

```
- name: Generate UUID for unique balance
  set_fact:
    uuid: "{{ 99999999 | random | to_uuid }}"

- name: Add independent 5GB balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Categories": "*any",
          "Balance": {
            "ID": "Data_5GB_{{ uuid[0:8] }}",
            "Value": 5368709120,
            "ExpiryTime": "+120h",  # 5 days
            "Weight": 10
          }
        }]
      }
```

Customer Experience:

- Purchases addon on Dec 24 → Gets 5GB expiring Dec 29
- Purchases addon on Dec 25 → Gets 5GB expiring Dec 30
- Both balances coexist; consumption order depends on balance weights (both have weight 10, so order not guaranteed)

Example 2: Rollover Data Package

Scenario: "Monthly 50GB Plan" where unused data rolls over when customer tops up early.

Implementation:

```
- name: Add rollover data balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "Rollover_Monthly_50GB",
            "Value": 53687091200,  # 50GB
            "ExpiryTime": "+720h",  # 30 days
            "Weight": 10
          }
        }]
      }
```

Action Type: Uses default `*topup` behavior (rollover enabled)

Customer Experience:

- Day 1: Gets 50GB expiring in 30 days
- Day 20: Used 30GB, has 20GB remaining
- Day 20: Tops up again → Gets 70GB total (20GB + 50GB), expiry extends to +30 days from Day 20

Example 3: Fixed Monthly Plan (No Rollover)

Scenario: "Unlimited 100GB Monthly" plan that resets to exactly 100GB each month, no rollover.

Implementation:

```
- name: Create monthly reset action
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActions",
        "params": [{
          "ActionsId": "Action_Monthly_100GB_Reset",
          "Overwrite": true,
          "Actions": [{
            "Identifier": "*topup_reset",
            "BalanceType": "*data",
            "Units": 107374182400,  # 100GB
            "ExpiryTime": "*monthly",
            "BalanceId": "Monthly_Plan__107374182400",
            "Weight": 10
          }]
        }]
      }

- name: Create monthly ActionPlan
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActionPlan",
        "params": [{
          "Id": "ActionPlan_Monthly_100GB",
          "ActionPlan": [{
            "ActionsId": "Action_Monthly_100GB_Reset",
            "Time": "*monthly",
            "Weight": 10
          }],
          "Overwrite": true,
          "ReloadScheduler": true
        }]
      }

- name: Assign ActionPlan to account
```

```
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV2.SetAccount",
        "params": [{
          "Account": "{{ service_uuid }}",
          "ActionPlanIds": ["ActionPlan_Monthly_100GB"],
          "ReloadScheduler": true
        }]
      }
```

Customer Experience:

- Month 1: Gets 100GB, uses 95GB, has 5GB remaining
- Month 2: Balance resets to 100GB (5GB unused data lost)
- Month 2: Uses 20GB, has 80GB remaining
- Month 3: Balance resets to 100GB (80GB unused data lost)

Example 4: Multi-Tier Balances with Weight Priority

Scenario: Customer has "Bonus Data" (high priority) and "Regular Data" (low priority). Bonus data consumed first.

Implementation:

```
# Add bonus data with high weight
- name: Add bonus data balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "Bonus_Data",
            "Value": 5368709120,  # 5GB
            "ExpiryTime": "+240h",  # 10 days
            "Weight": 20  # Higher priority
          }
        }]
      }

# Add regular data with normal weight
- name: Add regular data balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "Regular_Data",
            "Value": 53687091200,  # 50GB
            "ExpiryTime": "+720h",  # 30 days
            "Weight": 10  # Normal priority
          }
        }]
      }
```

Customer Experience:

- Has 5GB bonus data (weight 20) + 50GB regular data (weight 10)
- Consumes all 5GB bonus data first
- Then consumes from 50GB regular data pool
- Regular data preserved longer

Common Action Identifiers

CGRateS supports multiple action identifiers for different operations:

Balance Manipulation

***topup** - Add to existing balance (rollover) ***topup_reset** - Reset balance to new value (no rollover) ***debit** - Subtract from balance ***debit_reset** - Set balance to negative value ***reset_account** - Remove all balances

Designing Addon Products

When designing addon products in OmniCRM, consider these questions:

Question 1: Should balances stack?

Yes (Independent) → Use unique Balance IDs (with UUID) **No (Replace)** → Use fixed Balance ID with `*topup_reset` **Yes (Rollover)** → Use fixed Balance ID with `*topup`

Question 2: What happens to unused balance?

Rollover → Use `*topup` action **Lost** → Use `*topup_reset` action **Separate pools** → Use unique Balance IDs

Question 3: How should balances be consumed?

Oldest first → Use different weights (assign higher weight to older/soon-to-expire balances) **Premium first** → Different weights (higher weight = higher priority) **Specific order** → Use weights: 30 (premium), 20 (bonus), 10 (regular) **Random/No preference** → Use same weight (consumption order not guaranteed)

Question 4: What's the expiry strategy?

Fixed duration → Use relative expiry (`+720h` for 30 days) **End of month** → Use `*monthly` in ActionPlan **Never expires** → Use `*unlimited` or very long duration

CGRateS Action Structure in Playbooks

Here's the complete structure for creating an Action:

```
- name: Create CGRateS Action
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActions",
        "params": [{
          "ActionsId": "Action_Name_Here",
          "Overwrite": true,  # Replace if exists
          "Actions": [
            {
              "Identifier": "*topup",  # or *topup_reset
              "BalanceType": "*data",  # *data, *voice, *sms,
*monetary
              "Units": 5368709120,  # Amount to add
              "ExpiryTime": "+120h",  # +Xh, *unlimited, *monthly
              "DestinationIds": "*any",  # Usually *any
              "BalanceId": "Balance_Name",  # Unique or shared
              "Weight": 10,  # Priority (higher = consumed first)
              "Blocker": false,  # If true, prevent negative
balance
              "Disabled": false,  # If true, balance is disabled
              "SharedGroups": ""  # Shared balance group
(optional)
            },
            {
              "Identifier": "*cdrlog",  # Log this action as CDR
              "BalanceType": "*generic",
              "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"Addon Name\"}"
            }
          ]
        }]
      }
```

Field Descriptions

ActionsId - Unique identifier for this action set

Identifier - The operation type (`*topup`, `*topup_reset`, `*cdrlog`, etc.)

BalanceType - Type of balance:

- `*data` - Data balances (bytes)
- `*voice` - Voice balances (seconds)
- `*sms` - SMS balances (count)
- `*monetary` - Monetary balances (currency units)
- `*generic` - Generic balances

Units - Amount to add/deduct (in base units: bytes for data, seconds for voice)

ExpiryTime - When balance expires:

- `+Xh` - Relative (e.g., `+720h` = 30 days)
- `*unlimited` - Never expires
- `*monthly` - End of month
- `2024-12-31T23:59:59Z` - Absolute timestamp

BalanceId - Identifier for this balance (shared ID = interacts, unique ID = independent)

Weight - Priority (higher number = higher priority, consumed first)

Blocker - If true, prevents account from going negative

Disabled - If true, balance exists but cannot be used

Defining Actions via Python (Initial Setup)

Actions are typically defined during initial system configuration using Python scripts with the `cgrateshttpapi` library. These examples show how to define Actions using `OCS_Obj.SendData()`.

Prerequisites

```
import cgrateshttpapi
import time

OCS_Obj = cgrateshttpapi.CGRateS("ocs.example.com", "2080")
tenant = "your_tenant_name"
tpid = str(tenant) + "_" + str(int(time.time()))
```

Defining Destinations

Before creating Actions, you must define destinations that specify WHERE balances can be used.

Destinations come in two types:

- **Geographic Destinations** - Number prefixes for voice/SMS TO places (e.g., `Dest_International_UK`)
- **PLMN Destinations** - Network codes for data FROM places (e.g., `Dest_PLMN_OnNet`, `Dest_PLMN_US_Verizon`)

Critical Rule:

- **Voice/SMS balances** → Use geographic destinations (the number being called TO)
- **Data balances** → Use PLMN destinations (the network customer is connected on FROM)

For complete destination configuration including:

- Geographic destinations (domestic, international, toll-free, premium)
- PLMN destinations (on-net, roaming networks, zones)
- PLMN format rules and best practices
- Troubleshooting destination issues

See: **CGRateS Destinations Configuration**

Unit Calculations

Understanding unit conversions is critical for defining balances correctly:

```
# Data balances (in bytes)
1_GB = 1 * 1024 * 1024 * 1024  # 1073741824 bytes
100_GB = 100 * 1024 * 1024 * 1024

# Voice balances (in nanoseconds)
1_minute = 60 * 1000000000  # 60 billion nanoseconds
3000_minutes = 3000 * 60 * 1000000000

# SMS balances (in count)
3000_sms = 3000
```

Example 1: Multi-Balance Monthly Plan (Python)

A comprehensive monthly plan with data, voice, SMS, and roaming balances that reset each month.

```
Action_AU_Premium_Plan_1 = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_au-premium-plan-1",
        "Overwrite": True,
        "Tenant": str(tenant),
        "Actions": [
            # First, reset the account to clear old balances
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },
            # Add 100GB data balance
            # IMPORTANT: Data balances use PLMN destinations
(network customer is connected to)
            # NOT geographic destinations. Use YOUR on-net PLMN.
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_Data_Domestic__" + str(100 * 1024
* 1024 * 1024),
                "BalanceType": "*data",
                "DestinationIDs": "Dest_PLMN_OnNet",  # Your on-
net PLMN (mcc505.mnc057)
                "Units": 100 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 90
            },
            # Add 3000 minutes voice balance
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_Voice_Domestic__" + str(3000 * 60
* 1000000000),
                "BalanceType": "*voice",
                "DestinationIDs":
"Dest_AU_Mobile;Dest_AU_Fixed;Dest_AU_TollFree;",
                "Units": 3000 * 60 * 1000000000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 89
            },
            # Add 3000 SMS balance
```

```
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_SMS_Domestic__" + str(3000),
                "BalanceType": "*sms",
                "DestinationIDs": "Dest_AU_Mobile;",
                "Units": 3000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 88
            },
            # Add 6GB roaming data
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_Roaming_Data__" + str(6 * 1024 *
1024 * 1024),
                "BalanceType": "*data",
                "DestinationIDs": "Dest_Roaming_All",
                "Units": 6 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1100,
                "Weight": 87
            },
            # Log this action as a CDR
            {
                "Identifier": "*cdrlog",
                "BalanceId": "",
                "BalanceUuid": "",
                "BalanceType": "*generic",
                "Directions": "*out",
                "Units": 0,
                "ExpiryTime": "",
                "Filter": "",
                "TimingTags": "",
                "DestinationIds": "",
                "RatingSubject": "",
                "Categories": "",
                "SharedGroups": "",
                "BalanceWeight": 0,
                "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"AU Premium Plan
1\"}",
                "BalanceBlocker": "false",
                "BalanceDisabled": "false",
                "Weight": 80
```

```
            }
        ]
    }]
}

# Send the action definition to CGRateS
result = OCS_Obj.SendData(Action_AU_Premium_Plan_1)
assert result['error'] is None or result['error'] == "EXISTS"
print("Created Action: Action_au-premium-plan-1")
```

Key Points:

- Uses `*reset_account` to clear old balances first
- Uses `*topup_reset` for fixed monthly allowances (no rollover)
- BalanceWeight determines consumption order (domestic 1200 > roaming 1100)
- Weight determines execution order within the Action
- Includes `*cdrlog` for tracking activations

Example 2: Simple Data Addon (Python)

A simple 20GB data addon with rollover disabled.

```
Action_AU_Data_Addon_20GB = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_au-data-addon-20gb",
        "Overwrite": True,
        "Tenant": str(tenant),
        "Actions": [
            # Reset account first
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },
            # Add 20GB data
            # Data balances use PLMN destinations (which network
customer is on)
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_Data_Domestic__" + str(20 * 1024
* 1024 * 1024),
                "BalanceType": "*data",
                "DestinationIDs": "Dest_PLMN_OnNet",  # Your on-
net PLMN (mcc505.mnc057)
                "Units": 20 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 90
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_AU_Data_Addon_20GB)
assert result['error'] is None or result['error'] == "EXISTS"
print("Created Action: Action_au-data-addon-20gb")
```

Example 3: International Voice Addon (Python)

An addon for international calling minutes.

```
Action_AU_International_Voice_100min = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_au-international-voice-100min",
        "Overwrite": True,
        "Tenant": str(tenant),
        "Actions": [
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },
            # Add 100 minutes for international calls
            {
                "Identifier": "*topup_reset",
                "BalanceId": "AU_Voice_International__" + str(100
* 60 * 1000000000),
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_International_All",
                "Units": 100 * 60 * 1000000000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1000,
                "Weight": 90
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_AU_International_Voice_100min)
assert result['error'] is None or result['error'] == "EXISTS"
print("Created Action: Action_au-international-voice-100min")
```

Note: Voice/SMS use geographic destinations (number being called), while data uses PLMN destinations (network customer is connected to). See Defining Products for destination configuration.

Python Action Field Reference

Action Definition Fields:

- **ActionsId** (required) - Unique identifier for this action set (must match product_slug convention in CRM)
- **Overwrite** - If True, replace existing action with same ID
- **Tenant** - CGRateS tenant name
- **Actions** - Array of individual actions to execute

Individual Action Fields:

- **Identifier** - Action type (`*topup`, `*topup_reset`, `*reset_account`, `*cdrlog`, etc.)
- **BalanceId** - Unique identifier for this balance (must match across topups for rollover to work)
- **BalanceType** - Type of balance (`*data`, `*voice`, `*sms`, `*monetary`)
- **DestinationIDs** - Controls WHERE the balance can be used:
  - For **voice/SMS**: Use geographic destinations (e.g., `"Dest_AU_Mobile"`, `"Dest_International_UK"`)
  - For **data**: Use PLMN destinations (e.g., `"Dest_PLMN_OnNet"`, `"Dest_PLMN_US_Verizon"`)
- **Units** - Amount to add (bytes for data, nanoseconds for voice, count for SMS)
- **ExpiryTime** - When balance expires (`*month`, `+720h`, `2024-12-31`, etc.)
- **BalanceWeight** - Consumption priority (higher = consumed first)
- **Weight** - Execution order within the action set (higher = executes first)
- **Blocker** (optional) - Boolean flag; if `True`, blocks all usage when this balance reaches zero (see Balance Blockers)
- **Disabled** (optional) - Boolean flag; if `True`, this balance is ignored/skipped during consumption

Executing Actions

Once an Action is created, execute it on an account:

```
- name: Execute Action on Account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.ExecuteAction",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionsId": "Action_Name_Here"
        }]
      }
```

This executes all operations defined in the Action on the specified account.

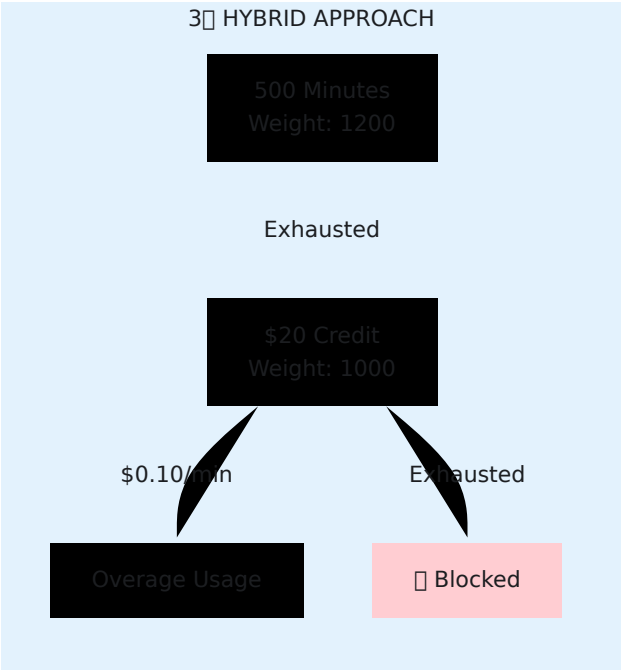
Balance Management Approaches

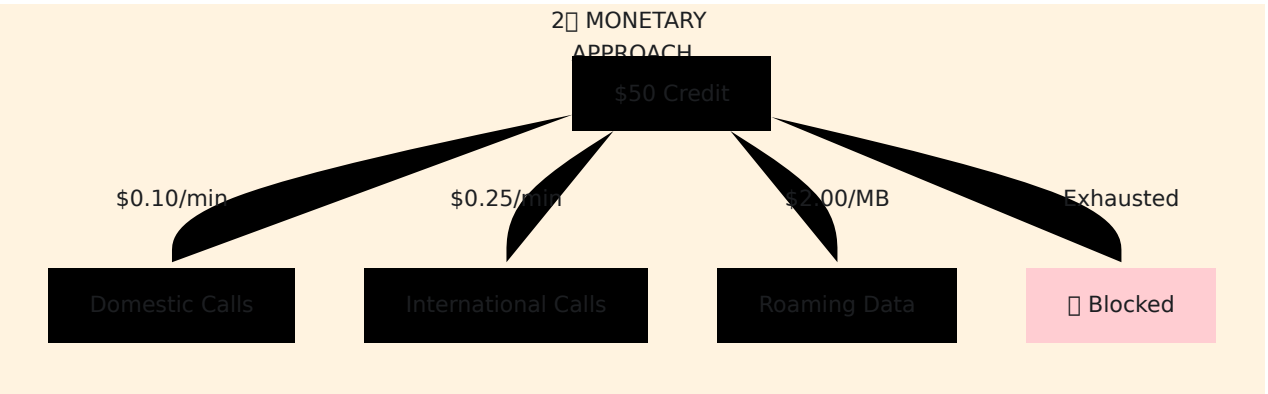
There are three primary approaches to managing balances in CGRateS, each with different trade-offs for customer experience, billing predictability, and operational complexity.

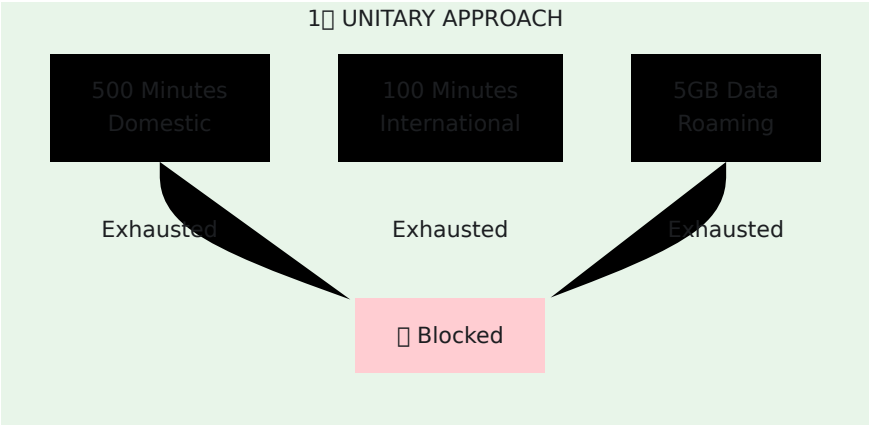
Comparison: Unitary vs Monetary vs Hybrid

This table summarizes the trade-offs between the three balance approaches:

Feature	Unitary	Monetary (PAYG)	Hybrid
Customer Predictability	□ Fixed monthly cost	□ Variable costs	⚠ Mostly predictable
Destination Flexibility	□ Limited to included destinations	□ Call/use anywhere	□ Included + anywhere
Overage Handling	□ Hard cutoff	□ Automatic usage	□ Automatic overflow
Bill Shock Risk	□ Low (hard caps)	□ High (unlimited billing)	⚠ Moderate (capped overflow)
Configuration Complexity	⚠ Moderate (many balances)	□ Simple (one balance)	□ Complex (both)
Revenue Optimization	⚠ Lower ARPU	□ Higher ARPU from heavy users	□ Balanced ARPU
Customer Satisfaction	□ High (no surprises)	□ Low (bill shock)	□ High (best of both)
Best For	Predictable users	Occasional users	Most customers







Approach 1: Unitary Balances

Concept: Provide specific quantities for specific destinations. Each balance has a fixed amount (minutes, GB, SMS count) tied to specific destinations. When

exhausted, usage is blocked unless there's a monetary fallback.

Example: Domestic Plan with Multiple Balances

```
Action_Domestic_Plan = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_domestic-plan",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },
            # 500 minutes domestic calls
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Domestic_Voice__{500 * 60 *
1000000000}",
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_Domestic_All",  # ONLY
domestic
                "Units": 500 * 60 * 1000000000,  # 500 minutes in
nanoseconds
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 90
            },
            # 1000 SMS domestic
            {
                "Identifier": "*topup_reset",
                "BalanceId": "Domestic_SMS__1000",
                "BalanceType": "*sms",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 1000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 89
            },
            # 10GB domestic data
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Domestic_Data__{10 * 1024 * 1024 *
1024}",
                "BalanceType": "*data",
```

```
                "DestinationIDs": "Dest_PLMN_OnNet",  # Your on-
net PLMN
                "Units": 10 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 88
            },
            {
                "Identifier": "*cdrlog",
                "BalanceType": "*generic",
                "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"Domestic Plan\"}",
                "Weight": 80
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_Domestic_Plan)
assert result['error'] is None or result['error'] == "EXISTS"
```

How This Works:

- Domestic calls (1-555-1234) → Uses 500-minute balance
- International calls (44-20-xxx) → NO balance available, blocked OR uses monetary balance if available
- Domestic SMS → Uses 1000-SMS balance
- Home data usage → Uses 10GB balance
- Roaming data → NO balance available (would need separate roaming data balance)

Pros:

- Predictable costs for customers
- No bill shock
- Clear limits

Cons:

- Less flexible - can't use service outside included destinations

- Requires multiple balances for different use cases
- Customer may feel restricted

Approach 2: Monetary (PAYG)

Concept: Provide monetary credit charged at destination-specific rates. Single monetary balance used for ALL usage types. CGRateS looks up the rate for each destination and deducts cost from the credit.

Note: PAYG requires defining Rate Profiles for each destination to set the dollar amount per unit. See Rate Profiles for PAYG/Monetary Balances for complete configuration.

Example: $50 PAYG Credit

```
Action_PAYG_Credit = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_payg-50-credit",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            # $50 monetary balance
            {
                "Identifier": "*topup",
                "BalanceId": "PAYG_Monetary_Balance",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",  # Works for ANY
destination
                "Units": 5000,  # $50.00 (in cents)
                "ExpiryTime": "+2160h",  # 90 days
                "BalanceWeight": 1000,  # Lower than unitary
balances
                "Weight": 90
            },
            {
                "Identifier": "*cdrlog",
                "BalanceType": "*generic",
                "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"$50 PAYG
Credit\"}",
                "Weight": 80
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_PAYG_Credit)
```

How PAYG Works:

Scenario 1: Domestic call, 10 minutes

- Rate: $0.10/min
- Charge: 10 × $0.10 = $1.00

- Remaining: $49.00

Scenario 2: Call to UK, 5 minutes

- Rate: $0.25/min + $0.05 connect fee
- Charge: (5 × $0.25) + $0.05 = $1.30
- Remaining: $47.70

Scenario 3: Roaming on Verizon, 100MB data

- Rate: $2.00/MB
- Charge: 100 × $2.00 = $200.00
- Result: Insufficient funds → Session blocked at ~$47 worth (~23MB)

Pros:

- One balance for everything - very flexible
- Customer can use service anywhere rates are defined
- Simple configuration

Cons:

- Unpredictable costs for customers
- Bill shock risk (especially roaming)
- Can be expensive for heavy users

Approach 3: Hybrid (Best of Both)

Concept: Combine unitary balances with monetary fallback. Use high-weight unitary balances for included usage, with low-weight monetary balance as overflow. Best customer experience with predictable base cost and flexible overages.

Example: Hybrid Flex Plan

```
Action_Hybrid_Plan = {
    "id": "0",
    "method": "ApierV1.SetActions",
    "params": [{
        "ActionsId": "Action_hybrid-flex-plan",
        "Overwrite": True,
        "Tenant": tenant,
        "Actions": [
            {
                "Identifier": "*reset_account",
                "Weight": 700
            },

            # ============= UNITARY BALANCES (Included)
=============
            # 500 domestic voice minutes
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Domestic_Voice__{500 * 60 *
1000000000}",
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 500 * 60 * 1000000000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,  # Consumed FIRST for
domestic calls
                "Weight": 95
            },
            # 100 international voice minutes
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"International_Voice__{100 * 60 *
1000000000}",
                "BalanceType": "*voice",
                "DestinationIDs": "Dest_International_All",
                "Units": 100 * 60 * 1000000000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1150,  # Consumed FIRST for
international
                "Weight": 94
            },
            # 1000 domestic SMS
            {
```

```
                "Identifier": "*topup_reset",
                "BalanceId": "Domestic_SMS__1000",
                "BalanceType": "*sms",
                "DestinationIDs": "Dest_Domestic_All",
                "Units": 1000,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 93
            },
            # 15GB domestic data
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Domestic_Data__{15 * 1024 * 1024 *
1024}",
                "BalanceType": "*data",
                "DestinationIDs": "Dest_PLMN_OnNet",
                "Units": 15 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1200,
                "Weight": 92
            },
            # 2GB roaming data (Zone 1)
            {
                "Identifier": "*topup_reset",
                "BalanceId": f"Roaming_Zone1_Data__{2 * 1024 *
1024 * 1024}",
                "BalanceType": "*data",
                "DestinationIDs": "Dest_PLMN_Zone_NorthAmerica",
                "Units": 2 * 1024 * 1024 * 1024,
                "ExpiryTime": "*month",
                "BalanceWeight": 1100,
                "Weight": 91
            },

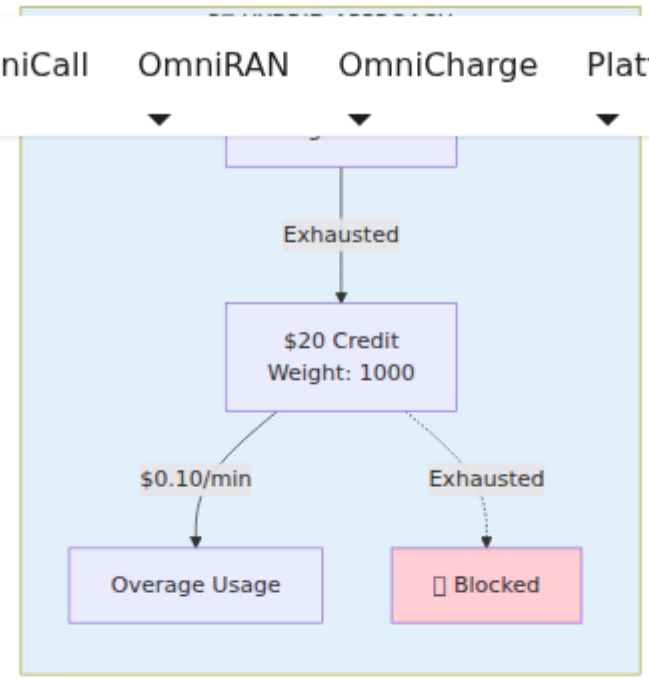
            # ============= MONETARY BALANCE (Overflow/PAYG)
=============
            # $20 for overages
            {
                "Identifier": "*topup",
                "BalanceId": "PAYG_Overflow_Balance",
                "BalanceType": "*monetary",
                "DestinationIDs": "*any",
                "Units": 2000,  # $20.00
                "ExpiryTime": "*month",
```

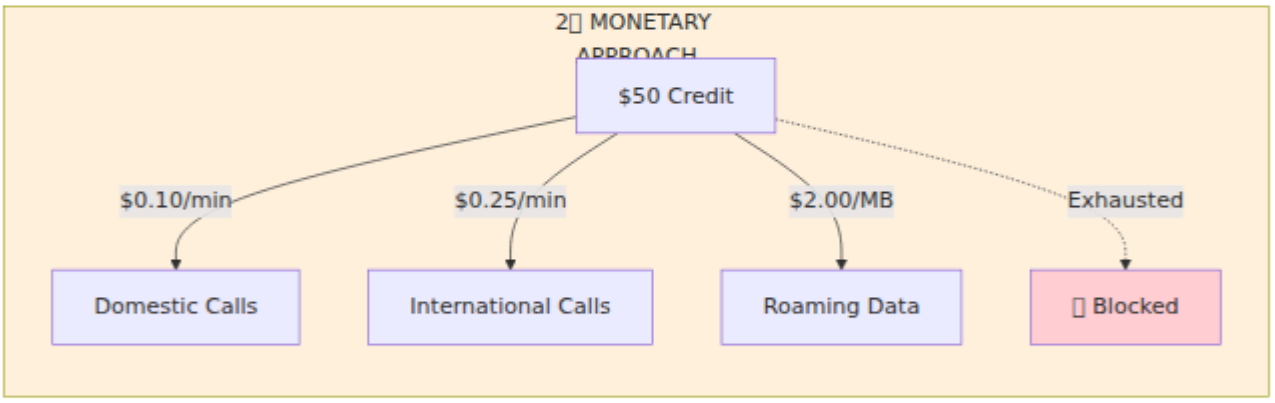
```
                "BalanceWeight": 1000,  # Consumed LAST (fallback)
                "Weight": 90
            },

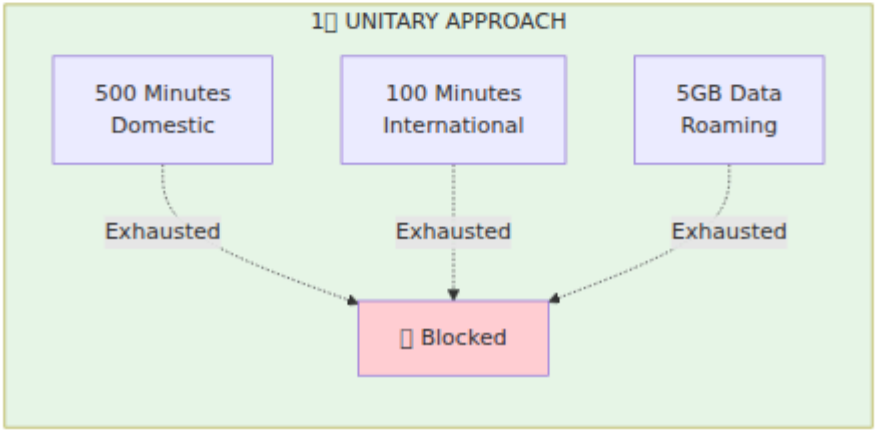
            {
                "Identifier": "*cdrlog",
                "BalanceType": "*generic",
                "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"Hybrid Flex
Plan\"}",
                "Weight": 80
            }
        ]
    }]
}

result = OCS_Obj.SendData(Action_Hybrid_Plan)
```

Balance Consumption Flow:







Example Scenarios:

Scenario 1: 600 domestic minutes used

1. First 500 minutes → Uses "Domestic_Voice_500min" (weight 1200) - FREE

2. Next 100 minutes → "Domestic_Voice_500min" exhausted, falls back to "PAYG_Overflow_Balance" (weight 1000)
3. Charged: 100 min × $0.10 = $10.00 from monetary balance
4. Remaining: $10.00 monetary

Scenario 2: 150 international minutes (to UK)

1. First 100 minutes → Uses "International_Voice_100min" (weight 1150) - FREE
2. Next 50 minutes → Falls back to "PAYG_Overflow_Balance"
3. Charged: (50 × $0.25) + $0.05 connect = $12.55
4. Remaining: $7.45 monetary (if starting with $20)

Pros:

- Predictable base cost
- Flexibility for occasional overages
- Best customer experience
- No hard cutoff - service continues

Cons:

- More complex to configure
- More complex to explain to customers
- Requires careful balance weight management

Real-World Usage Scenarios

These scenarios demonstrate how the concepts come together in practice. Each shows the complete flow from usage event to balance deduction or blocking.

Scenario 1: Customer at Home Calls UK

Customer has: Domestic Plan (500min domestic, 1000 SMS, 10GB data)

Action: Calls UK number (44-20-7946-0958) for 10 minutes

Balance Check:

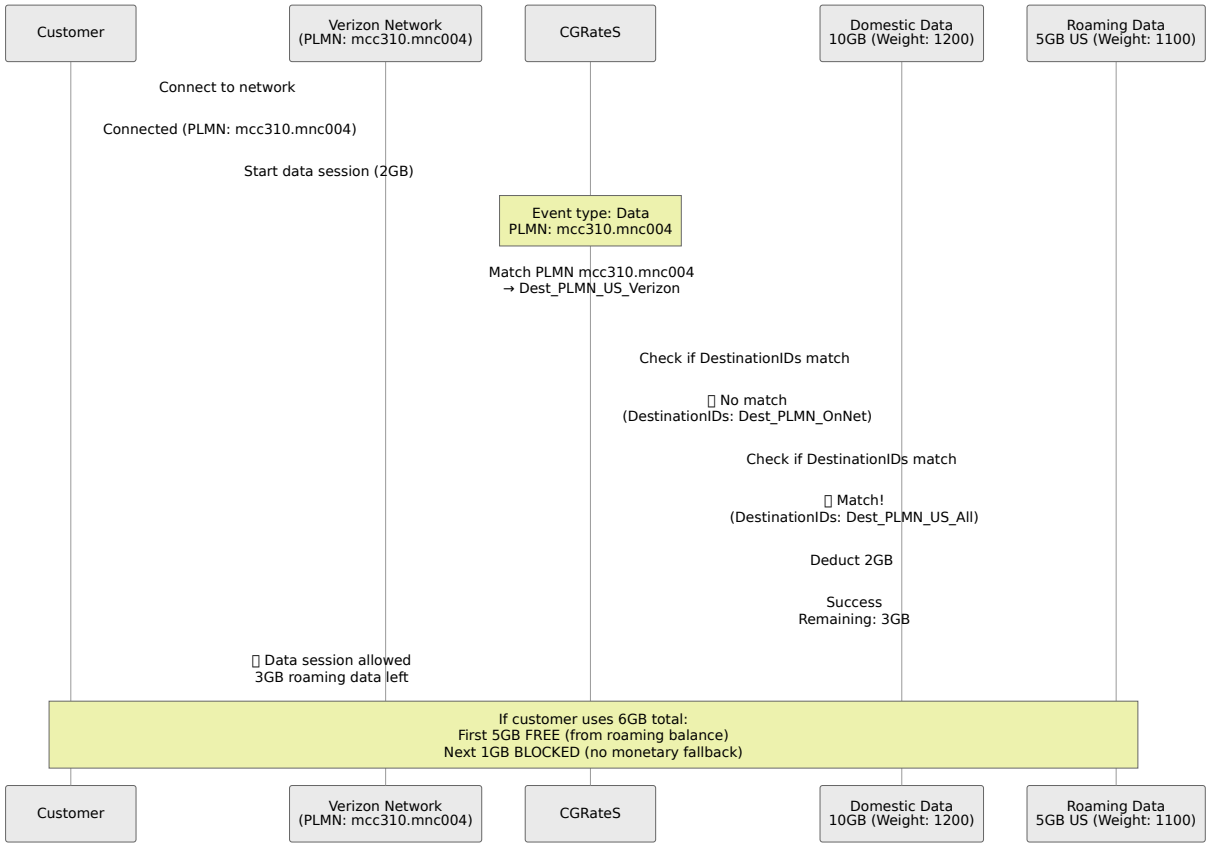
1. CGRateS receives call to `44207946...`
2. Matches destination: `Dest_International_UK`
3. Checks for balance with `DestinationIDs: "Dest_International_UK"`
4. NO matching balance found
5. Checks for monetary balance
6. NO monetary balance found
7. **Result:** Call BLOCKED (insufficient balance)

Solution: Customer needs International Plan OR PAYG credit to make UK calls

Scenario 2: Customer Roaming in US Uses Data

Customer has: Domestic Plan + US Roaming 5GB addon

Action: Roaming on Verizon (PLMN mcc310.mnc004), uses 2GB data



Balance Check:

1. CGRateS receives data session on PLMN `mcc310.mnc004`

2. Matches destination: `Dest_PLMN_US_Verizon`
3. Checks for data balance with `DestinationIDs: "Dest_PLMN_US_All"` (broader match)
4. Finds: "Roaming_US_Data_5GB" balance (BalanceWeight: 1100)
5. Deducts 2GB
6. **Remaining:** 3GB roaming data

What if they used 6GB?

1. First 5GB → Uses roaming balance (exhausted)
2. Next 1GB → Checks for monetary balance
3. NO monetary balance → **Session blocked** at 5GB

Scenario 3: Customer with Hybrid Plan Exceeds Domestic Minutes

Customer has: Hybrid Plan (500 domestic min + $20 overflow)

Action: Makes 600 minutes of domestic calls

Balance Check:

1. First 500 minutes:
   - Uses "Domestic_Voice_500min" (BalanceWeight: 1200)
   - No charge
2. "Domestic_Voice_500min" exhausted
3. Next 100 minutes:
   - Falls back to "PAYG_Overflow_Balance" (BalanceWeight: 1000)
   - Rate: $0.10/min
   - Charge: 100 × $0.10 = $10.00
   - Deducted from $20 monetary balance
   - **Remaining:** $10.00

Billing:

- Customer sees: 500 included minutes + 100 overage minutes ($10.00)

Scenario 4: PAYG User Roams Unexpectedly

Customer has: $50 PAYG credit

Action: Travels to US, roams on Verizon, uses 100MB data (unknowingly)

Charge Calculation:

1. 100MB on Verizon
2. Rate: $2.00/MB (from PAYG rates)
3. Total charge: 100 × $2.00 = $200.00
4. Available: $50.00
5. **Result:** Customer uses ~25MB before credit exhausted, session blocked
6. **Bill shock!** Customer unexpectedly consumed entire $50

Better approach: Recommend roaming addon to avoid bill shock

Best Practices

1. Use Descriptive Balance IDs

Good Balance IDs are self-documenting:

```
# Good
"Data_5GB_5days_{{ uuid }}"
"Voice_100min_Monthly"
"Bonus_Data_Loyalty"

# Bad
"balance1"
"data"
"temp"
```

2. Document Your Weight Strategy

Define a consistent weight scheme across all products:

```
# Weight scheme:
# 30 = Premium/Promotional balances
# 20 = Bonus/Loyalty balances
# 10 = Regular/Purchased balances
# 5 = Backup/Fallback balances
```

3. Include CDR Logging

Always log balance additions for audit trails:

```
{
  "Identifier": "*cdrlog",
  "BalanceType": "*generic",
  "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"{{ package_name
}}\"}"
}
```

4. Use ActionPlans for Recurring Operations

For monthly resets, don't run the Action manually - use ActionPlans:

```
# Create ActionPlan that runs monthly
- name: Create monthly ActionPlan
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActionPlan",
        "params": [{
          "Id": "ActionPlan_Monthly_Reset",
          "ActionPlan": [{
            "ActionsId": "Action_Monthly_Reset",
            "Time": "*monthly",
            "Weight": 10
          }],
          "ReloadScheduler": true
        }]
      }
```

5. Reset ActionTriggers After Topup

After executing an action, reset triggers to prevent duplicate notifications:

```
- name: Reset ActionTriggers
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.ResetAccountActionTriggers",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "Executed": false
        }]
      }
```

6. Set Appropriate Balance Weights

Use a consistent weight strategy across all products:

```
# Consumption priority (highest to lowest)
BalanceWeight: 1200  # Domestic included (use first at home)
BalanceWeight: 1150  # International included (use first for intl)
BalanceWeight: 1100  # Roaming included (use first when roaming)
BalanceWeight: 1000  # Monetary fallback (use last)
```

This ensures predictable consumption order: domestic balances first, then international, then roaming, and finally monetary PAYG as fallback.

7. Control Balance Usage with DestinationIDs

Always use specific DestinationIDs to prevent unintended usage:

```
# Good - explicit destination control
{
    "BalanceType": "*voice",
    "DestinationIDs": "Dest_International_UK",  # ONLY UK
    "Units": 200 * 60 * 1000000000
}

# Bad - unintended usage
{
    "BalanceType": "*voice",
    "DestinationIDs": "*any",  # Could be used for premium
numbers!
    "Units": 200 * 60 * 1000000000
}
```

8. Group Destinations Logically

Create destination groups that make sense for your product offering:

```
# Good - logical grouping
"Dest_International_Europe" = All EU countries (shared 500min
pool)

# Bad - too granular
"Dest_France", "Dest_Germany", "Dest_Italy" (separate small pools)
```

See CGRateS Destinations for destination grouping examples.

9. Include Monetary Fallback in Plans

For the best customer experience, include a small monetary balance as overflow:

```
# Recommended: Always include small monetary balance
{
    "BalanceType": "*monetary",
    "Units": 1000,  # $10 overflow protection
    "BalanceWeight": 1000  # Lower than unitary balances
}
```

This prevents hard service cutoffs and provides flexibility for occasional overages.

10. Use Rate Increments Strategically

Choose appropriate rate increments for different service types:

```
# Domestic: Customer-friendly per-second
"RateIncrement": "1s"

# International: Standard 6-second blocks
"RateIncrement": "6s"

# Premium: 30-second blocks to discourage abuse
"RateIncrement": "30s"

# Data: Per KB for accuracy
"RateIncrement": "1024"
```

11. Set Reasonable Expiry Times

Match expiry times to product types:

```
# Monthly subscription plans
"ExpiryTime": "*month"

# One-time topups/addons
"ExpiryTime": "+720h"  # 30 days

# PAYG credit (longer validity)
"ExpiryTime": "+2160h"  # 90 days

# Roaming addons (trip-based)
"ExpiryTime": "+360h"  # 15 days
```

Troubleshooting

Issue: Balance Not Added

Symptoms: Action executes successfully but balance doesn't appear

Possible Causes:

- Wrong Account UUID

- BalanceType mismatch
- Expiry already passed

Solution: Verify account exists and check balance expiry time

Issue: Wrong Balance Consumed

Symptoms: System consuming from unexpected balance

Possible Causes:

- Weight configuration incorrect
- Multiple balances with same ID

Solution: Review weight values and ensure Balance IDs are unique if independence is desired

Issue: Rollover Not Working

Symptoms: Using `*topup` but old balance not rolling over

Possible Causes:

- Using different Balance IDs (need same ID)
- Action using `*topup_reset` instead of `*topup`

Solution: Verify Balance ID consistency and action type

Issue: Balance Expires Immediately

Symptoms: Balance added but shows as expired

Possible Causes:

- ExpiryTime in past
- Using absolute timestamp instead of relative

Solution: Use relative expiry (`+Xh`) instead of absolute timestamps

Issue: Balance Not Being Consumed

Symptom: Customer has balance but still blocked or charged PAYG

Possible Causes:

1. DestinationIDs mismatch - Balance destinations don't match usage destination
2. Balance expired
3. Wrong balance type for usage

Debug Steps:

```
# Check account balances
OCS_Obj.SendData({
    'method': 'ApierV2.GetAccount',
    'params': [{"Tenant": tenant, "Account": "service_uuid"}]
})

# Check what's returned:
# - Balance exists?
# - DestinationIDs correct?
# - ExpiryTime in future?
# - Units > 0?
```

Solution: Verify destination matches and balance is active. See Scenario 1: Customer at Home Calls UK for example.

Issue: Wrong Rate Applied

Symptom: Customer charged incorrect amount for PAYG usage

Possible Causes:

1. Destination overlap (wrong precedence in RatingPlan)
2. Rating plan binding weights incorrect
3. Rate definition has wrong values

Solution:

- Ensure specific destinations have higher weight in RatingPlan bindings
- Check longest prefix match is working correctly
- Verify rate values and increments are correct

See Rate Profiles for PAYG/Monetary Balances for proper configuration.

Issue: Roaming Balance Not Used

Symptom: Customer roaming, has roaming balance, but charged PAYG or blocked

Possible Causes:

1. PLMN destination mismatch - Balance doesn't include visited PLMN
2. Customer connected to wrong/unexpected network
3. DestinationIDs don't match the actual PLMN

Solution:

```
# Check which PLMN customer is on (from CDRs or usage events)
# Verify balance includes that PLMN:
"DestinationIDs": "Dest_PLMN_US_All"  # Should include
mcc310.mnc004
```

See CGRateS Destinations for PLMN destination configuration and Scenario 2: Customer Roaming in US Uses Data for working example.

Issue: Hybrid Plan Not Falling Back to Monetary

Symptom: Unitary balance exhausted but monetary balance not being used

Possible Causes:

1. Monetary balance has DestinationIDs restriction (should be `*any`)
2. No PAYG rates defined for that destination
3. Balance weight issue - monetary balance weight not lower than unitary

Solution:

- Ensure monetary balance has `DestinationIDs: "*any"`
- Verify PAYG rates defined for all destinations customer might use
- Check balance weights: monetary should be lowest (e.g., 1000)

See Approach 3: Hybrid for proper hybrid configuration.

Issue: Unexpected International Charges

Symptom: Customer called domestic number, charged international rates

Possible Causes:

1. Number actually international (e.g., Canada +1 number treated as international)
2. Prefix overlap in destination definitions
3. Customer misdialed (added extra digits)

Solution:

- Check CDRs for actual dialed number
- Verify destination prefix definitions don't overlap incorrectly
- Consider separate Canada destination if NANP countries need different rates

See CGRateS Destinations for geographic destination configuration.

Related Documentation

Core Concepts

- Defining Products - Complete workflow for creating products, defining CGRateS Actions, and linking them together
- CGRateS Destinations - How to define geographic and PLMN destinations for voice, SMS, and data services

Implementation & Operations

- Charging and Payments from Playbooks - Two-phase commit payment flow, pro-rata calculations, and charging customers
- Ansible Playbooks Guide - Playbook structure, provisioning flows, and deprovisioning with rescue blocks
- Provisioning System Overview - How provisioning works in OmniCRM

CGRateS Destinations Configuration

This guide explains how to configure destinations in CGRateS for OmniCRM. Destinations define WHERE balances can be used - whether that's calling specific numbers (geographic) or using data/voice on specific networks (PLMN).

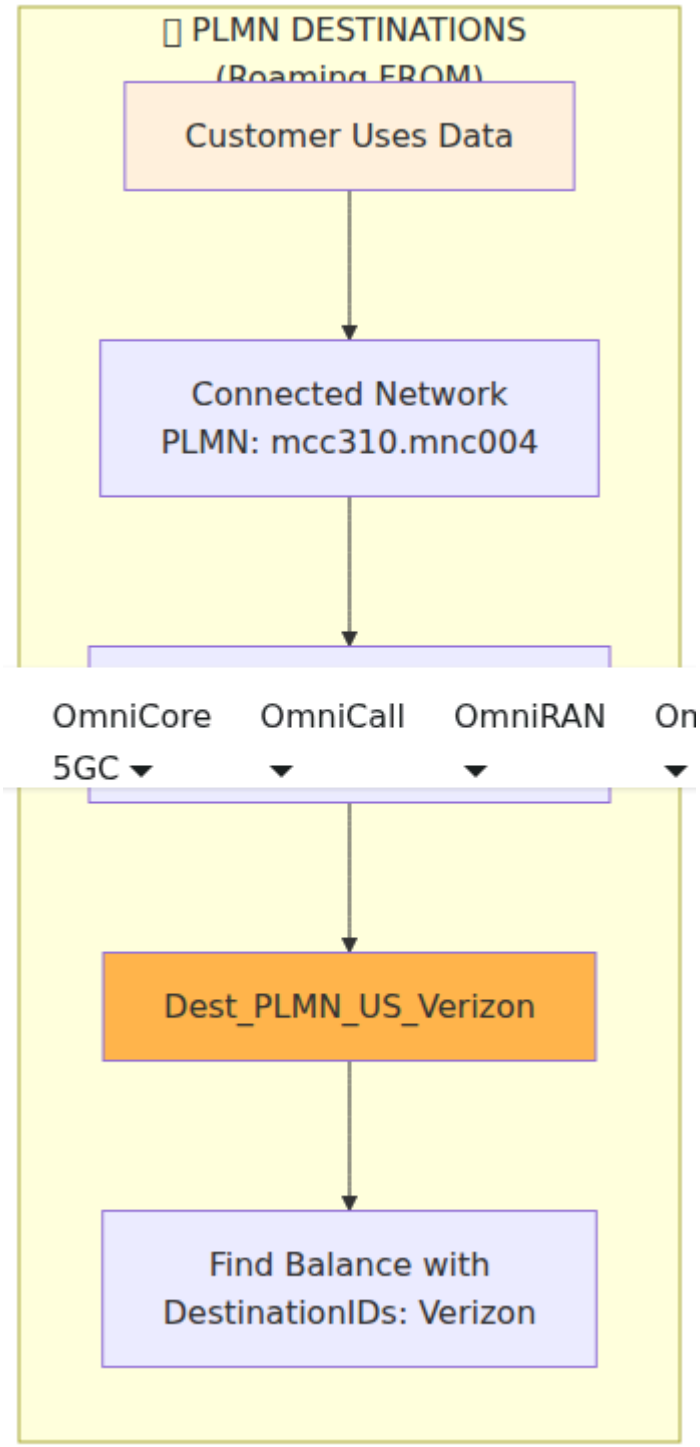
Overview

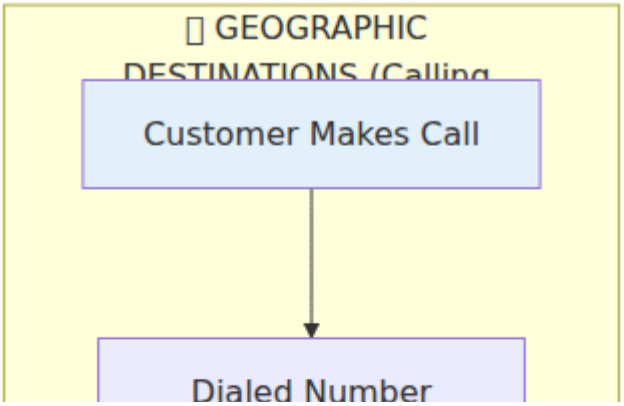
CGRateS uses **destinations** to control where customers can use their balances:

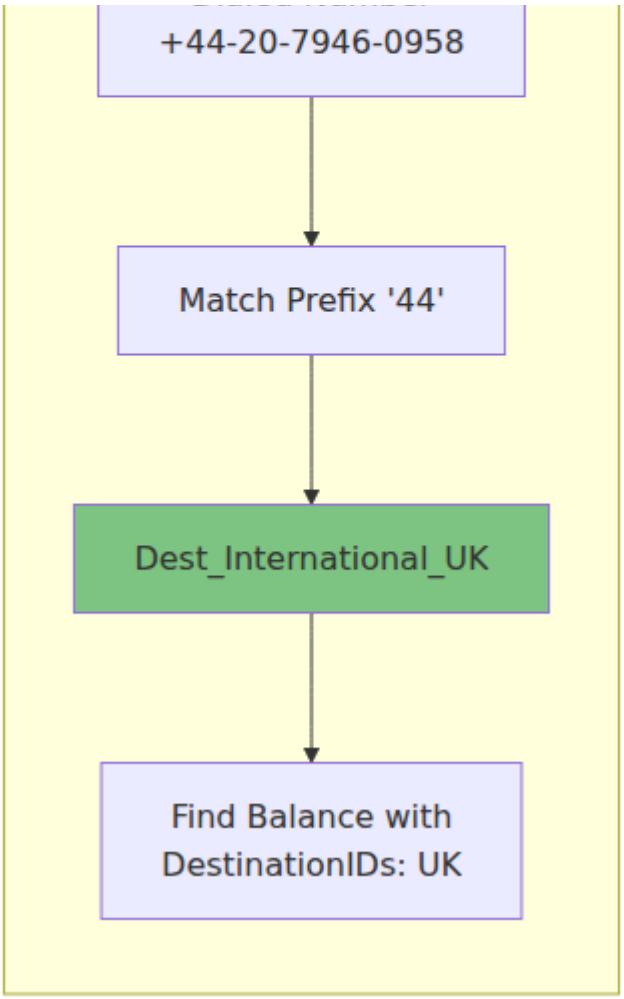
- **Geographic Destinations** - Number prefixes for calls/SMS TO specific locations (e.g., UK numbers, US toll-free)
- **PLMN Destinations** - Network codes for data usage and roaming FROM specific networks (e.g., Verizon, Vodafone UK)

When customers use services, CGRateS matches:

- **Voice/SMS**: The dialed number prefix → Geographic destination
- **Data**: The network PLMN code → PLMN destination


PLMN DESTINATIONS
Customer Uses Data
Connected Network
PLMN: mcc310.mnc004
OmniCore
5GC
OmniCall
OmniRAN
Dest_PLMN_US_Verizon
Find Balance with
DestinationIDs: Verizon


GEOGRAPHIC
Customer Makes Call
Dialed Number



Critical Rule

- **Voice/SMS balances** → Use geographic destinations (the number being called TO)
- **Data balances** → Use PLMN destinations (the network customer is connected on FROM)

Prerequisites

```
import cgrateshttpapi
import time

OCS_Obj = cgrateshttpapi.CGRateS("ocs.example.com", "2080")
tenant = "your_tenant_name"
tpid = str(tenant) + "_" + str(int(time.time()))
```

Part 1: Geographic Destinations (Calling TO Places)

Geographic destinations define number prefixes for voice calls and SMS to specific locations.

Domestic Destinations

```
#
# ======================================================================
# DOMESTIC DESTINATIONS (US/Canada - NANP)
#
# ======================================================================

# US/Canada Mobile & Fixed (share area codes)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_Domestic_All",
        "Prefixes": ["1"]  # NANP (US/Canada)
    }]
})

# US Toll-Free
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_Domestic_TollFree",
        "Prefixes": ["1800", "1888", "1877", "1866", "1855",
"1844", "1833"]
    }]
})

# US Premium Rate
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_Domestic_Premium",
        "Prefixes": ["1900"]
    }]
})
```

International Destinations

```
#
# ============================================================================
# INTERNATIONAL DESTINATIONS (By Country)
#
# ============================================================================

# United Kingdom
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_International_UK",
        "Prefixes": ["44"]
    }]
})

# China
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_International_China",
        "Prefixes": ["86"]
    }]
})

# Australia - Mobile
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_AU_Mobile",
        "Prefixes": ["614"]  # Australian mobiles (04xx dialed as
614xx)
    }]
})

# Australia - Fixed Line
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
```

```
        "TPid": tpid,
        "ID": "Dest_AU_Fixed",
        "Prefixes": [
            "612",  # NSW (Sydney)
            "613",  # VIC (Melbourne)
            "617",  # TAS (Hobart)
            "618"   # SA, WA, NT (Adelaide, Perth, Darwin)
        ]
    }]
})

# Australia - Toll-Free
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_AU_TollFree",
        "Prefixes": [
            "611800",  # Toll-free
            "611300"   # Local rate
        ]
    }]
})

# Australia - Premium Rate
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_AU_Premium",
        "Prefixes": ["6119"]  # Premium rate services
    }]
})

# Europe (grouped)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_International_Europe",
        "Prefixes": [
            "33",  # France
            "49",  # Germany
            "39",  # Italy
```

```
            "34",  # Spain
            "31",  # Netherlands
            "32",  # Belgium
            "41"   # Switzerland
        ]
    }]
})

# International - All (catch-all, excludes domestic)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_International_All",
        "Prefixes": ["2", "3", "4", "5", "6", "7", "8", "9"]  # All except "1" (NANP)
    }]
})
```

Use Cases:

- **Domestic plans**: "Unlimited calls to US/Canada numbers" → `Dest_Domestic_All`
- **UK calling addon**: "100 minutes to UK" → `Dest_International_UK`
- **Australian plan**: "3000 minutes to Australian mobiles and fixed lines" → `Dest_AU_Mobile`, `Dest_AU_Fixed`, `Dest_AU_TollFree`
- **International bundle**: "50 minutes to any international number" → `Dest_International_All`

Part 2: PLMN Destinations (Usage FROM Places - Roaming / Data Usage)

PLMN destinations define network codes for data usage and roaming scenarios. Use format `mccXXX.mncYYY` where:

- **MCC** = Mobile Country Code (3 digits)

- **MNC** = Mobile Network Code (2-3 digits)

PLMN Format Rules

- **Specific network**: `"mcc310.mnc004"` → Only Verizon network 004
- **All networks in country**: `"mcc310"` → Any US network
- **Examples**: `mcc310.mnc004`, `mcc234.mnc015`, `mcc505.mnc057`

On-Net (Your Home Network)

IMPORTANT: Define YOUR specific network where YOUR SIMs are provisioned.

```
# On-Net (Your Home Network)
# This is YOUR operator's PLMN - the network where YOUR customers' SIMs are active
# All domestic on-net data balances should use this destination

OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_OnNet",
        "Prefixes": ["mcc505.mnc057"]  # Example: MCC 505, MNC 57 if this is your home network
    }]
})
# Replace mcc505.mnc057 with YOUR actual operator's PLMN code
# All domestic on-net data balances should use the prefixes set out here
# Otherwise they're considered roaming
```

US Roaming PLMN Destinations

```
#
# ============================================================================
# US ROAMING PLMN DESTINATIONS
#
# ============================================================================

# Verizon Wireless
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_US_Verizon",
        "Prefixes": [
            "mcc310.mnc004", "mcc310.mnc010", "mcc310.mnc012",
"mcc310.mnc013",
            "mcc311.mnc480", "mcc311.mnc481", "mcc311.mnc482",
"mcc311.mnc483"
        ]
    }]
})

# All US PLMNs (catch-all)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_US_All",
        "Prefixes": ["mcc310", "mcc311", "mcc312", "mcc313",
"mcc316"]
    }]
})
# Note: This matches ANY network with these MCCs (310, 311, etc.)
# Customer on mcc310.mnc004 (Verizon), mcc310.mnc410 (AT&T),
mcc311.mnc580 (US Cellular)
# would ALL match this destination
```

UK Roaming PLMN Destinations

```
#
# ============================================================================
# UK ROAMING PLMN DESTINATIONS
#
# ============================================================================

# Vodafone UK
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_UK_Vodafone",
        "Prefixes": ["mcc234.mnc015"]
    }]
})

# EE (Everything Everywhere)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_UK_EE",
        "Prefixes": ["mcc234.mnc030", "mcc234.mnc033"]
    }]
})

# All UK PLMNs
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_UK_All",
        "Prefixes": ["mcc234"]
    }]
})
```

Roaming Zones (Multi-Country Groups)

Great for regional roaming packages like "Europe Roaming" or "Asia Pacific Roaming".

```
#
================================================================
# ROAMING ZONES (Multi-Country Groups)
#
================================================================

# Zone 1: North America
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_NorthAmerica",
        "Prefixes": [
            "mcc310", "mcc311", "mcc312", "mcc313", "mcc316",  #
USA
            "mcc302", "mcc334"  # Canada
        ]
    }]
})
# Using MCC-only prefixes provides coverage on ANY network in these
countries
# Great for "North America roaming" packages that work on all
carriers

# Zone 2: Europe
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_Europe",
        "Prefixes": [
            "mcc234",  # United Kingdom
            "mcc208",  # France
            "mcc262",  # Germany
            "mcc222",  # Italy
            "mcc214",  # Spain
            "mcc228"   # Switzerland
        ]
    }]
})

# Zone 3: Asia Pacific
OCS_Obj.SendData({
```

```
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_AsiaPacific",
        "Prefixes": [
            "mcc505",  # Australia
            "mcc460",  # China
            "mcc454",  # Hong Kong
            "mcc440",  # Japan
            "mcc520",  # Thailand
            "mcc525",  # Singapore
            "mcc530"   # New Zealand
        ]
    }]
})

# Catch-all for any roaming (use with caution)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_Roaming_All",
        "Prefixes": ["mcc"]  # Matches ANY PLMN (very broad)
    }]
})
```

Use Cases:

- **Network-specific roaming**: "5GB on Verizon only" → `Dest_PLMN_US_Verizon`
- **Country-wide roaming**: "10GB in USA (any network)" → `Dest_PLMN_US_All`
- **Regional roaming**: "15GB Europe roaming" → `Dest_PLMN_Zone_Europe`
- **Global roaming**: "1GB anywhere" → `Dest_Roaming_All`

When to Use Each Approach

Destination Type	Use Case	Example	Balance Types
Geographic	Voice/SMS to specific countries	"100 minutes to UK numbers"	Voice, SMS
On-net PLMN	Domestic data on YOUR network	"100GB on-net data"	Data
Specific PLMN	Premium roaming on preferred networks	"5GB on Verizon only"	Data (and roaming voice/SMS)
Country-wide PLMN	Roaming in any network in country	"5GB in USA (any network)"	Data (and roaming voice/SMS)
Zone PLMN	Regional roaming packages	"10GB Europe roaming"	Data (and roaming voice/SMS)

Dynamic Destination Updates and Service Access

How Destination Updates Work

Critical Concept: Destinations in CGRateS are **referenced by ID**, not copied. When you update a destination's prefixes or PLMN codes and **load the TariffPlan into the runtime**, **all existing balances referencing that destination are immediately affected**.

This means:

- **No need to update individual customer balances** when expanding or restricting service coverage
- **Network-wide changes** to all customers using that destination once the tariff plan is loaded
- ⚠ **Changes take effect when you load the TariffPlan** - you can modify destinations multiple times before loading, and changes only become active after `LoadTariffPlanFromStorDb`

Example 1: Expanding Coverage

You have a destination for European roaming:

```
# Initial configuration - Only 3 countries
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_Europe",
        "Prefixes": [
            "mcc262",  # Germany
            "mcc208",  # France
            "mcc222"   # Italy
        ]
    }]
})
```

Customers with balances referencing `Dest_PLMN_Zone_Europe` can roam in Germany, France, and Italy.

Later, you add Spain and UK:

```
# Updated configuration - Now 5 countries
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_Europe",
        "Prefixes": [
            "mcc262",  # Germany
            "mcc208",  # France
            "mcc222",  # Italy
            "mcc214",  # Spain (NEW)
            "mcc234"   # UK (NEW)
        ]
    }]
})

# Load the tariff plan to make changes active
OCS_Obj.SendData({
    'method': 'ApierV1.LoadTariffPlanFromStorDb',
    'params': [{
        "TPid": tpid,
        "DryRun": False,
        "Validate": True
    }]
})

# Reload the destination cache
OCS_Obj.SendData({
    'method': 'CacheSv1.ReloadCache',
    'params': [{
        "DestinationIDs": ["Dest_PLMN_Zone_Europe"]
    }]
})
```

Result: After loading the tariff plan, all existing customers with balances for `Dest_PLMN_Zone_Europe` gain access to roam in Spain and UK - no individual balance updates required.

Example 2: Restricting Coverage

Removing a country from a destination blocks access once the tariff plan is loaded:

```
# Remove Germany from Europe zone
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_Zone_Europe",
        "Prefixes": [
            "mcc208",  # France
            "mcc222",  # Italy
            "mcc214",  # Spain
            "mcc234"   # UK
            # Germany (mcc262) REMOVED
        ]
    }]
})

# Load the tariff plan to make changes active
OCS_Obj.SendData({
    'method': 'ApierV1.LoadTariffPlanFromStorDb',
    'params': [{
        "TPid": tpid,
        "DryRun": False,
        "Validate": True
    }]
})

# Reload cache
OCS_Obj.SendData({
    'method': 'CacheSv1.ReloadCache',
    'params': [{
        "DestinationIDs": ["Dest_PLMN_Zone_Europe"]
    }]
})
```

Result: After loading the tariff plan, customers attempting to roam in Germany will be **blocked**, even if they still have balance remaining for

`Dest_PLMN_Zone_Europe`. The balance exists but doesn't match the PLMN destination anymore.

Example 3: Voice/SMS Geographic Destinations

The same principle applies to geographic destinations for voice and SMS:

```
# Add Canada to "Domestic" calling
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_Domestic_All",
        "Prefixes": [
            "1",  # Already includes USA (and previously Canada)
            # No change needed - "1" prefix already covers both
        ]
    }]
})

# Or create separate North America destination
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_North_America",
        "Prefixes": [
            "1"  # USA + Canada
        ]
    }]
})
```

Impact: Any balances with `DestinationIDs: "Dest_Domestic_All"` now work for both US and Canada calls (if using prefix "1").

Service Access Rules

Critical: If a customer attempts to use a service (voice/SMS/data) and **no destination matches**, the service will be **denied**, even if they have balances.

Scenario 1: No Matching Destination

```
# Customer has balance:
{
    "BalanceId": "Europe_Data_5GB",
    "BalanceType": "*data",
    "DestinationIDs": "Dest_PLMN_Zone_Europe",  # Only France,
Germany, Italy
    "Units": 5 * 1024 * 1024 * 1024
}

# Customer roams on network in Spain (mcc214.mnc001)
# Spain is NOT in Dest_PLMN_Zone_Europe
```

Result:

- □ Data session **blocked** (no matching destination)
- Balance remains unused
- Customer receives "Insufficient Credit" or similar error

Fix: Add Spain to `Dest_PLMN_Zone_Europe` OR ensure customer has a monetary balance with `DestinationIDs: "*any"` as fallback.

Scenario 2: No Wildcard Fallback

```
# Customer has two balances:
{
    "BalanceId": "UK_Voice_100min",
    "BalanceType": "*voice",
    "DestinationIDs": "Dest_International_UK",  # Only prefix "44"
    "Units": 100 * 60 * 1000000000
}
# NO monetary balance with "*any" destination

# Customer calls Australia (+61)
```

Result:

- □ Call **blocked** (no destination matches prefix "61")

- UK minutes balance unused (only matches "44")
- No monetary fallback to cover the call

Fix: Add a monetary balance with `DestinationIDs: "*any"` OR add specific Australia destination to their balance.

Scenario 3: Wildcard Fallback Works

```
# Customer has:
# Balance 1: UK minutes
{
    "BalanceId": "UK_Voice_100min",
    "BalanceType": "*voice",
    "DestinationIDs": "Dest_International_UK",
    "Units": 100 * 60 * 1000000000,
    "BalanceWeight": 1200
}

# Balance 2: Monetary with wildcard
{
    "BalanceId": "PAYG_Credit",
    "BalanceType": "*monetary",
    "DestinationIDs": "*any",  # Matches ANYTHING
    "Units": 5000,  # $50
    "BalanceWeight": 1000  # Lower priority
}

# Customer calls Australia (+61)
```

Result:

- □ Call **allowed**
- UK minutes balance NOT used (doesn't match "61")
- PAYG Credit balance used (matches "*any")
- Charged at PAYG rate for Australia

Testing and Simulation

Destination changes can be tested and simulated in non-production environments before being applied to production. This allows you to:

- Verify new PLMN codes are correct
- Test coverage expansion/restriction impact
- Validate that existing balances behave as expected with updated destinations
- Ensure fallback mechanisms work correctly

Recommendation: Always test destination updates in a staging environment with test accounts before applying to production.

Key Takeaways

1. **Destinations are dynamic** - Changes affect all balances referencing them once the tariff plan is loaded
2. **Load TariffPlan to activate** - Use `LoadTariffPlanFromStorDb` to make destination changes active in runtime
3. **No destination match = No service** - Customers will be blocked if their usage doesn't match any destination
4. **Wildcard (`*any`) is powerful** - Use for monetary fallback to prevent unexpected blocking
5. **Cache reload required** - Always reload destination cache after loading tariff plan
6. **Test before production** - Destination changes impact all customers once loaded

Rate Profiles for PAYG/Monetary Balances

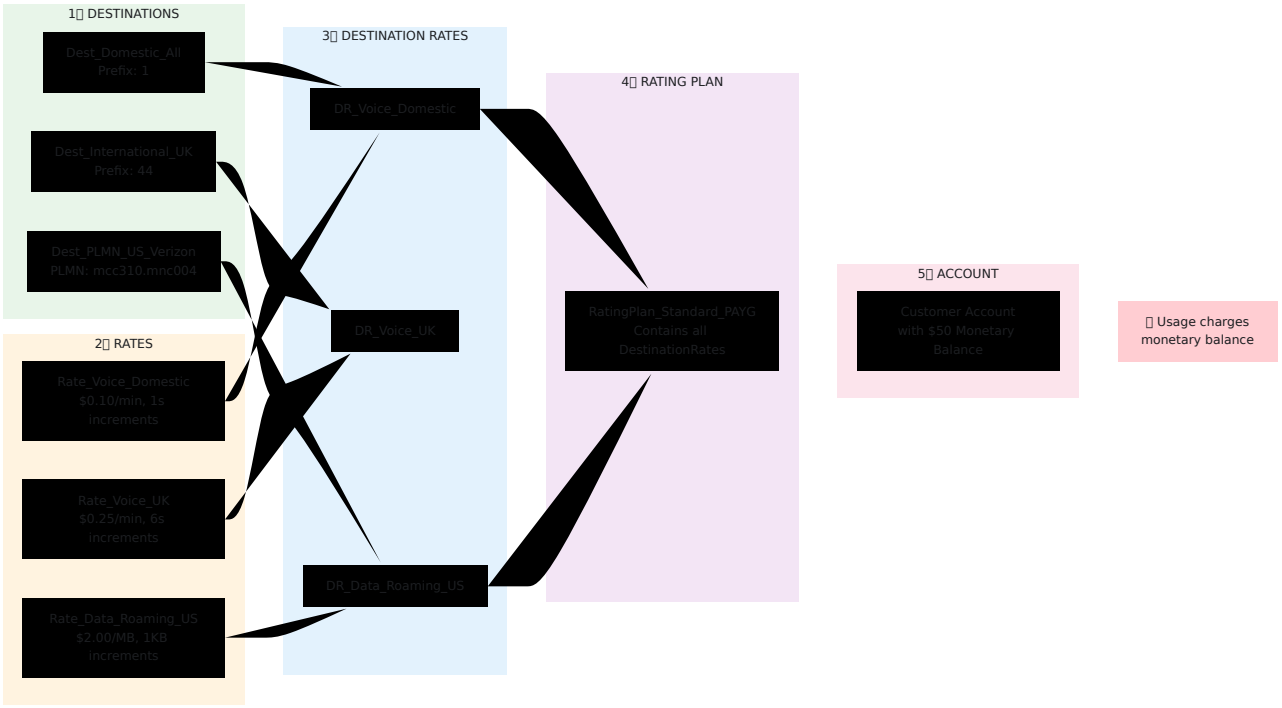
When using monetary balances (PAYG - Pay As You Go), you need to define **Rate Profiles** that specify how much to charge per unit for different destinations.

Important Note on CGRateS Flexibility: CGRateS is extremely flexible and can apply different rates and plans based on many factors including:

- Where the customer is calling FROM (PLMN - covered here)
- What they're calling TO (geographic destination - covered here)
- Time of day (peak/off-peak rating)
- Customer tier (VIP, standard, etc.)
- Service quality level
- And many more complex rating scenarios

This guide focuses on the **CRM-level configuration** for PLMN-based roaming and geographic destination-based rating, which covers the most common use cases. Advanced rating scenarios (time-of-day, customer tiers, quality-based routing) are possible in CGRateS but outside the scope of this CRM-focused documentation.

How Rate Profiles Work



Defining Rate Profiles

Rate profiles define the cost per unit for different usage types. Here are examples for voice, SMS, and data:

```
#
# ============================================================================
# VOICE RATES (Per Minute)
#
# ============================================================================

# Domestic voice: $0.10/minute
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPRate',
    'params': [{
        "TPid": tpid,
        "ID": "Rate_Voice_Domestic",
        "RateSlots": [{
            "ConnectFee": 0,
            "Rate": 0.10,
            "RateUnit": "60s",         # 1 minute
            "RateIncrement": "1s",     # Per-second billing
            "GroupIntervalStart": "0s"
        }]
    }]
})

# UK voice: $0.25/minute
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPRate',
    'params': [{
        "TPid": tpid,
        "ID": "Rate_Voice_UK",
        "RateSlots": [{
            "ConnectFee": 0.05,        # $0.05 connection fee
            "Rate": 0.25,
            "RateUnit": "60s",
            "RateIncrement": "6s",     # 6-second blocks
            "GroupIntervalStart": "0s"
        }]
    }]
})

#
# ============================================================================
# SMS RATES (Per Message)
#
# ============================================================================
```

```
# Domestic SMS: $0.05/message
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPRate',
    'params': [{
        "TPid": tpid,
        "ID": "Rate_SMS_Domestic",
        "RateSlots": [{
            "ConnectFee": 0,
            "Rate": 0.05,
            "RateUnit": "1",          # 1 SMS
            "RateIncrement": "1",     # Per message
            "GroupIntervalStart": "0s"
        }]
    }]
})

#
# ============================================================================
# DATA RATES (Per MB) - For Roaming
#
# ============================================================================

# Roaming on US Premium Networks (Verizon, AT&T): $2.00/MB
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPRate',
    'params': [{
        "TPid": tpid,
        "ID": "Rate_Data_Roaming_US_Premium",
        "RateSlots": [{
            "ConnectFee": 0,
            "Rate": 2.00,
            "RateUnit": "1048576",    # 1 MB in bytes
            "RateIncrement": "1024",  # Per KB
            "GroupIntervalStart": "0s"
        }]
    }]
})
```

Rate Slot Fields:

- **ConnectFee** - One-time charge per session
- **Rate** - Cost per RateUnit

- **RateUnit** - Billing unit size (60s, 1MB, 1 message)
- **RateIncrement** - Minimum chargeable unit
- **GroupIntervalStart** - When this rate tier starts

Linking Destinations to Rates

After defining rates, link them to destinations using DestinationRates:

```
# Link Domestic destination to Domestic voice rate
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestinationRate',
    'params': [{
        "TPid": tpid,
        "ID": "DR_Voice_Domestic",
        "DestinationRates": [{
            "DestinationId": "Dest_Domestic_All",
            "RateId": "Rate_Voice_Domestic",
            "RoundingMethod": "*up",
            "RoundingDecimals": 4
        }]
    }]
})

# Link UK destination to UK voice rate
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestinationRate',
    'params': [{
        "TPid": tpid,
        "ID": "DR_Voice_UK",
        "DestinationRates": [{
            "DestinationId": "Dest_International_UK",
            "RateId": "Rate_Voice_UK",
            "RoundingMethod": "*up",
            "RoundingDecimals": 4
        }]
    }]
})

# Link Verizon PLMN to roaming data rate
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestinationRate',
    'params': [{
        "TPid": tpid,
        "ID": "DR_Data_Roaming_US_Premium",
        "DestinationRates": [{
            "DestinationId": "Dest_PLMN_US_Verizon",
            "RateId": "Rate_Data_Roaming_US_Premium",
            "RoundingMethod": "*up",
            "RoundingDecimals": 4
        }]
```

```
    }]
})
```

Creating the Rating Plan

Combine all DestinationRates into a RatingPlan:

```
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPRatingPlan',
    'params': [{
        "TPid": tpid,
        "ID": "RatingPlan_Standard_PAYG",
        "RatingPlanBindings": [
            # Voice rates (higher weight = more specific)
            {"DestinationRatesId": "DR_Voice_UK", "TimingId":
"*any", "Weight": 40},
            {"DestinationRatesId": "DR_Voice_Domestic",
"TimingId": "*any", "Weight": 20},

            # SMS rates
            {"DestinationRatesId": "DR_SMS_Domestic", "TimingId":
"*any", "Weight": 20},

            # Data roaming rates
            {"DestinationRatesId": "DR_Data_Roaming_US_Premium",
"TimingId": "*any", "Weight": 50}
        ]
    }]
})
```

Loading the Tariff Plan

Finally, load the tariff plan into CGRateS:

```
# Load tariff plan
OCS_Obj.SendData({
    'method': 'ApierV1.LoadTariffPlanFromStorDb',
    'params': [{
        "TPid": tpid,
        "DryRun": False,
        "Validate": True
    }]
})

# Reload cache
OCS_Obj.SendData({
    'method': 'CacheSv1.ReloadCache',
    'params': [{
        "Tenant": tenant,
        "DestinationIDs": ["*all"]
    }]
})
```

See also:

- Defining Products - Complete workflow for creating products
- CGRateS Actions and Topup Behaviors - How to define Actions and balance management approaches

Best Practices

1. Be Specific with On-Net

```
# Good - specific home network
"DestinationIDs": "Dest_PLMN_OnNet",  # mcc505.mnc057

# Bad - too broad, matches competitors
"DestinationIDs": "Dest_PLMN_AU_All",  # mcc505 (all AU operators)
```

2. Use Meaningful Destination Names

```
# Good - self-documenting
Dest_PLMN_US_Verizon
Dest_International_UK
Dest_PLMN_Zone_Europe

# Bad - unclear
Dest_Data_1
Dest_Voice_Package
```

3. Group Related Destinations Logically

```
# Good - logical grouping
Dest_Domestic_All
Dest_Domestic_TollFree
Dest_Domestic_Premium

# Bad - too granular
Dest_Area_Code_212
Dest_Area_Code_213
Dest_Area_Code_214
```

4. Document PLMN Sources

When defining PLMN destinations, add comments indicating where the MCC/MNC codes came from:

```
# Verizon Wireless
# Source: https://www.mcc-mnc.com/ (verified 2024-12)
OCS_Obj.SendData({
    'method': 'ApierV2.SetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_US_Verizon",
        "Prefixes": [
            "mcc310.mnc004",  # Verizon - Nationwide
            "mcc310.mnc010",  # Verizon - East
            ...
        ]
    }]
})
```

Troubleshooting

Issue: Balance Not Matching Destination

Symptom: Customer has balance but can't use it for specific destination

Check:

```
# 1. Verify destination exists
OCS_Obj.SendData({
    'method': 'ApierV2.GetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_US_Verizon"
    }]
})

# 2. Check balance DestinationIDs field
# Ensure it includes the destination or "*any"

# 3. For PLMN: Verify customer is actually on that network
# Check Diameter CCR messages for Visited-PLMN-Id AVP
```

Issue: Data Usage Counted as Roaming

Symptom: Domestic data usage consuming roaming balance instead of on-net balance

Cause: Customer's PLMN not defined in `Dest_PLMN_OnNet`

Solution:

```
# Check which PLMN customer is on (from Diameter CCR)
# Verify balance includes that PLMN:

OCS_Obj.SendData({
    'method': 'ApierV2.GetTPDestination',
    'params': [{
        "TPid": tpid,
        "ID": "Dest_PLMN_OnNet"
    }]
})
# Ensure Prefixes includes customer's actual network PLMN
# Example: ["mcc505.mnc057"] must match customer's SIM network
```

Issue: International Calls Not Working

Symptom: Customer has "international minutes" but calls fail

Check:

1. **Destination prefix**: Does dialed number match destination prefix?
   - Calling +44-20-xxxx → Needs destination with prefix "44"
2. **Balance DestinationIDs**: Does balance include that destination?
   - Check balance has `"DestinationIDs": "Dest_International_UK"` or `"Dest_International_All"`
3. **Balance not expired**: Check `ExpiryTime`
4. **Balance has units**: Check `Units > 0`

Related Documentation

- CGRateS Actions and Topup Behaviors - How to use destinations in Actions, balance approaches, and rating strategies
- Defining Products - Complete product creation workflow

Ansible Playbooks: Detailed Guide

OmniCRM products are provisioned using **Ansible**, allowing for automated service management based on the specific requirements of each product and its associated inventory.

See also: `SIM Card Provisioning <concepts_sim_provisioning>` for a complete example of Ansible-based provisioning for mobile services, including physical SIMs and eSIMs.

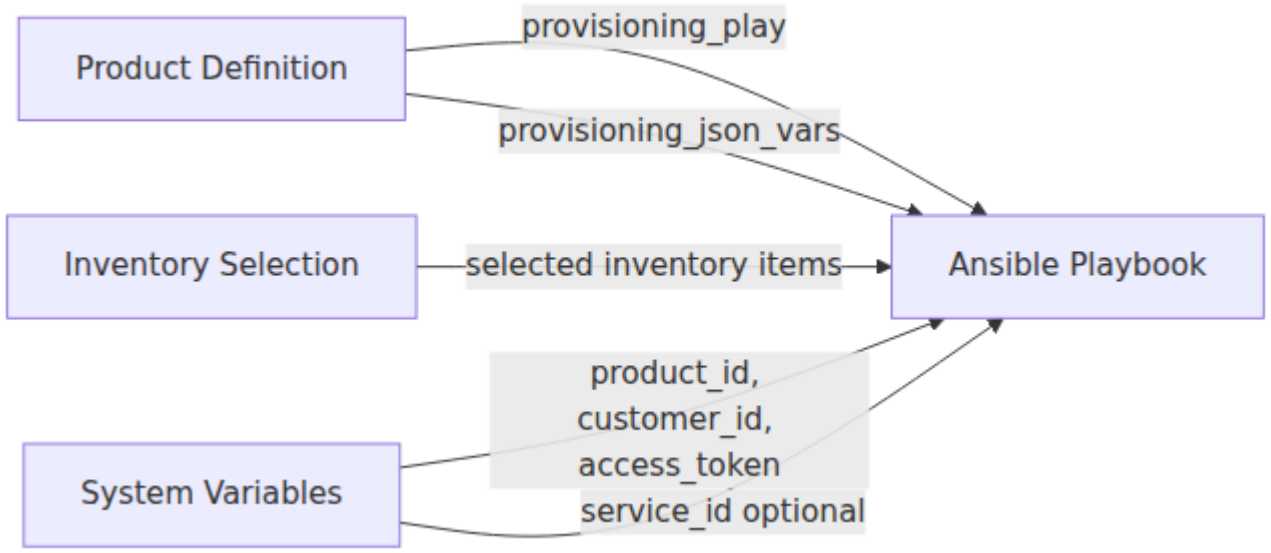
How Playbooks and Products Work Together

Critical Concept: Playbooks are what actually create services in OmniCRM. When you assign a playbook to a product, you're defining **what happens** when that product is provisioned - but that can mean different things for different products.

Products Trigger Playbooks

When a product is provisioned in OmniCRM:

1. The product definition specifies which playbook to run (via `provisioning_play` field)
2. The product passes variables to the playbook (via `provisioning_json_vars` and inventory selections)
3. The playbook executes and does whatever it's programmed to do
4. The playbook determines what gets created (if anything)



What Playbooks Can Do

A single provisioning playbook can:

Create Multiple Services
A bundled product playbook might create:

- A main internet service record
- An IPTV addon service record
- A VoIP service record
- All with one product provision action

Create No Services
Some playbooks don't create service records at all:

- A playbook that just configures CPE equipment
- A playbook that sends configuration to network equipment
- A playbook that updates external systems

Create One Service
The most common pattern:

- Create a single service record for the customer
- Link inventory to that service
- Set up billing for that service

Modify Existing Services
Topup and addon playbooks:

- Don't create new services
- Update existing service records (add data, extend expiry, etc.)
- Add balances to existing billing accounts

Perform Actions Without Service Records
Some playbooks are purely operational:

- Reset account balances
- Swap inventory items between customers
- Generate reports or configurations

Example: Different Playbook Behaviors

```
# Product 1: Mobile SIM Service (creates 1 service)
# provisioning_play: play_simple_service
- Creates service record in CRM
- Creates billing account in OCS
- Assigns SIM card and phone number inventory
- Sends welcome email

# Product 2: Internet Bundle (creates 3 services)
# provisioning_play: play_bundle_internet_tv_voice
- Creates internet service record
- Creates IPTV service record
- Creates VoIP service record
- Links all to same customer
- Single billing account for the bundle

# Product 3: Data Topup (creates 0 services)
# provisioning_play: play_topup_no_charge
- Finds existing service by service_id
- Adds data balance to existing OCS account
- Updates service expiry date
- NO new service created

# Product 4: CPE Configuration (creates 0 services)
# provisioning_play: play_prov_cpe_mikrotik
- Generates router configuration
- Updates inventory record with config
- Emails config to support team
- NO service created (just equipment setup)
```

The key point: **The playbook defines the behavior, the product is just a trigger.**

Plays vs Tasks

Understanding the distinction between Plays and Tasks is fundamental to working with OmniCRM playbooks.

Play (Playbook)
A complete provisioning workflow that orchestrates multiple tasks to achieve a business objective. Plays are the top-level playbooks stored in `OmniCRM-API/Provisioners/plays/` and are referenced in product definitions.

Examples:

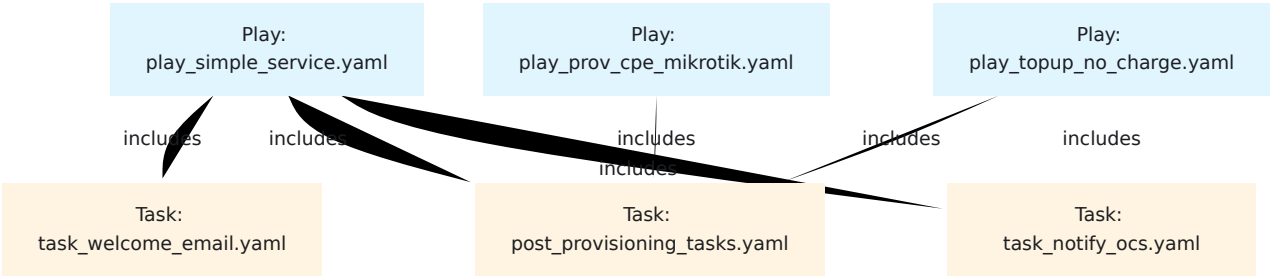
- `play_simple_service.yaml` - Provision a basic service
- `play_topup_no_charge.yaml` - Apply a free topup to a service
- `play_prov_cpe_mikrotik.yaml` - Configure customer premises equipment

Task (Reusable Component)
A self-contained, reusable set of operations that can be included by multiple plays. Tasks are prefixed with `task_` and live in the same directory.

Examples:

- `task_welcome_email.yaml` - Send a welcome email to a customer
- `task_activate_olt.yaml` - Activate OLT equipment
- `task_notify_ocs.yaml` - Send notifications to the billing system

The relationship between them:



```yaml
# play_simple_service.yaml (A Play)
- name: Simple Provisioning Play
  hosts: localhost
  tasks:
    - name: Main provisioning block
      block:
        - name: Create service
          uri: ...

        - name: Configure billing
          uri: ...

        # Include reusable task
        - include_tasks: task_welcome_email.yaml

        # Include post-provisioning tasks
        - include_tasks: post_provisioning_tasks.yaml
```

Playbook Structure and Anatomy

All OmniCRM playbooks follow a consistent structure. Understanding this structure is essential for creating and maintaining playbooks.

Basic Structure

Every playbook starts with these standard headers:

```yaml
- name: Descriptive Name of the Playbook
  hosts: localhost           # Always localhost for OmniCRM
  gather_facts: no           # Disabled for performance
  become: False              # Don't escalate privileges

  tasks:
    - name: Main block
      block:
        # Provisioning tasks go here

      rescue:
        # Rollback/cleanup tasks go here
```

Header Explanation

name
Descriptive name shown in provisioning logs and UI. This appears as `playbook_description` in the provision record.

hosts: localhost
All OmniCRM playbooks run on localhost since they interact with remote systems via APIs, not SSH.

gather_facts: no
Ansible's fact gathering is disabled because:

- We don't need system information
- It adds unnecessary overhead
- Can crash browsers if displayed in debug output

become: False
No privilege escalation is needed since we're making API calls, not modifying system files.

Configuration Loading

Every playbook must load the central configuration file:

```
tasks:
  - name: Include vars of crm_config
    ansible.builtin.include_vars:
      file: "../../crm_config.yaml"
      name: crm_config
```

This makes the configuration available as `crm_config.ocs.cgrates`, `crm_config.crm.base_url`, etc.

The `crm_config.yaml` typically contains:

```
ocs:
  cgrates: "10.0.1.100:2080"
  ocsTenant: "default_tenant"
crm:
  base_url: "https://crm.example.com"
```

Variable Access Patterns

Variables can come from several sources:

From the Product Definition:

```
- name: Access product_id passed by OmniCRM
  debug:
    msg: "Provisioning product {{ product_id }}"
```

From Inventory Selection:

```
- name: Get inventory ID for SIM Card
  set_fact:
    sim_card_id: "{{ hostvars[inventory_hostname]['SIM Card'] |
int }}"
  when: "'SIM Card' in hostvars[inventory_hostname]"
```

From API Responses:

```
- name: Get Product information from CRM API
  uri:
    url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: api_response_product

- name: Use the product name
  debug:
    msg: "Product name is {{
api_response_product.json.product_name }}"
```

Common Playbook Patterns

Service Provisioning Pattern

This is the most common pattern for creating new services.

```yaml
- name: Service Provisioning Playbook
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main block
      block:

      # 1. Load configuration
      - name: Include vars of crm_config
        ansible.builtin.include_vars:
          file: "../../crm_config.yaml"
          name: crm_config

      # 2. Get product information
      - name: Get Product information from CRM API
        uri:
          url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
          method: GET
          headers:
            Authorization: "Bearer {{ access_token }}"
          return_content: yes
          validate_certs: no
        register: api_response_product

      # 3. Get customer information
      - name: Get Customer information from CRM API
        uri:
          url: "http://localhost:5000/crm/customer/customer_id/{{
customer_id }}"
          method: GET
          headers:
            Authorization: "Bearer {{ access_token }}"
          return_content: yes
        register: api_response_customer

      # 4. Set facts from retrieved data
      - name: Set package facts
        set_fact:
          package_name: "{{ api_response_product.json.product_name
}}"
```

```
          package_comment: "{{ api_response_product.json.comment
}}"
          setup_cost: "{{
api_response_product.json.retail_setup_cost }}"
          monthly_cost: "{{ api_response_product.json.retail_cost
}}"

      # 5. Generate unique identifiers
      - name: Generate UUID
        set_fact:
          uuid: "{{ 99999999 | random | to_uuid }}"

      - name: Generate Service UUID
        set_fact:
          service_uuid: "Service_{{ uuid[0:8] }}"

      # 6. Create account in billing system
      - name: Create account in OCS/CGRateS
        uri:
          url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
          method: POST
          body_format: json
          headers:
            Content-Type: "application/json"
          body:
            {
              "method": "ApierV2.SetAccount",
              "params": [{
                  "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                  "Account": "{{ service_uuid }}",
                  "ActionPlanIds": [],
                  "ActionPlansOverwrite": true,
                  "ExtraOptions": {
                    "AllowNegative": false,
                    "Disabled": false
                  },
                  "ReloadScheduler": true
              }]
            }
          status_code: 200
        register: ocs_response

      - name: Verify OCS account creation
        assert:
```

```
      that:
        - ocs_response.status == 200
        - ocs_response.json.result == "OK"

    # 7. Add initial balance
    - name: Add 0 Monetary Balance
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body_format: json
        body:
          {
            "method": "ApierV1.AddBalance",
            "params": [{
                "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                "Account": "{{ service_uuid }}",
                "BalanceType": "*monetary",
                "Categories": "*any",
                "Balance": {
                    "ID": "Initial Balance",
                    "Value": 0,
                    "ExpiryTime": "+4320h",
                    "Weight": 1,
                    "Blocker": true
                }
            }]
          }
        status_code: 200
      register: balance_response

    # 8. Create service record in CRM
    - name: Get current date and time in ISO 8601 format
      command: date --utc +%Y-%m-%dT%H:%M:%S%z
      register: current_date_time

    - name: Add Service via API
      uri:
        url: "http://localhost:5000/crm/service/"
        method: PUT
        body_format: json
        headers:
          Content-Type: "application/json"
          Authorization: "Bearer {{ access_token }}"
        body:
```

```
            {
              "customer_id": "{{ customer_id }}",
              "product_id": "{{ product_id }}",
              "service_name": "{{ package_name }} - {{
service_uuid }}",
              "service_type": "generic",
              "service_uuid": "{{ service_uuid }}",
              "service_billed": true,
              "service_taxable": true,
              "service_provisioned_date": "{{
current_date_time.stdout }}",
              "service_status": "Active",
              "wholesale_cost": "{{
api_response_product.json.wholesale_cost | float }}",
              "retail_cost": "{{ monthly_cost | float }}"
            }
          status_code: 200
        register: service_creation_response

      # 9. Add setup cost transaction
      - name: Add Setup Cost Transaction via API
        uri:
          url: "http://localhost:5000/crm/transaction/"
          method: PUT
          headers:
            Content-Type: "application/json"
            Authorization: "Bearer {{ access_token }}"
          body_format: json
          body:
            {
              "customer_id": {{ customer_id | int }},
              "service_id": {{
service_creation_response.json.service_id | int }},
              "title": "{{ package_name }} - Setup Costs",
              "description": "Setup costs for {{ package_comment
}}",
              "invoice_id": null,
              "retail_cost": "{{ setup_cost | float }}"
            }
          return_content: yes
        register: transaction_response

      # 10. Include post-provisioning tasks
      - include_tasks: post_provisioning_tasks.yaml
```

```
    rescue:

    # Rollback/cleanup section
    - name: Print all vars for debugging
      debug:
        var: hostvars[inventory_hostname]

    - name: Remove account in OCS
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body_format: json
        body:
          {
            "method": "ApierV2.RemoveAccount",
            "params": [{
                "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                "Account": "{{ service_uuid }}",
                "ReloadScheduler": true
            }]
          }
        status_code: 200
      ignore_errors: True
      when: service_uuid is defined

    - name: Delete Service from CRM if it was created
      uri:
        url: "http://localhost:5000/crm/service/service_id/{{
service_creation_response.json.service_id }}"
        method: DELETE
        headers:
          Authorization: "Bearer {{ access_token }}"
        status_code: 200
      ignore_errors: True
      when: service_creation_response is defined

    - name: Fail if not intentional deprovision
      assert:
        that:
          - action == "deprovision"
```

Topup/Recharge Pattern

Used for adding credits, data, or time to existing services.

```yaml
- name: Service Topup Playbook
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Include vars of crm_config
      ansible.builtin.include_vars:
        file: "../../crm_config.yaml"
        name: crm_config

    # 1. Get service information
    - name: Get Service information from CRM API
      uri:
        url: "http://localhost:5000/crm/service/service_id/{{
service_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_service

    # 2. Get product information (what to topup)
    - name: Get Product information from CRM API
      uri:
        url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_product

    # 3. Extract service details
    - name: Set service facts
      set_fact:
        service_uuid: "{{ api_response_service.json.service_uuid
}}"
        customer_id: "{{ api_response_service.json.customer_id }}"
        package_name: "{{ api_response_product.json.product_name
}}"
        topup_value: "{{ api_response_product.json.retail_cost }}"
```

```
    # 4. Execute action in billing system (free topup)
    - name: Execute Action to add credits
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body_format: json
        body:
          {
            "method": "APIerSv1.ExecuteAction",
            "params": [{
                "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                "Account": "{{ service_uuid }}",
                "ActionsId": "Action_Topup_Standard"
            }]
          }
        status_code: 200
      register: action_response

    - name: Verify action executed successfully
      assert:
        that:
          - action_response.status == 200
          - action_response.json.result == "OK"

    # 5. Reset any triggered limits
    - name: Reset ActionTriggers
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body_format: json
        body:
          {
            "method": "APIerSv1.ResetAccountActionTriggers",
            "params": [{
                "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                "Account": "{{ service_uuid }}",
                "Executed": false
            }]
          }
        status_code: 200

    # 6. Update service dates
    - name: Calculate new expiry date
      command: "date --utc +%Y-%m-%dT%H:%M:%S%z -d '+30 days'"
```

```
      register: new_expiry_date

    - name: Update Service with new expiry
      uri:
        url: "http://localhost:5000/crm/service/{{ service_id }}"
        method: PATCH
        headers:
          Authorization: "Bearer {{ access_token }}"
          Content-Type: "application/json"
        body_format: json
        body:
          {
            "service_deactivate_date": "{{ new_expiry_date.stdout
}}",
            "service_status": "Active"
          }

    # 7. Optional: Send notification
    - name: Send Notification SMS
      uri:
        url: "http://sms-gateway/api/send"
        method: POST
        body_format: json
        body:
          {
            "source": "CompanyName",
            "destination": "{{ customer_phone }}",
            "message": "Your service has been topped up. New
expiry: {{ new_expiry_date.stdout }}"
          }
        status_code: 201
      ignore_errors: True
```

CPE Provisioning Pattern

Used for configuring customer premises equipment (routers, modems, ONTs).

```yaml
- name: CPE Provisioning Playbook
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Include vars of crm_config
      ansible.builtin.include_vars:
        file: "../../crm_config.yaml"
        name: crm_config

    # 1. Get inventory item for CPE
    - name: Set CPE inventory ID from hostvars
      set_fact:
        cpe_inventory_id: "{{ hostvars[inventory_hostname]['WiFi
Router CPE'] | int }}"
      when: "'WiFi Router CPE' in hostvars[inventory_hostname]"

    # 2. Get CPE details from inventory
    - name: Get Inventory data for CPE
      uri:
        url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ cpe_inventory_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_cpe

    # 3. Get customer site information
    - name: Get Site info from API
      uri:
        url: "{{ crm_config.crm.base_url
}}/crm/site/customer_id/{{ customer_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_site

    # 4. Update CPE inventory with location
    - name: Patch CPE inventory item with location
      uri:
```

```
        url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ cpe_inventory_id }}"
        method: PATCH
        body_format: json
        headers:
          Authorization: "Bearer {{ access_token }}"
        body:
          {
            "address_line_1": "{{
api_response_site.json.0.address_line_1 }}",
            "city": "{{ api_response_site.json.0.city }}",
            "state": "{{ api_response_site.json.0.state }}",
            "latitude": "{{ api_response_site.json.0.latitude }}",
            "longitude": "{{ api_response_site.json.0.longitude
}}"
          }
        status_code: 200

    # 5. Generate credentials
    - name: Set CPE hostname
      set_fact:
        cpe_hostname: "CPE_{{ cpe_inventory_id }}"
        cpe_username: "admin_{{ cpe_inventory_id }}"

    - name: Generate random password
      set_fact:
        cpe_password: "{{ lookup('pipe', 'cat /dev/urandom | tr -
dc a-zA-Z0-9 | head -c 16') }}"

    # 6. Generate WiFi credentials
    - name: Set WiFi SSID
      set_fact:
        wifi_ssid: "Network_{{ cpe_inventory_id }}"

    - name: Generate WiFi password
      set_fact:
        word_list:
          - apple
          - cloud
          - river
          - mountain
          - ocean

    - name: Create WiFi PSK
```

```
      set_fact:
        random_word: "{{ word_list | random }}"
        random_number: "{{ 99999 | random(start=10000) }}"

    - name: Combine WiFi PSK
      set_fact:
        wifi_psk: "{{ random_word }}{{ random_number }}"

    # 7. Generate configuration file
    - name: Set config filename
      set_fact:
        config_name: "{{ cpe_hostname }}_{{ lookup('pipe', 'date
+%Y%m%d%H%M%S') }}.cfg"
        config_dest: "/tmp/{{ cpe_hostname }}_{{ lookup('pipe',
'date +%Y%m%d%H%M%S') }}.cfg"

    - name: Create config from template
      template:
        src: "templates/cpe_router_config.j2"
        dest: "{{ config_dest }}"

    # 8. Read generated config
    - name: Read config file
      ansible.builtin.slurp:
        src: "{{ config_dest }}"
      register: config_content

    # 9. Update inventory with provisioning info
    - name: Patch CPE inventory with config
      uri:
        url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ cpe_inventory_id }}"
        method: PATCH
        body_format: json
        headers:
          Authorization: "Bearer {{ access_token }}"
        body:
          {
            "itemtext3": "{{ wifi_ssid }}",
            "itemtext4": "{{ wifi_psk }}",
            "management_url": "{{ cpe_hostname }}",
            "management_username": "{{ cpe_username }}",
            "management_password": "{{ cpe_password }}",
            "config_content": "{{ config_content.content |
```

```
b64decode }}",
            "inventory_notes": "Provisioned: {{ lookup('pipe',
'date +%Y-%m-%d') }}"
          }
        status_code: 200

    # 10. Send config to support team
    - name: Email configuration to support
      uri:
        url: "https://api.mailjet.com/v3.1/send"
        method: POST
        body_format: json
        headers:
          Content-Type: "application/json"
        body:
          {
            "Messages": [{
              "From": {
                "Email": "provisioning@example.com",
                "Name": "Provisioning System"
              },
              "To": [{
                "Email": "support@example.com",
                "Name": "Support Team"
              }],
              "Subject": "CPE Config - {{ cpe_hostname }}",
              "Attachments": [{
                "ContentType": "text/plain",
                "Filename": "{{ config_name }}",
                "Base64Content": "{{ config_content.content }}"
              }]
            }]
          }
        user: "{{ mailjet_api_key }}"
        password: "{{ mailjet_api_secret }}"
        force_basic_auth: true
        status_code: 200
```

Auto-Renewal Pattern

Configure automatic recurring charges or renewals using CGRateS ActionPlans.

```
# Part of a topup playbook that sets up auto-renewal

# 1. Normalize auto_renew parameter
- name: Normalize auto_renew to boolean
  set_fact:
    auto_renew_bool: "{{ (auto_renew | string | lower) in ['true',
'1', 'yes'] }}"

# 2. Create action for auto-renewal
- name: Create Action for AutoRenew
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActions",
        "params": [{
          "ActionsId": "Action_AutoTopup_{{ service_uuid }}_{{
product_id }}",
          "Overwrite": true,
          "Actions": [
            {
              "Identifier": "*http_post",
              "ExtraParameters": "{{ crm_config.crm.base_url
}}/crm/provision/simple_provision_addon/service_id/{{ service_id
}}/product_id/{{ product_id }}"
            },
            {
              "Identifier": "*cdrlog",
              "BalanceType": "*generic",
              "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"Auto Renewal\"}"
            }
          ]
        }]
      }
    status_code: 200
  register: action_response
  when: auto_renew_bool

# 3. Create monthly ActionPlan
- name: Create ActionPlan for Monthly Renewal
```

```
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.SetActionPlan",
        "params": [{
          "Id": "ActionPlan_Monthly_{{ service_uuid }}_{{
product_id }}",
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "ActionPlan": [{
            "ActionsId": "Action_AutoTopup_{{ service_uuid }}_{{
product_id }}",
            "Years": "*any",
            "Months": "*any",
            "MonthDays": "*any",
            "WeekDays": "*any",
            "Time": "*monthly",
            "StartTime": "*now",
            "Weight": 10
          }],
          "Overwrite": true,
          "ReloadScheduler": true
        }]
      }
    status_code: 200
  when: auto_renew_bool

# 4. Assign ActionPlan to account
- name: Assign ActionPlan to account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV2.SetAccount",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionPlanIds": ["ActionPlan_Monthly_{{ service_uuid
}}_{{ product_id }}"],
          "ActionPlansOverwrite": true,
```

```
          "ReloadScheduler": true
        }]
      }
    status_code: 200
  when: auto_renew_bool

# 5. Remove ActionPlan if auto-renew disabled
- name: Remove ActionPlan from account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.RemoveActionPlan",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Id": "ActionPlan_Monthly_{{ service_uuid }}_{{
product_id }}"
        }]
      }
    status_code: 200
  ignore_errors: true
  when: not auto_renew_bool
```

Reusable Tasks

Reusable tasks are small, self-contained playbooks that can be included by multiple plays. They promote code reuse and consistency.

Welcome Email Task

`task_welcome_email.yaml` - Sends a welcome email to new customers.

```
# This task expects these variables to be set by the parent play:
# - api_response_customer (customer details)
# - package_name (product name)
# - monthly_cost (recurring cost)
# - setup_cost (one-time cost)

- name: Set email configuration
  set_fact:
    mailjet_api_key: "{{ lookup('env', 'MAILJET_API_KEY') }}"
    mailjet_api_secret: "{{ lookup('env', 'MAILJET_SECRET') }}"
    email_from: "noreply@example.com"
    recipients: []

- name: Set email subject and sender name
  set_fact:
    email_subject: "Welcome to our service!"
    email_from_name: "Customer Service Team"

- name: Prepare list of recipients from customer contacts
  loop: "{{ api_response_customer.json.contacts }}"
  set_fact:
    recipients: "{{ recipients + [{'Email': item.contact_email,
'Name': item.contact_firstname ~ ' ' ~ item.contact_lastname}] }}"

- name: Get first contact name
  set_fact:
    first_contact: "{{
api_response_customer.json.contacts[0].contact_firstname }}"

- name: Send welcome email
  uri:
    url: "https://api.mailjet.com/v3.1/send"
    method: POST
    body_format: json
    headers:
      Content-Type: "application/json"
    body:
      {
        "Messages": [{
          "From": {
            "Email": "{{ email_from }}",
            "Name": "{{ email_from_name }}"
          },
```

```
          "To": "{{ recipients }}",
          "Subject": "{{ email_subject }}",
          "TextPart": "Dear {{ first_contact }}, welcome! Your
service is ready.",
          "HTMLPart": "Dear {{ first_contact }},<br/><h3>Welcome!
</h3><br/>Your {{ package_name }} service is now active.
<br/>Monthly cost: ${{ monthly_cost }}<br/>Setup fee: ${{
setup_cost }}<br/>If you have any questions, contact
support@example.com"
        }]
      }
    user: "{{ mailjet_api_key }}"
    password: "{{ mailjet_api_secret }}"
    force_basic_auth: true
    status_code: 200
  register: email_response
```

Post Provisioning Tasks

`post_provisioning_tasks.yaml` - Standard cleanup and notifications run after every provision.

```
# This file is included at the end of most provisioning playbooks
# It handles common post-provisioning operations

- include_tasks: task_notify_ocs.yaml
```

The `task_notify_ocs.yaml` might contain:

```
- name: Notify OCS of provisioning completion
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.ReloadCache",
        "params": [{
          "ArgsCache": "*all"
        }]
      }
    status_code: 200
  ignore_errors: true
```

Common Operations

Working with Inventory

Retrieving inventory details:

```
- name: Get SIM Card inventory ID
  set_fact:
    sim_inventory_id: "{{ hostvars[inventory_hostname]['SIM Card']
| int }}"
  when: "'SIM Card' in hostvars[inventory_hostname]"

- name: Get SIM Card details
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ sim_inventory_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: sim_response

- name: Extract SIM details
  set_fact:
    iccid: "{{ sim_response.json.iccid }}"
    imsi: "{{ sim_response.json.imsi }}"
    ki: "{{ sim_response.json.ki }}"
```

Assigning inventory to customer:

```
- name: Assign SIM to customer
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ sim_inventory_id }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "customer_id": {{ customer_id }},
        "service_id": {{ service_id }},
        "item_state": "Assigned"
      }
    status_code: 200
```

Date and Time Operations

Getting current date/time:

```
- name: Get current date and time in ISO 8601 format
  command: date --utc +%Y-%m-%dT%H:%M:%S%z
  register: current_date_time

- name: Get today's date only
  set_fact:
    today: "{{ lookup('pipe', 'date +%Y-%m-%d') }}"
```

Calculating future dates:

```
- name: Calculate expiry date 30 days from now
  command: "date --utc +%Y-%m-%dT%H:%M:%S%z -d '+30 days'"
  register: expiry_date

- name: Calculate date 90 days in future
  command: "date --utc +%Y-%m-%d -d '+{{ days }} days'"
  register: future_date
  vars:
    days: 90
```

Generating Random Values

UUIDs and identifiers:

```
- name: Generate UUID
  set_fact:
    uuid: "{{ 99999999 | random | to_uuid }}"

- name: Generate service identifier
  set_fact:
    service_uuid: "SVC_{{ uuid[0:8] }}"
```

Random passwords:

```
- name: Generate secure password
  set_fact:
    password: "{{ lookup('pipe', 'cat /dev/urandom | tr -dc a-zA-
Z0-9 | head -c 16') }}"
```

Memorable passphrases:

```
- name: Set word list
  set_fact:
    words:
      - alpha
      - bravo
      - charlie
      - delta
      - echo

- name: Generate passphrase
  set_fact:
    word: "{{ words | random }}"
    number: "{{ 99999 | random(start=10000) }}"

- name: Combine into passphrase
  set_fact:
    passphrase: "{{ word }}{{ number }}"
```

Working with CGRateS/OCS

Creating accounts:

```
- name: Create billing account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV2.SetAccount",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionPlanIds": [],
          "ActionPlansOverwrite": true,
          "ExtraOptions": {
            "AllowNegative": false,
            "Disabled": false
          },
          "ReloadScheduler": true
        }]
      }
    status_code: 200
  register: account_response
```

Adding balances:

```
- name: Add data balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Categories": "*any",
          "Balance": {
            "ID": "Data Package",
            "Value": 10737418240,
            "ExpiryTime": "+720h",
            "Weight": 10
          }
        }]
      }
    status_code: 200
```

Executing actions:

```
- name: Execute charging action
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.ExecuteAction",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionsId": "Action_Standard_Charge"
        }]
      }
    status_code: 200
```

Getting account information:

```
- name: Get account details
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV2.GetAccount",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}"
        }]
      }
    status_code: 200
  register: account_info
```

Working with Attribute Profiles:

```
- name: Get AttributeProfile
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.GetAttributeProfile",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "ID": "ATTR_{{ service_uuid }}"
        }]
      }
    return_content: yes
    status_code: 200
  register: attr_response
  ignore_errors: true

- name: Extract attribute value
  set_fact:
    phone_number: "{{ attr_response.json.result.Attributes |
json_query(\"[?Path=='*req.PhoneNumber'].Value[0].Rules\") | first
}}"
  when: attr_response is defined
```

Conditional Logic

Checking if variables exist:

```
- name: Use custom value or default
  set_fact:
    monthly_cost: "{{ custom_cost | default(50.00) }}"

- name: Only run if variable is defined
  debug:
    msg: "Service UUID is {{ service_uuid }}"
  when: service_uuid is defined
```

Boolean conditions:

```
- name: Provision equipment
  include_tasks: configure_cpe.yaml
  when: provision_cpe | default(false) | bool

- name: Skip if deprovision
  assert:
    that:
      - action != "deprovision"
  when: action is defined
```

Multiple conditions:

```
- name: Complex conditional task
  uri:
    url: "{{ endpoint }}"
    method: POST
  when:
    - service_uuid is defined
    - customer_id is defined
    - action != "deprovision"
    - enable_feature | default(true) | bool
```

Loops and Iteration

Simple loops:

```
- name: Create multiple balances
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Account": "{{ service_uuid }}",
          "BalanceType": "{{ item.type }}",
          "Balance": {
            "Value": "{{ item.value }}"
          }
        }]
      }
  loop:
    - { type: "*voice", value: 3600 }
    - { type: "*data", value: 10737418240 }
    - { type: "*sms", value: 100 }
```

Looping over API responses:

```
- name: Get all customer sites
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/site/customer_id/{{
customer_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: sites_response

- name: Configure equipment at each site
  debug:
    msg: "Configuring site at {{ item.address_line_1 }}"
  loop: "{{ sites_response.json }}"
```

Error Handling

Using ignore_errors:

```yaml
- name: Optional SMS notification
  uri:
    url: "http://sms-gateway/send"
    method: POST
    body: {...}
  ignore_errors: true
```

Assertions for validation:

```yaml
- name: Verify API response
  assert:
    that:
      - response.status == 200
      - response.json.result == "OK"
    fail_msg: "API call failed: {{ response.json }}"
```

Conditional error handling:

```yaml
- name: Try to get existing service
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/service/service_uuid/{{ service_uuid }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: service_lookup
  failed_when: false

- name: Create service if it doesn't exist
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/service/"
    method: PUT
    body: {...}
  when: service_lookup.status == 404
```

Best Practices

Variable Naming

Use descriptive, consistent names:

```yaml
# Good
service_uuid: "SVC_12345"
customer_name: "John Smith"
monthly_cost: 49.99

# Bad
svc: "SVC_12345"
name: "John Smith"
cost: 49.99
```

Prefix variables by source:

```yaml
api_response_customer: {...}
api_response_product: {...}
cgr_account_info: {...}
```

Debugging

Print variables for troubleshooting:

```yaml
- name: Print all variables
  debug:
    var: hostvars[inventory_hostname]

- name: Print specific variable
  debug:
    msg: "Service UUID: {{ service_uuid }}"

- name: Print API response
  debug:
    var: api_response_product.json
```

Validation

Always validate critical API responses:

```
- name: Create account
  uri:
    url: "{{ billing_endpoint }}"
    method: POST
    body: {...}
  register: response

- name: Verify account creation
  assert:
    that:
      - response.status == 200
      - response.json.result == "OK"
    fail_msg: "Failed to create account: {{ response.json }}"
```

Idempotency

Design tasks to be safely re-runnable:

```
# Check if resource exists first
- name: Check if account exists
  uri:
    url: "{{ ocs_endpoint }}/get_account"
    method: POST
    body: {"Account": "{{ service_uuid }}"}
  register: account_check
  failed_when: false

# Only create if doesn't exist
- name: Create account
  uri:
    url: "{{ ocs_endpoint }}/create_account"
    method: POST
    body: {...}
  when: account_check.status == 404
```

Security

Never hardcode credentials:

```
# Bad
mailjet_api_key: "abc123def456"

# Good - use environment variables
mailjet_api_key: "{{ lookup('env', 'MAILJET_API_KEY') }}"

# Good - use config file
mailjet_api_key: "{{ crm_config.email.api_key }}"
```

Always use HTTPS and authentication:

```
- name: Call external API
  uri:
    url: "https://api.example.com/endpoint"
    method: POST
    headers:
      Authorization: "Bearer {{ access_token }}"
    validate_certs: yes
```

Documentation

Document complex logic:

```
# Calculate pro-rata charge for partial month
# If customer signs up on the 15th and billing is on 1st,
# charge 50% of monthly cost for remaining days
- name: Calculate days until end of month
  command: "date -d 'last day of this month' +%d"
  register: days_in_month

- name: Get current day
  command: "date +%d"
  register: current_day

- name: Calculate pro-rata amount
  set_fact:
    days_remaining: "{{ (days_in_month.stdout | int) -
(current_day.stdout | int) }}"
    pro_rata_cost: "{{ (monthly_cost | float) * (days_remaining |
float) / (days_in_month.stdout | float) }}"
```

Testing Playbooks

Testing Approach

1. **Dry Run First**: Test with non-production systems
2. **Verify Variables**: Use debug tasks to confirm all required variables are present
3. **Check Responses**: Validate API responses before proceeding
4. **Rollback Testing**: Intentionally fail tasks to verify rescue blocks work
5. **Deprovision Testing**: Test with `action: "deprovision"` to verify cleanup

Example test playbook:

```yaml
- name: Test Service Provisioning
  hosts: localhost
  gather_facts: no

  tasks:
    - name: Verify required variables
      assert:
        that:
          - product_id is defined
          - customer_id is defined
          - access_token is defined
        fail_msg: "Missing required variables"

    - name: Test API connectivity
      uri:
        url: "http://localhost:5000/crm/health"
        method: GET
      register: health_check

    - name: Verify health check
      assert:
        that:
          - health_check.status == 200
```

Common Pitfalls

Missing type conversions:

```yaml
# Wrong - may be string
customer_id: "{{ customer_id }}"

# Correct - ensure integer
customer_id: {{ customer_id | int }}
```

Not handling undefined variables:

```
# Wrong - fails if not defined
service_uuid: "{{ service_uuid }}"

# Correct - provide default
service_uuid: "{{ service_uuid | default('') }}"
```

Forgetting validation:

```
# Wrong - doesn't check response
- name: Create account
  uri: ...
  register: response

# Correct - validate response
- name: Create account
  uri: ...
  register: response

- name: Verify creation
  assert:
    that:
      - response.json.result == "OK"
```

Provisioning Workflow

Generally, Omnitouch staff will work with the customer to:

1. Define the product requirements
2. Develop the necessary Ansible playbooks to automate the provisioning process
3. Test the playbooks in a staging environment
4. Deploy to production

This ensures that each service is deployed consistently and reliably, reducing the risk of errors and ensuring that all necessary steps are completed in the correct order.

Ansible Variables

The variables passed to Ansible playbooks include:

Product Variables
Derived from the OmniCRM product configurations and define how the service should be set up.

Inventory Variables
Selected from the inventory, these include items such as modems, SIM cards, IP address blocks, or phone numbers that are required for provisioning.

System Variables
Automatically added by OmniCRM:

- `product_id` - The product being provisioned
- `customer_id` - The customer receiving the service
- `service_id` - The service being modified (for topups/changes)
- `access_token` - JWT for API authentication

Deprovisioning

When a service is no longer needed, the **Ansible Playbooks** are also used to deprovision the service using the `rescue` block pattern. This:

- Removes any configurations
- Releases inventory back to the pool
- Deletes billing accounts
- Ensures the system is kept clean

Deprovisioning Methods

There are two primary ways deprovisioning is triggered:

1. Automatic Rollback (Provisioning Failure) When any task in the main provisioning block fails, the rescue section automatically executes to clean up partial changes.

2. Manual Deprovisioning Setting `action: "deprovision"` when running a playbook triggers the rescue block intentionally to remove a service.

Deprovisioning Pattern

All OmniCRM playbooks follow this structure for safe cleanup:

```yaml
- name: Service Provisioning Playbook
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main block
      block:
        # All provisioning tasks go here
        - name: Create OCS account
          uri: ...

        - name: Create service record
          uri: ...
          register: service_creation_response

        - name: Add transaction
          uri: ...

      rescue:
        # Deprovisioning/rollback tasks go here
        - name: Print all vars for debugging
          debug:
            var: hostvars[inventory_hostname]

        # Cleanup tasks execute in reverse order
        - name: Remove account in OCS
          uri: ...

        - name: Delete Service from CRM
          uri: ...

        - name: Fail if not intentional deprovision
          assert:
            that:
              - action == "deprovision"
```

Complete Deprovisioning Example

Here's a complete example from `play_simple_service.yaml`:

```
rescue:
  # 1. Debug information
  - name: Print all vars for Deprovision/Rollback
    debug:
      var: hostvars[inventory_hostname]

  - name: Get today's date
    set_fact:
      today: "{{ lookup('pipe', 'date +%Y-%m-%d') }}"

  # 2. Get service information if available
  - name: Try to get Service information from CRM API to
Deprovision
    uri:
      url: "http://localhost:5000/crm/service/service_id/{{
service_creation_response.json.service_id }}"
      method: GET
      headers:
        Authorization: "Bearer {{ access_token }}"
      return_content: yes
    register: api_response_service
    ignore_errors: True
    when: service_creation_response is defined and
service_creation_response.json is defined and
service_creation_response.json.service_id is defined

  - name: Print api_response_service
    debug:
      var: api_response_service
    when: api_response_service is defined

  # 3. Set service_uuid for cleanup
  - name: Set service_uuid facts for Deprovision
    set_fact:
      service_uuid: "{{ api_response_service.json.service_uuid }}"
    when:
      - service_uuid is not defined
      - api_response_service is defined
      - api_response_service.json is defined

  # 4. Remove OCS account
  - name: Remove account in OCS
    uri:
```

```
      url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
      method: POST
      body_format: json
      headers:
        Content-Type: "application/json"
        Authorization: "Bearer {{ access_token }}"
      body:
        {
          "method": "ApierV2.RemoveAccount",
          "params": [{
            "Tenant": "{{ crm_config.ocs.ocsTenant }}",
            "Account": "{{ service_uuid }}",
            "ReloadScheduler": true
          }]
        }
      status_code: 200
    register: response
    ignore_errors: True
    when: service_uuid is defined

  - name: Print response from OCS account removal
    debug:
      var: response
    when: response is defined

  # 5. Delete service record from CRM
  - name: Delete Service from CRM if it was created
    uri:
      url: "http://localhost:5000/crm/service/service_id/{{
service_creation_response.json.service_id }}"
      method: DELETE
      headers:
        Authorization: "Bearer {{ access_token }}"
      status_code: 200
    register: delete_service_response
    ignore_errors: True
    when: service_creation_response is defined and
service_creation_response.json is defined and
service_creation_response.json.service_id is defined

  - name: Print delete service response
    debug:
      var: delete_service_response
    when: delete_service_response is defined
```

```
  # 6. Determine if this was intentional or a failure
  - name: Set status to "Success" if Manual deprovision / Fail if
failed provision
    assert:
      that:
        - action == "deprovision"
      fail_msg: "Provisioning failed and was rolled back"
      success_msg: "Service deprovisioned successfully"
```

Key Deprovisioning Concepts

ignore_errors: True Most cleanup tasks use `ignore_errors: True` because resources might not exist (e.g., if provisioning failed before creating them).

Conditional Execution Use `when` clauses to only clean up resources that were created:

```
when: service_creation_response is defined
```

Reverse Order Cleanup happens in reverse order of creation:

1. Delete dependent resources first (transactions, inventory assignments)
2. Delete service record
3. Delete OCS/billing account
4. Release any held resources

Final Assertion The final assert distinguishes between:

- **Intentional deprovision** (`action == "deprovision"`) → Success
- **Failed provisioning** (action not set) → Failure

Deprovisioning Different Resource Types

OCS/CGRateS Accounts:

```
- name: Remove account in OCS
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV2.RemoveAccount",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ReloadScheduler": true
        }]
      }
    status_code: 200
  ignore_errors: True
  when: service_uuid is defined
```

CRM Service Records:

```
- name: Delete Service from CRM
  uri:
    url: "http://localhost:5000/crm/service/service_id/{{
service_id }}"
    method: DELETE
    headers:
      Authorization: "Bearer {{ access_token }}"
    status_code: 200
  ignore_errors: True
  when: service_id is defined
```

Inventory Items (Return to Pool):

```
- name: Release SIM card back to inventory pool
  uri:
    url: "http://localhost:5000/crm/inventory/inventory_id/{{
sim_inventory_id }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "customer_id": null,
        "service_id": null,
        "item_state": "Available"
      }
    status_code: 200
  ignore_errors: True
  when: sim_inventory_id is defined
```

ActionPlans (Recurring Charges):

```
- name: Remove ActionPlan from account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.RemoveActionPlan",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Id": "ActionPlan_Monthly_{{ service_uuid }}_{{
product_id }}"
        }]
      }
    status_code: 200
  ignore_errors: True
```

Payment Authorizations:

```
- name: Release payment authorization
  uri:
    url: "http://localhost:5000/crm/payments/release/{{
authorization_id }}"
    method: POST
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "metadata": {
          "release_reason": "provisioning_failed"
        }
      }
    return_content: yes
  ignore_errors: True
  when: authorization_id is defined
```

Manual Deprovisioning Workflow

To manually deprovision a service:

1. Identify the service to deprovision
2. Run the original provisioning playbook with `action: "deprovision"`
3. Playbook enters rescue block immediately
4. All cleanup tasks execute
5. Service is removed cleanly

Example API call:

```
POST /crm/provision/run_playbook
{
  "product_id": 123,
  "customer_id": 456,
  "service_id": 789,
  "action": "deprovision"
}
```

Partial Cleanup Scenarios

Scenario 1: OCS Account Created, Service Creation Failed

- OCS account exists
- Service record does NOT exist
- Rescue block removes OCS account
- No service to delete (safely skipped with `when` condition)

Scenario 2: Service Created, Transaction Failed

- OCS account exists
- Service record exists
- Transaction does NOT exist
- Rescue block removes both OCS account and service
- No transaction to void (never created)

Scenario 3: Complete Provisioning, Payment Capture Failed

- OCS account exists
- Service record exists
- Payment authorized but NOT captured
- Rescue block:
  - Releases payment authorization (customer not charged)
  - Removes service record
  - Removes OCS account

Best Practices for Deprovisioning

1. Use ignore_errors liberally Cleanup should be forgiving - don't fail if a resource doesn't exist.

2. Check resource existence with when clauses Only attempt cleanup if the resource was created:

```
when: service_creation_response is defined
```

3. Print debug information Always include debug tasks to help troubleshoot failed provisions:

```
- name: Print all vars for debugging
  debug:
    var: hostvars[inventory_hostname]
```

4. Clean up in reverse dependency order Delete children before parents:

- Transactions before services
- Services before OCS accounts
- Inventory assignments before inventory releases

5. Handle payment authorizations Always release payment authorizations in rescue blocks to avoid charging customers for failed provisions.

6. Reload schedulers after cleanup When removing OCS resources, include `ReloadScheduler: true` to ensure CGRateS updates immediately.

Deprovisioning vs Deletion

Deprovisioning (via playbook rescue):

- Removes service from all systems
- Releases inventory
- Cancels recurring charges
- Leaves audit trail
- Recommended approach

Direct Deletion (via API):

- Only deletes CRM record
- Does NOT clean up OCS account
- Does NOT release inventory
- Can leave orphaned resources
- Not recommended for production

Rollback and Error Handling

Ansible's **block/rescue** feature is employed during both provisioning and deprovisioning to handle errors gracefully. If a task fails at any point during provisioning, the rescue section automatically rolls back changes to return to a consistent state. This ensures reliability and reduces the risk of partial or failed deployments.

Error Handling Example

```
- name: Main block
  block:
    - name: Step 1: Create account
      uri: ...
      register: response

    - name: Verify step 1
      assert:
        that:
          - response.status == 200

    - name: Step 2: Create service
      uri: ...

  rescue:
    # If any assert fails or any task errors:
    # 1. Execution jumps to rescue block
    # 2. Cleanup tasks execute
    # 3. Playbook fails with error message
    - name: Cleanup partial changes
      uri: ...
```

For complete details on the provisioning system, workflows, and authentication, see `concepts_provisioning`.

OmniCRM API

All functions within OmniCRM are accessible via the API - There is no functionality that is only available in the UI.

This allows you to integrate OmniCRM with other systems or automate tasks.

The API is a RESTful API, and is secured using multiple authentication methods including JWT tokens, API keys, and IP whitelisting.

The API is documented using Swagger, a tool that allows easy reading, understanding, and testing of API functionality.

The API documentation is available at the following URL:

> <https://yourcrm/crm/docs/>

Authentication Methods

OmniCRM supports three authentication methods, each designed for different use cases:

1. **JWT Bearer Tokens** - For interactive user sessions (Web UI, mobile apps)

2. **API Keys** - For server-to-server integrations and automation scripts
3. **IP Whitelisting** - For trusted internal systems (provisioning servers, monitoring tools)

JWT Bearer Token Authentication

This is the primary authentication method for user sessions. Users log in with email and password, receive a JWT token, and use it for subsequent requests.

Use Cases:

- Web UI authentication
- Mobile app authentication
- Short-lived programmatic access

How to Authenticate:

To log in, send a JSON body with the following structure to `/crm/auth/login` as a POST request:

```
{
    "email": "youruser@yourdomain.com",
    "password": "yourpassword"
}
```

The API will return a JSON object containing a `token` field, which is used to authenticate all future requests. Additionally, the response includes a `refresh_token` that can be used to refresh the token when it expires, along with the user's permissions and roles.

You can test this from the Swagger page by selecting the `/auth/login` endpoint, filling in your Username and Password, and clicking the `Try it out` button.

To authorize the session, copy the token value and click the "Authorize" button at the top-right of the Swagger page. Paste the token into the "Value" field, prefixed by `Bearer` and click "Authorize".

Now, all subsequent requests will be authenticated with this token.

API Key Authentication

API keys provide secure, long-lived authentication for server-to-server integrations and automation scripts without requiring user passwords.

Use Cases:

- Automated provisioning systems
- Monitoring and alerting tools
- Integration with external systems
- Scheduled tasks and cron jobs

How API Keys Work:

API keys are configured in the `crm_config.yaml` file and are associated with specific roles and permissions. Each API key is a secure random string (minimum 32 characters) that authenticates requests when passed in the `X-API-KEY` header.

Configuring API Keys:

API keys must be added to `crm_config.yaml` by an administrator with server access:

```
api_keys:
  your-secure-api-key-here-minimum-32-chars:
    roles:
      - admin
    description: "Provisioning automation system"
  another-api-key-for-monitoring-system:
    roles:
      - view_customer
      - view_service
    description: "Monitoring and alerting"
```

Using API Keys:

Include the API key in the `X-API-KEY` header of your requests:

```
curl -X GET "https://yourcrm.com/crm/customers" \
  -H "X-API-KEY: your-secure-api-key-here-minimum-32-chars"
```

Python Example:

```
import requests

crm_url = 'https://yourcrm.com'
api_key = 'your-secure-api-key-here-minimum-32-chars'

headers = {
    "Content-Type": "application/json",
    "X-API-KEY": api_key
}

# Get Customers
response = requests.get(crm_url + '/crm/customers',
headers=headers)
for customer in response.json()['data']:
    print(customer)
```

Best Practices:

- Generate API keys using cryptographically secure random generators (`openssl rand -base64 48`)
- Use different API keys for different systems
- Document the purpose of each API key in the `description` field
- Rotate API keys periodically
- Never commit API keys to version control
- Assign minimal necessary permissions to each API key

IP Whitelist Authentication

IP whitelisting allows specific IP addresses to access the API without authentication. This is useful for trusted internal systems on private networks.

Use Cases:

- Internal provisioning servers
- Network monitoring systems on management VLANs
- Ansible playbooks running on controlled infrastructure

Configuring IP Whitelist:

Add trusted IP addresses to `crm_config.yaml`:

```
ip_whitelist:
  - 192.168.1.100
  - 10.0.0.0/24
  - 172.16.50.10
```

Security Considerations:

- Only use IP whitelisting on private, secured networks
- Never whitelist public IP addresses
- Use the most specific IP ranges possible
- Document why each IP is whitelisted
- Regularly audit whitelisted IPs

Example API Calls with Python

Here is an example of how to log in and retrieve a list of customers using JWT token authentication:

```
import requests

crm_url = 'https://yourcrm.com'
session = requests.Session()

print("Provisioning data to server: " + str(crm_url))

headers = {
    "Content-Type": "application/json"
}

# Get Auth Token
response = session.post(crm_url + '/crm/auth/login', json={
    "email": "youruser@yourdomain.com",
    "password": "yourpassword"
}, headers=headers)

print(response.status_code)
print(response.json())
assert response.status_code == 200

headers['Authorization'] = 'Bearer ' + response.json()['token']
print("Authenticated to CRM successfully")

# Get Customers
response = session.get(crm_url + '/crm/customers',
headers=headers)
for customer in response.json()['data']:
    print(customer)
```

API Performance Monitoring

All API requests are automatically tracked with comprehensive metrics. For details on API performance metrics including request rates, response times,

error rates, and endpoint-specific statistics, see Monitoring & Metrics.

The metrics endpoint is available at `/crm/metrics` in Prometheus format for monitoring and alerting.

Related Documentation

- System Architecture - Overall system design and component relationships
- Monitoring & Metrics - Complete metrics reference including API, database, and integration metrics
- Authentication Flows - Detailed authentication and authorization flows
- RBAC - Role-based access control and permissions

CRM Service / Product Charging Notes

Note

For a complete end-to-end guide covering product definition, provisioning, addons, and deprovisioning with detailed Ansible examples and pricing strategy, see `Complete Product Lifecycle Guide <guide_product_lifecycle>`.

For detailed information on provisioning mobile services with SIM cards, see `SIM Card Provisioning <concepts_sim_provisioning>`.

Products & Services Overview

Product (Menu Item):

A Product is like a specific dish on a restaurant menu, such as a "Spaghetti Carbonara."

It has a clear description, a list of ingredients (like pasta, cream, eggs, cheese, and bacon), and a price.

In OmniCRM, a Product similarly contains the details of what is included — features, specifications, and pricing.

Often, customers may want modifications, like "hold the onions" or "add extra cheese" to their meal. Within OmniCRM, this corresponds to customizing a service before creation. The level of customizations or modifications to a service are up to you (the operator) to define.

In OmniCRM, customers or staff might modify a Product to better suit a specific customer's needs, such as upgrading their Internet speed or adding specific features. This customization is reflected in the specific Service provided.

A product is essentially an offering that customers can choose to order from, similar to reading and picking a dish from the menu.

Product Catalog (Restaurant Menu):

The Product Catalog is like the entire menu in a restaurant, which lists all the dishes available — from appetizers to desserts.

It is the complete collection of everything the restaurant (or in your case, the Service Provider) has to offer.

In the business context, the Product Catalog provides customers with all available Products, so they can choose the one that best meets their needs.

Service (Prepared Dish):

When a customer orders an item from the menu, the dish is prepared in the kitchen. This is akin to creating a Service from a Product.

In OmniCRM, when a customer selects a Product, an instance of that Product is created and delivered as a Service.

It is customized and prepared specifically for that customer, just like a meal prepared for a diner.

For example, when someone selects the "Internet Bronze Plan" from the Product Catalog, the provisioning system "cooks" up an instance of that plan from the ingredients (IP addresses, Modems and Ports) — i.e., activates the plan and delivers it to the specific customer.

Bundled Products (Combo Meals):

The Product Catalog might also offer bundles, like a combo meal that includes an appetizer, main course, and dessert together for a special price.

In OmniCRM, bundled Products combine multiple individual Products into one convenient package — like a "Home Essentials Bundle" that includes Internet, cable, and phone services at a discounted rate.

Once selected, this bundle is turned into multiple Services tailored for the customer.

Product Definitions

A product is a template that is used to create a service / addon / discount / bolt on, etc.

Inside the definition we include:

- Information about the product (features, inclusions, T&Cs, contract length, icon, etc) that is displayed to the user of the CRM (Customer or *Staff*).
- The business logic around who can purchase the product (*Business* or *Residential*), if it relies on having a parent service provisioned (like mobile addons only available to customers with a mobile service), if it can be ordered directly by a customer via self care or only by a customer service agent, and when the product can be purchased (Allowing for a product to only be available for a set period of time).
- When Inventory items are to be included (such as Modems or SIM Cards) these are specified as Inventory Items List, for example the below service requires a SIM Card and a Phone Number to be assigned:

`['SIM Card', 'Phone Number']` These correlate to the `Inventory Items <administration_inventory>` defined in the CRM.

- Reference an Ansible Playbook to provision the service `Provisioning Play <concepts_ansible>` as well as the variables to pass to Ansible. These variables to pass are magic, in that they may be variables like `service_id` that are defined by the product we're adding it to, or they may be like `ICCID` & `MSISDN` where we have selected inventory items that are passed over when assigning the inventory. Bundling is handled in the provisioning play to contain multiple services, for example a bundled home internet, TV & Voice product, may provision a service for each.

Product Categories and Service Types

Products use two classification fields to help organize and filter offerings:

Product Categories

The `category` field controls where products are displayed in the UI. Common values include:

- **standalone** - Shown as a base service option when creating a new service
- **addon** - Shown when adding to an existing service
- **bundle** - Shown as a bundled service option (provisioned like an addon to existing services)
- **promo** - Special promotional offerings

These categories are purely organizational and don't dictate what gets provisioned. The actual provisioning behavior is determined entirely by the Ansible playbook referenced in `provisioning_play`.

For example: - A `standalone` product typically creates a new service object - An `addon` or `bundle` product is typically added to an existing service - But this is up to the implementer writing the playbook - you could create multiple service objects from an addon, or modify existing services from a standalone product if needed

The category simply controls the UI flow and where customers/staff see the product option.

Service Types

The `service_type` field categorizes what kind of service is being provided.

These are entirely defined by the user, but common values include:

- **mobile** - Mobile phone services with voice, SMS, and data
- **fixed** - Fixed wireless or wired internet services

- **fixed-voice** - Fixed-line voice services (VoIP, landline)
- **hotspot** - Mobile hotspot or rental devices
- **dongle** - USB modem or dongle services
- **voice** - Voice-only services
- **data** - Data-only services

Like categories, service types are customizable based on your offerings. They help in:

- Filtering which addons apply to which base services
- Organizing products in the customer portal
- Matching inventory requirements
- Determining provisioning workflows

Example: A customer with a `mobile` service can see mobile addons, while a customer with a `fixed` service sees fixed-line addons.

Managing Products

Products are managed through the Product Management page, where you can view, search, filter, and edit all available products.

Product Modal Interface

Clicking on any product opens an enhanced tabbed interface that organizes all product settings into logical groups for easier navigation and editing.

The product management modal features five organized tabs:

1. □ **Basic Info** - Core product information (name, slug, category, icon, features, terms)
2. □ **Pricing** - All cost-related fields including recurring costs, setup costs, and tax percentage
3. ⚙ **Configuration** - Renewal settings, customer types, and dependencies
4. □ **Provisioning** - Ansible playbook configuration and inventory requirements
5. □ **Availability** - Date ranges and system timestamps

Pricing Tab Organization:

The Pricing tab groups cost fields into logical sections:

- **Recurring Costs** - Monthly retail and wholesale costs side-by-side
- **Setup Costs** - One-time activation fees for retail and wholesale
- **Tax** - Tax percentage configuration with automatic calculation

Edit Mode Features:

- **Icon Picker** - Search and select FontAwesome icons visually
- **Inventory Items Picker** - Select from available inventory item types
- **Date/Time Picker** - Easy selection of availability windows
- **Currency Formatting** - Automatic $ prefix for cost fields
- **Dropdown Selectors** - Pre-defined options for categories and boolean fields

Icon Picker:

When editing the icon field, a searchable icon picker interface appears allowing you to visually browse and select from thousands of FontAwesome icons.

Features: * Search icons by keyword (e.g., "wrench", "mobile", "wifi") * Preview icon appearance in real-time * Shows icon class name for reference * Dropdown selection for quick access

Configuration Tab:

The Configuration tab organizes product behavior settings into logical groups.

Configuration Sections:

- **Renewal Settings:**
  - Auto Renew - Default renewal behavior (Prompt/Yes/No)
  - Allow Auto Renew - Whether customers can enable auto-renewal
  - Contract Days - Minimum contract length (e.g., 30 for monthly, 365 for annual)
- **Customer Types:**
  - Residential - Available to consumer customers
  - Business - Available to commercial customers
- **Dependencies:**
  - Relies On List - Product IDs or service types required before this product can be added
  - Used for addon dependencies (e.g., mobile addons require active mobile service)

Provisioning Tab:

The Provisioning tab handles Ansible automation and inventory requirements.

Provisioning Fields:

- **Provisioning Play:**
  - Name of Ansible playbook (without .yaml extension)
  - Must exist in OmniCRM-API/Provisioners/plays/ directory
  - Called when service is created, updated, or deprovisioned
- **Provisioning JSON Vars:**
  - Default variables passed to Ansible playbook as JSON
  - Can be overridden during provisioning
  - Playbook receives these plus customer_id, product_id, service_id, access_token
- **Inventory Items List:**
  - Multi-select picker showing available inventory item types
  - Examples: SIM Card, Phone Number, Modem Router, IPv4 Address
  - Customer/staff selects specific items from available inventory during ordering
  - Selected inventory IDs passed to playbook with inventory type as variable name

Availability Tab:

The Availability tab controls when the product can be purchased and displays system metadata.

Availability Settings:

- **Available From:**
  - Date/time when product becomes available for purchase
  - Leave empty for immediate availability
  - Useful for pre-announcing new products
- **Available Until:**
  - Date/time when product is no longer available for purchase
  - Leave empty for indefinite availability
  - Perfect for limited-time promotions or end-of-life products
- **System Metadata (Read-Only):**
  - Created - Timestamp when product was first created
  - Last Modified - Timestamp of most recent update
  - Automatically maintained by the system

Modal Actions:

- **View Mode:**
  - Close - Dismiss modal
  - Clone Product - Create a copy with "_clone" suffix
  - Edit Product - Switch to edit mode
- **Edit/Create Mode:**
  - Cancel - Discard changes and close
  - Save Changes - Create or update product (large button for emphasis)

Product Fields

The Product model contains all the information needed to define an offering and how it should be provisioned. These fields are managed through the Product Management modal interface described above.

Basic Information

- **product_id** - Unique identifier automatically assigned by the system
- **product_name** - Display name shown to customers and staff in the UI
- **product_slug** - Unique identifier used in URLs and API calls (lowercase, no spaces, use hyphens)
- **category** - Controls where this product appears in the UI:
  - `standalone` - Shown as a base service option when creating a new service
  - `addon` - Shown when adding to an existing service
  - `bundle` - Shown as a bundled service option
  - `promo` - Special promotional offerings
- **service_type** - Type of service being provided (e.g., mobile, fixed, fixed-voice, hotspot, dongle, voice, data). Used to filter which addons apply to which services.
- **comment** - Internal notes about the product for staff reference only (not shown to customers)
- **icon** - FontAwesome icon class displayed in the UI (e.g., `fa-solid fa-sim-card`)

Pricing Fields

- **retail_cost** - Monthly recurring charge billed to the customer (set to 0 for one-time purchases or prepaid products)
- **wholesale_cost** - Your monthly cost for providing this service (used for margin calculations)
- **retail_setup_cost** - One-time activation or setup fee charged to the customer
- **wholesale_setup_cost** - Your one-time cost for setting up the service

- **tax_percentage** - Tax percentage applied to this product (e.g., 10 for 10%, 12.5 for 12.5%). Set to 0 for tax-exempt products. This tax rate is automatically applied to transactions created from this product.

Tax Application:

When a transaction is created from this product, the tax percentage is automatically copied to the transaction and the tax amount is calculated. For example:

- Product with 10% tax, $50.00 retail cost → Transaction has $5.00 tax
- Product with 0% tax (tax-exempt) → Transaction has $0.00 tax
- Manual transaction override → Staff can change tax percentage per transaction

Customer Visibility and Access

- **enabled** - Whether this product is active and available for purchase (set to false to hide without deleting)
- **residential** - Whether residential (consumer) customers can purchase this product
- **business** - Whether business (commercial) customers can purchase this product
- **customer_can_purchase** - Whether customers can self-purchase via the portal (true) or if only staff can add it (false)

- **available_from** - Date/time when this product becomes available for purchase (optional)
- **available_until** - Date/time when this product is no longer available for purchase (optional, useful for limited-time offers)

Contract and Renewal

- **contract_days** - Minimum contract length in days (e.g., 30 for monthly, 365 for annual, 0 for no minimum contract)
- **auto_renew** - Default renewal behavior:
  - `prompt` - Asks customer each time whether to renew
  - `true` - Automatically renews without asking
  - `false` - Requires manual renewal
- **allow_auto_renew** - Whether customers can enable automatic renewal (set to false for one-time purchases)

Customer-Facing Content

- **terms** - Terms and conditions displayed to customers before purchase (include limitations, expiry rules, usage conditions)
- **features_list** - List of features and inclusions shown to customers (Python list format: `['Feature 1', 'Feature 2']`)

Provisioning Configuration

- **provisioning_play** - Name of the Ansible playbook that provisions this service (without .yaml extension). Must exist in `OmniCRM-API/Provisioners/plays/` directory.
- **provisioning_json_vars** - Default variables passed to the Ansible playbook as JSON. These can be overridden when provisioning. The playbook receives these along with `customer_id`, `product_id`, `service_id`, and `access_token`.
- **inventory_items_list** - List of inventory items required for this product (e.g., `['SIM Card', 'Mobile Number']`). When a customer orders, they'll be prompted to select specific items from available inventory. Selected inventory IDs are passed to the provisioning playbook with the inventory type as the variable name.

- **relies_on_list** - List of product IDs or service types that must exist before this product can be added. Used for addon dependencies (e.g., mobile addons require an active mobile service).

System Metadata

- **created** - Timestamp when the product was created (automatically set)
- **last_modified** - Timestamp when the product was last updated (automatically updated)

Example Product Definitions

Standalone Product (Mobile SIM)

```
{
  "product_id": 1,
  "product_slug": "Mobile-SIM",
  "product_name": "Mobile SIM Only",
  "category": "standalone",
  "service_type": "mobile",
  "provisioning_play": "play_psim_only",
  "provisioning_json_vars": "{\"iccid\": \"\", \"msisdn\": \"\"}",
  "inventory_items_list": "['SIM Card', 'Mobile Number']",
  "retail_cost": 0,
  "retail_setup_cost": 0,
  "wholesale_cost": 3,
  "wholesale_setup_cost": 1,
  "contract_days": 0,
  "residential": true,
  "business": true,
  "enabled": true,
  "customer_can_purchase": true,
  "icon": "fa-solid fa-sim-card",
  "features_list": "['Australian Phone Number (04xxx)', 'Fastest speeds', 'Best coverage', 'Roaming on the Mainland']",
  "terms": "Must be activated within 6 months. All credit lost if service is not used for 12 months.",
  "comment": "Physical SIM card for use with Mobile Phones"
}
```


This standalone product requires two inventory items (SIM Card and Mobile Number) and creates a new service when provisioned.

Addon Product (Monthly Data Plan)


```
{
  "product_slug": "norfone-mobile-prepaid-mini",
  "product_name": "Norfone Mini Plan",
  "category": "addon",
  "service_type": "mobile",
  "provisioning_play": "play_topup_charge_then_action",
  "provisioning_json_vars": "",
  "inventory_items_list": "[]",
  "retail_cost": 30,
  "retail_setup_cost": 0,
  "wholesale_cost": 5.84,
  "contract_days": 30,
  "residential": true,
  "business": false,
  "enabled": true,
  "customer_can_purchase": true,
  "auto_renew": "prompt",
  "icon": "fa-solid fa-sim-card",
  "features_list": "['8GB of Ultra fast data', 'Unlimited Calls & Texts to Norfone users', '100 Minutes of Talk to Australia', '100 SMS to Australia', '30 Day Expiry']",
  "terms": "Credit expires after 30 days. Once data, voice or sms is used up, you will need to top up to continue using the service.",
  "comment": "Our smallest plan for light users"
}
```


This addon product doesn't require inventory and is applied to an existing service. It charges the customer and adds credits/balances to their service.

Bundle Product (Seniors Package)


```
{
  "product_slug": "Bundle-Seniors",
  "product_name": "Seniors Bundle",
  "category": "bundle",
  "service_type": "fixed",
  "provisioning_play": "play_seniors_package",
  "provisioning_json_vars": "{\"IPTV_Service_ID\":
\"SeniorBundle\"}",
  "inventory_items_list": "['Modem Router']",
  "retail_cost": 30,
  "retail_setup_cost": 0,
  "wholesale_cost": 10,
  "wholesale_setup_cost": 11,
  "contract_days": 180,
  "residential": true,
  "business": false,
  "enabled": true,
  "icon": "fa-solid fa-person-walking-with-cane",
  "features_list": "['20Mbps Download', '5Mbps Upload', 'Unlimited
Data', 'Home Voice', 'TV: Extra +£5 per month', '£60 Installation
Fee']",
  "terms": "6 Month Contract, must show senior citizen's card to
qualify",
  "comment": "20Mbps/2Mbps GPON Service + IPTV + Phone"
}
```


This bundle product provisions multiple services (Internet + IPTV + Phone) using a single playbook. It requires one inventory item (Modem Router).

Addon Product (Simple Top-up)

```
{
  "product_slug": "Mobile-Topup-5",
  "product_name": "PAYG £5 Topup",
  "category": "addon",
  "service_type": "mobile",
  "provisioning_play": "play_topup_monetary",
  "provisioning_json_vars": "{\"service_id\": \"\"}",
  "inventory_items_list": "[]",
  "retail_cost": 5,
  "retail_setup_cost": 0,
  "wholesale_cost": 0,
  "contract_days": 0,
  "residential": true,
  "business": false,
  "enabled": true,
  "customer_can_purchase": true,
  "icon": "fa-solid fa-coins",
  "features_list": "['£5 credit', 'Valid for 180 days']",
  "terms": "Valid for 180 days or until all credit is used. See
our website for full rates",
  "comment": "£5 to use for Calls, SMS & Data"
}
```

This addon simply adds monetary credit to an existing service. No inventory required, and it uses `service_id` to identify which service to top up.

How Variables are Passed to Ansible

Understanding how variables flow from the product definition through the API to the Ansible playbook is critical for writing effective provisioning playbooks.

Variable Sources and Merging

When a provisioning job is created, variables come from multiple sources and are merged together in this order (later sources override earlier ones):

1. **Product's provisioning_json_vars** - Default variables from the product definition
2. **Request body** - Variables passed in the API call (can override product defaults)
3. **System-added variables** - Automatically added by the provisioning system
4. **Inventory selections** - IDs of selected inventory items (if `inventory_items_list` is not empty)

Variable Merging Process

The system merges variables from all sources, with later sources overriding earlier ones. This allows for flexible customization at provision time.

For example, if your product has:

```
"provisioning_json_vars": "{\"monthly_cost\": 50, \"data_gb\": 100}"
```

And your API request includes:

```
{
  "product_id": 10,
  "customer_id": 456,
  "monthly_cost": 45,
  "custom_param": "value"
}
```

The final `extra_vars` passed to Ansible will be:

```
{
    "monthly_cost": 45,         # Overridden from request
    "data_gb": 100,             # From provisioning_json_vars
    "product_id": 10,           # From request
    "customer_id": 456,         # From request
    "custom_param": "value",    # From request
    "access_token": "eyJ..."    # Added by system
}
```

System-Added Variables

The provisioning system automatically adds:

- `access_token` - JWT token for authenticating API calls back to the CRM (provided directly for IP/API key auth, or generated from `refresh_token` for user auth)
- `initiating_user` - The user ID who triggered the provisioning (or first admin for automated systems)
- Any fields from the request body (`product_id`, `customer_id`, `service_id`, etc.)

Inventory Variables

When a product requires inventory items (e.g., `inventory_items_list: "['SIM Card', 'Mobile Number']"`), the process works as follows:

1. **UI/API prompts for selection** - User selects specific inventory items from available stock
2. **Inventory IDs are added to variables** - The selected inventory item IDs are added with the inventory type as the variable name
3. **Playbook accesses inventory IDs** - The provisioning playbook can then retrieve full inventory details from the CRM API

For example, if a user selects: - SIM Card with inventory_id: 789 - Mobile Number with inventory_id: 101

The variables passed to the playbook include: - `SIM Card`: 789 - `Mobile Number`: 101

The playbook can then use these IDs to fetch the complete inventory records (ICCID, IMSI, MSISDN, etc.) from the CRM API and use that information to provision the service on network equipment.

How Ansible Receives Variables

The provisioning system passes all merged variables to the Ansible playbook as `extravars`. Inside the playbook, these variables are available through Ansible's standard variable system and can be used in tasks.

Variables can be referenced directly in playbook tasks using the `{{ variable_name }}` syntax. For example, `{{ product_id }}`, `{{ customer_id }}`, `{{ monthly_cost }}`, etc.

Variables Passed to Addon Products

When an addon product is provisioned, the system automatically passes:

- `product_id` - The ID of the addon product being provisioned
- `customer_id` - The customer who owns the service
- `service_id` - The ID of the service this addon is being added to (critical for addons)
- `access_token` - Authentication token for API calls
- Any variables from `provisioning_json_vars`
- Any additional variables from the API request

Example Addon Provisioning Flow

When a customer adds the "£5 Topup" addon to their mobile service (service_id: 123), the playbook receives variables including:

- `product_id`: 45 (the topup product)
- `customer_id`: 456 (the customer)
- `service_id`: 123 (the service to add credit to)
- `access_token`: Authentication token
- Plus any variables from the product's `provisioning_json_vars`

The playbook then uses these variables to:

1. **Fetch service details** from the CRM API using the `service_id`
2. **Extract the service UUID** and other information from the service record
3. **Add credit to the billing system** (OCS) using the service UUID
4. **Record the transaction** in the CRM for billing purposes

This flow allows the addon to identify exactly which service to modify and apply the changes appropriately.

Difference Between Standalone and Addon Variables

Standalone Products receive:

- `product_id` - The product being provisioned
- `customer_id` - The customer ordering the service
- Inventory item IDs (e.g., `SIM Card`, `Mobile Number`) if the product requires them
- `access_token` - For API authentication

Addon Products receive:

- `product_id` - The addon product being provisioned
- `customer_id` - The customer who owns the service
- `service_id` - **The ID of the existing service to modify** (this is the key difference)
- `access_token` - For API authentication

The key difference is `service_id` - this tells the playbook which existing service to modify or add to.

Bundle Products

Bundle products are provisioned like addons but their playbook may create multiple service records. They receive the same variables as addons, including:

- `product_id` - The bundle product
- `customer_id` - The customer
- `service_id` - Parent service (if applicable)
- Inventory item IDs (e.g., `Modem Router`) if required
- `access_token` - For API authentication

The bundle playbook (e.g., `play_seniors_package`) then creates multiple related services (Internet, IPTV, Phone) and links them together.

Services

A service is an instance of a product that belongs to a customer, that they get billed for.

It is essentially a link to an `OCS` (Online Charging System) account which handles the charge generation and the actual balances and usages for the account. The OCS is powered by CGRateS and manages monetary balances, unitary balances (data, voice, SMS), ActionPlans for auto-renewal, and ThresholdS for spending limits.

Adding a Service: Product Selection and Filtering

When adding a service to a customer (either a new standalone service or an addon to an existing service), the system displays available products in a carousel interface. The products shown are filtered based on several criteria:

Product Filtering for Standalone Services

When creating a new service for a customer, the UI displays products filtered by:

1. **Customer Type** - Products are categorized as:
   - **Individual (Residential)**: Products where `residential = true` or `business = false`

    - **Business**: Products where `business = true`
2. **Category** - Products are separated into:
    - **Service Plans**: Products with `category` = `standalone` or `bundle`
    - **Addons**: Products with `category` = `addon` (shown in separate carousel)
3. **Availability** - Products are only shown if:
    - `enabled = true` - Product is active and not disabled
    - Current date is between `available_from` and `available_until` - Product is within its availability window
    - `customer_can_purchase = true` (if customer is self-purchasing) - Product allows direct customer purchase

Note

API-Level Filtering: The API automatically filters products by enabled status and availability dates at two levels:

- **Purchase/Selection Endpoints** (`/crm/product/`) - Used by Addons modal and PlanList for product selection. Automatically filters to show ONLY enabled products within their availability date range. This ensures customers and staff can only select products that are currently available for purchase.
- **Management Endpoints** (`/crm/product/paginated`) - Used by Product Management page. Shows ALL products including disabled and outside availability dates, allowing administrators to manage the full product catalog including inactive products.

Pass `include_disabled=true` to the base product endpoint to bypass filtering (only for administrative use).

The UI displays separate carousels for:

- **Individual Service Plans** - Residential products for consumer customers
- **Business Service Plans** - Commercial products for business customers
- **Individual Addons** - Residential addon packs
- **Business Addons** - Commercial addon packs

Product Filtering for Addon Services

When adding an addon to an **existing service**, additional filtering is applied:

1. **Service Type Matching** - Only addons with matching `service_type` are shown:
   - If the existing service has `service_type = "mobile"`, only addons with `service_type = "mobile"` are displayed
   - This ensures mobile customers only see mobile addons, internet customers only see internet addons, etc.
2. **Dependency Checking** - If an addon has a `relies_on_list`:
   - The system checks if the customer has the required products/services
   - Only addons whose dependencies are satisfied are shown
3. **Same Customer Type Filter** - Addons are still filtered by `residential` vs `business` to match the customer type

Example Filtering Scenario

For a business customer with an existing mobile service (`service_type = "mobile"`):

- **Standalone Products Shown**: All business standalone/bundle products (`business = true`, `category != "addon"`)
- **Addon Products Shown**: Only business mobile addons (`business = true`, `category = "addon"`, `service_type = "mobile"`)
- **Products Hidden**: Residential products, addons for other service types (internet, voice, etc.), disabled products

Service Fields

The Service model contains fields that track the provisioned service instance and its relationship to the customer, product, and billing system.

Basic Service Information

- **service_id** - Unique identifier automatically assigned by the system (read-only)
- **customer_id** - Link to the customer who owns this service (read-only after creation)
- **product_id** - Link to the product this service was created from (read-only after creation)
- **service_name** - Display name shown to customers (editable)
- **service_type** - Type of service: mobile, internet, voip, iptv, bundle, etc. (editable)
- **service_uuid** - Unique identifier used in OCS/CGRateS for billing (read-only, auto-generated)
- **icon** - FontAwesome icon class for display in self-care portal (editable)

Service Status and Dates

- **service_status** - Current status: Active, Inactive, Suspended, etc. (editable)
- **service_provisioned_date** - When the service was first provisioned (auto-set, read-only)
- **service_active_date** - When the service became active (editable)
- **service_deactivate_date** - When the service expires or will be deactivated (editable)
- **contract_end_date** - End date of contract commitment (editable)

Billing and Pricing

- **retail_cost** - Monthly recurring charge to customer (editable)
- **wholesale_cost** - Your cost for providing the service (editable)
- **service_billed** - Whether this service appears on invoices (editable, default: true)
- **service_taxable** - Whether taxes apply to this service (editable, default: true)
- **invoiced** - Whether the service has been invoiced (auto-set by billing system)
- **promo_code** - Promotional code used when service was created (editable)

Customer Visibility

- **service_visible_to_customer** - Whether customer can see this service in self-care portal (editable, default: true)
- **service_usage_visible_to_customer** - Whether customer can view usage/balance details (editable, default: true)

Provisioning Configuration

- **provisioning_play** - Ansible playbook used to provision this service (inherited from product, read-only)
- **provisioning_json_vars** - Variables passed to provisioning playbook (inherited from product, read-only)
- **deprovisioning_play** - Ansible playbook to run when service is deprovisioned (read-only)
- **deprovisioning_json_vars** - Variables for deprovisioning playbook (read-only)

Service Relationships

- **bundled_parent** - If this service is part of a bundle, the service_id of the parent service (read-only)
- **site_id** - Link to the physical site/location where service is delivered (editable)

Notes and Metadata

- **service_notes** - Internal notes about the service for staff reference (editable)
- **created** - Timestamp when service was created (auto-set, read-only)
- **last_modified** - Timestamp of last update (auto-updated, read-only)

Editable vs Read-Only Fields

Editable via API/UI:

Services can be updated via `PATCH /crm/service/{service_id}` with these fields:

- service_name, service_type, service_status
- service_notes
- retail_cost, wholesale_cost
- service_billed, service_taxable
- service_visible_to_customer, service_usage_visible_to_customer
- service_active_date, service_deactivate_date, contract_end_date
- icon, promo_code, site_id

Read-Only (Auto-Set):

These fields cannot be directly modified after creation:

- service_id, customer_id, product_id
- service_uuid (generated during provisioning)
- service_provisioned_date
- provisioning_play, provisioning_json_vars
- deprovisioning_play, deprovisioning_json_vars
- bundled_parent
- invoiced (managed by billing system)
- created, last_modified (automatically managed)

Provisioning Products into Services

The provisioning process converts a Product (template) into a Service (customer-specific instance) through a series of coordinated steps involving the Web UI, API, and Ansible playbooks.

High-Level Provisioning Flow

1. **Pre-provisioning Setup** - Product created in API with provisioning configuration, and corresponding Ansible playbooks written and tested
2. **Service Selection** - From the Customer Page, staff or customer selects "Add Service"
3. **Product Filtering** - Displayed products filtered based on:
    - Customer type (residential/business)

    - Existing services (for addon dependencies in `relies_on_list`)
    - Availability dates (`available_from`/`available_until`)
    - `enabled` and `customer_can_purchase` flags
4. **Customization** - Option to override provisioning variables (for price adjustments, custom configurations, etc.)
5. **Inventory Selection** - If product requires inventory (`inventory_items_list` is not empty), user selects specific items (e.g., which SIM card, which phone number)
6. **Provision Initiation** - When "Provision" button is clicked, the API creates a provisioning job

Detailed API and Ansible Integration Flow

When a service is provisioned, the following sequence occurs:

Step 1: Provision Job Creation

The API receives the provision request and creates a provisioning job with:

- `provisioning_play` - Name of the Ansible playbook (e.g., `play_psim_only`)
- `provisioning_json_vars` - JSON string of variables from the product or overridden by request
- `customer_id` - ID of the customer ordering the service
- `product_id` - ID of the product being provisioned
- `service_id` - (Optional) ID of existing service for addons
- Inventory selections - IDs of selected inventory items

Step 2: Variable Assembly

The provisioning service merges variables from multiple sources in this order:

1. Product's `provisioning_json_vars` (defaults from product definition)
2. Request body parameters (can override product defaults)
3. System-added variables:
    - `access_token` - JWT token for API authentication back to CRM
    - `initiating_user` - User ID who triggered provisioning
    - `customer_id`, `product_id`, `service_id`

4. Inventory selections - Added as `{inventory_type: inventory_id}` pairs

Example merged variables:

```
{
    "customer_id": 123,
    "product_id": 456,
    "service_id": 789,          # Only for addons
    "SIM Card": 1001,           # From inventory selection
    "Mobile Number": 1002,      # From inventory selection
    "monthly_cost": 30,         # From provisioning_json_vars
    "data_gb": 50,              # From provisioning_json_vars
    "access_token": "eyJ...",   # System-added for API callbacks
    "initiating_user": 5        # System-added
}
```

Step 3: Provision Record Creation

A `Provision` record is created in the database with:

- `provision_id` - Unique identifier for tracking
- `provisioning_play` - Playbook filename
- `provisioning_json_vars` - Merged variables as JSON string
- `task_count` - Number of tasks in the playbook (extracted from YAML)
- `provisioning_status` - Status code (initially set to 1 = running, then updated to 0 = success, 2 = failed, or may remain 1 if still in progress)
- `product_id`, `customer_id`, `service_id` - Context references

Step 4: Background Playbook Execution

The API spawns a background thread that:

1. Loads the playbook YAML from `OmniCRM-API/Provisioners/plays/{playbook_name}.yaml`
2. Calls `ansible_runner.run()` with:
   - `playbook` - Path to the loaded YAML file
   - `extravars` - All merged variables (passed to Ansible)
   - `inventory` - Set to `'localhost,'` (local execution)

    - `event_handler` - Custom handler to capture task execution events
3. Monitors playbook execution in real-time

Step 5: Event Capture and Logging (`ProvisioningEventHandler`)

As each Ansible task executes, events are captured and stored as `Provision_Event` records:

- `event_name` - Task name from playbook
- `event_number` - Sequence number
- `provisioning_status` - Status code indicating task outcome:
    - **0** = Success - Task completed successfully
    - **1** = Running - Task is currently executing
    - **2** = Failed - Critical failure that stops provisioning
    - **3** = Failed (ignored) - Task failed but errors were ignored (`ignore_errors: true` in playbook)
- `provisioning_result_json` - Task results with sensitive data redacted

The event handler automatically strips passwords, keys, secrets, and other sensitive data from logs.

Step 6: Ansible Playbook Execution (`Provisioners/plays/*.yaml`)

The Ansible playbook runs locally and typically performs these actions:

1. **Fetch Product Definition** - GET request to `/crm/product/product_id/{{ product_id }}` using `{{ access_token }}`

2. **Fetch Customer Information** - GET request to `/crm/customer/customer_id/{{ customer_id }}`

3. **Process Inventory Items** (if required) - GET request to `/crm/inventory/inventory_id/{{ inventory_id }}` for each selected item to retrieve full details (ICCID, MSISDN, serial numbers, etc.)

4. **Configure External Systems** - Make API calls to:

    - HSS (Home Subscriber Server) for subscriber provisioning
    - IMS (IP Multimedia Subsystem) for voice registration

- CGRateS/OCS for account creation, charging configuration, rate plans
- ENUM servers for phone number mapping
- Network equipment (routers, switches, etc.)

5. **Add Setup Costs** (if applicable) - POST to `/crm/transaction/` to record one-time charges

6. **Charge the Customer** - POST to OCS/CGRateS to charge retail_setup_cost if configured

7. **Create OCS Account** - POST to OCS/CGRateS to create billing account with UUID

8. **Configure Recurring Charges** - Create Actions and ActionPlans in OCS/CGRateS for monthly recurring charges

9. **Create Service Record** - PUT/POST to `/crm/service/` to create the service record in CRM:

```
{
  "customer_id": 123,
  "product_id": 456,
  "service_name": "Mobile SIM - 0412345678",
  "service_uuid": "generated-uuid-for-ocs",
  "service_status": "Active",
  "service_type": "mobile",
  "retail_cost": 30,
  "wholesale_cost": 5,
  "provisioning_play": "play_psim_only",
  "provisioning_json_vars": "{...}"
}
```

10. **Assign Inventory** - PATCH to `/crm/inventory/inventory_id/{{ inventory_id }}` to mark inventory as "Assigned" to the service

11. **Send Notifications** (optional) - Email or SMS to customer with service details

Step 7: Completion and Status Update

When playbook completes:

- **Success**: `Provision.provisioning_status` updated to **0** (Success)
- **Critical Failure**: `Provision.provisioning_status` updated to **2** (Failed), and failure email sent to `crm_config.provisioning.failure_list`
- **Non-Critical Failures**: Tasks that fail with `ignore_errors: true` are marked with status **3** (Failed but ignored) and do not stop provisioning

The provisioned service is now visible in the CRM and active for the customer (if provisioning succeeded).

Key Differences: Standalone vs Addon vs Bundle Provisioning

Standalone Products (`category: standalone`):

- Receive `customer_id` and `product_id`
- Typically require inventory items (SIM cards, phone numbers, modems)
- Create **new** service record via API PUT `/crm/service/`
- Provision new resources on external systems (HSS, OCS, network equipment)
- Example: New mobile SIM activation, new internet connection

Addon Products (`category: addon`):

- Receive `customer_id`, `product_id`, and ``**service_id**`` (existing service to modify)
- Typically do NOT require inventory (or minimal inventory)
- **Modify existing** service or add charges to existing OCS account
- May execute actions on OCS (add data pack, add credit, enable feature)
- Do not create new service records (or create child service records linked to parent)
- Example: Monthly data plan top-up, international roaming pack, extra credit

Bundle Products (`category: bundle`):

- Similar to addons in terms of variables received
- May require some inventory items (e.g., modem for home bundle)
- Create **multiple** related service records (Internet + TV + Phone)
- Provision multiple resources across different systems
- Link services together in CRM for unified billing/management
- Example: Home bundle (Internet + IPTV + VoIP phone)

Provisioning Playbook Requirements

For a playbook to work correctly, it must:

1. **Be located at** `OmniCRM-API/Provisioners/plays/{playbook_name}.yaml`
2. **Accept variables** via Ansible's `extravars` (accessed as `{{ variable_name }}`)
3. **Authenticate API calls** using `Authorization: Bearer {{ access_token }}` header
4. **Handle failures gracefully** using `rescue` blocks and `ignore_errors` where appropriate
5. **Create service record** for standalone products, or modify existing service for addons
6. **Assign inventory** if inventory items were selected
7. **Return meaningful error messages** via `fail` module when critical errors occur

Common Variables Available in Playbooks

Every playbook receives these variables:

- `customer_id` - Integer, customer ordering the service
- `product_id` - Integer, product being provisioned
- `service_id` - Integer (addons/bundles only), existing service to modify
- `access_token` - String, JWT token for CRM API authentication
- `initiating_user` - Integer, user who triggered provisioning
- Plus any inventory item IDs: `{{ inventory_type }}: inventory_id`
- Plus any variables from `provisioning_json_vars`

- Plus any variables passed in the provision request

Playbooks can use these to:

- Fetch full product details: `GET /crm/product/product_id/{{ product_id }}`
- Fetch customer details: `GET /crm/customer/customer_id/{{ customer_id }}`
- Fetch inventory details: `GET /crm/inventory/inventory_id/{{ SIM_Card }}`
- Create transactions: `POST /crm/transaction/`
- Create services: `PUT /crm/service/`
- Update services: `PATCH /crm/service/{{ service_id }}`
- Assign inventory: `PATCH /crm/inventory/inventory_id/{{ inventory_id }}`

Example: Simple Addon Playbook Flow

For a mobile data top-up addon:

1. Playbook receives: `customer_id`, `product_id`, `service_id`, `access_token`
2. Fetch service details: `GET /crm/service/{{ service_id }}` to get `service_uuid`
3. Fetch product details: `GET /crm/product/product_id/{{ product_id }}` to get pricing and data amount
4. Charge customer in OCS: `POST to CGRateS` to deduct retail_cost from balance
5. Add data credit in OCS: `POST to CGRateS` to add data balance with expiry
6. Record transaction in CRM: `POST /crm/transaction/` with charge details
7. Complete successfully

The entire process is tracked in the `Provision` and `Provision_Event` tables for debugging and audit purposes.

OCS Involvement

`OCS` (Online Charging System), implemented via CGRateS, handles all real-time charging and usage tracking for services. The CRM service record acts as a pointer to the OCS account, which manages:

- **Recurring charges** - Monthly fees, DID rental, subscription charges
- **Usage-based charging** - Per-minute voice calls, per-MB data, per-SMS charges
- **Balance management** - Monetary balances (prepaid credit) and unitary balances (data GB, voice minutes, SMS count)
- **Balance conversions** - Converting monetary balances into unitary balances (e.g., spending $30 to get 10GB data pack)
- **Account state** - Active, suspended, disabled based on credit limits and thresholds

The CRM service record contains metadata and configuration (customer, product, pricing, visibility), while OCS contains the live billing state (balances, usage, charges).

Retrieving Service Usage and Balances

Service usage information is retrieved from OCS/CGRateS and displayed to customers and staff in real-time.

How Usage is Retrieved

When a service's usage is requested (via UI or API), the following flow occurs:

1. **API Request** - Frontend calls `GET /crm/service/{service_id}` or views service details in UI

2. **Service Lookup** - API retrieves service record from database, extracts `service_uuid`

3. **CGRateS API Calls** - The system makes two calls to CGRateS:

    i. **Get_Balance(service_uuid)** - Retrieves account balance with `BalanceMap`
        - Returns balances organized by type: DATA, VOICE, SMS, MONETARY, DATA_DONGLE
        - Each balance includes: ID, Value, ExpirationDate, Weight, DestinationIDs
        - System adds human-readable fields: `custom_Name_hr`, `custom_Expiration`, `custom_Description_String`
    ii. **Get_ActionPlans(service_uuid)** - Retrieves active auto-renewal action plans (covered in next section)

4. **Response Merging** - CGRateS data is merged into the service response:

```
{
  "service_id": 123,
  "service_name": "Mobile Service",
  "service_uuid": "abc-123-def",
  "cgrates": {
    "BalanceMap": {
      "DATA": [{
        "ID": "DATA_10GB",
        "Value": 5368709120,
        "ExpirationDate": "2025-02-01T00:00:00Z",
        "custom_Name_hr": "10GB Data Pack",
        "custom_Expiration": "Feb 1, 2025",
        "custom_Description_String": "5 GB remaining"
      }],
      "VOICE": [{
        "ID": "VOICE_UNLIMITED",
        "Value": 999999999,
        "custom_Name_hr": "Unlimited Calls",
        "custom_Description_String": "Unlimited minutes"
      }],
      "MONETARY": [{
        "ID": "PREPAID_CREDIT",
        "Value": 25.50,
        "custom_Description_String": "$25.50 credit"
      }]
    },
    "ActionPlans": [...]
  }
}
```


5. **UI Display** - Frontend components display the usage data:
    - **ServiceUsage.js** - Main usage display component with automatic refresh every 3 seconds
    - **UsageCard.js** - Summary cards for each balance type
    - **UsageProgress.js** - Progress bars showing percentage used/remaining
    - Balances are color-coded and formatted for readability

Usage Data Structure

Each balance in the `BalanceMap` contains:

CGRateS Native Fields:

- `ID` - Unique identifier for the balance (e.g., "DATA_10GB_2025_01")
- `Value` - Balance amount:
  - For DATA: bytes (5368709120 = 5 GB)
  - For VOICE: seconds (3600 = 1 hour)
  - For SMS: count (100 = 100 messages)
  - For MONETARY: currency units (25.50 = $25.50)
- `ExpirationDate` - ISO 8601 timestamp when balance expires
- `Weight` - Priority for balance consumption (higher weight consumed first)
- `DestinationIDs` - Destinations this balance applies to (e.g., ["AU", "INTERNATIONAL"])

Human-Readable Fields (added by CRM):

- `custom_Name_hr` - Human-readable name extracted from ID
- `custom_Expiration` - Formatted expiration date (e.g., "Jan 15, 2025" or "in 11 days")
- `custom_Description_String` - Human-readable balance description:
  - DATA: "5 GB remaining" or "10 GB total"
  - VOICE: "60 minutes remaining" or "Unlimited"
  - SMS: "50 SMS remaining"
  - MONETARY: "$25.50 credit"

Usage Visibility Control

Service usage visibility is controlled by two fields:

- **service_visible_to_customer** - If false, service is hidden entirely from customer's self-care portal
- **service_usage_visible_to_customer** - If false, service is visible but usage/balance details are hidden (customer can see they have the service, but not how much they've used)

This allows operators to:

- Hide internal/test services from customers
- Show service exists without revealing usage (useful for unlimited plans or sensitive services)
- Fully transparent usage display (default)

Real-Time Usage Updates

The Web UI automatically refreshes usage data:

- **Interval**: Every 3 seconds (configurable in ServiceUsage component)
- **Method**: Polls `GET /crm/service/{service_id}` which fetches live data from CGRateS
- **Efficiency**: Only active service views refresh; list views use cached data

This ensures customers and staff see near-real-time balance updates as usage occurs.

Recurring Charges / AutoRenew

Recurring charges, such as a Monthly Service Charge, or a Per-DID-Charge are first created as Actions inside `OCS` and take the format `Action_ServiceUUID_ServiceName_WhatitDoes`.

For say a $60 per month GPON service that includes 1TB of usage, the Action would look something like this:

`Action_kj49-adsf-1234-9742_60_GPON_1TB_MonthlyExpiry`

1. Reset Monetary Balance to $0
2. Send an HTTP POST to `/simple_provision` on the CRM to provision something
3. Add a Credit for 1TB Usage expiring in 1 month

If we want to make the MRC recurring (we do) then we would create an `ActionPlan` named `ActionPlan_{{ service_uuid }}_Monthly_Charge` which

would have the time set to *monthly* to trigger every month, and assign the `ActionPlan` to the account.

We can set based on the *Year / Months / Days* parameter an expiry date for when the MRC will stop also, for example for a fixed 12 month service that stopped after this point.

Because the Actions and `ActionPlans` are both unique to the service, they do not share anything with any other services.

This means that we can provision them with adjusted values, and it will not impact any other services.

Addons & Bolt Ons

Addons / Bolt-Ons such as buying extra data, roaming packs, international minutes, etc, are handled in much the same way. An Action is created to do what is needed, such as charging a monetary value and then granting a unitary balance with a set expiry.

Rather than using `ActionPlans` to automatically add this to reoccur on the account, we just trigger `ExecuteAction` for the Action we just created once off from within Ansible.

Adding Prepaid Monetary Balances

For prepaid monetary balances, such as a $10 PAYG plan, this is added as a monetary balance, but with a higher priority.

The credit limit on these services for the default balance would be $0.

Credit Limits / Preventing Excessive Overspend

`ThresholdS` are used on each account to set the maximum spend for a given time period.

For PAYG / Prepaid customers, this is $0.

Interacting with OCS via CRM

For each Service you can see the `Balances` and `ActionPlans`, `Actions` and `ThresholdS` from `OCS` from within the CRM API.

`ActionPlans` can be removed as needed from the CRM API, actioned via Ansible Playbooks. `ActionPlans` can be added as needed, from the CRM, by adding an Addon/Service and actioned via Ansible Playbooks.

`OCS` accounts can be disabled, which will stop `ActionPlans` from being executed and from services being able to be consumed.

For Credit Limits, a `ThresholdS` value is set per the policy for the product.

Viewing and Managing ActionPlans in the CRM

ActionPlans (auto-renewal configurations) are displayed and managed through the CRM interface, allowing staff and customers to see upcoming automatic renewals and manage them.

How ActionPlans are Retrieved and Displayed

When viewing a service in the CRM, ActionPlans are automatically fetched and displayed:

1. **API Call** - When `GET /crm/service/{service_id}` is called, the API:

- Retrieves the service record from the database
- Extracts the `service_uuid` (OCS account identifier)
- Calls the CGRateS API to fetch ActionPlans by service UUID
- This internally calls `Get_ActionPlans(service_uuid)` on CGRateS

2. **ActionPlan Data Structure** - Each ActionPlan returned contains:

```
{
    "ActionPlanId": "ServiceID_abc-123-
def__ProductID_456__...",
    "PlanName": "Monthly_Renewal_Plan",
    "NextExecTime": "2025-02-01T00:00:00Z",
    "custom_NextExecTime_hr": "in 11 days",
    "ActionPlanId_split_dict": {
        "ServiceID": "abc-123-def",
        "ProductID": 456,
        "CustomerID": 789,
        ...
    }
}
```

   - `ActionPlanId` - Unique identifier containing encoded service/product/customer information
   - `PlanName` - Name of the action plan (typically the renewal playbook name)
   - `NextExecTime` - ISO timestamp when the ActionPlan will next execute
   - `custom_NextExecTime_hr` - Human-readable time until execution (e.g., "in 11 days", "tomorrow", "Feb 1, 2025")
   - `ActionPlanId_split_dict` - Dictionary with parsed components from the ActionPlanId

3. **UI Display** - ActionPlans are shown in the **ActionPlansTable** component:

   Table Columns:

   - **Product Name** - Retrieved by looking up `ProductID` from the ActionPlanId
   - **Cost** - Shows `retail_cost` from the product definition

- **Renewal Date** - Displays `custom_NextExecTime_hr` (human-readable)
- **Actions** - Two buttons:
  - **Renew Now** - Immediately provision the addon/renewal (bypasses waiting for scheduled execution)
  - **Remove Auto Renew** - Cancels the automatic renewal

When No ActionPlans Exist:

- Table shows message: "No auto-renew enabled for this service"
- Customer can add auto-renewing addons to enable auto-renewal

Managing ActionPlans

Staff and customers can manage ActionPlans through the UI:

Removing an ActionPlan (Canceling Auto-Renewal):

1. Click "Remove Auto Renew" button in ActionPlansTable
2. Confirmation modal appears: "Are you sure you want to remove this auto-renewal?"
3. On confirmation, frontend calls: `DELETE /crm/oam/remove_action_plan/{action_plan_id}`
4. API removes the ActionPlan from CGRateS via `ocs.Remove_ActionPlan()`
5. Activity is logged: "Removed ActionPlan {ActionPlanId} from service {service_id}"
6. ActionPlan disappears from the table

Renewing Immediately (Manual Renewal):

1. Click "Renew Now" button in ActionPlansTable
2. Confirmation modal appears: "Are you sure you want to renew this now?"
3. On confirmation, the system:
   - Extracts product_id from ActionPlanId
   - Creates a new provisioning job for that product
   - Provisions the addon immediately (runs the provisioning playbook)
   - Service receives the addon benefits without waiting for scheduled renewal

4. Provisioning status modal shows progress
5. On success, balances are immediately updated

Adding Auto-Renewal:

Auto-renewal is enabled by provisioning an addon product that has `auto_renew` set:

- Products with `auto_renew = "true"` - Automatically create ActionPlans during provisioning
- Products with `auto_renew = "prompt"` - Ask customer if they want auto-renewal (modal dialog)
- Products with `auto_renew = "false"` - Never create ActionPlans (one-time purchase)

The provisioning playbook creates the ActionPlan in CGRateS with:

- Unique ActionPlanId encoding service, product, and customer IDs
- Renewal schedule (monthly, yearly, custom interval)
- Action to execute (typically reprovisioning the same addon)
- Expiration date (if contract has fixed term)

ActionPlan Naming Convention

ActionPlans follow a standardized naming convention to encode metadata:

Format:

```
ServiceID_{service_uuid}__ProductID_{product_id}__CustomerID_{custome
```

Example:

```
ServiceID_abc-123-
def__ProductID_456__CustomerID_789__MonthlyRenewal
```

This encoding allows the CRM to:

- Identify which service the ActionPlan belongs to
- Look up product details (name, pricing) for display
- Track customer ownership
- Parse renewal type and schedule

The CRM automatically parses these components into `ActionPlanId_split_dict` for easy access.

ActionPlans in Service View

When viewing a service in the CRM, the ActionPlans table is displayed in the service details:

Staff View (`ServiceView.js`):

- Shows full ActionPlans table with all management options
- Displays product names, costs, renewal dates
- Allows removal and immediate renewal

Customer Self-Care View:

- Shows upcoming renewals in a simplified view
- Displays next renewal date and amount
- May allow customers to disable auto-renewal (configurable per product)

Empty State:

- If no ActionPlans exist: "No auto-renew enabled for this service"
- Suggests adding an auto-renewing addon to enable automatic renewals

ActionPlans and Expiring Services

The CRM includes an expiring services endpoint that identifies services needing renewal:

```
GET /crm/service/expiring?threshold=7
```

This returns services expiring within the threshold days and includes:

- Services with balances expiring soon
- Services without active ActionPlans (manual renewal required)
- Services with ActionPlans scheduled to execute soon

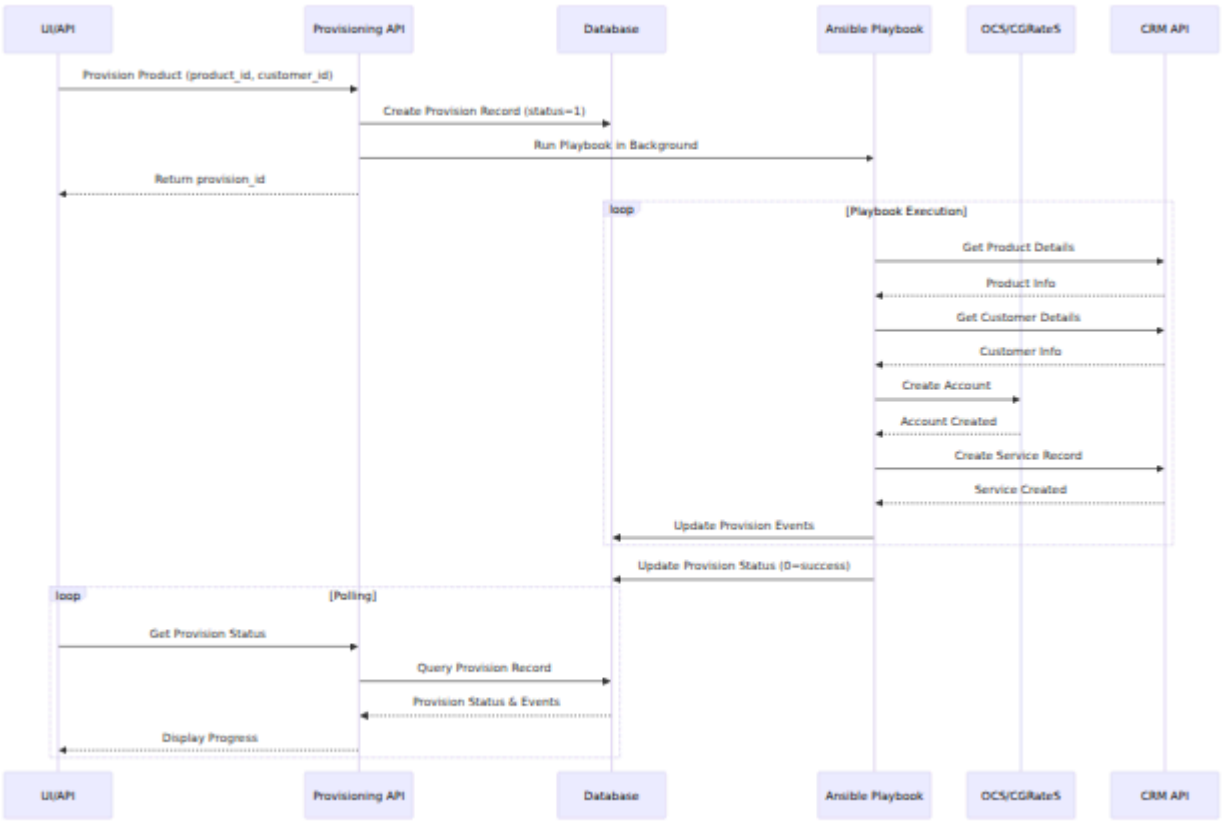
This allows operators to:

- Send renewal reminders to customers
- Identify at-risk customers (expiring without auto-renewal)
- Monitor upcoming auto-renewals
- Proactively manage service continuity

Provisioning System

OmniCRM uses **Ansible** to automate the provisioning, configuration, and deprovisioning of customer services. The provisioning system is designed to be flexible, allowing for complex workflows while maintaining consistency and reliability.

See also: `SIM Card Provisioning <concepts_sim_provisioning>` for detailed information on mobile SIM provisioning, including both physical SIMs and eSIMs.



Note

For a complete walkthrough of the product-to-service journey with detailed Ansible playbook examples, pricing strategies, and real-world scenarios, see `Complete Product Lifecycle Guide <guide_product_lifecycle>`.

Overview

When a product is ordered or a service needs to be configured, OmniCRM creates a **Provisioning Job** that executes one or more Ansible playbooks. These playbooks interact with various backend systems (OCS/CGRateS, network equipment, APIs, etc.) to fully provision the service.

The provisioning system supports two main workflows:

1. **Standard Provisioning** - Triggered by staff or customers through the UI/API
2. **Simple Provisioning** - Triggered by external systems like OCS for automated operations

Provisioning Status Values

Provisioning jobs and individual tasks can have the following statuses:

- **Status 0 (Success)** - The provisioning job completed successfully
- **Status 1 (Running)** - The provisioning job or task is currently executing
- **Status 2 (Failed - Critical)** - A critical failure occurred that caused the provisioning to fail
- **Status 3 (Failed - Ignored)** - A task failed but had `ignore_errors: true`, so provisioning continued

When a provisioning job fails, OmniCRM sends email notifications to the configured failure notification list with detailed error information.

How Products Drive Provisioning

The **Product** definition is the blueprint for what gets provisioned and how. When a user selects a product to provision, the system reads several key fields from the product definition to determine what to do.

Product Fields Used in Provisioning

A product definition contains:

- `provisioning_play` - The name of the Ansible playbook to execute (without the .yaml extension)
- `provisioning_json_vars` - JSON string containing default variables to pass to Ansible
- `inventory_items_list` - List of inventory types that must be assigned (e.g., `['SIM Card', 'Mobile Number']`)
- `product_id`, `product_name`, pricing fields - Automatically passed to the playbook

Example Product Definition

```
{
  "product_id": 1,
  "product_slug": "Mobile-SIM",
  "product_name": "Mobile SIM Only",
  "provisioning_play": "play_psim_only",
  "provisioning_json_vars": "{\"iccid\": \"\", \"msisdn\": \"\"}",
  "inventory_items_list": "['SIM Card', 'Mobile Number']",
  "retail_cost": 0,
  "retail_setup_cost": 0,
  "wholesale_cost": 3,
  "wholesale_setup_cost": 1
}
```

From Product to Provisioning Job

When provisioning is initiated, the system:

1. **Loads the playbook** specified in `provisioning_play`

   The system looks for `OmniCRM-API/Provisioners/plays/play_psim_only.yaml`

2. **Merges variables** from multiple sources into `extra_vars`:

   i. **From provisioning_json_vars**: `{"iccid": "", "msisdn": ""}`
   ii. **From request body**: Any additional variables the user/API provides
   iii. **From product fields**: `product_id`, `customer_id`, etc.
   iv. **From authentication**: `access_token` or setup for `refresh_token`

3. **Assigns inventory** based on `inventory_items_list`

   Before running the playbook, the UI/API prompts for inventory selection:

   - **SIM Card** - User selects an available SIM from inventory
   - **Mobile Number** - User selects an available phone number

The selected inventory IDs are added to `extra_vars` with the inventory type as the key:

```
extra_vars = {
    "product_id": 1,
    "customer_id": 456,
    "SIM Card": 789,         # inventory_id of selected SIM
    "Mobile Number": 101,    # inventory_id of selected phone
number
    "iccid": "",             # From provisioning_json_vars
    "msisdn": "",            # From provisioning_json_vars
    "access_token": "eyJ..."
}
```

4. **Passes everything to Ansible** via `hostvars[inventory_hostname]`

   Inside the playbook, variables are accessible as:

```
- name: Get inventory_id for SIM Card
  set_fact:
    inventory_id_sim_card: "{{ hostvars[inventory_hostname]
['SIM Card'] | int }}"
  when: "'SIM Card' in hostvars[inventory_hostname]"
```

How Playbooks Use Inventory Variables

Once the playbook has the inventory IDs, it retrieves the full inventory details from the API:

```
- name: Get SIM Card Details from Inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: sim_card_response

- name: Extract ICCID and IMSI from inventory
  set_fact:
    iccid: "{{ sim_card_response.json.iccid }}"
    imsi: "{{ sim_card_response.json.imsi }}"

- name: Get Phone Number Details from Inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_phone_number }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: phone_number_response

- name: Extract MSISDN
  set_fact:
    msisdn: "{{ phone_number_response.json.msisdn }}"
```

The playbook can then use these values to:

- Provision the SIM card on the HSS with the IMSI
- Configure the phone number in the billing system
- Assign the inventory items to the customer
- Create the service record with these details

Real-World Example: Mobile SIM Provisioning

From `play_psim_only.yaml`, here's how it uses product and inventory data:

```
- name: Get Product information from CRM API
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/product/product_id/{{
product_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: api_response_product

- name: Set package facts from product
  set_fact:
    package_name: "{{ api_response_product.json.product_name }}"
    package_comment: "{{ api_response_product.json.comment }}"
    setup_cost: "{{ api_response_product.json.retail_setup_cost
}}"
    monthly_cost: "{{ api_response_product.json.retail_cost }}"

- name: Set inventory_id_sim_card if SIM Card was selected
  set_fact:
    inventory_id_sim_card: "{{ hostvars[inventory_hostname]['SIM
Card'] | int }}"
  when: "'SIM Card' in hostvars[inventory_hostname]"

- name: Set inventory_id_phone_number if Mobile Number was
selected
  set_fact:
    inventory_id_phone_number: "{{ hostvars[inventory_hostname]
['Mobile Number'] | int }}"
  when: "'Mobile Number' in hostvars[inventory_hostname]"

- name: Get SIM Card details from inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: sim_inventory_response

- name: Get Phone Number details from inventory
  uri:
```

```
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_phone_number }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: phone_inventory_response

- name: Extract values from inventory
  set_fact:
    iccid: "{{ sim_inventory_response.json.iccid }}"
    imsi: "{{ sim_inventory_response.json.imsi }}"
    msisdn: "{{ phone_inventory_response.json.msisdn }}"
    ki: "{{ sim_inventory_response.json.ki }}"
    opc: "{{ sim_inventory_response.json.opc }}"

- name: Provision subscriber on HSS
  uri:
    url: "http://{{ hss_server }}/subscriber/{{ imsi }}"
    method: PUT
    body_format: json
    body:
      {
        "imsi": "{{ imsi }}",
        "msisdn": "{{ msisdn }}",
        "ki": "{{ ki }}",
        "opc": "{{ opc }}",
        "enabled": true
      }
    status_code: 200

- name: Assign inventory to customer
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "customer_id": {{ customer_id }},
        "item_state": "Assigned"
```

```
      }
    status_code: 200
```

This demonstrates the complete flow:

1. Product definition specifies `provisioning_play: "play_psim_only"`
2. Product requires `inventory_items_list: ['SIM Card', 'Mobile Number']`
3. User selects inventory items during provisioning
4. Inventory IDs are passed to playbook as `extra_vars`
5. Playbook retrieves full inventory details from API
6. Playbook uses inventory data to configure network equipment
7. Playbook marks inventory as assigned to the customer

Rollback and Cleanup: Best Practice Pattern

Critical Best Practice: The same playbook should handle both failed provision rollback and intentional deprovisioning using Ansible's `block` and `rescue` structure.

Playbook Structure

From `play_psim_only.yaml`:

```yaml
- name: OmniCore Service Provisioning 2024
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main block
      block:
        # --- PROVISIONING TASKS ---
        - name: Get Product information
          uri: ...

        - name: Create account in OCS
          uri: ...

        - name: Provision subscriber on HSS
          uri: ...

        - name: Create service record
          uri: ...

        # ... many more provisioning tasks ...

      rescue:
        # --- CLEANUP TASKS ---
        # This section runs when:
        # 1. Any task in the block fails (rollback)
        # 2. action == "deprovision" (intentional cleanup)

        - name: Get Inventory items linked to this service
          uri:
            url: "{{ crm_config.crm.base_url
}}/crm/inventory/customer_id/{{ customer_id }}"
            method: GET
          register: inventory_api_response
          ignore_errors: True

        - name: Return inventory to pool
          uri:
            url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ item.inventory_id }}"
            method: PATCH
            body_format: json
```

```
      body:
        service_id: null
        customer_id: null
        item_state: "Used"
    with_items: "{{ inventory_api_response.json.data }}"
    ignore_errors: True

  - name: Delete Account from Charging
    uri:
      url: "http://{{ crm_config.ocs.OCS }}/jsonrpc"
      method: POST
      body:
        {
          "method": "ApierV1.RemoveAccount",
          "params": [{
              "Tenant": "{{ crm_config.ocs.ocsTenant }}",
              "Account": "{{ service_uuid }}"
          }]
        }
    ignore_errors: True

  - name: Delete Attribute Profile
    uri:
      url: "http://{{ crm_config.ocs.OCS }}/jsonrpc"
      method: POST
      body:
        {
          "method": "APIerSv1.RemoveAttributeProfile",
          "params": [{
              "ID": "ATTR_ACCOUNT_{{ service_uuid }}"
          }]
        }
    ignore_errors: True

  - name: Remove Resource Profile
    uri: ...
    ignore_errors: True

  - name: Remove Filters
    uri: ...
    ignore_errors: True

  - name: Deprovision Subscriber from HSS
    uri:
```

```
            url: "{{ item.key }}/subscriber/{{
item.value.subscriber_id }}"
            method: DELETE
          loop: "{{ hss_subscriber_data | dict2items }}"
          ignore_errors: True
          when:
            - deprovision_subscriber | bool == true

        - name: Patch Subscriber to Dormant State
          uri:
            url: "{{ item.key }}/subscriber/{{
item.value.subscriber_id }}"
            method: PATCH
            body:
              {
                "enabled": true,
                "msisdn": "9999{{ imsi[-10:] }}",  # Dummy number
                "ue_ambr_dl": 9999999,              # Unusably
high
                "ue_ambr_ul": 9999999
              }
          loop: "{{ hss_subscriber_data | dict2items }}"
          when:
            - deprovision_subscriber | default(false) | bool ==
false

        # Final assertion determines success or failure
        - name: Set status to "Success" if Manual deprovision /
Fail if failed provision
          assert:
            that:
              - action == "deprovision"
```

Why This Pattern is Best Practice

1. No Code Duplication

The same cleanup tasks handle both scenarios:

- **Failed Provision (Rollback)**: If any task in the `block` fails, the `rescue` section executes automatically

- **Intentional Deprovision**: When called with `action: "deprovision"`, the playbook immediately jumps to `rescue`

2. Complete Cleanup Guaranteed

When a provision fails partway through, the rescue section ensures:

- All created OCS accounts are deleted
- All configured network equipment entries are removed
- Assigned inventory is returned to the pool
- HSS subscribers are deleted or set to dormant
- No partial provisioning remains in any system

This prevents "orphaned" resources that:

- Consume inventory without being tracked
- Create billing accounts that aren't linked to services
- Cause confusion during troubleshooting
- Waste network resources

3. Graceful Failure Handling with ignore_errors

Notice every cleanup task uses `ignore_errors: True`. This is intentional because:

- During rollback, some resources may not have been created yet
- We want to attempt all cleanup tasks even if some fail
- The final assertion determines overall success/failure

For example, if provisioning fails at "Create account in OCS", the cleanup will try to:

- Delete the OCS account (will fail, but ignored)
- Remove attribute profiles (will fail, but ignored)
- Return inventory (succeeds)
- Delete HSS subscriber (may not exist, ignored)

4. Distinguishing Deprovision from Rollback

The final assertion at the end of `rescue` is clever:

```
- name: Set status to "Success" if Manual deprovision / Fail if
failed provision
  assert:
    that:
      - action == "deprovision"
```

This means:

- **If ``action == "deprovision"``**: Assertion passes, playbook succeeds (status 0)
- **If ``action`` is not set or != "deprovision"**: Assertion fails, playbook fails (status 2)

So the same cleanup code results in different provisioning job statuses depending on intent.

5. Conditional Cleanup Based on Service Type

Some cleanup tasks use conditionals to handle different scenarios:

```
- name: Deprovision Subscriber from HSS
  uri: ...
  when:
    - deprovision_subscriber | bool == true

- name: Patch Subscriber to Dormant State
  uri: ...
  when:
    - deprovision_subscriber | default(false) | bool == false
```

This allows for flexible cleanup:

- **Full deletion**: When SIMs are dedicated to customers (`deprovision_subscriber: true`)
- **Dormant state**: When SIMs are reusable and should remain in HSS (`deprovision_subscriber: false`)

How to Use This Pattern

For Provisioning:

```
{
  "product_id": 1,
  "customer_id": 456,
  "provisioning_play": "play_psim_only"
}
```

If provisioning fails, automatic rollback occurs via `rescue`.

For Deprovisioning:

```
{
  "service_id": 123,
  "service_uuid": "Service_abc123",
  "action": "deprovision",
  "provisioning_play": "play_psim_only"
}
```

The playbook skips directly to `rescue` section, runs all cleanup, and succeeds.

Benefits Summary

 Single source of truth: One playbook handles provision and deprovision **Atomic operations**: Either fully provisioned or fully cleaned up **No orphaned resources**: Failed provisions leave no trace **Easier maintenance**: Changes to provisioning logic automatically apply to cleanup **Reduced errors**: No chance of provision and deprovision code getting out of sync **Testable**: Can test deprovision logic by running with `action: "deprovision"`

This pattern should be followed in all provisioning playbooks to ensure reliability and consistency.

Overriding Product Variables

The `provisioning_json_vars` can be overridden at provision time. For example, a product might define:

```
{
  "provisioning_json_vars": "{\"monthly_cost\": 50,
\"data_limit_gb\": 100}"
}
```

But when provisioning, you can override these:

```
{
  "product_id": 1,
  "customer_id": 456,
  "monthly_cost": 45,
  "data_limit_gb": 150
}
```

The merged `extra_vars` will use the overridden values. This allows for:

- Custom pricing for specific customers
- Different data limits based on promotions
- Testing with different parameters without modifying the product

Products Without Inventory

Not all products require inventory. For example, a data addon or a feature toggle might have:

```
{
  "product_id": 10,
  "product_name": "Extra 10GB Data",
  "provisioning_play": "play_local_data_addon",
  "provisioning_json_vars": "{\"data_gb\": 10}",
  "inventory_items_list": "[]"
}
```

In this case, the playbook receives:

```
extra_vars = {
    "product_id": 10,
    "customer_id": 456,
    "service_id": 123,  # Service to add data to
    "data_gb": 10,
    "access_token": "eyJ..."
}
```

The playbook simply adds the data to the existing service without needing any inventory items.

Standard Provisioning Workflow

Standard provisioning is initiated when:

- A staff member adds a service to a customer from the UI
- A customer orders a service through the self-care portal
- The API is called directly with `PUT /crm/provision/`

When You Click "Provision"

Here's the complete flow that occurs when a user clicks the "Provision" button:

1. UI Displays Product Selection

User selects a product from the product catalog. Product contains:

- `provisioning_play` - Which Ansible playbook to run
- `inventory_items_list` - Required inventory (e.g., `['SIM Card', 'Mobile Number']`)
- `provisioning_json_vars` - Default variables

2. Inventory Picker (If Required)

If `inventory_items_list` is not empty, a modal appears showing dropdowns for each inventory type. User must select available inventory items before proceeding.

3. Provision Button Clicked

JavaScript sends `PUT /crm/provision/` request:

```
PUT /crm/provision/
Authorization: Bearer eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9...
Content-Type: application/json

{
  "product_id": 42,
  "customer_id": 123,
  "SIM Card": 5001,
  "Mobile Number": 5002
}
```

4. API Receives Request

The provisioning endpoint:

- Validates authentication (Bearer token, API key, or IP whitelist)
- Checks user has `CREATE_PROVISION` permission
- Extracts `initiating_user` from token
- Loads product definition from database
- Retrieves playbook path: `OmniCRM-API/Provisioners/plays/play_psim_only.yaml`

5. Variables Merged

System combines variables from multiple sources:

```
# From product
product_vars = json.loads(product['provisioning_json_vars'])
# From request body
request_vars = request_body_json
# System-added
system_vars = {
    'product_id': 42,
    'customer_id': 123,
    'access_token': auth_token,  # See authentication section
below
    'initiating_user': 7
}
# Final merged
extra_vars = {**product_vars, **request_vars, **system_vars}
```

6. Provision Record Created

Database record created with status 1 (Running):

```
provision = {
    'provision_id': 456,
    'customer_id': 123,
    'product_id': 42,
    'provisioning_play': 'play_psim_only',
    'provisioning_json_vars': json.dumps(extra_vars),
    'provisioning_status': 1,  # Running
    'task_count': 85,
    'initiating_user': 7,
    'created': '2025-01-10T14:30:00Z'
}
```

7. Background Thread Spawned

The system spawns a background thread to execute the playbook asynchronously:

- Playbook: `play_psim_only.yaml`
- Variables: merged extra_vars
- Provision ID: 456 (for status tracking)

- Refresh token: passed for token refresh during execution

8. API Returns Immediately

Response returned to UI with `provision_id`:

```
{
  "provision_id": 456,
  "provisioning_status": 1,
  "message": "Provisioning job created"
}
```

9. UI Polls for Updates

UI starts polling `GET /crm/provision/provision_id/456` every 3 seconds to check status. The response includes:

```
{
  "provision_id": 456,
  "provisioning_status": 1,
  "task_count": 12,
  "provisioning_result_json": [
    {
      "event_number": 1,
      "event_name": "Get Product information from CRM API",
      "provisioning_status": 0,
      "timestamp": "2024-01-15T10:30:05"
    },
    {
      "event_number": 2,
      "event_name": "Assign SIM Card from inventory",
      "provisioning_status": 1,
      "timestamp": "2024-01-15T10:30:07"
    }
  ]
}
```

10. Ansible Executes in Background

Playbook runs tasks sequentially:

- Each task completion creates `Provision_Event` record in database
- Event includes: task name, status (0=success, 2=failed, 3=failed but ignored), result JSON
- UI displays real-time progress showing completed tasks and currently running task
- Failed tasks show error messages in the event details

Tracking in the UI:

While provisioning is running (status 1), users can view:

- **Service Details Page** - Shows provisioning status badge (Running/Success/Failed)
- **Activity Log** - Lists all provisioning events with timestamps
- **Provision Details View** - Shows task-by-task progress with expand/collapse for details

Example display:

Provisioning Status: Running (8 of 12 tasks completed)

✓ Get Product information from CRM API ✓ Fetch Customer details ✓ Assign SIM Card from inventory (ICCID: 8991101200003204510) ✓ Assign Mobile Number (555-0123) ⟳ Create account in OCS/CGRateS (in progress...) □ Configure network policies □ Create service record ...

11. Provisioning Completes

Final status set:

- `provisioning_status: 0` - Success
- `provisioning_status: 2` - Failed (critical error)

UI stops polling and displays result:

- **Success**: Green checkmark, service marked Active, user can view service details
- **Failure**: Red X, error message displayed, option to retry or contact support

- **Email notification**: If failure, email sent to `provisioning.failure_list` in config

Authentication and Authorization

User Tracking

Every provisioning job tracks which user initiated it:

- **User-initiated**: The `initiating_user` field is set to the user's ID from their JWT token
- **API Key auth**: Uses the first admin user ID
- **IP whitelist auth**: Uses the first admin user ID

Permission Checks

The system checks permissions before allowing provisioning:

- Staff need the `CREATE_PROVISION` permission
- Customers can only provision services for their own account (`VIEW_OWN_PROVISION` permission)

How Ansible Authenticates with the CRM API

Ansible playbooks need to make authenticated API calls back to the CRM (to fetch product details, create services, update inventory, etc.). Authentication is handled through **Bearer tokens** passed to the playbook.

The source of the `access_token` depends on the authentication method used to call the provisioning API:

Method 1: User Login (Bearer Token)

When a user logs in via web UI:

1. User authenticates: `POST /crm/auth/login`
2. Receives JWT `access_token` (short-lived, 15-30 min) and `refresh_token` (long-lived)
3. Makes provisioning request with Bearer token in header

4. Provisioning API extracts token from `Authorization: Bearer ...` header
5. Stores the token for use during provisioning
6. Passes to Ansible as `access_token` variable

Implementation Flow:

The system extracts the Bearer token from the Authorization header, validates and decodes it, then stores it for use during provisioning. The token is then passed to the playbook as an extra variable so it can authenticate subsequent API calls.

Method 2: API Key (X-API-KEY Header)

For automated systems using API keys:

1. System makes request: `PUT /crm/provision/` with `X-API-KEY: your-api-key...` header
2. Provisioning API validates API key against `crm_config.yaml`
3. **Generates a new JWT token on-the-fly** for the first admin user
4. Stores the token for provisioning
5. Passes to Ansible

Why Generate a Token?

API keys are strings, not JWTs. Playbooks call API endpoints expecting JWT authentication. So:

- Validate API key
- If valid and has `admin` role, generate temporary JWT
- Use first admin user's ID as JWT subject
- Token allows playbook to make authenticated API calls

Implementation Flow:

The system validates the API key against configured keys. If valid and has admin role, it generates a temporary JWT using an admin user identity, then stores it for provisioning use.

Method 3: IP Whitelist

For trusted internal systems on private networks:

1. System makes request from whitelisted IP (e.g., 192.168.1.100)
2. Provisioning API checks client IP against `ip_whitelist` in `crm_config.yaml`
3. If whitelisted, **generates a new JWT token** for first admin user
4. Stores the token for provisioning
5. Passes to Ansible

Implementation Flow:

The system checks the client IP against the whitelist. If allowed, it generates a JWT for an admin user and stores it for provisioning use.

Using the Token in Playbooks

Every API call in the playbook includes the token:

```
- name: Get Product Details
  uri:
    url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
    headers:
      Authorization: "Bearer {{ access_token }}"

- name: Create Service Record
  uri:
    url: "http://localhost:5000/crm/service/"
    method: PUT
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      customer_id: "{{ customer_id }}"
      service_name: "Mobile Service"
```

Token Expiration and Refresh

Long-running playbooks (5-10 minutes) may outlive the `access_token` (15-30 min expiry). For user-initiated provisions, the system passes both `access_token` and `refresh_token`:

```
refresh_token = request.cookies.get('refresh_token')
run_playbook(playbook_path, extra_vars, provision_id,
refresh_token=refresh_token)
```

If `access_token` expires, the playbook runner can:

1. Detect 401 Unauthorized response
2. Call `POST /crm/auth/refresh` with `refresh_token`
3. Receive new `access_token`
4. Retry failed request

For API key/IP whitelist auth, generated tokens can have longer expiration (1-2 hours) since these are trusted automated systems.

The Provisioning Process

1. **Job Creation**

   When a provisioning request is received, the system:

   - Validates the request and checks permissions
   - Loads the Ansible playbook specified in the product definition
   - Creates a `Provision` record in the database with status 1 (Running)
   - Extracts variables from the product definition and request body
   - Captures authentication tokens for API access

2. **Token Handling**

   Ansible playbooks need to authenticate with the CRM API to retrieve data and make changes. The provisioning system handles this in two ways:

   - **Bearer Token (JWT)**: For user-initiated provisioning, the `refresh_token` from the request is used to generate fresh access tokens during playbook execution
   - **API Key/IP Auth**: For automated systems, an `access_token` is passed directly to the playbook

3. **Background Execution**

The playbook runs in a background thread. This allows the API to return immediately while provisioning continues asynchronously.

During execution:

- Each task completion/failure creates a `Provision_Event` record
- The event handler monitors for critical vs. ignored failures
- Real-time status updates are written to the database
- The UI can poll for updates via `GET /crm/provision/provision_id/<id>`

4. **Playbook Execution**

   The Ansible playbook typically performs these operations:

   - Retrieves product information from the API
   - Retrieves customer information from the API
   - Assigns inventory items (SIM cards, IP addresses, phone numbers, etc.)
   - Creates accounts in OCS/OCS
   - Configures network equipment
   - Creates the service record in the CRM API
   - Adds setup cost transactions
   - Sends welcome emails/SMS to customers

5. **Error Handling**

   Ansible playbooks use `block` and `rescue` sections for rollback:

   - If a critical task fails, the rescue section removes partial provisioning
   - Tasks with `ignore_errors: true` are marked as status 3 and don't fail the job
   - Fatal errors (YAML syntax, connection failures) create a special error event with debugging information

Example: Standard Provisioning Playbook

Here's an example from `play_simple_service.yaml`:

```
- name: Simple Provisioning Play
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main block
      block:
      - name: Get Product information from CRM API
        uri:
          url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
          method: GET
          headers:
            Authorization: "Bearer {{ access_token }}"
          return_content: yes
          validate_certs: no
        register: api_response_product

      - name: Set package facts
        set_fact:
          package_name: "{{ api_response_product.json.product_name
}}"
          setup_cost: "{{
api_response_product.json.retail_setup_cost }}"
          monthly_cost: "{{ api_response_product.json.retail_cost
}}"

      - name: Generate Service UUID
        set_fact:
          service_uuid: "Service_{{ 99999999 | random | to_uuid
}}"

      - name: Create account in OCS
        uri:
          url: "http://{{ crm_config.ocs.OCS }}/jsonrpc"
          method: POST
          body_format: json
          body:
            {
              "method": "ApierV2.SetAccount",
              "params": [{
                  "Tenant": "{{ crm_config.ocs.ocsTenant }}",
```

```
                  "Account": "{{ service_uuid }}",
                  "ActionPlanIds": [],
                  "ExtraOptions": { "AllowNegative": false,
"Disabled": false }
                }]
              }
            status_code: 200
          register: response

      - name: Add Service via API
          uri:
            url: "http://localhost:5000/crm/service/"
            method: PUT
            body_format: json
            headers:
              Authorization: "Bearer {{ access_token }}"
            body:
              {
                "customer_id": "{{ customer_id }}",
                "product_id": "{{ product_id }}",
                "service_name": "Service: {{ service_uuid }}",
                "service_uuid": "{{ service_uuid }}",
                "service_status": "Active",
                "retail_cost": "{{ monthly_cost | float }}"
              }
            status_code: 200
          register: service_creation_response

      - name: Add Setup Cost Transaction
          uri:
            url: "http://localhost:5000/crm/transaction/"
            method: PUT
            headers:
              Authorization: "Bearer {{ access_token }}"
            body_format: json
            body:
              {
                "customer_id": {{ customer_id | int }},
                "service_id": {{
service_creation_response.json.service_id | int }},
                "title": "{{ package_name }} - Setup Costs",
                "retail_cost": "{{ setup_cost | float }}"
              }
          register: api_response_transaction
```

```
    rescue:
      - name: Remove account in OCS
        uri:
          url: "http://{{ crm_config.ocs.OCS }}/jsonrpc"
          method: POST
          body_format: json
          body:
            {
              "method": "ApierV2.RemoveAccount",
              "params": [{
                  "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                  "Account": "{{ service_uuid }}"
              }]
            }
          status_code: 200

      - name: Fail the provision
        assert:
          that:
            - false
```

This playbook demonstrates the typical flow:

1. Retrieve product details from the CRM API
2. Generate a unique service UUID
3. Create the billing account in OCS
4. Create the service record via the CRM API
5. Add setup cost transactions
6. If anything fails, the `rescue` section removes the OCS account

Simple Provisioning Workflow

Simple provisioning is designed for automated systems that need to trigger provisioning without user interaction. The most common use case is OCS triggering addon provisioning via ActionPlans.

Simple Provisioning Endpoints

OmniCRM provides two simple provisioning endpoints:

- `POST /crm/provision/simple_provision_addon/service_id/<id>/product_id/<id>`

  For automated addon provisioning (e.g., recurring charges, automatic top-ups)

- `POST /crm/provision/simple_provision_addon_recharge/service_id/<id>/product_id/<id>`

  For quick recharge operations that need immediate feedback

Authentication for Simple Provisioning

Simple provisioning endpoints use **IP whitelisting** or **API keys** for authentication:

- The request's source IP is checked against `ip_whitelist` in `crm_config.yaml`
- Or an API key from `api_keys` in `crm_config.yaml` can be provided
- An access token is generated and passed to the playbook

Example: OCS ActionPlan Callback

OCS can be configured to call the simple provisioning endpoint when executing recurring actions:

```
{
  "method": "ApierV1.SetActionPlan",
  "params": [{
    "Id": "ActionPlan_Service123_Monthly_Charge",
    "ActionsId": "Action_Service123_Add_Monthly_Data",
    "Timing": {
      "Years": [],
      "Months": [],
      "MonthDays": [1],
      "Time": "00:00:00Z"
    },
    "Weight": 10,
    "ActionTriggers": [
      {
        "ThresholdType": "*min_event_counter",
        "ThresholdValue": 1,
        "ActionsID": "Action_Service123_HTTP_Callback"
      }
    ]
  }]
}
```

The action makes an HTTP POST to:

This triggers the associated playbook (e.g., `play_topup_no_charge.yaml`) which adds data/credits to the service.

Example: Simple Topup Playbook

From `play_topup_monetary.yaml`:

```yaml
- name: Mobile Topup Monetary - 2024
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Get Product information from CRM API
      uri:
        url: "http://localhost:5000/crm/product/product_id/{{
product_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_product

    - name: Get Service information from CRM API
      uri:
        url: "http://localhost:5000/crm/service/service_id/{{
service_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
      register: api_response_service

    - name: Set service facts
      set_fact:
        service_uuid: "{{ api_response_service.json.service_uuid
}}"
        customer_id: "{{ api_response_service.json.customer_id }}"
        package_name: "{{ api_response_product.json.product_name
}}"
        monthly_cost: "{{ api_response_product.json.retail_cost
}}"

    - name: Get Customer Payment Method
      uri:
        url: "http://localhost:5000/api/payments/methods/default?
customer_id={{ customer_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
```

```
      return_content: yes
    register: api_response_payment_method

- name: Charge customer
  uri:
    url: "http://localhost:5000/api/payments/charge"
    method: POST
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "customer_id": "{{ customer_id | int }}",
        "amount": "{{ monthly_cost }}",
        "currency": "USD",
        "metadata": {
          "description": "{{ package_name }} topup",
          "service_id": "{{ service_id | int }}"
        }
      }
  register: api_response_payment

- name: Add monetary balance to OCS
  uri:
    url: "http://{{ crm_config.ocs.OCS }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
            "Tenant": "{{ crm_config.ocs.ocsTenant }}",
            "Account": "{{ service_uuid }}",
            "BalanceType": "*monetary",
            "Balance": {
                "Value": "{{ monthly_cost | float * 100 }}",
                "ExpiryTime": "+4320h"
            }
        }]
      }
    status_code: 200

- name: Add Transaction to CRM
  uri:
```

```
        url: "http://localhost:5000/crm/transaction/"
        method: PUT
        headers:
          Authorization: "Bearer {{ access_token }}"
        body_format: json
        body:
          {
            "customer_id": {{ customer_id | int }},
            "service_id": {{ service_id | int }},
            "title": "{{ package_name }}",
            "retail_cost": "{{ monthly_cost | float }}"
          }

    - name: Send Notification SMS
      uri:
        url: "http://sms-gateway/SMS/plaintext/{{ api_key }}"
        method: POST
        body_format: json
        body:
          {
            "source_msisdn": "YourCompany",
            "destinatination_msisdn": "{{ customer_phone }}",
            "message_body": "Thanks for topping up {{ monthly_cost
}}!"
          }
        status_code: 201
      ignore_errors: True
```

This playbook:

1. Gets service and product details from the API
2. Retrieves the customer's payment method
3. Charges the customer via Stripe API
4. Adds monetary balance to OCS
5. Records the transaction in the CRM
6. Sends a confirmation SMS (with `ignore_errors: True` so failures don't fail the job)

Provisioning Chains

For complex products that require multiple provisioning steps, OmniCRM supports **provisioning chains**. A chain executes multiple playbooks sequentially, passing context between them.

Example use case: A bundled service that provisions:

1. Base internet service (creates the primary service record)
2. IPTV addon (uses the service_id from step 1)
3. Static IP addon (uses the service_id from step 1)

The provisioning service automatically:

- Queries the database for the `service_id` created by the first playbook
- Injects it into the `extra_vars` for subsequent playbooks
- Tracks each playbook as a separate `Provision` record

Failure Reasons and Debugging

When provisioning fails, the system captures detailed information to help diagnose the issue.

Common Failure Scenarios

Critical Task Failures (Status 2)

These cause the entire provisioning job to fail:

- API calls returning unexpected status codes
- Assertions failing (e.g., `assert: that: response.status == 200`)
- Missing required inventory items
- Network equipment unreachable
- Invalid credentials or expired tokens
- OCS/OCS errors

Ignored Failures (Status 3)

These are logged but don't fail the job:

- Optional SMS/email notifications failing
- Non-critical data lookups (marked with `ignore_errors: True`)
- Cleanup operations during deprovisioning

Fatal Errors

These prevent the playbook from running at all:

- YAML syntax errors in the playbook
- Undefined variables in the playbook
- Missing playbook files
- Connection failures to the Ansible controller

When a fatal error occurs, the system creates a special error event containing:

- The Ansible exit code
- Full stdout (contains syntax error details)
- Full stderr (contains runtime errors)
- A list of common causes for that type of failure
- All variables passed to the playbook

Error Notification Emails

When provisioning fails (status 2), an email is automatically sent to the configured failure notification list (`provisioning.failure_list` in `crm_config.yaml`).

The email includes:

- Customer information
- Product/service details
- Color-coded task results:
  - **Green**: Successful tasks
  - **Orange**: Failed but ignored tasks

    - **Red**: Critical failures
- For critical failures: Full debug output including request/response bodies
- For fatal errors: Ansible output, error messages, and common causes

Monitoring Provisioning Jobs

OmniCRM provides comprehensive metrics for monitoring provisioning performance. For complete details on provisioning metrics including job duration, success rates, task counts, and error tracking, see Monitoring & Metrics.

Provisioning Status API

To check the status of a provisioning job:

```
GET /crm/provision/provision_id/<id>
Authorization: Bearer <token>
```

Response includes:

```
{
  "provision_id": 123,
  "customer_id": 456,
  "customer_name": "John Smith",
  "product_id": 10,
  "provisioning_status": 0,
  "provisioning_play": "play_psim_only",
  "playbook_description": "OmniCore Service Provisioning 2024",
  "task_count": 85,
  "provisioning_result_json": [
    {
      "event_number": 1,
      "event_name": "Get Product information from CRM API",
      "provisioning_status": 1,
      "provisioning_result_json": "{...}"
    },
    {
      "event_number": 2,
      "event_name": "Create account in OCS",
      "provisioning_status": 1,
      "provisioning_result_json": "{...}"
    }
  ]
}
```


Listing Provisioning Jobs

To get a paginated list of all provisioning jobs:

```
GET /crm/provision/?
page=1&per_page=20&sort=provision_id&order=desc
Authorization: Bearer <token>
```

Supports filtering:

```
GET /crm/provision/?filters={"provisioning_status":
[2]}&search=Mobile
Authorization: Bearer <token>
```

This returns only failed jobs (status 2) where the description contains "Mobile".

Best Practices

Playbook Design

- **Always use block/rescue**: Ensure partial provisioning can be rolled back
- **Use ignore_errors judiciously**: Only for truly optional operations
- **Log important variables**: Use `debug` tasks to log key values for troubleshooting
- **Validate responses**: Use `assert` to check API responses are as expected
- **Idempotency**: Design playbooks to be safely re-runnable

Authentication

- **User-initiated provisioning**: Always use refresh_token for long-running playbooks
- **Automated provisioning**: Use IP whitelist or API keys with generated access tokens
- **Token expiry**: The refresh_token ensures access tokens are regenerated as needed

Error Handling

- **Provide context**: Include customer_id, service_id, and operation details in error messages
- **Notify appropriately**: Critical failures trigger emails, but don't spam for expected failures
- **Debugging info**: Capture full request/response bodies in Provision_Event records

Security

- **Validate inputs**: Check customer_id, product_id, service_id before provisioning

- **Permission checks**: Verify users can only provision for authorized customers
- **Sensitive data**: Use the redaction system to strip passwords/keys from logs
- **IP whitelisting**: Restrict simple_provision endpoints to trusted systems only

Performance

- **Background execution**: Never block API responses waiting for provisioning
- **Polling intervals**: UI should poll for status updates every 2-5 seconds
- **Parallel tasks**: Use Ansible's native parallelism for independent operations
- **Database updates**: Event handler updates the database in real-time, no need to query during execution

Related Documentation

- `concepts_ansible` - General Ansible provisioning concepts
- `concepts_sim_provisioning` - SIM card provisioning (physical and eSIM)
- `concepts_api` - CRM API authentication and usage
- `concepts_products_and_services` - Product and service definitions
- `administration_inventory` - Inventory management for provisioning
- Monitoring & Metrics - Provisioning performance metrics and monitoring

SIM Card Provisioning

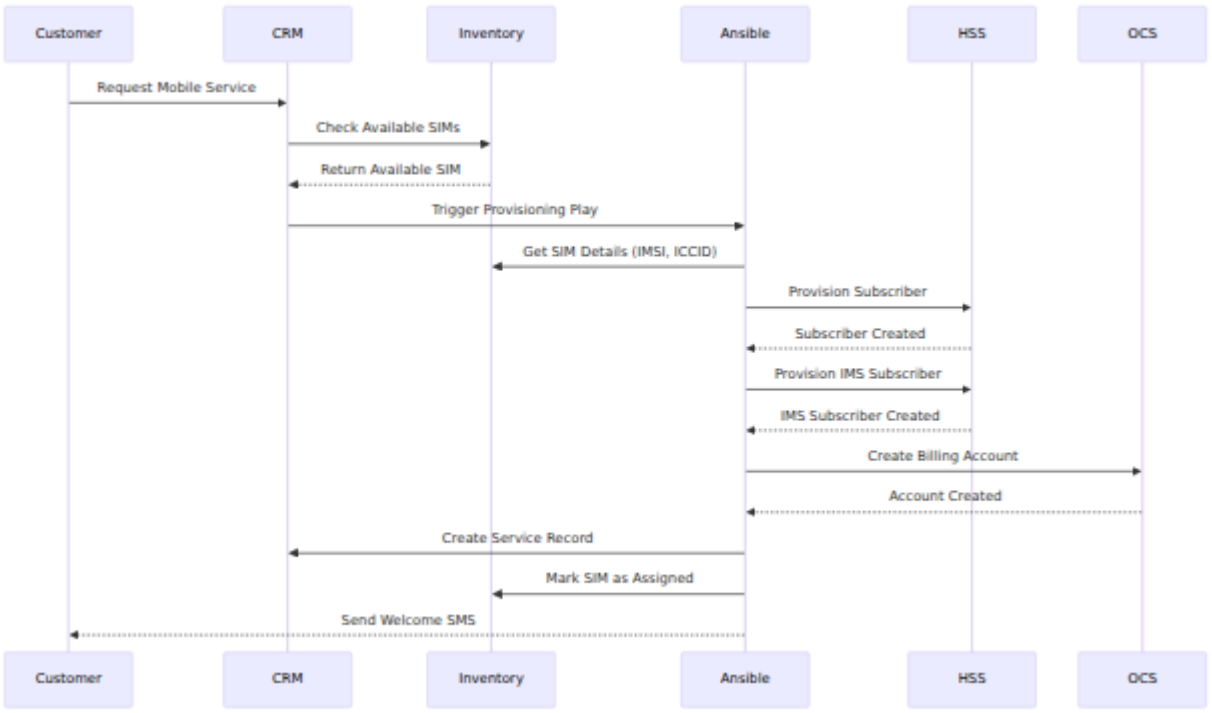
OmniCRM provides comprehensive support for provisioning both **physical SIM cards** and **eSIMs** (embedded SIMs) for mobile network operators and MVNOs. The system handles the complete lifecycle from inventory management through activation, assignment, and deprovisioning.

See also: `Provisioning System <concepts_provisioning>` for general provisioning concepts, `Inventory <administration_inventory>` for inventory management, `Ansible Playbooks <concepts_ansible>` for provisioning automation.

Overview

SIM provisioning in OmniCRM involves several integrated systems working together:

1. **Inventory Management** - Tracks available SIM cards (physical and eSIM profiles)
2. **HSS/IMS Integration** - Provisions subscriber credentials and voice services
3. **OCS Integration** - Sets up billing and charging for the service
4. **Ansible Automation** - Orchestrates the provisioning workflow
5. **Self-Signup Support** - Enables customers to activate their own SIMs



Physical SIM Card Provisioning

Physical SIM cards are traditional removable SIM cards that customers insert into their devices. OmniCRM manages these through the inventory system and provisions them to the HSS/IMS for network access.

Physical SIM Workflow

1. Inventory Setup

SIM cards must first be loaded into the inventory system:

- **ICCID** (Integrated Circuit Card Identifier) - Unique SIM card identifier
- **IMSI** (International Mobile Subscriber Identity) - Subscriber identity for the network

These are stored in inventory item fields:

- `itemtext1`: ICCID
- `itemtext2`: IMSI
- `itemtext3`: SIM Type (Physical/eSIM) - optional

Example Physical SIM Inventory Item:

```
{
  "inventory_id": 1001,
  "item": "SIM Card",
  "itemtext1": "89612345678901234567",  // ICCID
  "itemtext2": "310120123456789",       // IMSI
  "itemtext3": "Physical",               // SIM Type
  "item_location": "Warehouse A, Shelf 3",
  "item_state": "New",
  "wholesale_cost": 2.50,
  "retail_cost": 10.00
}
```

For a complete explanation of all inventory fields (itemtext1-20, item_state values, address fields, management_url, etc.), see `Inventory Overview - Inventory Item Fields <administration_inventory>`.

Authentication Credentials Storage

The authentication credentials for SIM cards are stored in the **HSS AuC (Authentication Center)**, not in the CRM inventory:

- **Ki** (Authentication Key) - Secret key for authentication (stored in HSS)
- **OPC** (Operator Code) - Operator-specific authentication parameter (stored in HSS)
- **PIN1/PIN2** - User PIN codes (stored in HSS)
- **PUK1/PUK2** - PIN unlock codes (stored in HSS)

The CRM inventory tracks which SIM (by ICCID/IMSI) is assigned to which customer, while the HSS handles the actual network authentication using the Ki/OPC credentials that match the physical SIM card.

2. Service Assignment

When a customer orders a mobile service:

1. Staff or customer selects an available SIM card from inventory
2. A mobile number (MSISDN) is selected from the phone number inventory

3. The product's provisioning playbook is triggered (e.g., `play_psim_only.yaml`)

3. HSS Provisioning

The Ansible playbook provisions the subscriber to the Home Subscriber Server (HSS):

First, it retrieves the **auc_id** (reference to the authentication credentials already stored in HSS):

```
- name: Get AuC ID for IMSI
  uri:
    url: "{{ item }}/auc/imsi/{{ imsi }}"
    method: GET
  loop: "{{ hss_peers }}"
  register: auc_lookup

- name: Extract auc_id
  set_fact:
    auc_id: "{{ auc_lookup.results[0].json.auc_id }}"
```

Then creates the subscriber record referencing that auc_id:

```
- name: Provision subscriber on HSS
  uri:
    url: "{{ item }}/subscriber/"
    method: PUT
    body_format: json
    body:
      enabled: true
      roaming_enabled: true
      auc_id: "{{ auc_id }}"
      msisdn: "{{ phone_number }}"
      imsi: "{{ imsi }}"
      ue_ambr_dl: 9999999
      ue_ambr_ul: 9999999
      apn_list: "1,2,3"
      default_apn: 1
  loop: "{{ hss_peers }}"
```

The authentication credentials (Ki, OPC) remain in the HSS AuC and are never exposed to the CRM or provisioning playbooks.

4. IMS Provisioning (for Voice Services)

For voice calling capability, an IMS subscriber is created:

```
- name: Create IMS subscriber for voice services
  uri:
    url: "{{ item }}/ims_subscriber/"
    method: PUT
    body_format: json
    body:
      imsi: "{{ imsi }}"
      msisdn: "{{ phone_number }}"
      msisdn_list: "{{ phone_number }}"
      ifc_path: "default_ifc.xml"
      sh_profile: "{{ sh_profile_xml }}"
  loop: "{{ hss_peers }}"
```

5. Billing System Setup

The OCS (Online Charging System) is configured with:

- Account creation
- IMSI/MSISDN mapping via attribute profiles
- Filter rules for identifying the subscriber
- Resource limits (concurrent sessions)
- Initial balance

6. Service Creation and Inventory Assignment

Finally:

- A service record is created in the CRM
- The SIM card inventory item is assigned to the customer (`customer_id` set)
- The SIM card is linked to the service (`service_id` set)
- Inventory state is updated to `"Assigned"`

Physical SIM Authentication

Physical SIMs use AuC (Authentication Center) credentials stored in the HSS:

- **Ki** and **OPC** are used for 4G/5G authentication (MILENAGE algorithm)
- These credentials are pre-loaded into the HSS AuC database during SIM import
- The physical SIM card contains matching Ki/OPC values
- During provisioning, the playbook references the **auc_id** to link the subscriber to these credentials
- Network authentication happens via challenge-response between the SIM and HSS
- The CRM never sees or handles the actual Ki/OPC values

eSIM Provisioning

eSIMs (embedded SIMs) are software-based SIM profiles that can be downloaded to compatible devices without physical SIM cards. OmniCRM supports eSIM provisioning with LPA (Local Profile Assistant) activation codes.

eSIM Features

LPA Activation Codes

eSIMs use LPA codes for activation:

```
LPA:1$smdp.example.com$ACTIVATION-CODE-ABC123XYZ
```

Where:

- `LPA:1` - LPA version identifier
- `smdp.example.com` - SM-DP+ (Subscription Manager Data Preparation) server address
- `ACTIVATION-CODE-ABC123XYZ` - Unique activation code for this eSIM profile

QR Code Generation

OmniCRM automatically generates QR codes from LPA activation codes:

- Stored in inventory `management_url` field
- Displayed in the UI as scannable QR code
- Customers scan with their device camera to install the eSIM profile
- No manual typing of long activation codes required

Example eSIM Inventory Item:

```
{
  "inventory_id": 1002,
  "item": "eSIM",
  "itemtext1": "89612345678901234567",
  "itemtext2": "310120123456790",
  "itemtext3": "eSIM",
  "management_url": "LPA:1$smdp.example.com$ACTIVATION-CODE-
ABC123XYZ",
  "item_location": "Virtual Inventory",
  "item_state": "New",
  "wholesale_cost": 0.00,
  "retail_cost": 0.00
}
```

When viewing this inventory item in the UI, a QR code is automatically generated and displayed for easy scanning.

eSIM Provisioning Workflow

The eSIM provisioning workflow is nearly identical to physical SIM provisioning, with a few key differences:

1. Automatic eSIM Assignment

If a product requires a SIM but no physical SIM is selected, the system can automatically assign an available eSIM:

```
# Automatic eSIM lookup
search_filters = {
    "customer_id": [None],
    "item_state": ["New"],
    "itemtext3": ["eSIM"]  # Filter for eSIM type
}
available_esim = search_inventory("SIM Card",
filters=search_filters)
```

2. HSS/IMS Provisioning

eSIMs are provisioned to HSS/IMS exactly like physical SIMs:

- Same IMSI provisioning
- Same IMS subscriber creation
- Same authentication credentials (Ki, OPC)

3. Customer Activation

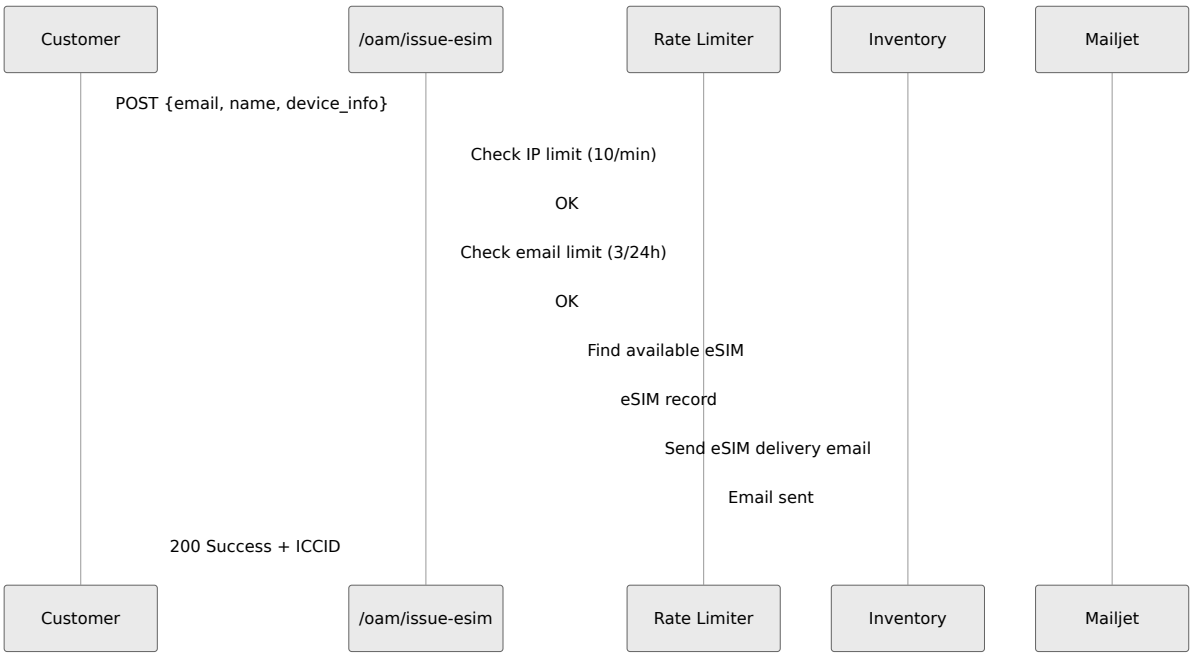
After provisioning:

1. Customer receives eSIM activation details via email or in the customer portal
2. QR code is displayed for scanning
3. Customer scans QR code with their device
4. Device downloads the eSIM profile from the SM-DP+ server
5. eSIM is installed and ready to use

Public eSIM Issuer API

OmniCRM provides a public API endpoint for self-service eSIM requests, enabling customers to request an eSIM directly from a website or mobile app without staff intervention.

Endpoint: `POST /crm/oam/issue-esim`



Request Parameters

Parameter	Type	Required	Default	
`email`	String	Yes	-	C a e M e
`name`	String	No	Derived from email	C r p l t t a u
`customer_id`	Integer	No	`null`	B c W c a l c t
`device_info`	Object	No	`{}`	D i a c t
`device_info.compatibility_status`	String	No	`"unknown"`	e c s `s` `r`

Parameter	Type	Required	Default	
`device_info.user_agent`	String	No	Request header	

Rate Limiting

The endpoint implements dual rate limiting to prevent abuse:

Limit	Window	Scope	Description
10 requests	1 minute	Per IP address	General rate limit applied via decorator
3 requests	24 hours	Per email address	Prevents excessive eSIM requests to same email

When rate limits are exceeded, the endpoint returns HTTP 429 with `error_type: "RateLimitExceeded"`.

Response Format

Success Response (HTTP 200):

```
{
  "result": "Success",
  "message": "eSIM request received. You will receive your eSIM QR
code via email shortly.",
  "esim_id": 8472,
  "iccid": "89442000000001234567",
  "email_sent": true
}
```


Field	Type	Description
`result`	String	Always `"Success"` for HTTP 200 responses
`message`	String	Human-readable confirmation message
`esim_id`	Integer	The inventory ID of the assigned eSIM
`iccid`	String	The ICCID of the assigned eSIM
`email_sent`	Boolean	Whether the delivery email was successfully sent

Error Responses

HTTP Code	Error Type	Description
400	-	Invalid or missing email address
429	`RateLimitExceeded`	Per-email or per-IP rate limit exceeded
503	`NoInventory`	No available eSIMs in inventory
500	-	Internal server error

Error Response Format:

```
{
  "result": "Failed",
  "reason": "Error description",
  "error_type": "ErrorType"
}
```

Email Delivery

The endpoint sends an eSIM delivery email via Mailjet containing:

- ICCID
- QR code (if available in `itemtext2`)
- Activation code/LPA string (if available in `itemtext3` or `management_url`)
- Step-by-step activation instructions

Configure the Mailjet template in `crm_config.yaml`:

```
mailjet:
  api_crmCommunicationEsimDelivery:
    from_email: "support@aimobile.ac"
    from_name: "Ascension Island Mobile"
    template_id: 1234567
    subject: "Your eSIM is Ready"
```

Parameter	Type	Required	Description
`from_email`	String	Yes	Sender email address
`from_name`	String	Yes	Sender display name
`template_id`	Integer	No	Mailjet template ID. If not provided, a default HTML email is generated.
`subject`	String	Yes	Email subject line

If no template is configured, the system generates a branded HTML email with:

- Company branding and logo
- QR code for eSIM activation (if available)
- Manual activation code instructions
- Device-specific setup guidance for iOS and Android

Activity Logging

Each eSIM request creates an activity record with:

- Activity type: `esim_request`
- Customer ID linkage (if provided)
- Device compatibility status
- User agent information

This enables tracking of eSIM requests and conversion analytics.

4. eSIM Data Structure in HSS

eSIMs in the HSS AuC (Authentication Center) are marked with an `esim: true` flag:

```
{
  "esim": true,
  "lpa": "LPA:1$smdp.example.com$ACTIVATION-CODE-ABC123XYZ",
  "iccid": "89612345678901234 57",
  "imsi": "310120123456790",
  "ki": "00112233445566778899AABBCCDDEEFF",
  "opc": "FFEEDDCCBBAA99887766554433221100",
  "pin1": "1234",
  "pin2": "5678",
  "puk1": "12345678",
  "puk2": "87654321",
  "batch_name": "eSIM_Batch_2024_Q1",
  "sim_vendor": "Thales"
}
```

eSIM Import Process

eSIMs are typically imported in bulk from the eSIM provider:

Import Script: `/OmniCRM-API/Provisioners/customer_product_creation/import_keys_esim.py`

The import process:

1. Reads eSIM data from Excel files provided by the vendor
2. Loads LPA activation codes from CSV files
3. Updates the HSS with eSIM credentials
4. Creates corresponding inventory items in the CRM
5. Links eSIM profiles to the inventory system

This ensures that eSIM profiles are available for assignment while maintaining proper inventory tracking.

Inventory Integration

The inventory system is central to SIM provisioning, tracking both physical and virtual resources needed for mobile services.

SIM Card Inventory Template

A typical SIM Card inventory template defines:

```
{
  "item": "SIM Card",
  "itemtext1_label": "ICCID",
  "itemtext2_label": "IMSI",
  "itemtext3_label": "SIM Type",
  "wholesale_cost": 2.50,
  "retail_cost": 10.00
}
```

Note: Authentication credentials (Ki, OPC, PIN, PUK) are stored in the HSS AuC, not in the CRM inventory.

For detailed information on creating and managing inventory templates, including how to define custom fields (itemtext1-20) and link templates to

products, see `Inventory Management - Inventory Templates <administration_inventory>` section.

Mobile Number Inventory

Phone numbers are managed as separate inventory items:

```
{
  "inventory_id": 4001,
  "item": "Mobile Number",
  "itemtext1": "+61412345678",
  "itemtext2": "Melbourne",
  "itemtext3": "Mobile",
  "item_location": "Australia - VIC",
  "item_state": "New",
  "wholesale_cost": 1.00,
  "retail_cost": 0.00
}
```

Inventory States for SIMs

SIM cards progress through several inventory states:

- **New** - Unused SIM, available for assignment
- **Assigned** - Currently active with a customer
- **Used** - Previously assigned, returned to inventory (can be reused)
- **Internal Use** - For testing or staff use
- **Damaged** - Non-functional, requires replacement
- **Lost** - Cannot be located
- **Stolen** - Reported stolen

Product Integration

Products specify required inventory via `inventory_items_list`:

```
{
  "product_id": 1,
  "product_slug": "Mobile-SIM",
  "product_name": "Mobile SIM Only",
  "provisioning_play": "play_psim_only",
  "inventory_items_list": "['SIM Card', 'Mobile Number']"
}
```

When provisioning this product:

1. UI displays inventory picker with two dropdowns
2. User selects available SIM Card (physical or eSIM)
3. User selects available Mobile Number
4. Inventory IDs are passed to the Ansible playbook
5. Playbook retrieves full inventory details via API
6. Provisioning proceeds with selected resources

For a complete explanation of how products drive provisioning, how inventory requirements are defined, and how variables are passed to playbooks, see `Provisioning System - How Products Drive Provisioning <concepts_provisioning>`.

Inventory Assignment Flow

The Ansible playbook handles inventory assignment.

For more details on how playbooks authenticate with the CRM API (Bearer tokens, API keys, refresh tokens), see `Provisioning System - Authentication and Authorization <concepts_provisioning>`.

```
- name: Get SIM Card details from inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: sim_inventory_response

- name: Extract SIM identifiers
  set_fact:
    iccid: "{{ sim_inventory_response.json.itemtext1 }}"
    imsi: "{{ sim_inventory_response.json.itemtext2 }}"

- name: Get AuC ID from HSS (reference to authentication
credentials)
  uri:
    url: "{{ item }}/auc/imsi/{{ imsi }}"
    method: GET
  loop: "{{ hss_peers }}"
  register: auc_response

- name: Extract AuC ID
  set_fact:
    auc_id: "{{ auc_response.results[0].json.auc_id }}"

# ... provision to HSS/IMS/OCS ...

- name: Assign SIM to customer
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      customer_id: "{{ customer_id }}"
      service_id: "{{ service_id }}"
      item_state: "Assigned"
```

This ensures:

- SIM is marked as assigned to the customer
- Service ID is linked for tracking
- Inventory state reflects current status
- Other systems can query inventory to find customer's SIM

Self-Signup with SIM Provisioning

OmniCRM supports customer self-service signup where customers can activate their own SIM cards or eSIMs without staff intervention.

Self-Signup Flow

1. Customer Initiates Signup

Customer visits self-signup page and begins account creation:

- Provides personal information
- Selects a service plan (product)
- Enters payment details

2. SIM Number Validation

Customer can provide their own SIM number (optional):

```
GET /auth/self-signup/validate-itemtext1/{sim_number}
```

This endpoint checks if:

- The SIM exists in inventory
- The SIM is available (not already assigned)
- The SIM is in the correct state ("New" or "Used")

3. Automatic SIM Assignment (If No SIM Provided)

If the customer doesn't have a SIM, the system auto-assigns one:

```
def _populate_base_plan_inventory(sim_number, plan):
    if sim_number:
        # Customer provided SIM - verify it exists
        sim_inventory = get_inventory_by_itemtext1(session,
sim_number, None)
        if not sim_inventory:
            # Check if there's an inactive service with this
number
            service = get_inactive_service_by_sim(sim_number)
            if service:
                sim_inventory =
get_sim_for_service(service.service_id)
    else:
        # Auto-assign available SIM from inventory
        sim_inventory =
get_first_available_inventory_by_item_name(
            session,
            "SIM Card",
            filters={"item_state": ["New"], "customer_id": [None]}
        )

    # Get ICCID and MSISDN
    iccid = sim_inventory.itemtext1

    # Auto-assign phone number
    number_inventory = get_first_available_inventory_by_item_name(
        session,
        "Mobile Number"
    )
    msisdn = number_inventory.itemtext1

    return {
        "SIM Card": sim_inventory.inventory_id,
        "Mobile Number": number_inventory.inventory_id
    }
```

4. Account Creation and Provisioning

Once payment is authorized:

```python
def _post_signup_tasks(customer_id, plan, payment_method):
    # 1. Save payment method
    save_stripe_payment_method(customer_id, payment_method)

    # 2. Charge customer card
    charge_customer_card(customer_id, plan.retail_setup_cost)

    # 3. Login user (get JWT tokens)
    tokens = login_customer(customer_id)

    # 4. Populate inventory (SIM and phone number)
    inventory_vars = _populate_base_plan_inventory(sim_number,
plan)

    # 5. Create provisioning job
    provision_vars = {
        "product_id": plan.product_id,
        "customer_id": customer_id,
        **inventory_vars  # Include SIM Card and Mobile Number IDs
    }

    # Optional: Chain addon products
    if plan.addon_chain:
        provision_vars["addon_chain"] = plan.addon_chain

    provision_id = create_provisioning_job(provision_vars)

    # 6. Return success with tokens
    return {
        "access_token": tokens.access_token,
        "refresh_token": tokens.refresh_token,
        "customer_id": customer_id,
        "provision_id": provision_id
    }
```

5. Customer Receives Activation Details

After provisioning completes:

- **Physical SIM**: Welcome email with phone number and activation instructions

- **eSIM**: Email includes QR code for eSIM profile download, or customer can view QR code in customer portal

6. Special Permissions for Self-Signup

During signup, the JWT token includes a special claim:

```
{
  "sub": "customer_123",
  "signup_process": true,
  "permissions": ["VIEW_OWN_PROVISION", "UPDATE_OWN_INVENTORY"]
}
```

This allows:

- Customer to read/update inventory during signup
- Restricted to their own customer account only
- Prevents assigning SIMs belonging to other customers

Self-Signup Security

Validation Checks:

- SIM must exist in inventory
- SIM must not be assigned to another customer
- SIM must be in acceptable state ("New", "Used")
- Customer can only assign SIMs to their own account
- Payment must be authorized before provisioning

Inventory Safeguards:

- Database transactions ensure atomic assignment
- Concurrent signup attempts are prevented via database locks
- Inventory state changes are logged for audit

Ansible-Based Provisioning

All SIM provisioning is orchestrated through Ansible playbooks, providing a consistent, auditable, and repeatable process.

For comprehensive documentation on Ansible playbook structure, the block/rescue pattern, how playbooks interact with products, and best practices, see `Ansible Playbooks: Detailed Guide <concepts_ansible>`.

Main SIM Provisioning Playbook

File: `/OmniCRM-API/Provisioners/plays/play_psim_only.yaml`

This is the primary playbook for mobile SIM provisioning (both physical and eSIM). It handles:

- Mobile voice & data services
- Data-only services
- Voice-only IMS subscribers

Playbook Structure (1,561 lines):

For detailed explanation of playbook headers, the hosts/gather_facts/become directives, and overall structure, see `Ansible Playbooks - Playbook Structure and Anatomy <concepts_ansible>`.

```yaml
- name: OmniCore Service Provisioning 2024
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main provisioning block
      block:
        # --- PRE-PROVISIONING (Lines 240-396) ---
        - name: Get SIM information from inventory
          # Retrieves IMSI, ICCID, etc.

        - name: Validate IMSI length
          # Must be exactly 15 digits

        - name: Check if IMSI exists in HSS
          # Prevents duplicate provisioning

        - name: Get AuC ID for IMSI
          # Retrieves auc_id reference from HSS

        # --- HSS PROVISIONING (Lines 398-534) ---
        - name: Create/Update HSS Subscriber
          # Provisions to all HSS peers

        - name: Create IMS Subscriber
          # Enables voice calling

        # --- OCS SETUP (Lines 536-837) ---
        - name: Create ENUM entry
          # E.164 number mapping

        - name: Create FilterS rule
          # Account identification

        - name: Create AttributeS profile
          # IMSI/MSISDN mapping

        - name: Create ResourceS profile
          # Concurrent session limits

        - name: Create OCS account
          # Billing account creation
```

```
    # --- SERVICE & INVENTORY (Lines 865-946) ---
    - name: Create service record
      # In CRM database

    - name: Assign SIM to service
      # Update inventory

    - name: Send welcome SMS
      # Customer notification

  rescue:
    # --- CLEANUP/DEPROVISIONING (Lines 975-1562) ---
    - name: Return inventory to pool
      # Reset customer_id, service_id to null

    - name: Delete OCS account
      # Remove billing account

    - name: Remove HSS subscribers
      # Or set to dormant state

    - name: Determine success/failure
      assert:
        that:
          - action == "deprovision"
```

Key Provisioning Steps

1. Pre-Provisioning Validation

```yaml
- name: Get SIM information from CRM inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: api_response_sim

- name: Extract and validate IMSI
  set_fact:
    imsi: "{{ api_response_sim.json.itemtext2 }}"

- name: Validate IMSI format
  assert:
    that:
      - imsi | length == 15
      - imsi is match('^[0-9]+$')
    fail_msg: "IMSI must be exactly 15 digits"
```

2. Retrieve AuC ID from HSS

```yaml
- name: Get AuC ID for IMSI from HSS
  uri:
    url: "{{ item }}/auc/imsi/{{ imsi }}"
    method: GET
  loop: "{{ crm_config.hss.hss_peers }}"
  register: auc_lookup

- name: Extract auc_id from first HSS response
  set_fact:
    auc_id: "{{ auc_lookup.results[0].json.auc_id }}"
```

3. HSS Subscriber Provisioning

```yaml
- name: Create subscriber in each HSS peer
  uri:
    url: "{{ item }}/subscriber/"
    method: PUT
    body_format: json
    body:
      enabled: true
      roaming_enabled: true
      auc_id: "{{ auc_id }}"
      msisdn: "{{ phone_number }}"
      imsi: "{{ imsi }}"
      ue_ambr_dl: 9999999  # Download speed limit
      ue_ambr_ul: 9999999  # Upload speed limit
      apn_list: "1,2,3"
      default_apn: 1
    status_code: [200, 201]
  loop: "{{ crm_config.hss.hss_peers }}"
  register: hss_responses
```

4. IMS Subscriber Provisioning (Voice)

```
- name: Create IMS subscriber for voice services
  uri:
    url: "{{ item }}/ims_subscriber/"
    method: PUT
    body_format: json
    body:
      imsi: "{{ imsi }}"
      msisdn: "{{ phone_number }}"
      msisdn_list: "{{ phone_number }}"
      ifc_path: "default_ifc.xml"
      sh_profile: |
        <?xml version="1.0"?>
        <IMSSubscription>
          <PrivateID>{{ imsi }}@ims.mnc{{ mnc }}.mcc{{ mcc
}}.3gppnetwork.org</PrivateID>
          <ServiceProfile>
            <PublicIdentity>
              <Identity>sip:{{ phone_number }}@ims.mnc{{ mnc
}}.mcc{{ mcc }}.3gppnetwork.org</Identity>
            </PublicIdentity>
          </ServiceProfile>
        </IMSSubscription>
    status_code: [200, 201]
  loop: "{{ crm_config.hss.hss_peers }}"
```

5. OCS Billing Configuration

```yaml
# Create account filters (identify subscriber by IMSI/MSISDN)
- name: Create FilterS for IMSI identification
  uri:
    url: "{{ crm_config.ocs.ocsApi }}/jsonrpc"
    method: POST
    body_format: json
    body:
      method: "ApierV1.SetFilter"
      params:
        - ID: "FILTER_IMSI_{{ service_uuid }}"
          Type: "*string"
          Element: "~*req.OriginHost"
          Values: ["{{ imsi }}"]

# Create attribute profile (map IMSI to account)
- name: Create AttributeS profile
  uri:
    url: "{{ crm_config.ocs.ocsApi }}/jsonrpc"
    method: POST
    body_format: json
    body:
      method: "ApierV1.SetAttributeProfile"
      params:
        - ID: "ATTR_ACCOUNT_{{ service_uuid }}"
          FilterIDs: ["FILTER_IMSI_{{ service_uuid }}"]
          Attributes:
            - Path: "*req.Account"
              Value: "{{ service_uuid }}"

# Create billing account
- name: Create OCS account
  uri:
    url: "{{ crm_config.ocs.ocsApi }}/jsonrpc"
    method: POST
    body_format: json
    body:
      method: "ApierV2.SetAccount"
      params:
        - Tenant: "{{ crm_config.ocs.ocsTenant }}"
          Account: "{{ service_uuid }}"
          ActionPlanIds: []
          ExtraOptions:
            AllowNegative: false
```

```
            Disabled: false

# Add initial balance
- name: Add initial monetary balance
  uri:
    url: "{{ crm_config.ocs.ocsApi }}/jsonrpc"
    method: POST
    body_format: json
    body:
      method: "ApierV1.AddBalance"
      params:
        - Tenant: "{{ crm_config.ocs.ocsTenant }}"
          Account: "{{ service_uuid }}"
          BalanceType: "*monetary"
          Balance:
            Value: 0
            ExpiryTime: "+8760h"  # 1 year
```

6. Service Creation

```
- name: Create service record in CRM
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/service/"
    method: PUT
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      customer_id: "{{ customer_id }}"
      product_id: "{{ product_id }}"
      service_name: "Mobile Service - {{ phone_number }}"
      service_uuid: "{{ service_uuid }}"
      service_status: "Active"
      retail_cost: "{{ monthly_cost }}"
    status_code: 200
  register: service_creation_response

- name: Extract service_id
  set_fact:
    service_id: "{{ service_creation_response.json.service_id }}"
```

7. Inventory Assignment

```
- name: Assign SIM card to customer and service
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_sim_card }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      customer_id: "{{ customer_id }}"
      service_id: "{{ service_id }}"
      item_state: "Assigned"
      sold_date: "{{ ansible_date_time.iso8601 }}"

- name: Assign phone number to customer and service
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ inventory_id_phone_number }}"
    method: PATCH
    headers:
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      customer_id: "{{ customer_id }}"
      service_id: "{{ service_id }}"
      item_state: "Assigned"
      sold_date: "{{ ansible_date_time.iso8601 }}"
```

Deprovisioning and Rollback

The same playbook handles both failed provision rollback and intentional deprovisioning using Ansible's `rescue` block.

For a detailed explanation of the block/rescue pattern and why this is best practice, see `Provisioning System - Rollback and Cleanup: Best Practice Pattern <concepts_provisioning>`.

```yaml
rescue:
  # This section runs when:
  # 1. Any task in block fails (automatic rollback)
  # 2. action == "deprovision" (intentional cleanup)

  - name: Get inventory items linked to service
    uri:
      url: "{{ crm_config.crm.base_url
}}/crm/inventory/customer_id/{{ customer_id }}"
      method: GET
      headers:
        Authorization: "Bearer {{ access_token }}"
    register: inventory_items
    ignore_errors: true

  - name: Return inventory to available pool
    uri:
      url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ item.inventory_id }}"
      method: PATCH
      headers:
        Authorization: "Bearer {{ access_token }}"
      body_format: json
      body:
        customer_id: null
        service_id: null
        item_state: "Used"
    loop: "{{ inventory_items.json.data }}"
    when: inventory_items.json.data is defined
    ignore_errors: true

  - name: Delete OCS account
    uri:
      url: "{{ crm_config.ocs.ocsApi }}/jsonrpc"
      method: POST
      body_format: json
      body:
        method: "ApierV1.RemoveAccount"
        params:
          - Tenant: "{{ crm_config.ocs.ocsTenant }}"
            Account: "{{ service_uuid }}"
    ignore_errors: true
```

```
  - name: Delete or disable HSS subscriber
    uri:
      url: "{{ item.key }}/subscriber/{{ item.value.subscriber_id
}}"
      method: DELETE
    loop: "{{ hss_subscriber_data | dict2items }}"
    when: deprovision_subscriber | default(false) | bool
    ignore_errors: true

  # Final assertion determines success or failure
  - name: Determine if this was intentional deprovision or failed
provision
    assert:
      that:
        - action == "deprovision"
      fail_msg: "Provisioning failed and rollback completed"
      success_msg: "Deprovisioning completed successfully"
```

Key Points:

- `ignore_errors: true` on all cleanup tasks ensures all cleanup attempts are made
- If `action == "deprovision"`, the assertion passes (status 0 = success)
- If `action` is not set, the assertion fails (status 2 = failed provision)
- This ensures atomic operations: either fully provisioned or fully cleaned up

Other SIM-Related Playbooks

Local Development Playbook: `play_local_mobile_sim.yaml` - Development version that skips external HSS/OCS dependencies

MSISDN Swap: `play_swap_msisdn.yaml` - Swaps phone numbers between existing services

Topup/Recharge Playbooks:

- `play_topup_monetary.yaml` - Add monetary balance
- `play_topup_no_charge.yaml` - Add free data/minutes
- `play_topup_dongle.yaml` - Topup for IoT/data devices

HSS and IMS Integration

OmniCRM integrates with PyHSS (open-source Home Subscriber Server) for subscriber management and authentication.

HSS Functions

File: `/OmniCRM-API/Provisioners/hss.py`

Key Functions:

```
def ProvisionMobileSIM(json_data, hss_urls):
    """
    Provisions a mobile SIM to HSS and IMS

    Args:
        json_data: Dict with IMSI, MSISDN, authentication
credentials
        hss_urls: List of HSS peer URLs

    Returns:
        Dict with subscriber IDs from each HSS peer
    """
    # Create HSS subscriber (for data)
    # Create IMS subscriber (for voice)
    # Return subscriber IDs for tracking

def get_subscriber_info_msisdn(msisdn, hss_urls):
    """
    Retrieves subscriber details by phone number

    Args:
        msisdn: Phone number to lookup
        hss_urls: List of HSS peer URLs

    Returns:
        Subscriber information from HSS
    """
```

Multi-HSS Support

OmniCRM supports provisioning to multiple HSS peers for redundancy:

```yaml
# crm_config.yaml
hss:
  hss_peers:
    - "http://10.12.64.140:8080"
    - "http://10.12.64.141:8080"
  apn_list: "1,2,3"
  default_apn: 1
```

Provisioning happens across all configured HSS instances to ensure:

- Geographic redundancy
- Load balancing
- Failover capability
- Synchronized subscriber data

Authentication Center (AuC)

The AuC stores subscriber authentication credentials. During provisioning, only the **auc_id** is retrieved:

Get AuC ID for IMSI:

```
GET /auc/imsi/{imsi}
```

Response:

```
{
  "auc_id": 12345,
  "imsi": "310120123456789",
  "iccid": "89612345678901234567",
  "esim": false,
  "lpa": null
}
```

For eSIMs, the `esim` flag is `true` and `lpa` contains the activation code for display to customers.

Note: The actual authentication credentials (Ki, OPC, PIN, PUK) remain in the HSS and are never exposed via API. The provisioning system only needs the `auc_id` to reference these credentials when creating subscribers.

OCS Integration

The Online Charging System (OCS) handles real-time charging and rating for mobile services. OmniCRM uses CGRateS as the OCS platform.

OCS Configuration

File: `/OmniCRM-API/Provisioners/ocs.py`

Configuration:

```
# crm_config.yaml
ocs:
  cgrates: "10.64.12.160:2080"
  ocsTenant: "mnc380.mcc313.3gppnetwork.org"
  ocsApi: "http://10.64.12.160:2080"
```

OCS Components for SIM Services

1. Filters - Subscriber Identification

Filters identify the subscriber from network requests:

```
{
  "ID": "FILTER_IMSI_Service_abc123",
  "Type": "*string",
  "Element": "~*req.OriginHost",
  "Values": ["310120123456789"]
}
```

2. Attributes - Account Mapping

Attributes map the IMSI to the billing account:

```
{
  "ID": "ATTR_ACCOUNT_Service_abc123",
  "FilterIDs": ["FILTER_IMSI_Service_abc123"],
  "Attributes": [
    {
      "Path": "*req.Account",
      "Value": "Service_abc123"
    },
    {
      "Path": "*req.Bandwidth",
      "Value": "100000000"  // 100 Mbps
    }
  ]
}
```

3. Resources - Session Limits

Resources control concurrent session limits:

```
{
  "ID": "RES_SESSIONS_Service_abc123",
  "FilterIDs": ["FILTER_IMSI_Service_abc123"],
  "Limit": 5,  // Max 5 concurrent sessions
  "UsageTTL": "-1"
}
```

4. Stats - Usage Tracking

Stats queues track usage for analytics:

```
{
  "ID": "STATS_Service_abc123",
  "FilterIDs": ["FILTER_IMSI_Service_abc123"],
  "Metrics": [
    "*sum#~*req.Usage",
    "*tcc"  // Total call count
  ]
}
```

5. Action Plans - Recurring Charges

Action plans handle recurring operations like monthly charges:

```
{
  "Id": "ActionPlan_Service_abc123_Monthly",
  "ActionsId": "Action_Add_Monthly_Data",
  "Timing": {
    "MonthDays": [1],  // 1st of each month
    "Time": "00:00:00Z"
  }
}
```

OCS API Functions

Key Functions from ocs.py:

```
async def async_get_balance(account, server, tenant):
    """Get current account balance"""

async def async_topup_dongle(tenant, account, server, days):
    """Add time-based data allowance"""

def Get_Account_Status(account, server, tenant):
    """Get comprehensive account information"""

def CGRateS_API_Call(method, params, server, tenant):
    """Generic CGRateS JSON-RPC API call"""
```

SIM Inventory Reconciliation

OmniCRM includes tools to ensure consistency between the CRM inventory and the HSS.

Reconciliation Script

File: `/OmniCRM-API/Provisioners/hss_reconcile.py`

Purpose:

- Identifies SIMs in HSS but not in inventory (orphaned)
- Finds assigned SIMs not provisioned in HSS
- Validates MSISDN formats
- Generates HTML reports

Checks Performed:

1. **Sold SIMs in HSS:**
    - Query all assigned SIMs from inventory
    - Check if each IMSI exists in HSS
    - Report SIMs assigned to customers but not in HSS
2. **Provisioned SIMs in Inventory:**
    - Query all subscribers from HSS
    - Check if each IMSI exists in inventory
    - Report orphaned HSS entries
3. **MSISDN Validation:**
    - Validate phone number formats
    - Check for Australian number compliance
    - Report malformed numbers

Running Reconciliation:

```
python hss_reconcile.py
```

Output:

- HTML report with color-coded results
- Lists of mismatches for investigation
- Recommendations for cleanup

Best Practices:

- Run reconciliation weekly
- Investigate discrepancies promptly
- Use reports to identify provisioning failures
- Clean up orphaned entries to free resources

Troubleshooting SIM Provisioning

Common Issues and Solutions

Issue: SIM provisioning fails with "IMSI already exists in HSS"

- **Cause:** IMSI is already provisioned from a previous attempt
- **Solution:** Check HSS for existing subscriber, either:
  - Delete the existing subscriber if it's orphaned
  - Update the existing subscriber instead of creating new
  - Run reconciliation to identify the conflict

Issue: eSIM QR code not generating

- **Cause:** `management_url` field not populated with LPA code
- **Solution:** Ensure eSIM import script sets `management_url` correctly
- **Format:** Must be `LPA:1$server$activation-code`

Issue: Inventory item shows as "Available" but is assigned

- **Cause:** Provisioning failed before inventory assignment

- **Solution:** Check provisioning events for failure reason
- **Fix:** Either complete provisioning or return inventory to pool

Issue: Customer cannot make calls (data works)

- **Cause:** IMS subscriber not provisioned
- **Solution:** Check if IMS provisioning step completed
- **Fix:** Manually provision IMS subscriber or re-run playbook

Issue: Authentication failures (SIM cannot connect)

- **Cause:** Ki/OPC mismatch between SIM card and HSS
- **Solution:** Verify AuC credentials match physical SIM
- **Fix:** Update HSS AuC with correct credentials

Issue: Self-signup fails to assign SIM

- **Cause:** No available SIMs in inventory
- **Solution:** Check inventory for SIMs with state "New" and customer_id NULL
- **Fix:** Import new SIM batch or mark returned SIMs as "Used"

Debugging Tips

1. Check Provisioning Events:

```
GET /crm/provision/provision_id/{id}
```

Look for failed tasks (status 2) and review error messages.

2. Verify HSS Subscriber:

```
GET {hss_url}/subscriber/msisdn/{phone_number}
```

Check if subscriber exists and has correct configuration.

3. Check OCS Account:

```
{
  "method": "ApierV2.GetAccount",
  "params": [
    {
      "Tenant": "mnc380.mcc313.3gppnetwork.org",
      "Account": "Service_abc123"
    }
  ]
}
```

4. Query Inventory Status:

```
GET /crm/inventory/?filters={"itemtext2":["310120123456789"]}
```

Search by IMSI to find inventory item and check its state.

5. Review Ansible Logs:

Check `/var/log/ansible/` or provisioning event details for full playbook output.

Best Practices

SIM Inventory Management

1. **Bulk Import:** Use import scripts for large SIM batches
2. **Regular Reconciliation:** Run weekly HSS/inventory reconciliation
3. **State Management:** Keep inventory states accurate (New, Assigned, Used)
4. **Vendor Tracking:** Record SIM vendor and batch information
5. **Cost Tracking:** Maintain accurate wholesale/retail costs

Security

1. **Credential Separation:** Authentication credentials (Ki/OPC) remain in HSS only, never in CRM

2. **Access Control:** Limit who can assign/modify SIM inventory
3. **Audit Logging:** Track all SIM assignments and changes
4. **PIN/PUK Management:** PIN/PUK codes stored in HSS, provided to customers via secure channels
5. **Lost/Stolen Process:** Immediately suspend service in HSS and mark inventory state

Provisioning

1. **Validation:** Always validate IMSI format and uniqueness
2. **Rollback:** Use block/rescue for automatic cleanup on failure
3. **Notifications:** Send clear activation instructions to customers
4. **Testing:** Test provisioning in development before production
5. **Monitoring:** Track provisioning success rates and failure reasons

eSIM Specific

1. **LPA Format:** Validate LPA code format before storing
2. **QR Testing:** Test QR codes on multiple devices
3. **Activation Instructions:** Provide clear step-by-step guides
4. **Profile Management:** Track eSIM profile downloads and installations
5. **Backup Codes:** Provide manual LPA codes in case QR scanning fails

Related Documentation

- `Provisioning System <concepts_provisioning>` - Complete provisioning workflow details
- `Ansible Playbooks <concepts_ansible>` - Playbook structure and best practices
- `Inventory Management <administration_inventory>` - Inventory system overview
- `Products and Services <concepts_products_and_services>` - Product configuration
- `Customer Care <customer_care>` - Supporting customers with SIM issues

- `Top-Up and Recharge <features_topup_recharge>` - Adding balance to mobile services

Customer Activity Log

Every change made to a customer, contact, site, service, and financial parameters, like Transactions, Invoices & Payment Methods, is recorded in the Activity Log.

This allows us to track changes made to the system, who made them, and when they were made, and is useful for auditing changes, and tracking down issues, for example, if a customer says they never received an invoice, we can check the Activity Log to see if it was sent, or if a contact was removed, we can see who removed it and when.

The Activity Log is a chronological list of changes, with the most recent changes at the top, and older changes further down the list, which can be filtered from the tabs.

Activity log records cannot be deleted, but they can be filtered, and the details can be viewed to see what was changed, and by whom.

Adding a Service

Services are the things we bill the customer for, they could be home internet services, mobile services, or even abstract services like leasing a subnet or providing metered electricity to a rack.

A Service is just an instance of a `Product <concepts_products_and_services>` for a given customer, that's picked out of the product catalog and provisioned for the customer.

If you haven't already `created a customer <basics_create_customer>`, you'll need to do that first, as services are linked to customers, you'll also need to define a payment method for the customer, as services generate charges that need to be paid.

Customers can provision their own services (if we allow them to), or Customer Service staff can provision services for the customer.

Based on the product definition, there are rules regarding who can purchase a product, such as only allowing business customers to purchase a business product, or only allowing customers with a mobile service to purchase a mobile addon.

Services can also have usage components, like data usage, call minutes, or other usage based charges, and can have multiple charges associated with them, such as monthly charges, one-off charges, or usage charges, we can view this from the "Usage" button.

Many services support Addons, for example a mobile service has all the topups available from the Addons menu, and a home internet service might have a static IP address or extra data available as an addon, again all of this is defined in the `product catalog<concepts_products_and_services>`.

Assign Plans Workflow

The Assign Plan feature allows staff to **provision services for customers** by selecting products from the catalog and initiating the provisioning process. This is the primary method for creating new services when customers don't self-provision.

Overview

Assigning a plan involves:

1. Selecting a customer
2. Choosing a product from the catalog
3. Configuring inventory requirements (SIM cards, equipment, etc.)
4. Setting service parameters (auto-renewal, custom fields)
5. Initiating provisioning
6. Monitoring provisioning progress

This workflow is used for all service types: mobile, internet, IPTV, and VoIP.

Accessing Assign Plan

From Product Catalog:

From Customer Page:

From Add-ons Page:

The assign plan interface opens in a modal or dedicated page.

Step-by-Step Workflow

Step 1: Browse Product Catalog

The product catalog displays available products grouped by category and customer type.

View Toggles:

> Categories: • Service Plans • Add-ons

Toggling between Individual and Business filters products to show only those available to the selected customer type.

Product Cards:

Products are displayed in a carousel or grid:

Click **"Assign to Customer"** to proceed.

Step 2: Select Customer

If not already on a customer page, you'll be prompted to select a customer.

Customer Search:

> Search Customers: [John ▼]
>
> Matching customers: • John Smith (ID: 123) • John Doe (ID: 456) • Johnson Enterprises (ID: 789)

Type to search by:

- Customer name
- Customer ID
- Email address
- Phone number

Select the customer from the dropdown.

Warning

Ensure you've selected the correct customer before proceeding. Assigning a plan to the wrong customer requires manual intervention to correct.

Step 3: Configure Inventory (if required)

If the product requires inventory items (defined in `inventory_items_list`), inventory pickers appear.

Inventory Picker Example:

> Required Inventory Items:
>
> SIM Card *
>
> Available SIM Cards: • SIM-00123 - ICCID: 8944...0001 (New) • SIM-00124 - ICCID: 8944...0002 (New) • SIM-00125 - ICCID: 8944...0003 (New)
>
> Mobile Number *
>
> Available Numbers: • +44 7700 900123 (Reserved) • +44 7700 900124 (Available) • +44 7700 900125 (Available)

Inventory Selection Rules:

- Asterisk (*) indicates required field
- Only available inventory items shown (status: "In Stock" or "New")
- Dropdowns dynamically load based on inventory template names
- Once selected, items are temporarily reserved

What Happens:

- Selected inventory items are passed as variables to the provisioning playbook
- During provisioning, items are assigned to the service and customer
- Item status changes from "In Stock" to "Assigned"

Step 4: Configure Auto-Renewal (optional)

For recurring services, you may be prompted to set auto-renewal:

> Would you like to enable auto-renewal for this service?
>
> When enabled, this service will automatically renew at the end of each billing period and charge the customer's default payment method.
>
> [No] [Yes]

Auto-Renewal Behavior:

- **Yes**: Service renews automatically, customer charged monthly
- **No**: Service expires at end of contract period, manual renewal required

Best Practice: Default to "Yes" for consumer services, "No" for one-time services or when customer requests manual control.

Step 5: Review and Confirm

Review screen shows all selections before provisioning:

> Customer: John Smith (ID: 123) Product: Mobile - 20GB Plan
>
> Inventory: • SIM Card: SIM-00123 (ICCID: 8944...0001) • Mobile Number: +44 7700 900123
>
> Pricing: • Setup Fee: £0.00 • Monthly Cost: £15.00
>
> Auto-Renew: Yes
>
> [Cancel] [Confirm & Provision]

Click **"Confirm & Provision"** to initiate the provisioning process.

Step 6: Provisioning Progress

The provisioning modal displays real-time progress:

> ✓ Validating customer account ✓ Assigning SIM Card (ICCID: 8944...0001) ✓ Assigning Mobile Number (+44 7700 900123) ⟳ Configuring OCS account (in progress...) □ Creating service record □ Sending welcome email
>
> Progress: 3 of 6 tasks completed

The modal polls the provisioning API every 0.2 seconds for status updates.

Progress Indicators:

- ☑ Completed successfully

⟳ Currently running

□ Pending (not started)

✗ Failed (if errors occur)

Step 7: Completion

Success:

> Service successfully provisioned for John Smith
>
> Service ID: 789 Service Name: Mobile - +44 7700 900123 Status: Active
>
> [View Service] [Close]

Click **"View Service"** to open the service details page.

Failure:

If provisioning fails:

> Error: Unable to connect to OCS
>
> The service record has been created but provisioning did not complete. Please review the error and retry.
>
> Provision ID: 456
>
> [View Logs] [Retry] [Close]

- **View Logs**: Opens provisioning details with error messages
- **Retry**: Attempts provisioning again

- **Close**: Exits modal (service record remains but not activated)

Special Cases

Adding Add-ons to Existing Service

When assigning an add-on (category: "addon") to a customer who already has a service:

1. **Automatic Service Detection:**
   - System finds customer's existing services
   - Filters by service_type (mobile add-on only shows for mobile services)
   - If customer has multiple matching services, prompts to select which one
2. **No New Service Created:**
   - Add-on provisions against existing service_id
   - Uses existing service's OCS account
   - Inventory (if any) assigned to existing service
3. **Provisioning Playbook:**
   - Different playbook than standalone services
   - Typically adds balance, features, or equipment to existing account

Example:

> Existing Mobile Services: • Mobile - +44 7700 900123 (ID: 789) • Mobile - +44 7700 900456 (ID: 790)
>
> Which service should receive this add-on? [Mobile - +44 7700 900123 ▼]
>
> [Cancel] [Continue]

Provisioning for Business Customers

Business customers may have additional requirements:

- **Site Selection** - Choose which business location receives service

- **Contact Assignment** - Designate billing/technical contacts
- **Custom Fields** - Account numbers, cost centers, PO numbers

Example Business Flow:

> Select Installation Site: [London Office - 123 Main St ▼]
>
> Billing Contact: [Jane Doe - <jane@acme.com> ▼]
>
> Technical Contact: [Bob Smith - <bob@acme.com> ▼]
>
> Purchase Order Number: [PO-2025-001234_____]
>
> [Cancel] [Continue]

Bulk Service Assignment

For assigning the same plan to multiple customers (e.g., mass migrations):

1. Use CSV import (if available)
2. Or assign individually with template settings
3. Inventory must be available in bulk
4. Monitor provisioning queue to avoid overload

Common Workflows

Workflow 1: New Mobile Service

1. Customer walks into store wanting mobile service
2. Staff opens **Products → Plans**
3. Toggles to **Individual** customer type
4. Selects **"Mobile - 20GB Plan"**
5. Clicks **"Assign to Customer"**
6. Searches for customer by phone: "+1234567890"
7. Selects **John Smith** from results
8. Chooses SIM Card from inventory picker

9. Chooses available mobile number
10. Enables **auto-renewal**
11. Confirms and provisions
12. Watches progress until complete
13. Hands SIM to customer with welcome packet

Workflow 2: Adding Internet to Existing Customer

1. Navigate to customer page: **Customers → John Smith**
2. Click **Services** tab
3. Click **"Add Service"** button
4. Browse internet plans
5. Select **"Fiber - 100Mbps"**
6. Select installation site (if business/multiple sites)
7. Choose CPE modem from inventory
8. Set installation date (if required)
9. Provision service
10. Create installation ticket

Workflow 3: Assigning Data Top-Up Add-on

1. Customer calls: "I need more data"
2. Staff searches customer in global search
3. Opens customer services tab
4. Clicks "Add-ons" next to mobile service
5. Selects "5GB Data Boost"
6. Payment authorized
7. Add-on provisions immediately
8. Customer receives instant data boost

Troubleshooting

"No products available"

- **Cause:** Filters exclude all products
- **Fix:**
  - Toggle customer type (Individual vs Business)
  - Check product catalog has enabled products
  - Verify products match customer eligibility

"No inventory available"

- **Cause:** Inventory items out of stock or all assigned
- **Fix:**
  - Add more inventory items to system
  - Check item status (should be "New" or "In Stock")
  - Verify inventory template names match product requirements

"Customer not found"

- **Cause:** Customer doesn't exist or search term incorrect
- **Fix:**
  - Create customer first
  - Try different search terms (ID, email, phone)
  - Check for typos

Provisioning gets stuck

- **Cause:** Playbook error or external system unreachable
- **Fix:**
  - Wait for timeout (typically 5 minutes)
  - Check provisioning logs for specific error
  - Verify OCS, network systems are online
  - Retry provisioning after fixing issue

Provisioning succeeds but service doesn't work

- **Cause:** OCS account created but network not updated
- **Fix:**
  - Check OCS has account
  - Verify SIM activated in HLR/HSS
  - Check network provisioning (RADIUS, DPI, etc.)
  - Review playbook tasks for missed steps

Best Practices

Before Assigning:

- Verify customer has valid payment method on file
- Confirm customer eligibility for product (residential vs business)
- Ensure required inventory is available
- Review product terms and pricing with customer

During Assignment:

- Double-check customer selection before confirming
- Select correct inventory items (check serial numbers)
- Enable auto-renewal for convenience (unless customer objects)
- Monitor provisioning progress until completion

After Assignment:

- Verify service appears in customer's service list
- Check service status is "Active"
- Confirm inventory assigned correctly
- Send welcome email or instructions to customer
- Test service if possible (make test call, check data)

For Add-ons:

- Confirm add-on is compatible with existing service
- Explain billing (one-time vs recurring)
- Verify payment before provisioning

- Check balance updated immediately after add-on provision

Related Documentation

- `csa_add_service` - Overview of services
- `concepts_products_and_services` - Product catalog concepts
- `administration_inventory` - Managing inventory items
- `concepts_provisioning` - Provisioning system details
- `guide_product_lifecycle` - Complete product lifecycle including provisioning

Call Detail Records (CDRs)

Call Detail Records show the individual **calls, SMS messages, and data sessions** for a service. Where Service Usage shows how much balance is *left*, Call Records show the *events* that used it — who was called, when, for how long, and what it cost.

Opening Call Records

Call Records live in the **Service Usage** window, next to the Balance view.

From a service:

1. Click the **Balance** (or **Usage**) button next to the service
2. Select the **Call Records (CDRs)** tab

You can also open it from the **CDRs** button on the Edit Service screen, or — for customers — from **View Call Records** on the Self-Care Portal usage page.

Reading the List

Records are listed with the **most recent first**. Each row shows:

Column	What it shows
Setup Time	When the call, message, or session started
Destination	The number called, the SMS recipient, or the data destination
Category	Whether it was a **Call**, **SMS**, or **Data** event
Usage	Call length (`HH:MM:SS`), data amount (MB/GB), or SMS count
Cost	What the event was charged

Use **Previous** and **Next** at the bottom to move through older records.

Click any row to open the full details for that record, including the answer time and the extra information recorded against it.

Finding Specific Records

Use the filter bar at the top to narrow the list, then click **Apply**:

- **Quick buttons (1h / 24h / 7d / 30d)** — show records from the last hour, day, week, or month.
- **From / To** — choose your own start and end date and time.
- **Destination starts with** — type the first digits of a number to show only matching calls (for example, `44` for UK numbers).
- **Category** — show only **Calls**, **SMS**, or **Data** (or **All**).

Reset clears the filters and shows the most recent records again.

> **Don't see anything?** The view opens on the most recent records, but if you picked a date range, the service may simply have had no activity in that period. Try **Reset**, or widen the **From / To** dates.

Downloading Records

Click **Export CSV** to download the records currently shown (after your filters) as a spreadsheet file. This is handy for sharing with a customer or keeping a record of a billing query.

Who Can See Call Records

- **Staff** need the call-records permission. If you don't see the **Call Records** tab, ask your administrator to enable it for your account.
- **Customers** can see the records for **their own services only** through the Self-Care Portal.

Call Records are **view-only** — they cannot be edited or deleted from here.

Modifying a Service

Services can be modified by the end customer via the `Self-Care Portal <self_care_portal>`, or by an administrator via the admin portal.

Once a service is provisioned, you can modify its parameters, add enhancements, or change settings.

Editing Service Parameters

Basic service parameters can be modified by clicking the **Edit** button on the service details page.

Editable Fields:

- Service Name

- Service Status (Active, Inactive, Suspended)
- Service Notes
- Auto-Renewal settings
- Linked inventory items
- Custom fields

Changes are saved immediately and reflected in the customer's self-care portal.

Adding Service Add-ons

Add-ons enhance existing services with additional features, data allowances, or hardware. Common add-on types include:

- **Data top-ups** - Additional data allowance (e.g., "5GB Data Boost")
- **Feature upgrades** - Extra capabilities (e.g., "International Calling")
- **Hardware rentals** - Equipment additions (e.g., "WiFi 6 Modem")
- **Premium services** - Enhanced features (e.g., "Static IP Address")

Accessing the Add-on Catalog

From a service details page:

1. Navigate to the service you want to enhance
2. Click the **"Add Add-on"** or **"Browse Add-ons"** button
3. The add-on catalog opens, filtered to show only compatible add-ons

Automatic Filtering:

The system automatically filters add-ons based on:

- **Service Type** - Only shows add-ons matching the service type (mobile, internet, voip, etc.)
- **Customer Type** - Filters by residential vs. business customer
- **Service Compatibility** - Checks if service meets add-on requirements
- **Availability** - Only shows enabled products

For example, if viewing a residential mobile service, you'll only see mobile add-ons marked for residential customers.

Add-on Display

Add-ons are displayed in an interactive carousel showing:

Product Card Display:

Information Displayed:

- Product icon
- Product name
- Feature list (bullet points)
- Setup cost
- Monthly/recurring cost
- Terms and conditions link
- "Add to Service" button

Provisioning an Add-on

Step 1: Select Add-on

Click on the desired add-on card, then click **"Add to Service"**

Step 2: Select Inventory (if required)

If the add-on requires physical inventory (e.g., hardware rental), an inventory picker appears:

> Available Modems: • Modem-12345 - TP-Link AX1800 (New) • Modem-12346 - TP-Link AX1800 (New) • Modem-12347 - Netgear RAX40 (New)

Select the specific inventory item to assign to this service.

Step 3: Configure Auto-Renewal (optional)

For recurring add-ons, you may be prompted:

> Would you like to enable auto-renewal for this add-on?
>
> [No] [Yes]

- **Yes** - Add-on renews automatically each billing period
- **No** - One-time purchase, customer must manually renew

Step 4: Confirm and Provision

Review the add-on details and click **"Confirm"**

The provisioning modal appears showing real-time progress:

> ✓ Validating payment ✓ Assigning inventory ⟳ Configuring service (in progress...) □ Creating transaction □ Sending confirmation email

Once complete, the add-on appears in the service's add-on list.

Provisioning Behind the Scenes:

When you add an add-on, the system:

1. Validates customer can purchase add-on
2. Runs add-on's Ansible playbook (`provisioning_play`)
3. Assigns any required inventory items to the service

4. Creates transaction record for billing
5. Updates service configuration (OCS, network systems, etc.)
6. Sends confirmation notification to customer

For technical details on add-on provisioning, see `Complete Product Lifecycle Guide - Adding Addons <guide_product_lifecycle>`.

Viewing Active Add-ons

Active add-ons appear on the service details page in the **"Add-ons"** section:

Example Display:

> 5GB Data Boost
> Added: 10 Jan 2025 Expires: 17 Jan 2025 Status: Active Cost: £5.00
>
> WiFi 6 Modem Rental
> Added: 01 Dec 2024 Inventory: Modem-12345 Auto-Renew: Yes Monthly: £10.00

Removing Add-ons

To remove an add-on from a service:

1. Navigate to the service details page
2. Locate the add-on in the **"Active Add-ons"** section
3. Click the **"Remove"** or **trashcan icon** next to the add-on
4. Confirm the removal

What Happens:

- **Hardware add-ons** - Deprovision playbook runs, inventory marked for return
- **Virtual add-ons** - Benefits removed immediately
- **Auto-renewing add-ons** - Cancels future renewals
- **Transaction created** - Credits any pro-rated amount if applicable

Warning

Removing hardware add-ons (modems, CPE, etc.) typically requires equipment to be returned. The system will mark inventory for return and may send return instructions to the customer.

Common Add-on Scenarios

Scenario 1: Customer Running Out of Data

1. Customer contacts support: "I've used my monthly allowance"
2. Staff navigates to customer's mobile service
3. Clicks "Add Add-on"
4. Selects "5GB Data Boost"
5. Provisions immediately
6. Customer receives instant data top-up

Scenario 2: Business Needs Static IP

1. Business customer requests static IP for VPN
2. Staff opens customer's internet service
3. Browses add-ons, selects "Static IP Address"
4. System provisions IP from available pool (inventory)
5. Configures routing in network equipment
6. Business receives IP configuration details

Scenario 3: Equipment Rental for Fiber Service

1. Customer signs up for fiber internet
2. During provisioning, customer opts for modem rental
3. Staff adds "WiFi 6 Modem" add-on
4. Selects available modem from inventory
5. Modem shipped to customer
6. Recurring £10/month charge added to account

Troubleshooting

"No compatible add-ons available"

- **Cause:** No add-ons match the service type or customer type
- **Fix:** Check product catalog has add-ons with matching `service_type` and `residential`/`business` settings

Add-on provisioning fails

- **Cause:** Provisioning playbook error or inventory unavailable
- **Fix:**
  - Check provisioning logs for specific error
  - Verify inventory items are in stock (if required)
  - Review playbook logs in provisioning system

Inventory picker shows no items

- **Cause:** No available inventory items of required type
- **Fix:**
  - Add inventory items to the system
  - Check existing items aren't all assigned or damaged
  - Verify inventory template name matches `inventory_items_list` exactly

Auto-renewal not working

- **Cause:** Auto-renewal flag not set or payment method expired
- **Fix:**
  - Verify service has `auto_renew: true`
  - Check customer has valid payment method on file
  - Review scheduled jobs in billing system

Related Documentation

- `guide_product_lifecycle` - Complete add-on provisioning flow

- `csa_add_service` - Creating new services
- `concepts_products_and_services` - Product and service concepts
- `administration_inventory` - Inventory management for hardware add-ons

Service Management

The Service Management interface provides comprehensive tools for viewing, filtering, and managing customer services across your organization.

Related documentation: `Adding Services <csa_add_service>`, `Service Usage <csa_service_usage>`, `Modifying Services <csa_modify>`, `Products & Services <concepts_products_and_services>`.

Accessing the Service List

Navigate to:

Or directly:

This displays all services with filtering, sorting, and bulk management capabilities.

Service List Overview

The service list displays services in a table with:

Columns:

- **Service ID** - Unique identifier
- **Service Name** - Descriptive name (e.g., "Mobile - +44 7700 900123")
- **Customer Name** - Associated customer (clickable link)
- **Service Type** - mobile, iptv, internet, voip
- **Status** - Active, Inactive, Suspended
- **Start Date** - When service began
- **End Date** - When service expires/ended
- **Monthly Cost** - Retail price
- **Actions** - View, Edit, Add-ons, Usage, Delete

Filtering Services

Status Tabs

Quick-filter services by status using the tab bar:

- **All Results** - Shows all services regardless of status
- **Active** - Currently active services (default view)
- **Inactive** - Cancelled or expired services
- **Suspended** - Temporarily disabled services (non-payment, fraud, etc.)

Clicking a tab updates the list instantly. The active tab is highlighted.

Service Type Filter

Filter by service type:

Select one or multiple types to show only matching services.

Use Cases:

- **Mobile** - View all mobile SIM services
- **Internet** - Show fiber, DSL, and fixed wireless

- **IPTV** - Display TV subscription services
- **VoIP** - List voice-over-IP services

Customer Filter

Search and filter by customer:

Start typing a customer name to see matching results:

Select a customer to show only their services.

Use Case: Quickly view all services for a specific customer.

Search

Global search across all service fields:

Searches:

- Service name
- Service ID
- Customer name
- Phone numbers (for mobile services)
- Service UUID

Example: Search "0770" to find all services with phone numbers containing "0770".

Sorting Services

Click any column header to sort by that field:

Sortable Columns:

- Service ID (default: newest first)
- Service Name (alphabetical)
- Customer Name (alphabetical)

- Service Type (alphabetical)
- Start Date (chronological)
- End Date (chronological)
- Monthly Cost (numerical)

Sort Direction:

- Click once: Ascending (A-Z, oldest-newest, lowest-highest)
- Click twice: Descending (Z-A, newest-oldest, highest-lowest)
- Active sort column shows ▲ or ▼ indicator

Sort Dropdown:

Top right dropdown provides quick sorting presets:

Viewing Service Details

Click on any service name to open the detailed service view.

Service Detail Tabs:

1. **Overview** - Service summary, status, dates, pricing
2. **Inventory** - Assigned equipment (SIM cards, modems, etc.)
3. **Transactions** - Charges, credits, payments
4. **Usage** - Data/voice/SMS usage statistics
5. **Add-ons** - Active and available add-ons
6. **Activity Log** - Change history

Quick Actions

From the service list, click the action menu (⋮) for quick operations:

- **View** - Opens service details
- **Edit** - Modify service parameters
- **Add-ons** - Browse and add service enhancements
- **Usage** - View current usage and balance

- **Delete** - Cancel/remove service

Bulk Operations

Select multiple services using checkboxes to perform bulk actions.

Selecting Services

Individual Selection:

Click the checkbox next to each service you want to select.

Select All:

Click the checkbox in the table header to select all visible services.

> ☑ Service 1 ☑ Service 2 ☑ Service 3

Selection Counter:

The interface shows how many services are selected:

Bulk Actions

Once services are selected, bulk action buttons appear:

Delete Multiple Services:

1. Select services to delete
2. Click **"Delete Selected"** button
3. Confirm deletion in modal

Warning

Bulk deletion is permanent and will:

- Cancel all selected services
- Mark inventory as unassigned

- Stop all recurring charges
- Create activity log entries

Use Cases:

- Clean up test services
- Cancel services for closed customer accounts
- Remove duplicate or erroneous entries

Best Practice: Use filters to narrow the list before bulk operations to avoid accidental deletions.

Service Status Management

Status Types

Services can have three statuses:

Active

- Service is operational
- Charges apply
- Customer can use service
- Displayed with green badge

Inactive

- Service has been cancelled or expired
- No charges applied
- Customer cannot use service
- Displayed with gray badge
- Inventory marked for return/refurbishment

Suspended

- Service temporarily disabled
- May or may not charge (configurable)

- Customer cannot use service
- Displayed with orange/yellow badge
- Common reasons: Non-payment, fraud investigation, customer request

Changing Service Status

To change a service's status:

1. Open service details
2. Click **"Edit"** button
3. Change **"Service Status"** dropdown
4. Click **"Save"**

What Happens:

- **Active → Inactive:** Triggers deprovisioning playbook (if configured)
- **Active → Suspended:** Disables service in OCS/network but keeps record
- **Suspended → Active:** Re-enables service, resumes billing
- **Inactive → Active:** May trigger re-provisioning (use caution)

Service Usage View

Click **"Usage"** in the actions menu to open the usage modal.

Information Shown:

- **Balance** - Remaining credit or prepaid value
- **Data Usage** - Used vs. allocated (progress bar)
- **Voice Usage** - Minutes used vs. plan allowance
- **SMS Usage** - Messages sent vs. allowance
- **Expiry Date** - When current balance/plan expires

Actions:

- **Top Up** - Add credit or data (for prepaid services)
- **View Details** - See detailed usage breakdown
- **Export** - Download usage report (if available)

Upcoming Auto-Renews

The Upcoming Auto-Renews view provides a centralized interface for monitoring and managing all scheduled service renewals across your organization.

Accessing Auto-Renews

Navigate to:

Or directly:

This displays all services with scheduled auto-renewal, sorted by next renewal date.

Auto-Renews Overview

The auto-renews list displays scheduled renewals in a table with:

Columns:

- **Customer** - Customer name (clickable link to customer overview)
- **Service** - Service name (clickable link to customer overview)

- **Product** - Product/plan name being renewed
- **Cost** - Renewal cost (from product retail price)
- **Renews On** - Date and time of next renewal with human-readable format
- **Status** - Service status (Active, Suspended, etc.)
- **Actions** - Renew now or remove auto-renewal

Example Display:

How Auto-Renewal Works

Auto-renewal is scheduled in CGRateS (the billing system) when a service is created or modified. The system:

1. **Schedules Action** - Creates an ActionPlan in CGRateS with the renewal date
2. **Monitors Balance** - Checks if customer has sufficient balance before renewal
3. **Executes Renewal** - On the scheduled date, automatically renews the service
4. **Updates Records** - Creates transactions, updates service dates, and logs activity

Data Source:

The Upcoming Auto-Renews view queries CGRateS directly using the `ApierV1.GetScheduledActions` API and enriches the data with customer and service information from the CRM database.

Renew Now

To manually trigger a renewal before the scheduled date:

1. Click the **(Renew Now)** button for the service
2. Review the renewal details in the confirmation modal:

> Customer: Acme Corp Service: FixedWireless_75628fa5 Product: Home Internet Mega Cost: $89.99
>
> Next scheduled renewal: Nov 11, 2025 10:45 AM
>
> [Cancel] [Confirm Renewal]

3. Click **"Confirm Renewal"** to process immediately
4. A provisioning job is created and executed
5. Monitor progress in the provisioning status modal

What Happens:

- Service is topped up with the product allowances
- Balance is updated in CGRateS
- Transaction record is created
- Service end date is extended
- Activity log entry is created

Use Cases:

- Customer requests early renewal
- Resolve service issues by resetting allowances
- Testing renewal processes
- Customer wants to use service before scheduled renewal

Remove Auto-Renewal

To cancel automatic renewal for a service:

1. Click the **(Remove Auto-Renew)** button for the service
2. Confirm deletion in the modal:

> This will remove the scheduled auto-renewal for:
>
> Customer: Acme Corp Service: FixedWireless_75628fa5 Next Renewal: Nov 11, 2025 10:45 AM
>
> The service will not automatically renew. You will need to manually renew or the service will expire on the end date.
>
> [Cancel] [Remove Auto-Renewal]

3. Click **"Remove Auto-Renewal"** to confirm
4. The ActionPlan is removed from CGRateS
5. Service will expire naturally unless manually renewed

What Happens:

- ActionPlan is deleted from CGRateS
- Service status remains unchanged
- Service will expire on its current end date
- Customer must manually renew or the service will stop

Use Cases:

- Customer is cancelling service
- Switching to manual renewal process
- Service plan is changing
- Customer requested to stop automatic charges

Warning

Removing auto-renewal means the service will expire unless manually renewed. Customers will not receive automatic service continuation.

Understanding the Display

Customer Column:

- Shows customer name as a clickable link
- Links to customer overview page
- Shows "N/A" if service is not linked to a customer (orphaned service)

Service Column:

- Shows service name/UUID
- Links to customer overview page
- Shows service UUID if name is not set
- Shows "N/A" if service cannot be found in database

Product Column:

- Product name from CGRateS ActionPlan
- Extracted from the scheduled action metadata
- Always shows product name even if service is not found

Cost Column:

- Retail cost from the Product table in CRM
- Amount that will be charged on renewal
- Shows "N/A" if product is not found in database

Renews On Column:

- Exact date and time of next renewal
- Human-readable relative time (e.g., "3 hours from now", "2 days from now")
- Time zone aware (uses CGRateS server timezone)

Status Column:

- Current service status from CRM database
- **Active** (Green) - Service is operational

- **Suspended** (Orange) - Service is temporarily disabled
- **Unknown** (Gray) - Service not found in database or status not set

Troubleshooting

Services showing "N/A" for Customer/Service

- **Cause:** Service UUID in CGRateS doesn't match service_uuid in CRM database
- **Fix:**
  - Verify service exists in database
  - Check that service_uuid format matches: `ServiceType_UUID` (e.g., `FixedWireless_75628fa5`)
  - Service may have been deleted from CRM but still scheduled in CGRateS

Cost showing "N/A"

- **Cause:** Product ID in CGRateS doesn't exist in CRM Product table
- **Fix:**
  - Verify product exists in database
  - Check product_id in the ActionPlan matches a product in CRM
  - Product may have been deleted

"Renews On" not showing date

- **Cause:** NextRunTime not present in CGRateS response
- **Fix:**
  - Check CGRateS ActionPlan configuration
  - Verify ActionTiming is correctly configured
  - Check CGRateS logs for errors

"Renew Now" fails

- **Cause:** Various provisioning errors
- **Troubleshooting:**
  - Check provisioning status modal for error details

- Verify Ansible playbooks are configured correctly
- Check OCS connectivity
- Review provisioning logs

Auto-renewal removed but still showing

- **Cause:** Cache delay or CGRateS sync issue
- **Fix:**
  - Click **"Refresh"** button to reload data
  - Verify ActionPlan was actually removed in CGRateS
  - Check CGRateS API connectivity

Pagination

Services are displayed in pages for performance:

> ◄ Previous 1 [2] 3 4 5 Next ►
>
> Items per page: [10 ▼]
>
> - 10
> - 25
> - 50
> - 100

Controls:

- **Previous/Next** - Navigate pages
- **Page Numbers** - Jump to specific page
- **Items per Page** - Adjust how many services show per page

Performance Tip: Use filters to reduce total results rather than increasing items per page.

Service Badges and Indicators

Visual indicators help identify service states quickly:

Status Badges:

Auto-Renewal Indicator:

Services with auto-renewal enabled show:

Expiring Soon:

Services expiring within 7 days show:

Overdue:

Services with outstanding balance show:

CGRateS Integration (Advanced)

For services integrated with CGRateS (the billing and rating engine), administrators can manage advanced configurations directly from the service view. This includes attributes, filters, and viewing active sessions.

Note

CGRateS integration features require the **cgrates_api_access** permission. Only administrators have access to these features by default. See `rbac` for permission configuration.

Automatic Provisioning vs. Manual Management

In normal operation, CGRateS attributes and filters are automatically provisioned by Ansible during the initial service provisioning workflow. When a new service is created, the provisioning playbooks:

- Create the service account in CGRateS
- Configure attributes (IMSI, MSISDN, account identifiers, speed profiles, etc.)
- Set up filters to ensure correct rating

- Apply the appropriate rating plans

However, there are cases where you may need to modify these configurations after the service has been provisioned:

- **Speed Profile Changes** - Customer upgrades/downgrades bandwidth (MaxBitrateDL/UL)
- **Policy Adjustments** - Change QoS policies or traffic shaping rules (PcefPolicyName)
- **Phone Number Changes** - Update MSISDN or other identifiers
- **Troubleshooting** - Fix misconfigurations or test different settings
- **Special Configurations** - Apply custom attributes not part of standard provisioning

The manual management interface allows administrators to make these changes directly without re-running the entire provisioning workflow. This is particularly useful for:

- **Quick Changes** - Modify a single attribute without waiting for provisioning
- **Testing** - Experiment with different configurations
- **Customer Support** - Resolve issues on the fly during support calls
- **Custom Configurations** - Apply service-specific settings not covered by templates

Warning

Manual changes to CGRateS configuration bypass the standard provisioning workflow. Ensure you understand the impact of your changes, as incorrect configurations can affect billing and service functionality. All changes are logged to the customer activity feed for audit purposes.

Accessing CGRateS Features

When viewing or editing a service that's provisioned in CGRateS, three collapsible sections appear at the bottom of the service form:

- **CGRateS Attributes** - Configure service-specific attributes
- **CGRateS Filters** - Define filtering rules for the service

- **Active Sessions** - View real-time active sessions

Each section is collapsed by default to keep the interface clean. Click the section header to expand and view/edit the configuration.

The collapsed sections show count badges indicating how many attributes, filters, or active sessions exist for the service.

CGRateS Attributes

Attributes allow you to define custom fields and transformations that are applied to rating events for this specific service.

Attribute ID Format: `ATTR_ACCOUNT_{service_uuid}`

Example: For service with UUID `Mobile_SIM_c2880638`, the attribute profile ID is `ATTR_ACCOUNT_Mobile_SIM_c2880638`

Managing Attributes:

1. Open service edit view
2. Expand **"CGRateS Attributes"** section
3. Click **"Edit Attributes"** button
4. Add/modify/remove attributes as needed
5. Click **"Save Attributes"**

Attribute Fields:

- **Path** - The field to modify (e.g., `*req.Account`, `*req.IMSI`)
- **Type** - How the value is set:

    - `*constant` - Sets a fixed value
    - `*variable` - Captures value from event fields using RSRParser
    - `*composed` - Appends value instead of overwriting
    - `*usage_difference` - Calculates duration between two fields
    - `*sum` - Sums multiple values
    - `*value_exponent` - Computes exponent of a field
- **Rules** - The value(s) to apply (can have multiple rules per attribute)

Example Attribute Configuration:

```
{
  "Path": "*req.Account",
  "Type": "*constant",
  "Value": [{"Rules": "Mobile_SIM_474a380a"}]
}
```

Common Use Cases:

- Set account identifier for rating
- Map IMSI/MSISDN to service
- Configure bandwidth limits (MaxBitrateDL/UL)
- Set policy names (PcefPolicyName)
- Transform or enrich rating events

Activity Logging:

All attribute modifications are logged to the customer's activity feed with full details of the changes made.

CGRateS Filters

Filters define matching rules that determine when this service's configuration should be applied during rating.

Filter ID Format: `FLTR_ACCOUNT_{service_uuid}`

Example: For service with UUID `Mobile_SIM_c2880638`, the filter ID is `FLTR_ACCOUNT_Mobile_SIM_c2880638`

Managing Filters:

1. Open service edit view
2. Expand **"CGRateS Filters"** section
3. Click **"Edit Filters"** button
4. Add/modify/remove filter rules
5. Click **"Save Filters"**

Filter Rule Fields:

- **Element** - The field to match against (e.g., `~*req.Account`, `~*req.Destination`)
- **Type** - Match type:
  - `*string` - Exact string match
  - `*prefix` - Starts with specified value
  - `*suffix` - Ends with specified value
  - `*empty` - Field is empty
  - `*exists` - Field exists
  - `*notexists` - Field does not exist
  - `*timings` - Match time/date patterns
  - `*destinations` - Match destination patterns
  - `*rsr` - RSR field matching
  - `*gt` / `*gte` / `*lt` / `*lte` - Numeric comparisons
- **Values** - The value(s) to match (can have multiple values per rule)

Example Filter Configuration:

```
{
  "Element": "~*req.Account",
  "Type": "*string",
  "Values": ["Mobile_SIM_474a380a"]
}
```

Common Use Cases:

- Ensure attributes only apply to specific account
- Filter by destination (national vs. international)
- Time-based filtering (peak vs. off-peak)
- Filter by service type or category

Activity Logging:

All filter modifications are logged to the customer's activity feed.

Active Sessions

View real-time active sessions for this service. This shows ongoing calls, data sessions, or other billable events currently in progress.

Viewing Active Sessions:

1. Open service edit view
2. Expand **"Active Sessions"** section
3. View list of active sessions
4. Click **"View Details"** on any session to see full session data
5. Click **"Refresh"** to reload session list

Session Information Displayed:

- **Setup Time** - When the session started
- **Usage** - Current session duration (in seconds)
- **Destination** - Called number or destination

Session Details Modal:

Clicking "View Details" opens a modal showing:

- **Basic Information:**
  - CGRID (session ID)
  - Account (service UUID)
  - Setup time
  - Current usage/duration
  - Destination
  - Category
- **Complete Session Data:**
  - Full JSON representation of the session
  - All CGRateS session fields
  - Real-time session state
  - Scrollable JSON viewer for inspection

Use Cases:

- Monitor active calls or data sessions
- Troubleshoot billing issues

- Verify session is being rated correctly
- Check session attributes and values
- Audit active service usage

Refresh Rate:

Sessions are fetched on-demand when you expand the section. Click "Refresh" to get the latest session data.

Note

Only sessions matching this service's account (service UUID) are displayed. The filter `*string:~*req.Account:{service_uuid}` is automatically applied.

CGRateS API Proxy

All CGRateS operations (attributes, filters, sessions) use the OmniCRM API proxy endpoint:

Endpoint: `POST /crm/ocs/proxy`

Required Fields:

- `method` - CGRateS API method (e.g., `APIerSv1.GetAttributeProfile`)
- `params` - Array of parameters for the method
- `customer_id` - Customer ID (for activity logging)
- `service_id` - Service ID (for activity logging)

Optional Fields:

- `tenant` - CGRateS tenant (defaults to config value)

Example Request:

```
{
  "method": "APIerSv1.GetAttributeProfile",
  "params": [{"ID": "ATTR_ACCOUNT_Mobile_SIM_c2880638"}],
  "customer_id": 123,
  "service_id": 456
}
```

Tenant Configuration:

The tenant is automatically set from the OmniCRM configuration file (`crm_config.yaml`) under `ocs.ocsTenant`. This ensures all CGRateS operations use the correct tenant without hardcoding values in the frontend.

Permission Requirement:

The `cgrates_api_access` permission is required. This permission is granted to the `admin` role by default.

Activity Logging:

All non-GET CGRateS API operations are automatically logged to the customer's activity feed, including:

- API method called
- Tenant used
- Full parameters sent
- Service ID the operation was performed on
- User who performed the operation
- Timestamp

This creates a complete audit trail of all CGRateS configuration changes.

Troubleshooting CGRateS Integration

"Permission Denied" when accessing CGRateS features

- **Cause:** User lacks `cgrates_api_access` permission
- **Fix:** Grant permission to user's role (typically admin-only feature)

Attributes or Filters not loading

- **Cause:** CGRateS connectivity issue or profile doesn't exist
- **Fix:**
  - Check CGRateS server connectivity in config
  - Verify tenant configuration is correct
  - Check browser console for API errors
  - Profile may not exist yet (will show empty form)

Changes not saving

- **Cause:** Validation error or CGRateS API error
- **Fix:**
  - Check for required fields (Path, Type, Element)
  - Verify JSON format is correct
  - Check activity log for error details
  - Review CGRateS logs

No active sessions showing

- **Cause:** No sessions currently active for this service
- **Fix:**
  - This is normal if service is not in use
  - Try refreshing after initiating a session (call, data, etc.)
  - Verify service UUID matches the account in CGRateS

Session details not updating in real-time

- **Cause:** Session data is fetched on-demand, not live
- **Fix:** Click "Refresh" button to get latest session data

Activity log not showing CGRateS changes

- **Cause:** Only non-GET operations are logged (reads are not logged)
- **Fix:** This is by design - only writes/modifications create activity entries

Common Workflows

Workflow 1: Find Customer's Services

1. Click **Service Type filter** (optional)
2. Click **Customer filter**
3. Type customer name
4. Select customer from dropdown
5. Review customer's services

Workflow 2: Identify Expiring Services

1. Click **"Active"** tab
2. Sort by **"End Date"** (ascending)
3. Services expiring soonest appear first
4. Contact customers for renewal

Workflow 3: Clean Up Test Services

1. Search for "test" in search box
2. Review results to confirm they're test data
3. Select all test services
4. Click **"Delete Selected"**
5. Confirm deletion

Workflow 4: Suspend Non-Paying Customer

1. Navigate to customer account
2. View services tab
3. Select all active services
4. Change status to "Suspended"
5. Save changes

Workflow 5: View Mobile Service Usage

1. Filter by **Service Type: Mobile**
2. Click service name to open details
3. Click **"Usage"** tab
4. Review data/voice/SMS consumption
5. Identify heavy users or overages

Troubleshooting

Services not appearing in list

- **Cause:** Status filter hiding results
- **Fix:** Click "All Results" tab to show all statuses

Cannot find service by search

- **Cause:** Search term doesn't match stored data
- **Fix:**
  - Try partial search (e.g., "0770" instead of full number)
  - Use customer filter instead
  - Check for typos

Bulk delete button disabled

- **Cause:** No services selected
- **Fix:** Check boxes next to services you want to delete

Sort not working

- **Cause:** Column not sortable
- **Fix:** Only columns with ▲▼ icons are sortable

Page loads slowly

- **Cause:** Too many services to display
- **Fix:**

    - Apply filters to reduce result set
    - Reduce items per page
    - Use search to narrow results

Related Documentation

- `csa_add_service` - Adding new services
- `csa_modify` - Modifying services and adding add-ons
- `concepts_products_and_services` - Product and service concepts
- `basics_customers` - Customer management

Service Usage and Balance Tracking

The Service Usage system provides **real-time monitoring** of customer consumption for data, voice, SMS, and monetary balances. This feature integrates with the OCS (Online Charging System) to display current usage, remaining allowances, and balance expiry information to both customers (via `Self-Care Portal <self_care_portal>`) and staff.

Overview

Usage tracking enables:

- **Real-time Balance Display** - View current usage and remaining allowances
- **Multiple Balance Types** - Track data, voice, SMS, and monetary balances simultaneously
- **Expiry Monitoring** - See when balances expire
- **Balance Breakdown** - Detailed view of individual balance buckets
- **Auto-Refresh** - Usage updates every 3 seconds automatically

Accessing Service Usage

From Service List:

1. Navigate to **Services → Service List**
2. Click the **actions menu (⋮)** next to a service
3. Select **"Usage"**

From Service Details:

1. Open a service's detail page
2. Click the **"Usage"** tab

From Customer Page:

1. Open customer overview
2. Navigate to **Services** tab
3. Click **"View Usage"** next to any service

The usage modal or page opens showing real-time consumption data. To inspect the individual calls, SMS, and data sessions behind these balances, switch to the **Call Records (CDRs)** tab — see Call Detail Records.

Usage Display

The usage interface shows summary cards and detailed progress bars for each balance type.

Summary Cards

Top row displays quick-view cards for each balance type:

Card Information:

- **Balance Type** - Icon and label (Data, Voice, SMS, Monetary)
- **Remaining Amount** - Current balance in appropriate units
- **Expiry Time** - Days/hours until balance expires
- **More Info Button** - Click to expand detailed breakdown

Progress Bars

Below the cards, progress bars show consumption visually with filled portions indicating remaining balance.

Progress Bar Features:

- **Visual Indicator** - Filled portion shows remaining balance
- **Percentage** - Numeric percentage of balance remaining
- **Absolute Values** - Shows used vs. total (e.g., "12.5GB / 20GB")
- **Color Coding**:
  - Green: >50% remaining
  - Yellow: 20-50% remaining
  - Red: <20% remaining

- **Clickable** - Click to expand detailed breakdown

Balance Types

Data Balance

Tracks internet data consumption.

Units: Gigabytes (GB) or Megabytes (MB)

Display Format:

> Progress: 12.5GB / 20GB (62%)

Common Scenarios:

- **Mobile data plans** - 5GB, 10GB, 20GB monthly allowances
- **Fixed wireless** - Unlimited or capped at high amounts (500GB, 1TB)
- **Top-ups** - Additional data purchased mid-cycle
- **Dongle services** - Prepaid data for hotspot devices

Multiple Buckets:

Services often have multiple data balances:

- Monthly allowance (expires monthly)
- Bonus data (expires after campaign period)
- Top-up data (shorter expiry, consumed first)

Voice Balance

Tracks phone call minutes.

Units: Minutes (min)

Display Format:

> Progress: 125 min / 500 min (25%)

Call Duration Tracking:

- Incoming calls (if charged)
- Outgoing calls
- International calls (separate bucket if applicable)
- Premium numbers

Calculation:

Voice usage is calculated by call duration in nanoseconds internally, converted to minutes for display.

SMS Balance

Tracks text message usage.

Units: Messages (msgs)

Display Format:

> Progress: 45 / 250 (18%)

Message Types:

- Standard SMS (160 characters)
- Long SMS (multiple segments)
- MMS (if separately tracked)

Monetary Balance

Tracks prepaid credit or account balance.

Units: Currency (£, $, €, etc.)

Display Format:

> Progress: £15.50 / £20.00 (77%)

Usage:

- Prepaid accounts use monetary balance to pay for usage
- Credit decrements as customer uses services
- Can be topped up via payment or voucher
- May expire if not used within validity period

Detailed Balance Breakdown

Click **"More Info"** on any card or click a progress bar to expand the detailed breakdown.

Expanded View:

> □ Monthly Allowance 20GB
> Remaining: 12.5 GB Used: 7.5 GB Expires: 25 Jan 2025 (15 days) Weight: 10
>
> □ Bonus Data 5GB
> Remaining: 5.0 GB Used: 0 GB Expires: 31 Jan 2025 (21 days) Weight: 20
>
> □ Top-Up Data 3GB
> Remaining: 0 GB Used: 3.0 GB Expires: 18 Jan 2025 (EXPIRED) Weight: 30
>
> Total Remaining: 17.5 GB

Balance Bucket Fields:

- **ID/Name** - Identifier for the balance bucket
- **Remaining** - Amount left in this specific bucket
- **Used** - Amount consumed from this bucket
- **Expiry Date** - When this balance expires
- **Weight** - Priority order (higher weight consumed first)

Weight System

Balances have a **weight** value that determines consumption order:

- **Higher weight = consumed first**

- **Lower weight = consumed last**

Example Weights:

- Top-up data: Weight 30 (consumed first, shorter expiry)
- Bonus data: Weight 20 (consumed second)
- Monthly allowance: Weight 10 (consumed last, longest expiry)

This ensures that expiring balances are used before longer-lasting ones.

For complete details on balance consumption rules, weight strategies, and how CGRateS prioritizes balances, see CGRateS Actions and Topup Behaviors.

Real-Time Updates

Usage data refreshes automatically every **3 seconds** via polling.

What Updates:

- Current balance amounts
- Usage progress bars
- Expiry timers
- Individual bucket details

User Experience:

- No page reload required
- Smooth updates without flicker
- Loading overlay during refresh
- Status badge shows current service state

Use Cases:

- Monitor customer usage during call
- Watch balance decrement in real-time as customer uses service
- Verify top-up immediately after purchase

Usage in Different Service Types

Mobile Services

Display all four balance types:

- Data (GB)
- Voice (minutes)
- SMS (messages)
- Monetary (currency)

Example:

> DATA: 12.5GB remaining VOICE: 125 min remaining SMS: 45 msgs remaining MONETARY: £15.50 remaining

Fixed Wireless / Internet

Typically shows only:

- Data (GB or TB)
- Monetary (if prepaid)

Example:

> DATA: 450GB / 500GB remaining MONETARY: £45.00 (prepaid credit)

Hotspot / Dongle Services

Shows dongle-specific data tracking:

- Data (consumed vs. prepaid)
- Monetary (prepaid balance)

Display Mode:

When `dongle=true`, the component hides voice and SMS, showing only relevant data and monetary balances.

Troubleshooting

Usage showing as 0 / 0

- **Cause:** Service not integrated with OCS or CGRateS
- **Fix:**
  - Verify service is provisioned in OCS
  - Check OCS API connectivity
  - Review service UUID mapping

Usage not updating

- **Cause:** Polling stopped or OCS unreachable
- **Fix:**
  - Refresh the page
  - Check browser console for errors
  - Verify OCS API is online

Balances show incorrect amounts

- **Cause:** OCS data mismatch or caching issue
- **Fix:**
  - Force OCS balance refresh
  - Check for pending transactions
  - Verify OCS configuration

Expiry dates missing

- **Cause:** Balance has no expiry set
- **Fix:**
  - Some balances are set to never expire (unlimited validity)
  - Check balance configuration in OCS

Multiple balances confusing

- **Cause:** Multiple top-ups or bonus data added
- **Fix:**

- Use detailed breakdown view to see all buckets
- Sort by weight to see consumption order
- Review individual expiry dates

Integration with OCS/CGRateS

Usage data comes from the **OCS (Online Charging System)**, typically CGRateS. For comprehensive information on how balances work, including balance types, consumption rules, rollover behavior, and Action configurations, see CGRateS Actions and Topup Behaviors.

Data Flow:

1. User opens usage view
2. OmniCRM calls `GET /crm/service/{service_id}`
3. API queries OCS via service UUID
4. OCS returns balance map:

```
{
  "BalanceMap": {
    "*data": [
      {
        "ID": "monthly_data_20GB",
        "Value": 13421772800,
        "ExpiryTime": "2025-01-25T23:59:59Z",
        "Weight": 10
      }
    ],
    "*voice": [
      {
        "ID": "monthly_voice_500min",
        "Value": 7500000000000,
        "ExpiryTime": "2025-01-25T23:59:59Z",
        "Weight": 10
      }
    ],
    "*sms": [
      {
        "ID": "monthly_sms_250",
        "Value": 250,
        "ExpiryTime": "2025-01-25T23:59:59Z",
        "Weight": 10
      }
    ],
    "*monetary": [
      {
        "ID": "prepaid_credit",
        "Value": 1550,
        "ExpiryTime": "2025-02-25T23:59:59Z",
        "Weight": 10
      }
    ]
  }
}
```


5. UI converts values to display units (bytes → GB, nanoseconds → minutes)
6. Progress bars and cards rendered
7. Polling continues every 3 seconds

OCS Balance Types Mapping:

The OCS returns balance data with type prefixes that map to UI display:

- `*data` → **DATA** card (internet usage)
- `*voice` → **VOICE** card (call minutes)
- `*sms` → **SMS** card (text messages)
- `*monetary` → **MONETARY** card (prepaid credit)

Each balance type can have multiple buckets (e.g., monthly allowance + bonus data + top-up data), all displayed in the detailed breakdown view.

Balance Value Conversions:

- **Data:** Bytes → GB (divide by 1024^3)
- **Voice:** Nanoseconds → Minutes (divide by 60×10^9)
- **SMS:** Count (no conversion)
- **Monetary:** Cents → Currency (divide by 100)

Auto-Renew and ActionPlans

Services with auto-renew enabled have **ActionPlans** scheduled in the OCS. For detailed information on how Actions work, balance manipulation, and configuring ActionPlans, see CGRateS Actions and Topup Behaviors.

What are ActionPlans?

ActionPlans are scheduled tasks in CGRateS that automatically execute at specific times to:

- Add balance to an account (auto top-up)
- Renew monthly allowances
- Apply recurring charges
- Expire old balances

How Auto-Renew Works:

1. **Service Provisioning:**
    - When service created with `auto_renew = true`

- Provisioning playbook creates ActionPlan in OCS
- ActionPlan configured to run monthly (or per billing cycle)

2. **ActionPlan Configuration:**

   ActionPlan contains:

   - **Account ID** - Service UUID
   - **Actions** - What to do (add data, voice, SMS, monetary balance)
   - **Schedule** - When to execute (e.g., monthly on 1st at 00:00 UTC)
   - **Amount** - How much balance to add

3. **Automatic Execution:**

   - OCS executes ActionPlan at scheduled time
   - Adds balance to account (e.g., 20GB data, 500 minutes voice)
   - Sets expiry date for new balance (e.g., 30 days)
   - Customer charged via payment method on file

4. **Viewing ActionPlans:**

   - Navigate to service details in OCS view
   - ActionPlans listed with next execution time
   - Shows: Plan name, next run date, action details

Example ActionPlan:


```
{
  "ActionPlanId":
"ProductID_MonthlyPlan__ProductName_20GB_Mobile__ActionPlan_Monthly_F
  "NextExecTime": "2025-02-01T00:00:00+00:00",
  "ActionName_hr": "Monthly Renew",
  "PlanName": "20GB Mobile",
  "ActionFrequency_hr": "Every MonthlyPlan",
  "custom_NextExecTime_hr": "in 22 days"
}
```


Managing Auto-Renew:

- **Enable** - Set during service creation or modification
- **Disable** - Remove ActionPlan from OCS (service keeps existing balance but won't auto-renew)
- **Modify** - Change renewal amount or frequency via service modification

Manual Renewal:

If auto-renew disabled, customer must manually:

- Top-up before balance expires
- Or service suspends when balance depletes

Viewing in UI:

Services tab shows auto-renew status:

> Next Renewal: 1 Feb 2025 (in 22 days) Renewal Amount: £15.00

Best Practices

For Support Staff:

- Check usage before answering "Why is my service slow?" calls
- Verify balance after top-ups to confirm success
- Use detailed breakdown to identify expired buckets
- Monitor high-usage customers to prevent overages

For Customers (Self-Care):

- Check usage regularly to avoid running out
- Top up before balance expires
- Understand weight system to know which balance is consumed first
- Contact support if usage seems incorrect

For Administrators:

- Configure appropriate balance expiries

- Set weight values to prioritize expiring balances
- Monitor OCS connectivity for accurate reporting
- Review balance configurations match product offerings

Related Documentation

- CGRateS Actions and Topup Behaviors - Complete guide to balance types, consumption rules, weights, rollover behavior, and Action configurations
- CGRateS Destinations - Destination configuration for geographic and PLMN-based balance restrictions
- `features_topup_recharge` - Top-up system for adding balance
- `csa_service_management` - Managing services
- `csa_modify` - Adding add-ons to increase allowances
- `concepts_products_and_services` - Product configuration

Customer Care

User Impersonation for Support and Troubleshooting

Impersonation allows authorized staff to temporarily log in as another user to troubleshoot issues, verify configurations, or see exactly what the user experiences. This feature is essential for customer support but requires appropriate permissions and is fully audited.

When impersonating a customer, staff access the `Self-Care Portal <self_care_portal>` exactly as the customer sees it, allowing for accurate troubleshooting and support.

See also: `RBAC <rbac>` for permission configuration, `Customers <basics_customers>` for customer management, `Self-Care Portal <self_care_portal>` for customer portal features.

Purpose

User impersonation provides:

1. **Troubleshooting** — See exactly what the customer sees to diagnose issues
2. **Verification** — Confirm service configurations and permissions work correctly
3. **Training** — Demonstrate features from the customer's perspective
4. **Support** — Help customers navigate the system without requiring screen sharing
5. **Audit Trail** — All impersonation sessions are logged for security and compliance

Required Permissions

To impersonate users, you must have one of the following permissions:

- `can_impersonate` — Dedicated impersonation permission for support staff
- `admin` — Full administrative access (includes impersonation rights)

Users without these permissions cannot access the impersonation feature.

How to Impersonate a User

Via Web UI:

1. **Navigate to Customer** — Find the customer in the CRM
2. **Select Contacts** — View the customer's contact list
3. **Click "Login as User"** — Button appears next to each contact that has a user account
4. **Confirm Impersonation** — System may prompt for confirmation
5. **Session Starts** — You are now logged in as that user

Via API:

Start impersonation session:

Endpoint: `POST /auth/impersonate`

Required Permission: `can_impersonate` or `admin`

Request:

```
{
  "user_id": 42
}
```

Response:

```
{
  "success": true,
  "impersonating_user_id": 1,
  "target_user_id": 42,
  "impersonation_start": "2025-01-04T15:30:00Z",
  "access_token": "new_token_for_impersonated_user",
  "refresh_token": "new_refresh_token"
}
```

The returned tokens are for the impersonated user's session.

What Happens During Impersonation

When you impersonate a user:

- **Full Context** — You see the system exactly as the target user sees it:
  - Their dashboard and navigation
  - Their customer data (if customer user)
  - Their permissions and access controls
  - Their services, invoices, and usage
- **Session Tracking** — The system tracks both identities:
  - `impersonating_user_id` — Your real user ID
  - `target_user_id` — The user you're impersonating

    - `impersonation_start` — When impersonation began
- **Indicator** — The UI displays a banner showing you are impersonating someone:
    - "You are currently logged in as [Username]"
    - "Click here to stop impersonation"
- **Audit Logging** — All actions are logged with both user IDs:
    - Actions appear as performed by the target user
    - Audit logs record who was actually performing them (impersonating user)
    - Complete audit trail maintained in `ImpersonationLog` table

Stopping Impersonation

Via Web UI:

1. **Click Banner** — Click the impersonation banner at the top of the page
2. **Or Navigate** — Go to user menu and select "Stop Impersonation"
3. **Confirmation** — Session ends and you return to your own account

Via API:

Endpoint: `POST /auth/stop_impersonation`

Request: No body required (authenticated request)

Response:

```
{
  "success": true,
  "impersonation_end": "2025-01-04T15:45:00Z",
  "duration_seconds": 900,
  "access_token": "your_original_token",
  "refresh_token": "your_original_refresh_token"
}
```

Your original session is restored.

Impersonation Audit Logging

All impersonation sessions are logged in the `ImpersonationLog` table with:

- **impersonating_user_id** — Staff member who performed impersonation
- **target_user_id** — Customer or user who was impersonated
- **impersonation_start** — Start timestamp
- **impersonation_end** — End timestamp (when session was stopped)
- **impersonation_duration** — Duration in seconds

This provides complete accountability for all impersonation sessions and allows:

- **Security audits** — Review who impersonated whom and when
- **Compliance reporting** — Demonstrate proper use of elevated access
- **Investigation** — Track actions during impersonation sessions
- **Monitoring** — Identify unusual impersonation patterns

Viewing Impersonation Logs:

Administrators can query impersonation logs via API:

`GET /auth/impersonation_logs?user_id={user_id}&start_date={date}&end_date={date}`

Filter by:

- Impersonating user (who performed the impersonation)
- Target user (who was impersonated)
- Date range
- Duration

Best Practices

1. **Minimize Duration** — Impersonate only as long as needed to resolve the issue

2. **Document Purpose** — Note why impersonation was needed in customer activity log
3. **Inform Customers** — Let customers know you may need to view their account (privacy policy)
4. **Verify Identity** — Confirm user identity before impersonating via their account
5. **Review Logs** — Regularly audit impersonation logs for unusual patterns
6. **Limit Permissions** — Only grant `can_impersonate` to support staff who need it
7. **Training** — Ensure staff understand the responsibility and audit implications

Security Considerations

- **Full Access** — Impersonation grants complete access to the target user's account
- **No Password Required** — Impersonation bypasses authentication (permission-based only)
- **Logged Actions** — All actions during impersonation are attributed to target user in application logs (but audit logs show real actor)
- **Session Isolation** — Impersonation creates a new session; doesn't affect target user's active sessions
- **Time Limits** — Impersonation sessions should be time-limited (configurable)
- **MFA Bypass** — Impersonation bypasses 2FA requirements (uses impersonator's authentication)

Restrictions

- **Cannot Impersonate Admins** — Depending on configuration, may not be able to impersonate other administrators
- **Same Permissions** — You get target user's permissions, not union of both users' permissions

- **Session Limits** — Only one impersonation session per staff member at a time
- **Audit Requirements** — Cannot disable or hide impersonation logging

Troubleshooting Common Issues

Issue: "Login as User" button doesn't appear

- Solution: Verify you have `can_impersonate` or `admin` permission
- Solution: Confirm the contact has a linked user account

Issue: Impersonation fails with permission error

- Solution: Check if target user is an administrator (may be restricted)
- Solution: Verify your impersonation permission is active

Issue: Cannot stop impersonation

- Solution: Use API endpoint to stop impersonation: `POST /auth/stop_impersonation`
- Solution: Clear browser cookies and log in again with your credentials

Issue: Actions not logging correctly

- Solution: Verify impersonation session is active (check banner)
- Solution: Review audit logs - actions are logged with both user IDs

Defining Products and CGRateS Configuration

This guide explains how to define products in OmniCRM along with their associated CGRateS billing configuration.

Products and their CGRateS Actions are typically defined together in Python scripts that configure both the CRM and OCS (Online Charging System).

Overview

Defining a complete product involves configuration in **two systems**:

1. **CGRateS/OCS** - Define the billing behavior (Actions, Rates, Destinations)
2. **OmniCRM** - Define the product metadata (price, name, features)

These are intentionally loosely linked, allowing you to interact with CGrateS via the Ansible Plays you define.

Important: CGRateS Capabilities

CGRateS is an extremely powerful and flexible rating engine. This guide shows **one common configuration pattern** for OmniCRM products, but CGRateS can do much more:

- **Advanced rating scenarios**: Time-of-day rates, customer tiers, call quality-based routing, burst billing
- **Complex roaming logic**: Different rates for MO vs MT calls/SMS when roaming, network-specific pricing
- **Legacy protocol support**: CAMEL for 2G/3G roaming (MO-MT SMS, USSD), Diameter for LTE/5G
- **Sophisticated charging**: Reservation-based charging, credit control, multi-tier fallback

- **Dynamic routing**: Cost-based routing, supplier selection, LCR (Least Cost Routing)

This is just the CRM guide - it focuses on simple product definition patterns that work well with OmniCRM's provisioning system. For advanced CGRateS configurations, consult the CGRateS documentation or see CGRateS Actions and Topup Behaviors for balance approaches and rating strategies.

Complete Product Definition Workflow

Step 1: Authenticate to CRM API

```
import requests
import json

crm_url = 'https://crm.example.com/'
session = requests.Session()

headers = {
    "Content-Type": "application/json"
}

# Get authentication token
response = session.post(crm_url + '/crm/auth/login', json={
    "email": "admin@example.com",
    "password": "your_password"
}, headers=headers)

assert response.status_code == 200
headers['Authorization'] = 'Bearer ' + response.json()['token']
print("Auth to CRM OK")
```

Step 2: Define Inventory Templates (Optional)

Inventory templates define the types of physical items (SIM cards, routers, etc.) that can be assigned during provisioning.

```
inventory_list_new = []

# Define SIM Card inventory template
inventory_list_new.append({
    "item": "SIM Card",
    "itemtext1_label": "ICCID",
    "itemtext2_label": "IMSI",
    "wholesale_cost": 0.2,
    "retail_cost": 1,
    "allow_dropdown_staff": True,
    "allow_dropdown_customer": True,
    "icon": "fa-solid fa-sim-card"
})

# Define Mobile Number inventory template
inventory_list_new.append({
    "item": "Mobile Number",
    "itemtext1_label": "E.164 Mobile Number",
    "itemtext2_label": "Type",
    "wholesale_cost": 0.2,
    "retail_cost": 3,
    "icon": "fa-solid fa-phone"
})

# Check if inventory template exists, create or update
for inventory_template in inventory_list_new:
    # Get existing templates
    inventory_list_existing = session.get(
        crm_url + '/crm/inventory/item_template/',
        headers=headers
    )

    # Check if template already exists
    if inventory_template['item'] in [x['item'] for x in
inventory_list_existing.json()]:
        # Update existing template
        inventory_template_id = [
            x['inventory_template_id']
            for x in inventory_list_existing.json()
            if x['item'] == inventory_template['item']
        ][0]

        response = session.patch(
```

```
            crm_url + '/crm/inventory/item_template/' +
str(inventory_template_id),
            json=inventory_template,
            headers=headers
        )
        assert response.status_code == 200
        print(f"Updated inventory template:
{inventory_template['item']}")
    else:
        # Create new template
        response = session.put(
            crm_url + '/crm/inventory/item_template',
            json=inventory_template,
            headers=headers
        )
        assert response.status_code == 200
        print(f"Created inventory template:
{inventory_template['item']}")
```

Inventory Template Fields:

- **item** (required) - Template name
- **itemtext1_label** - Label for first custom field
- **itemtext2_label** - Label for second custom field
- **wholesale_cost** - Your cost for this item
- **retail_cost** - Customer-facing cost
- **allow_dropdown_staff** - Show in staff dropdowns
- **allow_dropdown_customer** - Show in customer dropdowns
- **icon** - Font Awesome icon class

Step 3: Connect to CGRateS

```
import cgrateshttpapi
import time

OCS_Obj = cgrateshttpapi.CGRateS("ocs.example.com", "2080")

tenant = "your_tenant_name"
tpid = str(tenant) + "_" + str(int(time.time()))
```

Step 4: Define Destinations in CGRateS

Destinations define WHERE balances can be used. They must be defined before creating Actions that reference them.

There are two types:

1. **Geographic Destinations** - Number prefixes for voice/SMS TO specific places (e.g., `Dest_AU_Mobile`, `Dest_International_UK`)
2. **PLMN Destinations** - Network codes for data usage and roaming (e.g., `Dest_PLMN_OnNet`, `Dest_PLMN_US_Verizon`)

Critical Rule:

- **Voice/SMS balances** → Use geographic destinations (the number being called TO)
- **Data balances** → Use PLMN destinations (the network customer is connected on FROM)

For complete destination definition examples including:

- Geographic destinations (mobile, fixed-line, toll-free, international)
- PLMN destinations (on-net, roaming, zones)
- PLMN format rules (`mccXXX.mncYYY`)
- When to use each approach

See: CGRateS Actions - Defining Destinations

Step 5: Define CGRateS Actions

Actions are the mechanism for adding balances to customer accounts. Before you can link a CRM product to an Action, the Action must be defined in CGRateS.

Critical: Actions are defined during initial system configuration (not during provisioning). They specify what balances to add, expiry times, rollover behavior, etc.

See CGRateS Actions and Topup Behaviors for complete documentation on:

- How to define Actions using Python (`OCS_Obj.SendData`)
- Understanding `*topup` vs `*topup_reset` (rollover behavior)
- Unit calculations (bytes for data, nanoseconds for voice, count for SMS)
- Field reference (BalanceId, BalanceType, DestinationIDs, Units, ExpiryTime, Weight)
- Complete working examples (multi-balance plans, data addons, voice addons)
- Balance consumption rules and priority

Quick Rollover Reference:

- **`*topup`** - Adds to existing balance (enables rollover). For: prepaid addons, data packs
- **`*topup_reset`** - Replaces existing balance (no rollover). For: monthly plans with fixed allowances

Step 6: Create Products in CRM

Now that Actions are defined in CGRateS, create the corresponding products in CRM.

Example: Standalone SIM Service

```
product_list_new = []

product_list_new.append({
    "category": "standalone",
    "provisioning_play": "play_psim_only",
    "relies_on_list": "",
    "contract_days": 0,
    "retail_cost": 0,
    "retail_setup_cost": 0,
    "product_slug": "Mobile-SIM",
    "product_name": "Mobile SIM Only",
    "comment": "Physical SIM card for use with Mobile Phones",
    "provisioning_json_vars": "{\"iccid\" : \"\", \"msisdn\" :
\"\"}",
    "terms": "Must be activated within 6 months. All credit lost
if service is not used for 12 months.",
    "service_type": "mobile",
    "residential": True,
    "business": True,
    "enabled": True,
    "inventory_items_list": "['SIM Card', 'Mobile Number']",
    "icon": "fa-solid fa-sim-card",
    "features_list": "['Australian Phone Number (61xxx)', 'Fastest
speeds', 'Best coverage']",
    "wholesale_cost": 3,
    "wholesale_setup_cost": 1,
    "customer_can_purchase": True
})
```

Example: Monthly Plan Addon

```
product_list_new.append({
    "category": "addon",
    "provisioning_play": "play_topup_charge_then_action",
    "relies_on_list": "",
    "contract_days": 30,
    "retail_cost": 59.00,
    "retail_setup_cost": 0,
    "product_slug": "au-premium-plan-1",  # Links to Action_au-
premium-plan-1
    "product_name": "AU Premium Plan 1",
    "comment": "100GB Data in Australia, 3000 Minutes in
Australia, 3000 SMS in Australia, 6GB Roaming Data",
    "provisioning_json_vars": "",
    "terms": "Postpaid plan. Auto-renews every 30 days.",
    "service_type": "mobile",
    "residential": True,
    "business": True,
    "enabled": True,
    "icon": "fa-solid fa-mobile",
    "features_list": "['100GB Data in Australia', '3000 Minutes in
Australia', '3000 SMS in Australia', '6GB Roaming Data']",
    "wholesale_cost": 45.00,
    "wholesale_setup_cost": 0,
    "auto_renew": "True",
    "customer_can_purchase": True
})
```

Example: One-Time Topup Addon

```
product_list_new.append({
    "category": "addon",
    "provisioning_play": "play_topup_charge_then_action",
    "relies_on_list": "",
    "contract_days": 0,
    "retail_cost": 30,
    "retail_setup_cost": 0,
    "product_slug": "au-data-addon-20gb",  # Links to Action_au-data-addon-20gb
    "product_name": "AU Data Addon 20GB",
    "comment": "20GB Data in Australia",
    "provisioning_json_vars": "",
    "terms": "Prepaid top-up. Immediate charge.",
    "service_type": "mobile",
    "residential": True,
    "business": True,
    "enabled": True,
    "icon": "fa-solid fa-mobile",
    "features_list": "['20GB Data in Australia']",
    "wholesale_cost": 22,
    "wholesale_setup_cost": 0,
    "auto_renew": "False",
    "customer_can_purchase": True
})
```

Product Field Descriptions:

- **category** (required) - Product category:
  - `standalone` - Complete service (creates new service record)
  - `addon` - Added to existing service
  - `bundle` - Package of multiple services
- **provisioning_play** (required) - Ansible playbook to execute (e.g., `play_topup_charge_then_action`, `play_simple_service`)
- **relies_on_list** - Comma-separated list of product_slugs this product depends on
- **contract_days** - Contract duration in days (0 = no contract, 30 = monthly)
- **retail_cost** (required) - Customer-facing monthly/recurring cost
- **retail_setup_cost** - One-time setup fee charged to customer

- **product_slug** (required) - **Unique identifier that links to CGRateS Action** (convention: `Action_{product_slug}`)
- **product_name** (required) - Display name
- **comment** - Short description
- **provisioning_json_vars** - JSON string of variables passed to playbook
- **terms** - Terms and conditions text
- **service_type** - Service classification (mobile, dongle, fixed, etc.)
- **residential** - Available to residential customers
- **business** - Available to business customers
- **enabled** - Product is active and purchasable
- **inventory_items_list** - Python list string of required inventory items
- **icon** - Font Awesome icon class
- **features_list** - Python list string of feature bullets
- **wholesale_cost** - Your recurring cost
- **wholesale_setup_cost** - Your one-time cost
- **auto_renew** - "True" or "False" string for automatic renewal
- **customer_can_purchase** - Customer can buy via self-service portal

See also: Product Lifecycle

Step 7: Create or Update Products via API

```
# Get existing products
product_list_existing = session.get(crm_url + '/crm/product',
headers=headers)
existing_products = product_list_existing.json()

# Process each product
for product in product_list_new:
    print(f"Processing product: {product['product_slug']}")

    # Check if product already exists
    if product['product_slug'] in [x['product_slug'] for x in
existing_products]:
        print(f"Product already exists:
{product['product_slug']}")

        # Get product_id of existing product
        product_id = [
            x['product_id']
            for x in existing_products
            if x['product_slug'] == product['product_slug']
        ][0]

        product['product_id'] = product_id

        # Update existing product
        response = session.patch(
            crm_url + '/crm/product/' + str(product_id),
            json=product,
            headers=headers
        )
        print(f"Status: {response.status_code}")
        assert response.status_code == 200
        print(f"Updated product: {product['product_slug']}")
    else:
        # Create new product
        print(f"Creating new product: {product['product_slug']}")
        response = session.put(
            crm_url + '/crm/product',
            json=product,
            headers=headers
        )
```

```
        print(f"Status: {response.status_code}")
        assert response.status_code == 200
        print(f"Created product: {product['product_slug']}")
```

Linking Products to Actions

The critical link between CRM products and CGRateS Actions is the **naming convention**:

```
# In CGRateS
ActionsId = "Action_au-premium-plan-1"

# In CRM
product_slug = "au-premium-plan-1"

# In playbook (automatically constructed)
cgr_action_name = "Action_" + product_slug
# Result: "Action_au-premium-plan-1"
```

How Playbooks Execute Actions

Note: Using `ExecuteAction` is just one pattern for adding balances. You could also directly call `SetBalance` or other CGRateS APIs inside a playbook. However, `OmniCRM-API/Provisioners/plays/play_topup_charge_then_action.yaml` uses the ExecuteAction pattern as it's a common, reusable approach that separates balance logic (Actions) from provisioning logic (Playbooks).

When a product is provisioned using this pattern, the playbook constructs the Action name from the product_slug:

```
# In play_topup_charge_then_action.yaml
- name: Set cgr_action_name fact
  set_fact:
    cgr_action_name: "Action_{{
api_response_product.json.product_slug }}"

# Execute the action
- name: Execute CGRateS action
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "APIerSv1.ExecuteAction",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionsId": "{{ cgr_action_name }}"
        }]
      }
```

When using this pattern: The Action **must exist in CGRateS** before the playbook runs, otherwise execution will fail with "Action not found" error.

See also: Ansible Playbooks Guide

Complete Example: Defining a New Product

Let's walk through creating a complete new product "50GB Data Pack":

1. Define the Action in CGRateS

See the Simple Data Addon example in Step 5 above for how to define a data addon Action. For our 50GB example, the Action would follow the same pattern but with different units:

- **ActionsId**: `"Action_50gb-data-pack"` (matches product_slug below)
- **BalanceType**: `"*data"`
- **DestinationIDs**: `"Dest_PLMN_OnNet"` (for on-net data usage)
- **Units**: `50 * 1024 * 1024 * 1024` (50GB in bytes)
- **Identifier**: `"*topup"` (enables rollover)

2. Create the Product in CRM

```
product_50gb_data = {
    "category": "addon",
    "provisioning_play": "play_topup_charge_then_action",
    "relies_on_list": "",
    "contract_days": 0,
    "retail_cost": 25.00,
    "retail_setup_cost": 0,
    "product_slug": "50gb-data-pack",  # Must match ActionsId
without "Action_"
    "product_name": "50GB Data Pack",
    "comment": "50GB of high-speed data valid for 30 days",
    "provisioning_json_vars": "",
    "terms": "Data expires after 30 days. Unused data rolls over
if topped up again before expiry.",
    "service_type": "mobile",
    "residential": True,
    "business": True,
    "enabled": True,
    "icon": "fa-solid fa-database",
    "features_list": "['50GB High-Speed Data', '30 Day Validity',
'Rollover Enabled']",
    "wholesale_cost": 20.00,
    "wholesale_setup_cost": 0,
    "auto_renew": "False",
    "customer_can_purchase": True
}

# Create in CRM
response = session.put(
    crm_url + '/crm/product',
    json=product_50gb_data,
    headers=headers
)
assert response.status_code == 200
print("Product created: 50gb-data-pack")
```

3. Verify the Link

The product can now be provisioned:

1. Customer purchases "50GB Data Pack" (product_slug: `50gb-data-pack`)
2. Playbook `play_topup_charge_then_action` executes
3. Playbook constructs Action name: `Action_50gb-data-pack`
4. Playbook calls `APIerSv1.ExecuteAction` with ActionsId `Action_50gb-data-pack`
5. CGRateS finds the Action and executes it
6. Customer receives 50GB balance

See also: Charging and Payments from Playbooks

Common Product Patterns

These patterns show typical CRM product configurations and how they link to CGRateS Actions. For the corresponding Action definitions, see CGRateS Actions and Topup Behaviors.

Pattern 1: Multi-Balance Monthly Plan

Use Case: Comprehensive monthly plan with data, voice, SMS, roaming

CRM Product:

```
{
    "product_slug": "premium-monthly-plan",  # Links to
Action_premium-monthly-plan
    "product_name": "Premium Monthly Plan",
    "category": "addon",
    "retail_cost": 59.00,
    "auto_renew": "True",
    "contract_days": 30,
    "provisioning_play": "play_topup_charge_then_action",
    "features_list": "['100GB Data', '5000 Minutes', '5000 SMS',
'Roaming Included']"
}
```

Action: Uses `*topup_reset` with multiple balance types. See Example 1: Multi-Balance Monthly Plan (Python).

Pattern 2: Simple Data Addon (Rollover)

Use Case: One-time data purchase that rolls over if topped up again

CRM Product:

```
{
    "product_slug": "10gb-addon",  # Links to Action_10gb-addon
    "product_name": "10GB Data Addon",
    "category": "addon",
    "retail_cost": 15.00,
    "auto_renew": "False",  # One-time purchase
    "contract_days": 0,
    "provisioning_play": "play_topup_charge_then_action",
    "features_list": "['10GB Data with Rollover', '30 Day
Validity']"
}
```

Action: Uses `*topup` for rollover behavior. See CGRateS Actions - Rollover.

Pattern 3: Fixed Monthly Plan (No Rollover)

Use Case: Monthly plan that always resets to exactly the same amount

CRM Product:

```
{
    "product_slug": "fixed-50gb-monthly",  # Links to
Action_fixed-50gb-monthly
    "product_name": "Fixed 50GB Monthly",
    "category": "addon",
    "retail_cost": 35.00,
    "auto_renew": "True",
    "contract_days": 30,
    "provisioning_play": "play_topup_charge_then_action",
    "features_list": "['50GB Data', 'Resets Monthly', 'No
Rollover']"
}
```

Action: Uses `*topup_reset` to prevent rollover. See CGRateS Actions - Reset Behavior.

Advanced: Chargers and Rating Plans

Important: This section covers basic pay-per-use rating. CGRateS supports incredibly sophisticated rating scenarios including:

- **Differential roaming rates**: Different prices for MO vs MT calls/SMS when roaming
- **Protocol-specific charging**: CAMEL for 2G/3G (MO-MT SMS, USSD), Diameter for 4G/5G
- **Context-aware pricing**: Rates based on time, location, customer segment, network quality
- **Multi-dimensional rating**: Combining network type, roaming status, destination, and time-of-day

The examples below show simple, flat-rate PAYG configurations suitable for most OmniCRM deployments.

For pay-as-you-go billing (where usage beyond included balances costs money), you need to define Rating Plans that specify dollar amounts to charge.

How Rating Works

When a customer uses a service (data, voice, SMS):

1. CGRateS checks for unitary balances (e.g., included data GB)
2. If unitary balance exists, usage is deducted from it
3. If no unitary balance or balance exhausted, CGRateS falls back to monetary balance
4. **Rating Plan** determines the price (e.g., $0.10 per MB)
5. The calculated cost is deducted from the customer's monetary balance

Example: Setting Up Pay-Per-Use Data Charges

```
# 1. Define a Destination Rate (the price)
OCS_Obj.SendData({
    "method": "ApierV2.SetTPDestinationRate",
    "params": [{
        "TPid": tpid,
        "ID": "DR_DATA_PAYG",
        "DestinationRates": [{
            "DestinationId": "Dest_PLMN_OnNet",
            "RateId": "RT_DATA_$0_10_PER_MB",
            "RoundingMethod": "*up",
            "RoundingDecimals": 4,
            "MaxCost": 0,
            "MaxCostStrategy": ""
        }]
    }]
})

# 2. Define the actual rate
OCS_Obj.SendData({
    "method": "ApierV2.SetTPRate",
    "params": [{
        "TPid": tpid,
        "ID": "RT_DATA_$0_10_PER_MB",
        "RateSlots": [{
            "ConnectFee": 0,          # No connection charge
            "Rate": 0.10,             # $0.10 per unit
            "RateUnit": "1048576",    # 1 MB (1024 * 1024 bytes)
            "RateIncrement": "1048576", # Bill per MB
            "GroupIntervalStart": "0s"
        }]
    }]
})

# 3. Define a Rating Plan that uses this rate
OCS_Obj.SendData({
    "method": "ApierV2.SetTPRatingPlan",
    "params": [{
        "TPid": tpid,
        "ID": "RP_PAYG_DATA",
        "RatingPlanBindings": [{
            "DestinationRatesId": "DR_DATA_PAYG",
```

```
            "TimingId": "*any",
            "Weight": 10
        }]
    }]
})

# 4. Link the Rating Plan to a Rating Profile (for specific
accounts)
OCS_Obj.SendData({
    "method": "ApierV2.SetTPRatingProfile",
    "params": [{
        "TPid": tpid,
        "Tenant": tenant,
        "Category": "data",
        "Subject": "*any",  # Or specific account identifier
        "RatingPlanActivations": [{
            "ActivationTime": "2024-01-01T00:00:00Z",
            "RatingPlanId": "RP_PAYG_DATA",
            "FallbackSubjects": ""
        }]
    }]
})

# 5. Load the tariff plan
OCS_Obj.SendData({
    "method": "APIerSv1.LoadTariffPlanFromStorDb",
    "params": [{
        "TPid": tpid,
        "DryRun": False,
        "Validate": True,
        "APIOpts": {}
    }]
})
```

What this does:

- When a customer has no data balance (or runs out), data usage costs **$0.10 per MB**
- The charge is deducted from their monetary balance (`*monetary`)
- Billing increments are 1 MB (rounds up)

Example: Voice Call Rates

```
# Define different rates for different destinations
OCS_Obj.SendData({
    "method": "ApierV2.SetTPRate",
    "params": [{
        "TPid": tpid,
        "ID": "RT_VOICE_DOMESTIC_$0_30_PER_MIN",
        "RateSlots": [{
            "ConnectFee": 0.15,           # $0.15 connection fee
            "Rate": 0.30,                 # $0.30 per minute
            "RateUnit": "60s",            # Bill per minute
            "RateIncrement": "60s",       # Round to full minutes
            "GroupIntervalStart": "0s"
        }]
    }]
})

OCS_Obj.SendData({
    "method": "ApierV2.SetTPRate",
    "params": [{
        "TPid": tpid,
        "ID": "RT_VOICE_INTL_$1_50_PER_MIN",
        "RateSlots": [{
            "ConnectFee": 0.25,           # $0.25 connection fee
            "Rate": 1.50,                 # $1.50 per minute
            "RateUnit": "60s",
            "RateIncrement": "1s",        # Bill per second (more
accurate)
            "GroupIntervalStart": "0s"
        }]
    }]
})
```

Charger Profiles (Optional)

Chargers apply rating to specific types of events. For most use cases, the default charger is sufficient:

```
OCS_Obj.SendData({
    "method": "APIerSv1.SetChargerProfile",
    "params": [{
        "Tenant": tenant,
        "ID": "Charger_Default",
        "FilterIDs": [],
        "AttributeIDs": ["*constant:*req.RequestType:*none"],
        "Weight": 999
    }]
})
```

See also:

- CGRateS Actions and Topup Behaviors - Balance management approaches (unitary, monetary, hybrid) and rating configuration
- CGRateS Destinations - How to define geographic and PLMN destinations

Best Practices

1. Use Consistent Naming Conventions

```
# Good - clear relationship
ActionsId = "Action_premium-plan-100gb"
product_slug = "premium-plan-100gb"

# Bad - no clear relationship
ActionsId = "Action_Plan_A"
product_slug = "premium_100"
```

2. Define Actions Before Products

Always create CGRateS Actions before creating CRM products. The provisioning playbook will fail if it tries to execute a non-existent Action.

3. Include CDR Logging

Always add `*cdrlog` action to track balance additions:

```
{
    "Identifier": "*cdrlog",
    "BalanceType": "*generic",
    "ExtraParameters": "
{\"Category\":\"^activation\",\"Destination\":\"Product Name\"}",
    "Weight": 80
}
```

4. Use Descriptive Balance IDs

```
# Good
"BalanceId": "Premium_Data_100GB"
"BalanceId": "AU_Voice_Domestic__" + str(units)

# Bad
"BalanceId": "data1"
"BalanceId": "balance"
```

5. Document Units Clearly

```
# Good - shows calculation
Units = 100 * 1024 * 1024 * 1024  # 100GB in bytes
Units = 3000 * 60 * 1000000000    # 3000 minutes in nanoseconds

# Bad - magic number
Units = 107374182400
```

6. Use Weight Strategically

Higher weight = higher priority for both execution and consumption:

```
# Execution order (higher weight = executes first)
{"Identifier": "*reset_account", "Weight": 700}
{"Identifier": "*topup_reset", "Weight": 90}
{"Identifier": "*cdrlog", "Weight": 80}

# Balance consumption (higher weight = consumed first)
"BalanceWeight": 1200  # Premium/domestic balances
"BalanceWeight": 1100  # Roaming balances
"BalanceWeight": 1000  # International balances
```

7. Test with Small Values First

When defining new products, test with small balances first:

```
# Testing
Units = 100 * 1024 * 1024  # 100MB for testing

# Production
Units = 100 * 1024 * 1024 * 1024  # 100GB
```

Troubleshooting

Error: "Action not found"

Symptom: Playbook fails with "Action not found" or "ActionsId does not exist"

Cause: Action not defined in CGRateS, or naming mismatch

Solution:

1. Verify Action exists: Query CGRateS for the Action
2. Check naming: Ensure `ActionsId = "Action_" + product_slug`
3. Define the Action if missing

Error: "Destination not found"

Symptom: Action executes but balances not created

Cause: DestinationIDs references non-existent destination

Solution:

1. Define the destination in CGRateS first
2. Use `*any` for universal destinations
3. Check spelling of destination IDs

Product Created But No Balances Added

Symptom: Product provisions successfully but customer has no balance

Cause: Action exists but has no balance-adding operations

Solution:

1. Verify Action has `*topup` or `*topup_reset` operations
2. Check Units value is correct (not 0)
3. Verify ExpiryTime hasn't already passed

Balances Not Rolling Over

Symptom: Using rollover but unused balance disappears

Cause: Using `*topup_reset` instead of `*topup`

Solution:

- Change `Identifier` from `*topup_reset` to `*topup`
- Ensure BalanceId is consistent across topups

See also: CGRateS Actions and Topup Behaviors

Summary

This guide demonstrates one common approach to configuring products in OmniCRM with CGRateS. The patterns shown here work well for typical mobile virtual network operator (MVNO) use cases with prepaid/postpaid plans, data packages, and roaming.

Remember: CGRateS is capable of far more sophisticated scenarios than covered here. If you need advanced features like:

- Differential MO/MT pricing for roaming voice and SMS
- CAMEL-based charging for 2G/3G legacy devices
- Time-of-day or seasonal rate variations
- Customer tier-based pricing (bronze/silver/gold)
- Network quality or QoS-based charging
- Least-cost routing with multiple suppliers

...consult the CGRateS documentation directly and work with your rating plan configuration independently of the CRM product definitions.

Related Documentation

- CGRateS Actions and Topup Behaviors - Detailed guide on Action types and balance behavior
- Ansible Playbooks Guide - How playbooks execute Actions
- Charging and Payments from Playbooks - Payment processing during provisioning
- Product Lifecycle - Managing products through their lifecycle
- Concepts: Products and Services - Product fundamentals
- CGRateS Official Documentation - Complete CGRateS reference

Email & SMS Campaigns (EDM)

OmniCRM's bulk-campaigns module (EDM — Electronic Direct Mail) lets operators build audience segments, design templates, and send bulk campaigns to customers over **two channels: email (via SMTP) and SMS (via OmniMessage)**. A campaign targets one segment with one template on a chosen channel, with per-recipient personalisation, opt-out handling and tracking. This guide covers both channels.

See also: `Mailjet <integrations_mailjet>` for the transactional Mailjet integration, `Notification API <integrations_notifications>` for system notifications, `Configuration and Customization <administration_configuration>` for general config.

> **Scope note:** This describes the **bulk-campaign** send path only (email and SMS). Transactional email (welcome, invoices, password resets, eSIM delivery, ticket updates) is delivered separately through the Mailjet REST API and is not affected by the settings below.

Overview

The module has these building blocks:

Concept	Description
Segment	A targeted audience, defined by filter criteria (billing type, contact type, status, balance, …) or a static address list.
Template	Reusable content for a channel — an **operator-uploaded HTML body** (email) or a short **SMS message**, both with per-recipient personalisation.
Campaign	A send: one template to one segment on a chosen **channel**, with per-recipient tracking.
Channel	How a campaign is delivered — **email** (SMTP relay) or **SMS** (OmniMessage).

Channels

A campaign's `channel` decides everything downstream — delivery transport, template format, and which opt-out applies:

Channel	Delivered via	Personalisation	Opt-out	Details
Email	SMTP relay (Mailjet, Mailgun, SES, …)	Jinja2 HTML templates	`email` category prefs + unsubscribe + suppression list	Email delive
SMS	OmniMessage	`var1`–`var4` substitution	`sms` category prefs + OmniMessage STOP	SMS deliver (OmniMess

Email templates and personalisation

Templates store raw HTML that you **upload or paste** into the template editor. Personalisation uses **Jinja2** syntax, so templates can contain variables and simple logic:

- `{{ first_name }}`, `{{ last_name }}`, `{{ customer_name }}`, `{{ email }}`
- conditionals and loops, e.g. `{% if first_name %}Hi {{ first_name }}{% else %}Hello{% endif %}`

Any additional field provided by the segment for a recipient is also available to the template by name. Each recipient's email is rendered individually before sending.

Using bulk campaigns

This walkthrough covers building a segment, creating an email or SMS campaign, sending and tracking it, plus what recipients see. Everything lives under the **Marketing** section of the sidebar (**Segments**, **Templates**, **Campaigns**). (Operator-facing; written from the current implementation.)

Build a segment

A **segment** is the audience a campaign targets. From **Marketing → Segments** you can search, refresh and create segments. Each row shows the segment's criteria, current recipient count and when it was last refreshed; click a row to open it.

The Segments list. Recipient counts refresh on demand; clicking a row opens the segment.

Create Segment (or clicking a row to edit) opens the segment editor, where you define the audience from customer attributes — *Customers without services*, *Zero balance customers*, *Billing Types*, *Contact Types* and *Customer Status*. Save the segment first, then **Generate Segment** calculates the recipient list and **Export CSV** downloads it.

The segment editor: criteria on the left, a live recipient count and CSV export at the bottom.

> Segments are channel-agnostic — the same segment can be used for an email or an SMS campaign. Email campaigns target contacts with an email address; SMS campaigns target contacts with a phone number.

Upload a template

Email campaigns send an HTML template. From **Marketing → Templates**, create or edit a template and use **Upload .html** to load an HTML file straight into the body (or paste it). Templates support Jinja2 personalisation, and the **Available Variables** panel inserts `{{customer_name}}`, `{{contact_firstname}}`, `{{contact_lastname}}` and `{{contact_email}}` at the cursor.

SMS campaigns don't use a template — you write the message inline when composing the campaign.

Create a campaign

From **Marketing → Campaigns → Create Campaign**, a short wizard guides you through the campaign. The **Channel** toggle (Email / SMS) at the top of the wizard drives which steps and fields appear.

1. **Select Segment** — choose the audience. The selected segment shows its recipient count.

Step 1: pick the segment whose contacts will receive the campaign. The channel toggle sits above the steps.

2. **Template / Message** — for an **email** campaign, choose an HTML template (click a template card to select it; **Preview** shows the rendered HTML). For an **SMS** campaign this step is skipped — the wizard shows a notice and you write the message in the next step.

For SMS, the template step is replaced by a notice; you continue to write the message.

3. **Campaign Details** — the channel-specific configuration:
    - **Category** — the communication category the campaign belongs to (loaded from `edm.communication_categories`); recipients opted out of this category for this channel are excluded.
    - **Email**: *Campaign Name*, *Subject Line*, *From Email*, *From Name*.
    - **SMS**: *Campaign Name*, *Sender ID* and the *SMS Message* (personalise with `{{ first_name }}`, `{{ last_name }}`, `{{ customer_name }}`).

Email campaign details: subject and sender fields, plus the category selector.

SMS campaign details: the form switches to Sender ID and an SMS Message body.

4. **Review & Save** — confirm channel, category, segment and content, then save as a **draft**. **View recipients** lists the segment's contacts (name, email or phone, customer) before you commit.

Review for an email campaign.

*Review for an SMS campaign, with the **View recipients** link and the save-as-draft note.*

The campaign is always saved as a **draft** first — you send it from the campaign detail page (below).

Campaigns list

Marketing → Campaigns lists all campaigns with their **Channel** (Email / SMS), status, recipient count and — once sent — open and click rates. Filter by **All / Draft / Sent**, and click any row to open the campaign.

The Campaigns list. The Channel column distinguishes email from SMS at a glance; sent campaigns show their open and click rates inline.

Send and track a campaign

Click a campaign to open its detail page:

- A **draft** shows a **Send Campaign** button, enabled once the campaign has a segment and — for email, a template; for SMS, a message. If something is missing, the page lists what's required.
- Once **sent**, the detail page shows:
  - **Campaign Statistics** — *email*: delivered, open rate, click rate, opened/clicked/bounced; *SMS*: delivered / failed, with a **Sync** button that pulls the latest delivery counts from OmniMessage.
  - **Recipients** — a per-recipient list with status (`sent`, `delivered`, `opened`, `clicked`, `bounced`, `failed`). The address column shows the email address (email) or phone number (SMS).

The campaign detail page for a draft SMS campaign, ready to send. Once sent, this page shows delivery/engagement stats and per-recipient status; for SMS, ***Sync*** *refreshes counts from OmniMessage.*

Once sent, the same page surfaces the **Campaign Statistics** panel and the per-recipient list:

A sent email campaign: delivered count, open/click rate and opened/clicked/bounced totals, alongside the per-recipient list and each recipient's status.

> Because tracking is provider-agnostic, **Delivered** is derived from engagement — an open or click proves the message arrived. Open rate is therefore measured against delivered (engaged) recipients rather than total sent.

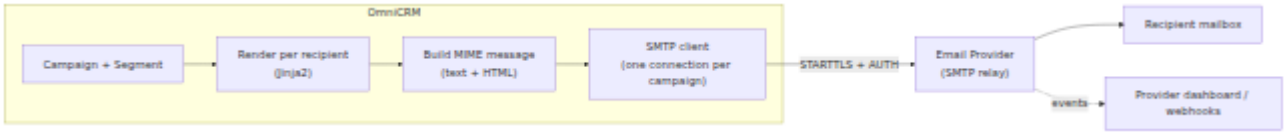
What recipients see (unsubscribe)

Every email carries an unsubscribe link that opens a **preference centre**: the contact's email categories with their current opt-in state, a **Save preferences** action, and an **Unsubscribe from all email** option. A mail client's one-click unsubscribe opts the contact out of just that campaign's category.

> Image files above live in `docs/images/` (filenames prefixed `edm-`).

Email delivery

Campaign email is delivered over **SMTP** to a configured relay. This makes the send path provider-independent: the same OmniCRM configuration can point at Mailjet, Mailgun, Amazon SES, or a customer's own SMTP server.



For each recipient OmniCRM:

1. Renders the template's HTML and text parts, and the subject, with the recipient's variables.
2. Builds a `multipart/alternative` MIME message (plain-text fallback + HTML).
3. Sends it over a single, reused SMTP connection for the whole campaign.
4. Records a per-recipient result (`sent` when the relay accepts the message, `failed` on rejection).

Each message also carries a correlation header, `X-MJ-CustomID`, in the form `campaign_{campaign_id}_recipient_{recipient_id}`. Mailjet echoes this back in its event webhooks; other relays simply ignore the unknown header.

SMTP Relay Configuration

The relay is configured under the `mailjet.smtp` block in `crm_config.yaml`. Despite the section name, this is the generic SMTP relay used for all EDM campaigns and can point at any provider.

```yaml
mailjet:
  api_key: "your-api-key"           # used by transactional email +
as the default SMTP username
  api_secret: "your-api-secret"     # used by transactional email +
as the default SMTP password
  smtp:
    host: in-v3.mailjet.com         # SMTP relay hostname
    port: 587                       # submission port
    use_tls: true                   # upgrade the connection with
STARTTLS
    use_auth: true                  # authenticate with
username/password
    username: ''                    # blank -> use mailjet api_key
    password: ''                    # blank -> use mailjet
api_secret
    timeout: 30                     # connection/command timeout in
seconds
```

Parameters

Parameter	Type	Required	Default	Description
`host`	String	Yes	`in-v3.mailjet.com`	Hostname of the SMTP relay.
`port`	Integer	No	`587`	Submission port. Use `587` for STARTTLS, `465` for implicit TLS; many providers also offer `2525`/`25`.
`use_tls`	Boolean	No	`true`	When `true`, the connection is upgraded with STARTTLS after connecting. Set `false` only for a local test server.
`use_auth`	Boolean	No	`true`	When `true`, OmniCRM authenticates with `username`/`password`. Set `false` only for an unauthenticated test server.
`username`	String	No	*(empty)*	SMTP username. **When blank, OmniCRM falls back to the Mailjet `api_key`.** For any non-Mailjet

Parameter	Type	Required	Default	Description
				relay you must set this explicitly.
`password`	String	No	*(empty)*	SMTP password. **When blank, OmniCRM falls back to the Mailjet `api_secret`.** For any non-Mailjet relay you must set this explicitly.
`timeout`	Integer	No	`30`	Connection and command timeout, in seconds.

> **Important:** `username`/`password` default to the Mailjet API credentials purely for convenience. When pointing at a different provider, **always set both explicitly** — otherwise OmniCRM will try to authenticate to that provider with Mailjet credentials and fail.

Provider Setup Reference

The tables below give the SMTP connection settings and the native tracking mechanism for popular providers. Hostnames, ports, and credential conventions can change or vary by region/plan — confirm against your provider's current documentation. The **Tracking** notes are *informational* — what each relay offers in its own console if you use it; OmniCRM only sends SMTP and does not auto-detect or display provider-native stats.

Mailjet

Setting	Value
Host	`in-v3.mailjet.com`
Ports	`587` (STARTTLS), `465` (TLS), `25` / `2525`
Username	API Key (Account → API Key Management)
Password	Secret Key

Tracking: Open and click tracking are applied by Mailjet (account default, or per message via the `X-Mailjet-TrackOpen` / `X-Mailjet-TrackClick` headers). Engagement events are available in the **Mailjet dashboard**, via the **Statistics API**, and as **Event API webhooks**. OmniCRM already includes a Mailjet webhook handler; correlate events to recipients with the `X-MJ-CustomID` value OmniCRM sends.

Mailgun

Setting	Value
Host	`smtp.mailgun.org` (US) · `smtp.eu.mailgun.org` (EU)
Ports	`587` / `465` / `25` / `2525`
Username	`postmaster@your-sending-domain` (or a custom SMTP login created on the domain)
Password	The SMTP credential password for that domain

Tracking: Enable open/click tracking per domain, or per message via `X-Mailgun-Track`, `X-Mailgun-Track-Opens`, `X-Mailgun-Track-Clicks`. Attach a campaign tag with `X-Mailgun-Tag` and custom correlation data with `X-Mailgun-Variables` (JSON). Stats appear in the **Mailgun dashboard** and

Events/Stats API; engagement can be pushed to OmniCRM via **Mailgun webhooks**.

Amazon SES

Setting	Value
Host	`email-smtp.<region>.amazonaws.com` (e.g. `email-smtp.us-east-1.amazonaws.com`)
Ports	`587` / `2587` (STARTTLS), `465` / `2465` (TLS), `25`
Username	SES **SMTP** username (generated in the SES console)
Password	SES **SMTP** password (distinct from your AWS access keys)

Tracking: Open and click tracking are enabled through a **Configuration Set**, attached per message with the `X-SES-CONFIGURATION-SET` header; add campaign dimensions with `X-SES-MESSAGE-TAGS`. Events (send, delivery, open, click, bounce, complaint) are delivered to an event destination (SNS, Kinesis Firehose, or EventBridge) and surfaced in **CloudWatch** — there is no built-in engagement dashboard, so plan an event destination if you want stats.

SendGrid (Twilio)

Setting	Value
Host	`smtp.sendgrid.net`
Ports	`587` / `465` / `25` / `2525`
Username	the literal string `apikey`
Password	a SendGrid API key with **Mail Send** permission

Tracking: Open/click tracking is set in **Tracking Settings** (account) or per message via the `X-SMTPAPI` header (JSON `filters` such as `opentrack`/`clicktrack`, plus `category` and `unique_args` for correlation). Stats are in the **SendGrid dashboard** and **Stats API**; engagement reaches OmniCRM via the **Event Webhook**.

Postmark

Setting	Value
Host	`smtp.postmarkapp.com`
Ports	`587` / `2525` / `25`
Username	your **Server API Token**
Password	your **Server API Token** (same value as username)

Tracking: Enable opens with `X-PM-Track-Opens: true` and links with `X-PM-Track-Links: HtmlAndText`. Tag campaigns with `X-PM-Tag` and add correlation with `X-PM-Metadata-<key>` headers. Use a **Broadcast message stream** for bulk/EDM sending. Stats are in the **Postmark dashboard** and **Stats API**; engagement reaches OmniCRM via **webhooks**.

Mailchimp Transactional (Mandrill)

Setting	Value
Host	`smtp.mandrillapp.com`
Ports	`587` / `465` / `25`
Username	your Mailchimp/Mandrill account username (usually the account email)
Password	any valid Mandrill API key

Tracking: Account default, or per message via `X-MC-Track` (e.g. `opens,clicks_all`). Tag with `X-MC-Tags` and add correlation with `X-MC-Metadata` (JSON). Stats are in the **Mandrill dashboard** and API; engagement reaches OmniCRM via **webhooks**.

> **Note:** The standard **Mailchimp Marketing** product is *not* an SMTP relay. Only **Mailchimp Transactional (Mandrill)** offers SMTP sending.

Brevo (formerly Sendinblue)

Setting	Value
Host	`smtp-relay.brevo.com`
Ports	`587` / `465` / `25` / `2525`
Username	your Brevo account login (email)
Password	your **SMTP key** (Brevo → SMTP & API → SMTP)

Tracking: Account-level open/click tracking; stats in the **Brevo dashboard**; engagement reaches OmniCRM via **webhooks**.

Generic / self-hosted SMTP

Setting	Value
Host	As provided (e.g. a Postfix relay, or a customer's Microsoft 365 / Google Workspace relay)
Ports	Typically `587` (STARTTLS) or `465` (TLS)
Username / Password	As provided by the operator

Tracking: A plain SMTP server provides **no native engagement tracking**. Use OmniCRM-native tracking (below) for opens and clicks, and bounce (DSN) processing for delivery failures.

SMS delivery (OmniMessage)

Bulk campaigns can also be **SMS**, delivered through the separate OmniMessage service. A campaign's `channel` is `email` (default) or `sms`; for SMS, set `channel: sms` and an `sms_message`.

Recipients are the segment's contacts that have a **phone number**, filtered by the campaign's category on the **`sms`** channel.

Sending follows the OmniMessage bulk-campaign flow (OmniCRM performs all three steps):

1. `POST /api/campaign_lists` — upload recipients as a named list (`msisdn` + `var1`–`var4`).
2. `POST /api/campaigns` — create the campaign (`message`, `list_id`, `source_msisdn`, `source_smsc`, `drip_tps`).
3. `POST /api/campaigns/control` `{action: "start"}` — start the drip.

Personalisation: OmniMessage templates support only `{{ var1 }}`–`{{ var4 }}` (plus `{{ msisdn }}`). Write the familiar named placeholders and OmniCRM maps them automatically: `first_name`→`var1`, `last_name`→`var2`, `customer_name`→`var3`, `email`→`var4`.

Status: OmniMessage has **no delivery webhook** — poll `GET /api/campaigns/:id` for its `stats`. `POST /crm/email-campaign/campaigns/<id>/sms-sync` pulls the latest stats into the campaign (`total_delivered` / `total_bounced` / `total_sent`); run it on a schedule for live numbers.

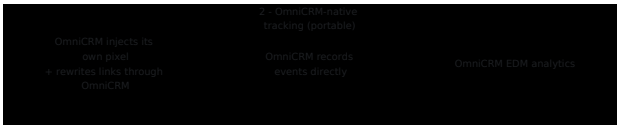
Config (`smsc` block in `crm_config.yaml`):

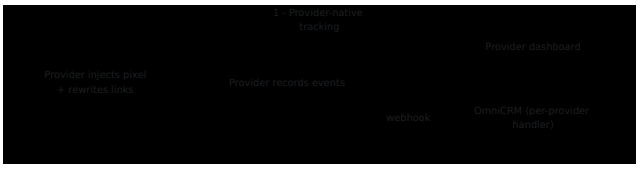
```
smsc:
  campaigns_url: 'https://smsc:8443/api'   # bulk-campaigns API
base
  source_msisdn: 'YourBrand'                 # default sender
  source_smsc: 'IMS_SMSC'                    # SMSC route
  drip_tps: 50                               # per-campaign send
rate
  verify_tls: false                          # OmniMessage uses a
self-signed cert
  timeout: 30
```

> OmniMessage maintains its own STOP/opt-out suppression; OmniCRM additionally applies the contact's `sms` category preferences when building the recipient list.

Statistics and Tracking

There are two independent ways to measure a campaign. They are not mutually exclusive.





What each model gives you

Metric	Recorded at send (every relay)	In your provider's own console [1]	OmniCRM-native tracking (any relay)
Sent / queued	✓	✓	✓
Send failures (rejected at relay)	✓	✓	✓
Delivered	–	✓	✓ (proven by an open/click; otherwise *assumed* = sent − bounced)
Opens	–	✓	✓ (tracking pixel)
Clicks	–	✓	✓ (link redirect)
Bounces	–	✓	✓ (DSN processing)
Spam complaints	–	✓	provider feedback loop only
Unsubscribes	–	✓	✓ (unsubscribe link + `List-Unsubscribe`)

[1] **OmniCRM does not detect which provider you use** — it is configured with only an SMTP host and credentials, which look identical for every relay. The middle column is whatever your relay happens to offer, viewed in **that provider's own console** (not in OmniCRM) — unless you wire up its webhook (Model 1) or use OmniCRM-native tracking (Model 2).

Model 1 — Provider-native tracking

Most relays can apply their own open-pixel and link tracking and record the events. Because OmniCRM only holds an SMTP host + credentials, **it cannot tell which provider that is**, and it does not surface these numbers — you read them by logging into **that provider's own console** yourself. This needs no OmniCRM configuration; it is simply whatever your chosen relay offers.

To pull those events **into OmniCRM's analytics** instead, OmniCRM must ingest the provider's **webhook** and match each event back to a recipient using the per-message correlation field:

Provider	Correlation field OmniCRM sets / uses
Mailjet	`X-MJ-CustomID` (handler already present)
Mailgun	`X-Mailgun-Variables`
Amazon SES	`X-SES-MESSAGE-TAGS`
SendGrid	`unique_args` (via `X-SMTPAPI`)
Postmark	`X-PM-Metadata-*`
Mandrill	`X-MC-Metadata`

Each provider's event format differs, so ingesting a new provider's events requires a provider-specific webhook handler.

Model 2 — OmniCRM-native tracking (portable)

Because provider-native tracking only exists while you stay on that provider, OmniCRM measures engagement itself, identically on **any** relay. This is **implemented and enabled by default**:

- **Opens** — a 1×1 tracking pixel is injected into the HTML; the request records the open against the recipient.

- **Clicks** — links are rewritten to redirect through OmniCRM, which logs the click and forwards to the destination.
- **Delivered** — an open or click is proof of delivery, so OmniCRM marks the recipient **delivered** on the first pixel/redirect hit — no provider webhook required. Recipients that were `sent` and never bounce are counted as *assumed delivered*.
- **Bounces** — campaigns use a return-path that routes bounce notifications (DSNs) to OmniCRM's inbound mail server for processing.
- **Unsubscribes** — a `List-Unsubscribe` header and an in-body unsubscribe link feed the existing unsubscribe suppression list.

With this model all statistics live in OmniCRM and survive a change of email provider.

Current support status

- **Active (default):** SMTP campaign sending and **OmniCRM-native tracking on any relay** — `sent`/`failed` at send, plus **delivered, opened, clicked, bounced** detected by OmniCRM itself (pixel, click-redirect, VERP bounce). No provider webhook required. See Tracking configuration.
- **Optional:** if you happen to use Mailjet, its event webhook can also feed engagement in (correlated via `X-MJ-CustomID`) — but OmniCRM does not depend on it.

Tracking configuration

OmniCRM-native tracking is configured under the `edm` block in `crm_config.yaml`:

```yaml
edm:
  enable_open_tracking: true     # inject the open pixel into
campaign HTML
  enable_click_tracking: true    # rewrite links through the click
redirect
  enable_unsubscribe: true       # add List-Unsubscribe header +
in-body link
  tracking_base_url: ''          # public URL recipients can
reach; falls back to crm.base_url
  tracking_secret: ''            # secret that signs tracking
tokens; falls back to mailjet.api_secret
  bounce_domain: ''              # domain whose MX points at the
inbound mail server (enables VERP bounces)
  bounce_prefix: 'bounce'        # VERP local-part prefix ->
bounce+<token>@<bounce_domain>
```

Parameter	Type	Default	Description
`enable_open_tracking`	Boolean	`true`	Inject a 1×1 oper tracking pixel into the HTML body.
`enable_click_tracking`	Boolean	`true`	Rewrite absolute `http(s)` links to redirect through OmniCRM so click are logged.
`enable_unsubscribe`	Boolean	`true`	Add a `List-Unsubscribe` hea (+ RFC 8058 one-click) and an in-b unsubscribe link.
`tracking_base_url`	String	*(crm.base_url)*	Public base URL f tracking links. **Mu be reachable by recipients' mail clients — not `localhost`.** Falls back to `crm.base_url` wh blank.
`tracking_secret`	String	*(mailjet.api_secret)*	Secret used to HMAC-sign trackin tokens. Falls back `mailjet.api_sec` when blank.
`bounce_domain`	String	*(empty)*	Domain for VERP bounce addresses (`bounce+`

Parameter	Type	Default	Description
			`<token>@<domain>` Its MX must point OmniCRM's inbou mail server. Blank disables the VERP return-path.
`bounce_prefix`	String	`bounce`	Local-part prefix f VERP bounce addresses.

Tokens are HMAC-signed `(campaign_id, recipient_id)` pairs, so tracking needs no extra database column and links cannot be forged or enumerated without the secret.

> **Note on tokens:** the token is the campaign/recipient IDs *signed*, not encrypted — the IDs are base64-encoded, so a recipient who decodes a tracking URL can read the (sequential) campaign and recipient numbers. Tokens are therefore tamper-proof but not opaque. If the IDs must not be exposed, switch to random per-recipient tokens stored on `EmailCampaignRecipient` (adds a column) or an encrypted token payload.

The public tracking endpoints (no authentication) are served by the API:

Endpoint	Purpose
`GET /crm/email-campaign/edm/open/<token>`	Records an open; returns a 1×1 transparent GIF.
`GET /crm/email-campaign/edm/click/<token>?u=<url>`	Records a click, then 302-redirects to `<url>` (http/https only).
`GET` or `POST /crm/email-campaign/edm/unsubscribe/<token>`	Adds the recipient to the suppression list **and records a `marketing`/`email` opt-out in the contact's communication preferences** (honoured on future sends).

> **Important:** `tracking_base_url` must be a URL recipients can reach. Bounce capture additionally requires `bounce_domain` with an MX record pointing at OmniCRM's inbound mail server, which recognises VERP recipients and records the bounce instead of creating a ticket.

Communication preferences

Per-contact opt-outs are stored in a `communication_preferences` JSON field on the contact (no extra table), shaped as `{category: {channel: opted_in}}` — categories `marketing`, `newsletter`, `product_updates`, `surveys`; channels `email`, `sms`. It uses an opt-out model: a missing category/channel means the contact is opted in, so new categories or channels need no schema change.

A campaign unsubscribe records a `marketing`/`email` opt-out, and campaign recipient selection excludes any contact opted out of `marketing`/`email` (in addition to the global suppression list). EDM campaigns are treated as the `marketing` category. Note: the opt-out filter uses `JSON_EXTRACT` and is not indexed, which is fine at typical contact volumes.

Communication categories

Categories are **operator-defined** in `crm_config.yaml` under `edm.communication_categories` (no table), as a list of `{key, name, channel, default_opt_in, active}`:

```yaml
edm:
  communication_categories:
    # Email marketing message types (opt-out: default_opt_in true
= subscribed until they opt out)
    - {key: marketing,       name: Marketing,           channel:
email, default_opt_in: true}
    - {key: newsletter,      name: Newsletter,          channel:
email, default_opt_in: true}
    - {key: promos,          name: Promotions & Offers, channel:
email, default_opt_in: true}
    - {key: product_updates, name: Product Updates,     channel:
email, default_opt_in: true}
    - {key: surveys,         name: Surveys & Feedback,  channel:
email, default_opt_in: false}
    - {key: events,          name: Events & Webinars,   channel:
email, default_opt_in: false}
    # SMS marketing message types (opt-in: default_opt_in false =
excluded until they opt in)
    - {key: marketing,       name: Marketing SMS,       channel:
sms,   default_opt_in: false}
    - {key: promos,          name: Promotions SMS,      channel:
sms,   default_opt_in: false}
    - {key: service_alerts,  name: Service Alerts,      channel:
sms,   default_opt_in: true}
```

Each category belongs to one **channel** (`email` or `sms`) and carries its own **default opt-in**, so an operator can run, say, an opt-out *Promotions (email)* category alongside an opt-in-required *SMS Alerts (sms)* category.

Effective opt-in for a contact resolves as: an **explicit** contact preference wins; otherwise the category's **`default_opt_in`** applies.

Endpoint	Purpose
`GET /crm/email-campaign/communication-categories`	List the category catalog (read-only; defined in `crm_config.yaml`).
`GET /crm/email-campaign/contacts/<id>/communication-preferences`	Resolved opt-in per active category for a contact.
`PUT /crm/email-campaign/contacts/<id>/communication-preferences`	Set one preference (body `{category, channel, opted_in}`).

Each **campaign specifies a `category`** (defaults to `marketing`). Recipient selection excludes contacts opted out of that category/channel, applying the category's `default_opt_in` for contacts with no explicit preference.

The **unsubscribe link is a preference centre**: it shows the contact's email categories with their current opt-in state (the campaign's own category highlighted), lets them save changes, and offers *Unsubscribe from all email* (a global suppression). A one-click unsubscribe (RFC 8058 `List-Unsubscribe-Post`) opts the contact out of just that campaign's category.

Deliverability

Regardless of provider, configure authentication for your sending domain so campaigns reach the inbox:

Mechanism	Purpose
SPF	Authorises the provider's servers to send for your domain.
DKIM	Cryptographically signs messages; each provider supplies the DKIM record(s) to publish.
DMARC	Aligns SPF/DKIM and sets a policy for failures; improves placement and reporting.
Return-Path	Set so bounce notifications (DSNs) are routed where OmniCRM (or the provider) can process them.

Testing

For development and testing, point the relay at a local SMTP debug server that captures messages instead of delivering them:

```
mailjet:
  smtp:
    host: 127.0.0.1
    port: 1025
    use_tls: false
    use_auth: false
```

A debug server is provided for this purpose; it prints each message's recipients, subject, and correlation ID (and, in verbose mode, the full rendered body), so you can confirm Jinja2 rendering and message structure without sending live email.

Troubleshooting

Campaign stuck or recipients marked `failed` immediately

- Verify `host`/`port` and that `username`/`password` are set for the chosen provider (they default to Mailjet credentials when blank).
- Confirm the sender address is a verified/authorised sender on the provider.
- Check the provider's domain authentication (SPF/DKIM) is complete.

Email sends but personalisation shows blank or literal `{{ ... }}`

- Confirm the variable name exists for the segment (e.g. `first_name`).
- Check the template uses valid Jinja2 syntax; a template error fails that recipient and is recorded in its error message.

Provider dashboard shows opens/clicks but OmniCRM analytics do not

- This is expected unless OmniCRM ingests that provider's webhook (Model 1) or OmniCRM-native tracking is enabled (Model 2). Mailjet event ingestion is available today; other providers require a provider-specific handler.

No open/click data anywhere

- Open/click tracking must be enabled on the provider (account setting or per-message headers). On a plain/self-hosted relay there is no native tracking — use OmniCRM-native tracking.

eSIM Inventory Management

This guide explains how to configure eSIM inventory for different distribution channels — digital (online) versus printed (physical cards).

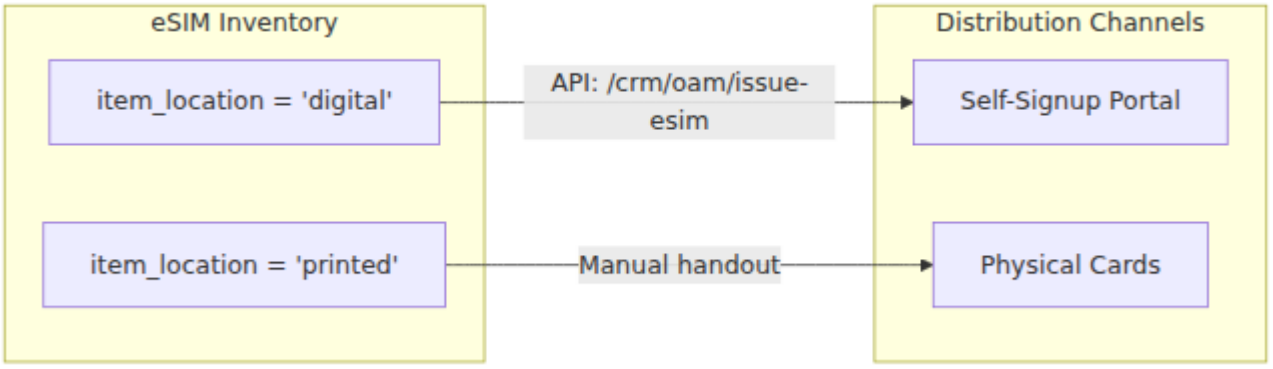
See also: `Inventory <administration_inventory>` for general inventory management, `SIM Card Provisioning <concepts_sim_provisioning>` for provisioning workflows and the eSIM issuer API.

Overview

eSIMs can be distributed through two channels:

1. **Digital Distribution** — Issued instantly via the self-signup portal, delivered by email with QR code
2. **Printed Distribution** — Pre-printed on cardboard cards for physical handout or retail sale

The `item_location` field in the Inventory table controls which channel an eSIM is available for.



Distribution Channel Configuration

The `item_location` field determines how an eSIM can be distributed:

Value	Description	Available Via
`digital`	Available for online/instant issuance	Self-signup portal, API
`printed`	Reserved for physical card distribution	Manual assignment only
Other values	Not available for automatic issuance	Manual assignment only

Setting Up Digital eSIMs

To make eSIMs available for online distribution:

1. Navigate to **Inventory** in OmniCRM
2. Select the eSIM inventory items intended for digital distribution
3. Set `item_location` to `digital`
4. Save changes

Setting Up Printed eSIMs

For eSIMs that have been printed on physical cards:

1. Navigate to **Inventory** in OmniCRM
2. Select the eSIM inventory items that are printed
3. Set `item_location` to `printed` (or any value other than `digital`)
4. Save changes

How Digital Issuance Works

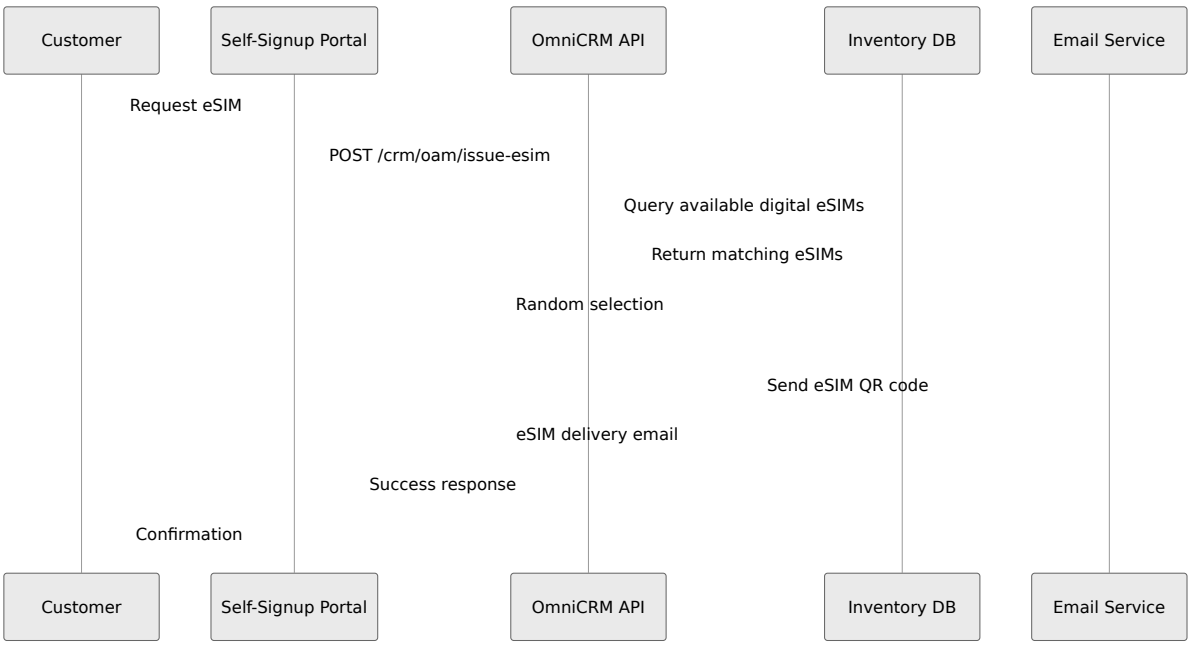
When a customer requests an eSIM through the self-signup portal via `POST /crm/oam/issue-esim`:

1. The API queries inventory for available eSIMs

2. Only eSIMs matching **all** of the criteria below are considered
3. One eSIM is randomly selected from the available pool
4. The eSIM details are sent to the customer via email

Inventory Selection Criteria

Field	Condition	Purpose
`item`	Contains "esim" (case-insensitive)	Identifies eSIM inventory items
`item_location`	Equals `digital`	Restricts to digital distribution channel
`customer_id`	Is null	Not yet assigned to a customer
`service_id`	Is null	Not yet assigned to a service



For full details on the issue-esim endpoint including request parameters, rate limiting, and error responses, see `SIM Card Provisioning - Public eSIM Issuer API <concepts_sim_provisioning>`.

Error Handling

If no digital eSIMs are available, the API returns:

HTTP Status	Error Type	Message
503	`NoInventory`	"No eSIMs currently available. Please try again later or choose a physical SIM."

Key Inventory Fields for eSIMs

Field	Type	Description
`item`	String	Item type identifier (must contain "esim" for eSIM items)
`item_location`	String	Distribution channel: `digital` for online, other values for physical
`itemtext1`	String	ICCID — the unique eSIM identifier
`management_url`	String	LPA activation string (e.g., `LPA:1$rsp-eu.simlessly.com$...`)
`customer_id`	Integer	Assigned customer (null if unassigned)
`service_id`	Integer	Assigned service (null if unassigned)

For a complete reference of all inventory item fields, see `Inventory - Inventory Item Fields <administration_inventory>`.

Automatic Import from HSS

When SIMs are imported from the HSS using the provisioning script, two fields are set automatically based on the HSS record:

Distribution Channel (`item_location`):

- If the batch name contains **"digital"** (case-insensitive), the eSIM is marked as `item_location = 'digital'` for online distribution
- Otherwise, the eSIM is set to the default physical location (e.g., "Ascension Island")

LPA Activation String (`management_url`):

- The `lpa` field from the HSS SIM record is automatically imported as `management_url`
- This enables QR code generation in the CRM for eSIM activation
- If the HSS record has no `lpa` value, the eSIM is imported without an activation string

This means distribution channel and LPA data can be controlled at the HSS level:

- Name batches appropriately (e.g., "Digital eSIMs Q1 2026", "Printed Cards Batch 3")
- Ensure eSIMs have their `lpa` field populated in the HSS before import

Best Practices

Inventory Segregation

- Keep digital and printed eSIM pools separate using `item_location`
- Monitor digital pool levels to ensure availability for self-signup customers
- Consider setting alerts when digital eSIM inventory runs low

Manual Batch Updates

When manually importing or updating eSIMs:

1. **Digital eSIMs**: Set `item_location = 'digital'` during import
2. **Printed eSIMs**: Set `item_location = 'printed'` or the physical location (e.g., "Georgetown Office")

Converting Between Channels

To move eSIMs between channels:

- **Printed to Digital**: Update `item_location` from `printed` to `digital`
- **Digital to Printed**: Update `item_location` from `digital` to `printed` (only if not yet issued)

Troubleshooting

No eSIMs Available for Online Issuance

Symptoms: Customers see "No eSIMs currently available" when requesting an eSIM online.

Possible causes:

- No eSIMs have `item_location` set to `digital`
- All digital eSIMs are already assigned (both `customer_id` and `service_id` are non-null)
- eSIM items don't have "esim" in the item name

Resolution:

1. Check inventory for eSIMs with `item_location = 'digital'`
2. Verify there are unassigned eSIMs (both `customer_id` and `service_id` are null)
3. Add more eSIMs to the digital pool or convert printed ones if available

Printed eSIMs Being Issued Online

Symptoms: eSIMs intended for physical cards are being issued through the portal.

Possible causes:

- `item_location` not set correctly on printed eSIMs

Resolution:

1. Update all printed eSIMs to have `item_location = 'printed'`
2. Ensure new printed eSIM imports set the correct `item_location` value

Cell Broadcast System

The Cell Broadcast System in OmniCRM enables mobile network operators to send emergency alerts and public warnings to mobile devices within specific geographic areas. Cell Broadcast is a critical public safety feature used for AMBER alerts, weather warnings, tsunami alerts, and other emergency notifications.

Key Advantage: Unlike standard SMS messaging, Cell Broadcast messages will audibly alert on phones that are on silent, out of credit or roaming. As this is a broadcast message, it is possible to send an alert to every member of the population carrying a mobile phone in a matter of seconds.

Omnitouch Warning Link (OWL)

The Omnitouch Warning Link (OWL) platform provides a comprehensive solution for disaster management professionals and mobile network operators:

- **Cell Broadcast Entity (CBE)** - Secure web-based application for authorized users to create and broadcast emergency warning messages
- **Cell Broadcast Center (CBC)** - Standards-compliant network integration component that connects to cellular networks (2G/3G/4G/5G) to distribute messages

OWL is designed for use on any device with a web browser (Chrome/Firefox/Safari/Edge), such as computers, laptops, tablets or mobile phones.

Overview

Cell Broadcast (also known as Public Warning System or PWS) allows operators to:

- **Send Emergency Alerts** - Distribute critical safety information to all devices in an area

- **Target Geographic Regions** - Broadcast to specific tracking areas or network cells by controlling which cell towers broadcast messages
- **Support Multiple Languages** - Provide alert messages in multiple languages simultaneously (up to 500 characters per language)
- **Manage Alert Lifecycle** - Create, update, approve, monitor and delete broadcast messages
- **Integrate with External Systems** - Connect with CBC (Cell Broadcast Center) infrastructure via multiple cellular network interfaces
- **Two-Factor Authentication** - Secure approval process using Time-based One-Time Passwords (TOTP)
- **Two-Person Rule** - Optional requirement for approval from a second person before message transmission

Unlike SMS, Cell Broadcast does not require subscriber lists and can reach all capable devices in a geographic area instantly, making it ideal for time-critical public safety alerts. In most networks, a broadcast to all devices takes under 10 seconds.

Use Cases

Cell Broadcast is used for:

- **Emergency Warnings** - Natural disasters (earthquakes, tsunamis, floods, fires)
- **AMBER Alerts** - Child abduction notifications
- **Weather Alerts** - Severe weather warnings, tornado alerts
- **Public Safety** - Terrorist threats, chemical spills, evacuations
- **Test Messages** - System testing and public awareness campaigns (Monthly Test Messages do not alert users but will be received)

Geographic targeting is often of paramount importance in emergency situations. For example, Tsunami alerts advising those near coastal areas to seek higher ground should not be sent to people in inland areas far from the hazard. By controlling which cell towers broadcast emergency warning messages, the scope of transmission can be limited to the appropriate geographical area.

Emergency Warning Message Lifecycle

Transmitting an Emergency Warning message requires quick action while providing accurate information and authentication to ensure message validity.

The message lifecycle consists of four stages:

1. **Message Definition** - Type of message, message content, expiry settings
2. **Message Targeting** - Geographic areas and cell towers to broadcast to
3. **Message Approval** - Authorization/verification of operator identity and second person approval (if required)
4. **Message Review** - Final confirmation before transmission

After broadcast, messages can be monitored, updated as situations evolve, and stopped when immediate danger subsides.

Stage 1: Message Definition

This step defines the basic parameters of the emergency warning message to be broadcast:

Message Identifier

Different types of messages have different identifiers, which are treated differently by receiving phones. For example, a Monthly Test Message should not alert actual users but they will still receive the message.

Note: Each message template available in the OWL system already has the appropriate Message Identifier (MI) embedded, so system users do not need to manually select this when creating an alert message.

Message Text

Text body limited to 500 characters containing the message to be displayed to end users. Messages can be provided in **multiple languages** by adding the second language text underneath the first. Remember the 500-character limit applies to the total message including all languages.

Message Templates
Hazard alert messages can be predefined in advance as "templates" for different envisioned scenarios such as:

- Floods
- Tsunamis
- Earthquakes
- Periodic tests
- Other disaster scenarios

Templates save time during emergencies. These templates can be modified as needed when defining the message, or messages can be scripted from scratch.

Message Expiry and Repetitions
Emergency messages have a finite lifetime for which they are relevant. When defining the message:

- **Expires (minutes)** - How long the message will continue to be broadcast
- **Message Repetitions** - How many times it will be retransmitted

Each phone will only show the message to the user once. However, cell sites will continue to transmit messages until the expiry time is reached to ensure people entering the coverage area from outside will receive the message.

Stage 2: Targeting

Cell Broadcast messages are sent at the cell tower level, and geographic reach can be limited by selecting which towers broadcast the message.

Optional Targeting
This step is optional. Not entering any targeting information means all cell towers will transmit the emergency warning message.

Predefined Target Areas
The OWL system has a database of all cell towers and can define target areas on a map. Areas can be targeted using predefined zones (determined in advance for quick selection) or by drawing custom areas on the map.

Map Drawing Tools
Custom target areas can be created using:

- Polygon tool - Draw precise coverage boundaries
- Circle tool - Quick radius-based alerts
- Rectangle tool - Grid-aligned coverage

The "Add New Zone" feature allows defining custom target areas that can be saved for future use.

Stage 3: Approval

An approval process validates that the person issuing the Emergency Warning message is authorized to do so.

Two-Factor Authentication
Uses Time-based One-Time Passwords (TOTP) via:

- **Physical token** (like an RSA SecurID)
- **App-based solution** (Google Authenticator, Authy, Microsoft Authenticator, or other TOTP-compatible apps)

Users who will be creating or approving draft message alerts must have an authenticator app on their smartphone to generate the authorization code that the system will request.

Setting Up 2FA
When first configuring 2FA:

1. Install an authenticator app on your smartphone (Google Authenticator, Authy, Microsoft Authenticator, etc.)
2. Navigate to your OWL account settings and scan the QR code with your authenticator app
3. Enter the verification code to confirm setup
4. Save backup codes in a secure location
5. Test code generation before emergencies

For detailed 2FA setup instructions, see `Two-Factor Authentication <2fa>`.

If you change mobile devices or the app stops syncing with your OWL account, contact your System Administrator for help. Administrators can reset 2FA tokens from the **Users and Roles → Users** page.

Two-Person Rule
Where the process requires approval from a second person, the person issuing the alert must input the Time-based One-Time Password of the other person before the process will be allowed to proceed. This provides oversight and minimizes risk of misuse.

Granular User Roles
Individual user roles can be configured to:

- Allow only certain users to send predefined messages
- Restrict message targeting to specific regions
- Require additional approval workflows

Stage 4: Review

Once Message Definition, Targeting, and Approval stages are complete, the operator must review the message before final broadcast. Once satisfied with the message details, they can transmit the message.

Transmission Speed: In most networks, a broadcast to all devices in the network takes under 10 seconds.

Stage 5: Monitoring and Updates

Once the message broadcast is started, operators can monitor and manage transmitted messages.

Network Feedback
Cellular networks return information about cell sites that have broadcast the message. If a cell site is offline or unavailable, this will be reported back to the operator.

Automatic Retransmission
Should any offline cell sites become available again while the Emergency

Warning is still active, all phones connected to that cell will receive the message.

In-Flight Updates
Once broadcast, the message can be:

- Updated as the situation evolves
- Modified with new message body content
- Recalled/stopped at any time

Historical Records
All information about historical messages can be viewed and reviewed for audit purposes.

Message Structure

Each Cell Broadcast message consists of:

Message Configuration

- **Message Identifier** - Unique identifier for the alert type (e.g., 4370 for ETWS Earthquake, 4371 for ETWS Tsunami)
- **Category** - Alert category (normal, emergency, high, extreme)
- **Repetition Period** - Seconds between broadcast repetitions
- **Number of Broadcasts** - How many times to broadcast the message
- **Warning Period** - Duration in seconds the warning is valid
- **Channel Indicator** - Type of channel used for broadcast

Localized Messages

Each CBC message can include multiple language variants:

- **Language** - ISO language code (en, es, fr, zh, etc.)
- **Message Body** - Alert text in that language (up to 1395 characters)

The system automatically broadcasts all language variants, allowing recipients to view alerts in their preferred language.

Tracking Areas

Defines geographic targeting for the alert:

- **Tracking Area** - Geographic identifier (cell ID, tracking area code)
- **Operator** - Mobile network operator code (MCC-MNC)
- **RAT Type** - Radio Access Technology (LTE, 5G, UMTS, GSM)

Multiple tracking areas can be specified to cover larger regions or multiple operators.

Creating a Cell Broadcast Message

Via Web UI:

1. **Navigate to Cell Broadcast** - Access the CBC management interface from the main navigation
2. **Click "Create Alert"** - Opens the message creation form
3. **Configure Message Parameters:**
    - Message Identifier (e.g., 4370 for earthquake alerts)
    - Category (normal, high, extreme)
    - Repetition Period (typically 5-60 seconds)
    - Number of Broadcasts (999 for continuous, or specific count)
    - Warning Period (duration in seconds)
    - Channel Indicator (typically "basic")

4. **Add Localized Messages:**
    - Click "Add Language"
    - Select language from dropdown
    - Enter message text (max 1395 characters for GSM7, less for Unicode)
    - Repeat for additional languages
5. **Define Tracking Areas:**
    - Click "Add Tracking Area"
    - Enter tracking area code
    - Select operator (MCC-MNC combination)
    - Choose RAT type (LTE, 5G, etc.)
    - Repeat for additional geographic areas

6. **Review and Create** - Verify all details and click "Create Alert"

Via API:

Endpoint: `PUT /crm/cbc/`

Required Permission: `CREATE_CBC_MESSAGE`

Request Body:

```
{
  "messageIdentifier": "4370",
  "category": "emergency",
  "repetitionPeriod": 10,
  "numberOfBroadcasts": 999,
  "warningPeriodSec": 3600,
  "channelIndicator": "basic",
  "localized_messages": [
    {
      "language": "en",
      "messageBody": "EARTHQUAKE WARNING: Magnitude 6.5 earthquake
detected. Take cover immediately. Drop, Cover, Hold On."
    },
    {
      "language": "es",
      "messageBody": "ADVERTENCIA DE TERREMOTO: Terremoto de
magnitud 6.5 detectado. Cúbrase inmediatamente. Agáchese, Cúbrase,
Agárrese."
    }
  ],
  "tracking_areas": [
    {
      "tracking_area": "12345",
      "operator": "310-410",
      "rat_type": "LTE"
    },
    {
      "tracking_area": "12346",
      "operator": "310-410",
      "rat_type": "5G"
    }
  ]
}
```


Response:

```
{
  "cbc_message_id": 123,
  "cbc_unique_id": "550e8400-e29b-41d4-a716-446655440000",
  "messageIdentifier": "4370",
  "category": "emergency",
  "repetitionPeriod": 10,
  "numberOfBroadcasts": 999,
  "warningPeriodSec": 3600,
  "channelIndicator": "basic",
  "initiating_user": 5,
  "approving_user": null,
  "created": "2025-01-10T14:30:00Z",
  "localized_messages": [...],
  "tracking_areas": [...]
}
```


The message is immediately sent to the Cell Broadcast Center for transmission.

Managing Existing Messages

View All Messages

Endpoint: `GET /crm/cbc/`

Required Permission: `VIEW_CBC_MESSAGE`

Returns list of all CBC messages with their status, timestamps, and configuration.

Update a Message

Endpoint: `PATCH /crm/cbc/{cbc_message_id}`

Required Permission: `UPDATE_CBC_MESSAGE`

Updates message content, tracking areas, or broadcast parameters. Updated messages are re-sent to the CBC.

Request Body:

```
{
  "cbc_message_id": 123,
  "numberOfBroadcasts": 500,
  "localized_messages": [
    {
      "language": "en",
      "messageBody": "UPDATED: Earthquake warning still in effect.
Aftershocks possible."
    }
  ]
}
```

Delete a Message

Endpoint: `DELETE /crm/cbc/{cbc_message_id}`

Required Permission: `DELETE_CBC_MESSAGE`

Removes the message from the database and attempts to cancel it on the CBC.

Approval Workflow

Cell Broadcast messages support an optional approval workflow for high-stakes alerts:

1. **Initiating User** - Staff member who creates the alert (`initiating_user` field)
2. **Approving User** - Manager who approves the alert before broadcast (`approving_user` field)

If approval is required:

- Message is created with `approving_user = null`
- Message is held in "pending approval" state
- Approving user reviews message and either approves or rejects
- On approval, `approving_user` is set and message is broadcast

This workflow is configurable based on organization policy.

Message Identifiers

Standard message identifiers follow 3GPP TS 23.041:

Earthquake and Tsunami Warning System (ETWS):

- **4370** - ETWS Earthquake Warning
- **4371** - ETWS Tsunami Warning
- **4372** - ETWS Earthquake and Tsunami Combined Warning
- **4373-4378** - ETWS Other Emergency Types
- **4379** - ETWS Test Message

Commercial Mobile Alert System (CMAS) / Wireless Emergency Alerts (WEA):

- **4352** - Presidential Alert
- **4353-4355** - Extreme Alerts
- **4356-4359** - Severe Alerts
- **4360-4363** - AMBER Alerts
- **4364-4367** - Public Safety Messages
- **4368-4369** - State/Local Tests
- **4380-4381** - Test Messages

Custom Ranges:

- **0-999** - Reserved for operator-specific alerts
- **1000-4095** - Custom message types

Integration with Cell Broadcast Center

The Cell Broadcast Entity (CBE) needs a mechanism to deliver messages to individual cellular networks. The OWL Cell Broadcast Center (CBC) connects to each cellular network to send Emergency Warning messages to the public.

Multi-Network Redundancy
In the event that one cellular network operator is unavailable (outage or no coverage), if another operating cellular network is available, users will still receive Emergency Warning messages via the other available networks.

Per-Operator CBC Instances
To ensure there is no connection between competing networks, OWL runs a separate CBC instance for each MNO; it is not shared between operators.

OWL CBC Configuration

The CBC URL is configured in `crm_config.yaml`:

```
cbc_url: "http://cbc.example.com:8080"
```

Message Transmission:

When a CBC message is created or updated:

1. OmniCRM CBE stores the message in its database
2. Message is formatted for the CBC API
3. HTTP POST request sent to `{cbc_url}/alerts/send`
4. CBC connects to cellular network via appropriate interface (CBSP, SBc-AP, or N50)
5. CBC acknowledges receipt and begins broadcast
6. Devices in the target tracking areas receive the alert

Message Deletion:

When a message is deleted, the CBE attempts to cancel it on the CBC to stop ongoing broadcasts.

Cellular Network Integration Points

Different generations of cellular networks (2G/3G/4G/5G) each have unique interfaces for connecting to/from the Cell Broadcast Center. Based on the

technologies used by each cellular network, the correct interface must be configured.

OWL Cell Broadcast Center supports 2G, 3G, 4G and 5G Cell Broadcast interfaces and has integrated with numerous commonly used cellular network components.

CBSP - 2G/3G - Base Station Controller (BSC)

The Cell Broadcast Service Protocol (CBSP) interface links the CBC to the Base Station Controller (BSC) controlling 2G (GSM) base stations.

- Used for 2G and 3G Cell Broadcast messaging with combined Radio Network Controller/Base Station Controller deployments
- Can be configured either as a client or server arrangement depending on the BSC vendor
- A connection must be established between all BSCs in the network and the OWL CBC
- Interfaces are continuously monitored with alerting to indicate if a CBSP link has gone down

Note: 3GPP defined Service Area Broadcast Protocol (SABP) for use in standalone RNC deployments. This can be used if required when CBSP is not supported for 3G cells on a combined RNC/BSC, however additional testing and support from the RNC vendor may be required.

SBc-AP - 4G/5G Non-Standalone - MME/IWF

The SBc-AP interface links the OWL CBC to the MME (Mobility Management Entity) serving 4G and 5G eNodeB/gNodeBs.

- Used for 4G LTE networks
- Also used for Non-Standalone 5G (the majority of deployments as of 2025)
- A connection must be established between all MMEs in the network and the OWL CBC
- Interfaces are continuously monitored with alerting to indicate if a SBc-AP link has gone down

N50 - 5G Standalone - AMF

For Standalone 5G networks, the N50 interface connects the OWL CBC to the AMF (Access and Mobility Management Function) serving 5G gNodeBs.

- Interface is present in the OWL CBC
- Has not been extensively tested with 3rd party AMFs due to the small number of commercially available 5G SA networks in 2025
- Will be fully supported as 5G SA deployments become more common

MNO Networking Requirements

Networking must be in place between the OWL CBC and the Mobile Network Operator's network to reach the interfaces outlined above.

This is handled case-by-case, but generally requires:

- Dedicated cross-connect/fiber between the CBC and MNO network
- Each interface logically separated
- Connectivity to each integration point (MME, RNC, BSC) in the cellular network

Supported Network Equipment

OWL CBC has been tested and integrates with commonly used cellular network components from major vendors:

Cell Site Data Integration

OWL supports automatic data scraping from:

- **Nokia NetAct**
- **Huawei U2000 / U2020**
- **ZTE NetNumen / ZXPOS**
- **Ericsson ENM**

Alternatively, cell site data can be provided to the Omnitouch operations team periodically via email.

User Management and Access Control

Role-Based Access Control (RBAC)

The OWL system uses role-based access control (RBAC): people (Registered Users) are assigned one or more Roles, and each Role is a bundle of Permissions. Permissions are the smallest unit of access (e.g., create draft message alert). A Registered User's effective access is the union of Permissions from all assigned Roles.

RBAC Components:

- **Users** - Real people who sign-in to the OWL system
- **Permissions** - Micro capabilities (e.g., approve draft message, create message, view reports)
- **Roles** - Named sets of permissions (e.g., Message Approvers, Message Creators)
- **Assignment** - Users receive one or more Roles; permissions aggregate

RBAC Benefits:

1. **Data Protection** - Users only see and do what they're allowed to
2. **Operational Fit** - Roles mirror job functions (Admin, Message Creator, Message Approver)
3. **Simple Admin** - Grant access by assigning roles; avoid per-user micromanagement

System Permissions

System permissions generally follow CRUD patterns with four options:

- **View** - Read or browse messages and reports
- **Create** - Create or add a message alert
- **Update** - Edit or modify a draft message alert
- **Delete** - Delete or remove a draft message alert

Core CBC Permissions:

- `CREATE_CBC_MESSAGE` - Create new broadcast messages
- `VIEW_CBC_MESSAGE` - View existing messages and their status
- `UPDATE_CBC_MESSAGE` - Modify message content or broadcast parameters
- `DELETE_CBC_MESSAGE` - Delete messages and cancel broadcasts

Assign these permissions to roles based on your organization's public safety responsibilities.

For comprehensive information on user roles and permissions management, see `Users and Roles <rbac>`.

User Account Management

First-Time Login

When a new user is set up in the system, they are provided with login credentials by the System Administrator:

1. Navigate to the OWL login URL provided by your System Administrator
2. Enter your username and password
3. If 2FA is enabled for your account, you will be prompted to set it up (see 2FA section above)

Best Practice: Users should change their initial password immediately after first login for security. Navigate to your user profile settings to change your password.

For more details on authentication flows, see `Authentication Flows and Admin Controls <authentication_flows>`.

Password Reset

Users can reset their own passwords:

1. From the system login page, select "Forgot Password"
2. Follow the email verification process
3. Set a new password

Admin Password Reset:

System Administrators can reset passwords for users from the **Users and Roles → Users** page:

1. Navigate to **Users and Roles → Users**
2. Select the user requiring password reset
3. Click **Reset Password**
4. System generates a secure random temporary password (12 characters)
5. Temporary password is displayed to the admin
6. Provide the temporary password to the user via a secure channel (phone or in-person, never via email)
7. User can login with the temporary password
8. **Important:** User should change this password immediately after logging in

For more details, see `Users and Roles <rbac>`.

Adding New System Users

System Administrators can add new users by navigating to **Users and Roles → Users**:

Required information for each new Registered User:

- First Name
- Last Name
- Email
- Password (temporary)
- Mobile Number
- Role(s)

Best Practice: Implement a New System User Application Form that aligns with your organization's existing policies and procedures. Only add users after proper approval.

Editing User Profiles

System Administrators can change permissions and access for existing users:

1. Navigate to **Users and Roles → Users**
2. Select the user to edit
3. Modify assigned roles as needed
4. Save changes

Deleting System Users

System Administrators can delete users from **Users and Roles → Users**.

Warning: Once a user has been deleted from the OWL system, the action cannot be undone. Take great care before executing this task.

Viewing All System Users

At any time, the System Administrator can view a list of all Registered Users and see what permissions and roles each one has by navigating to **Users and Roles → Users**.

Alert Message History

The OWL system keeps a record of all alert messages sent for auditing purposes and to support operational review.

Accessing Message History:

Navigate to **Manage Cell Broadcasts** to view:

- All previously sent messages
- Message status (active, expired, cancelled)
- Timestamp of transmission
- Initiating and approving users
- Geographic targeting details
- Message content and parameters

This helps with:

- Auditing the system

- Reviewing operating procedures used by the NDMO and other alerting agencies
- Understanding message effectiveness
- Compliance and reporting requirements

Cell Broadcast Map Visualization

The Cell Broadcast Map provides a **visual interface** for planning geographic coverage areas and identifying which cell towers will broadcast alerts.

Accessing the Map

Navigate to:

Or directly:

Required Permission: `VIEW_CBC_MESSAGE` or `CREATE_CBC_MESSAGE`

Map Features

The map displays:

Cell Tower Locations:

- **Tower Icons** - Cell site positions displayed as cell tower icons
- **Sector Indicators** - Directional arrows showing antenna sector orientation
- **Tower Names** - Site identifiers and names
- **Coverage Data** - Loaded from `cellSites.txt` file

Drawing Tools:

- **Polygon Tool** - Draw custom coverage areas
- **Circle Tool** - Create circular broadcast zones
- **Rectangle Tool** - Define rectangular coverage areas

Coverage Analysis:

- **Site List** - Table showing all cell sites within the drawn area
- **Zone Management** - Save and load predefined coverage zones
- **Site Count** - Real-time count of towers in coverage area

Using the Map

Step 1: Load Cell Site Data

The map automatically loads cell tower locations from `/cellSites.txt` on page load. This file contains:

- **lat/lng** - Tower coordinates
- **site_name** - Identifier
- **sectors** - Antenna directions in degrees

Step 2: Draw Coverage Area

Select a drawing tool:

1. Click **Polygon** to draw custom shapes
    - Click to add points
    - Double-click to complete
    - Creates precise coverage boundaries
2. Click **Circle** to draw circular areas
    - Click center point
    - Drag to set radius
    - Useful for quick radius-based alerts
3. Click **Rectangle** to draw rectangular areas
    - Click one corner
    - Drag to opposite corner
    - Efficient for grid-aligned coverage

Step 3: Review Covered Sites

After drawing, the system:

- Calculates which cell sites fall within the area

- Displays list in table below the map
- Shows site names and coordinates
- Provides count of affected towers

Example Coverage Table:

Step 4: Export Coverage Data

Use the coverage data to:

- **Identify tracking area codes** for the broadcast
- **Estimate alert reach** based on tower count
- **Plan emergency response** by understanding affected areas
- **Save zone definitions** for future use

Workflow Integration

The map visualization integrates with broadcast creation:

Planning an Alert:

1. **Open CBC Map** to visualize affected area
2. **Draw coverage zone** using polygon tool
3. **Review covered sites** and adjust boundaries
4. **Note tracking area codes** for affected cell sites
5. **Create CBC message** with appropriate targeting

Example: Coastal Tsunami Warning

Zone Management

Saving Zones:

Predefined coverage zones can be saved for common scenarios:

- **Coastal Region** - For tsunami/storm surge warnings
- **Wildfire Zones** - For evacuation alerts
- **Urban Centers** - For AMBER alerts in populated areas

- **Highway Corridors** - For traffic/weather alerts

Zone Data Format:

Zones are stored in `site_data.json`:

```
[
  {
    "area": "Coastal Region",
    "polygon": [
      {
        "coord": [
          {"lat": -33.8688, "lng": 151.2093},
          {"lat": -33.8650, "lng": 151.2070},
          {"lat": -33.8600, "lng": 151.2150},
          {"lat": -33.8688, "lng": 151.2093}
        ]
      }
    ]
  }
]
```

Loading Saved Zones:

1. Select zone from dropdown menu
2. Polygon displays on map automatically
3. Site list updates to show covered towers
4. Modify polygon if needed

Map Configuration

Google Maps API:

The map requires Google Maps API key configured in environment:

```
VITE_GOOGLE_API_KEY=your_google_maps_api_key_here
```

Cell Site Data:

Update `public/cellSites.txt` with your network's cell tower locations:

```
# Format: lat,lng,name,sector1,sector2,sector3
-33.8688,151.2093,SYD_CENTRAL,0,120,240
-33.8650,151.2070,SYD_HARBOUR,45,165,285
```

Obtain cell site coordinates from:

- Network planning tools
- Tower installation records
- Field surveys with GPS
- Radio network controller (RNC) configuration

Map Styling:

Custom map styles can be configured in `mapStyles.js` to:

- Highlight emergency services
- Show topographic features
- Emphasize population centers
- Match organizational branding

Use Cases

Emergency Planning:

- Pre-plan coverage zones for known hazard areas
- Test different targeting strategies
- Estimate population reach
- Coordinate with emergency services

Alert Verification:

- Confirm message will reach intended area
- Identify coverage gaps
- Avoid over-alerting adjacent regions
- Validate tracking area codes

Network Analysis:

- Visualize cell tower distribution
- Identify coverage overlaps
- Plan tower deployments for better alert coverage
- Optimize broadcast efficiency

Best Practices

Based on experience with customers around the world, Omnitouch recommends the following best practices for all OWL deployments.

Message Content:

- Keep messages concise and clear (under 360 characters for single-page alerts)
- Use all capital letters for emergency alerts (improves readability)
- Include specific action items ("Evacuate immediately", "Seek shelter")
- Avoid technical jargon
- Test messages with actual devices before emergencies

Language Support:

- Always provide messages in the primary language of the region
- Include additional languages for multicultural areas
- Ensure translations are culturally appropriate
- Test special characters and Unicode support

Geographic Targeting:

- Use smallest necessary tracking areas to avoid alert fatigue
- Consider population density when setting repetition period
- Test geographic targeting before emergencies
- Maintain accurate tracking area documentation

Testing:

- Use test message identifiers (4379, 4380-4381) for drills
- Schedule regular system tests
- Verify CBC integration is functioning
- Train staff on emergency procedures

Alert Fatigue:

- Only use for genuine emergencies
- Avoid over-broadcasting
- Set appropriate repetition periods
- Use severity levels appropriately

User Account Security

2FA Token Security:

- Protect physical 2FA tokens like building access cards
- Report lost or stolen tokens immediately
- Test 2FA regularly to ensure it's functioning
- Save backup codes when setting up 2FA and store them securely offline
- Contact System Administrator if you need 2FA reset

For more information on 2FA setup and recovery, see `Two-Factor Authentication <2fa>`.

Data Maintenance

Predefined Target Areas:

As geographic boundaries change, development occurs, and risk areas shift, there is a need to review the Predefined Target Areas. Omnitouch suggests this data is reviewed **annually by the NDMO**, with support from other alerting agencies where applicable.

Updates to boundaries can be defined using several common GIS platforms or Google Earth, then provided via email to the Omnitouch Operations team who will make the changes to the system.

Predefined Message Templates:

The predefined message templates should be reviewed **at least annually by the NDMO**, with support from other alerting agencies where applicable, to ensure:

- Message content still accurately reflects the hazard and call to action
- Contact information and instructions are current
- Language translations remain accurate
- Message tone and urgency are appropriate
- References to emergency services or procedures are up to date

Updates can be provided via email to the Omnitouch Operations team who will make the changes to the system.

Cell Site Data:

- Review and update cell site data whenever network changes occur
- Typical update frequency: monthly or quarterly
- Coordinate with MNO network planning teams
- Verify accuracy after major network upgrades or expansions

System Architecture

All Omnitouch products are designed to support geographically distributed deployments.

Deployment Options

All components can run as:

- **Containers (K8s)** - Kubernetes orchestrated containerized deployments
- **Virtual Machines** - VMware, Proxmox, HyperV
- **Private Cloud** - On-premises cloud infrastructure
- **Public Cloud** - AWS, GCP
- **Bare Metal** - Direct hardware deployment

Distributed Architecture

The distributed architecture allows:

- Local Disaster Management Offices to access OWL CBE and distribute messages even if a region becomes isolated from the national network
- Multiple Cell Broadcast Entities and multiple Cell Broadcast Centers per operator/per country
- Local disaster response agencies (Municipal Government, Police, Fire, etc.) to issue alerts to their region even if the main NDMO (National Disaster Management Office) loses access

This is particularly valuable when MNOs have distributed their cellular network with local BSC/MME resources.

CBE and CBC Networking

To ensure there is no connection between competing networks, each MNO has a separate CBC instance (not shared).

Networking requirements between CBE and CBC:

- All traffic is encrypted between CBE & CBC
- Authentication based on mutual certificates
- Connectivity from CBE to CBC over TLS on TCP port 443
- Coordination required between MNOs and the NDMO or agency hosting the CBE

Access Considerations

The agency hosting the CBE will need to define access procedures for end users (ie. Citrix, VPN, etc.), keeping in mind that the system must be accessible in non-ideal scenarios such as:

- Large scale outages of public power networks
- Telecommunications network failures
- Natural disasters affecting infrastructure

Deployment Requirements

CBE VM Requirements (NDMO / Government)

3x Virtual Machines:

- **2x CBE VMs** (Ideally in different datacenters/availability zones)
- **1x Monitoring VM**

Each VM requires:

- **Storage:** 50GB
- **CPU:** 2x Virtual CPU
- **RAM:** 8GB
- **OS:** Base OS provided by Omnitouch
- **Networking:** Allow traffic to CBC VMs on TCP port 443 for TLS traffic to control the CBCs

CBC VM Requirements (MNO)

3x Virtual Machines:

- **2x CBC VMs** (Ideally in different datacenters/availability zones)
- **1x Monitoring VM**

Each VM requires:

- **Storage:** 50GB
- **CPU:** 2x Virtual CPU
- **RAM:** 8GB
- **OS:** Base OS provided by Omnitouch
- **Connectivity:** To each of the Integration Points in the cellular network (MME, RNC, BSC)
- **Networking:** Allow traffic from CBE VMs on TCP port 443 for TLS traffic to be controlled by the CBEs

Integration Steps

Deploying OWL involves the following steps:

1. **Source new operator/s** - Identify participating mobile network operators
2. **Project admin (set-up)** - Establish project governance and administration
3. **Select hosting location for CBE** - Determine where CBE will be hosted
4. **Define Users & Message Flows/Procedures** - Establish approval workflows and user roles
5. **Define Polygons for Target Areas and Message Templates** - Pre-configure common scenarios
6. **IP Address allocations** - Allocate IP addresses for NDMO and MNOs
7. **Set up site-to-site VPN** - Establish secure connection to Omnitouch team
8. **Deploy CBE VMs to NDMO** - Install Cell Broadcast Entity
9. **Deploy CBC VMs to MNO** - Install Cell Broadcast Center at each operator
10. **Configure Network Elements** - Set up connectivity to CBC from cellular network equipment
11. **Networking between CBE and CBC VMs** - Establish secure communication
12. **Networking between CBC VMs and Network Elements** - Connect to BSC/MME/AMF
13. **Setup API access to NMS** - Configure cell site data integration
14. **Monitoring setup & tested** - Verify monitoring and alerting
15. **Verification/Testing of test alerts** - Conduct system testing
16. **Public warning test** - Perform end-to-end public test

Character Limits

Cell Broadcast messages have strict character limits based on encoding:

GSM 7-bit Encoding (English, basic Latin characters):

- Single page: 93 characters
- Multi-page: 15 pages × 93 = 1395 characters maximum

Unicode UCS-2 Encoding (non-Latin scripts, emojis):

- Single page: 41 characters
- Multi-page: 15 pages × 41 = 615 characters maximum

OWL Platform:

- Message text limited to 500 characters
- Web UI displays remaining character count and warns when approaching limits

Monitoring and Logs

Cell Broadcast activity is logged for audit purposes:

- Message creation, update, and deletion events
- Initiating and approving users
- Timestamps and message identifiers
- CBC API responses and errors
- Geographic targeting details

Access logs via the Activity Log or database queries:

```
SELECT * FROM cbc
WHERE created >= '2025-01-01'
ORDER BY created DESC;
```

Integration with Mobile Devices

Cell Broadcast messages are received by compatible mobile devices:

Device Support:

- Most smartphones from 2015 onwards support Cell Broadcast
- Feature phones may have limited support

- Device must be connected to the network (no data/SMS credits required)
- Works even during network congestion when SMS fails

User Experience:

- Alert displays as full-screen notification
- Unique alert tone plays
- Alert persists until acknowledged
- No user subscription required
- Cannot be blocked by users for presidential/extreme alerts

Testing Device Reception:

To verify devices can receive alerts:

1. Send test message (identifier 4379 or 4380-4381)
2. Ensure device is in the target tracking area
3. Check device has Cell Broadcast enabled in settings
4. Verify with multiple device models and OS versions

Additional Functionality

The OWL platform can be extended with optional features to complement Cell Broadcast messaging:

Mass Text / SMS

Sending regular SMS to individuals for supplementary notifications.

- Often used for downgraded alerts to inform people the immediate threat has passed, in a less-obtrusive way
- Much slower than Cell Broadcast but can include a confirmation mechanism to verify the message was received
- Useful for targeted follow-up communications

Voice Calling for Fixed Line

Automatically call fixed line numbers and play emergency warning messages.

- Pre-recorded message playback
- Text-to-speech rendition of emergency warning message
- Reaches populations without mobile phones
- Can verify message delivery through call completion

Cross-post to Social Media

Automatically post Emergency Warning messages to official social media channels.

- Extends reach beyond cellular network
- Provides reference for those who missed initial alert
- Allows for extended messaging beyond character limits

Automatic Radio/TV Transmission

Automatically broadcast emergency messages via radio and television.

- Pre-recorded message playback
- Text-to-speech rendition of emergency warning message
- Reaches populations during network outages
- Complements Cell Broadcast for comprehensive coverage

External Warning Devices

The OWL CBC can connect to a variety of external sources:

- Social media platforms
- Public APIs
- Voice call systems
- Radio broadcast systems
- Physical alarms and sirens

- Electronic signage

Customization options can be explored as part of the design phase.

Customization and Maintenance

Periodic Testing

Periodic testing of the solution should be performed at regular intervals to ensure:

- The solution and all components are functioning correctly
- All staff are familiar with the processes and procedures required for issuing Emergency Warning Messages
- Integration points remain operational
- Message templates are current and effective

Recommended Testing:

- Monthly test messages using identifiers 4379, 4380-4381
- Quarterly full system tests including approval workflows
- Annual public warning tests with advance notification
- Regular training sessions for authorized users

Cell Site Data Maintenance

When operators add or remove cell sites, or change Tracking Areas/Identifiers of cell sites, this information must be shared with the Omnitouch team to ensure the mapping tool data remains accurate.

Automatic Data Integration

OWL supports automatic data scraping from:

- Nokia NetAct
- Huawei U2000 / U2020

- ZTE NetNumen / ZXPOS
- Ericsson ENM

Manual Data Updates

Alternatively, cell site data can be provided to the Omnitouch operations team periodically via email in various formats.

Update Frequency: Review and update cell site data whenever network changes occur, typically monthly or quarterly.

Predefined Target Areas

As geographic boundaries change, development occurs, and risk areas shift, there is a need to review the Predefined Target Areas used in the Targeting stage.

Annual Review: Predefined target areas should be reviewed annually by the NDMO (National Disaster Management Office).

Update Process: Updates to boundaries can be defined using several common GIS platforms or Google Earth, then provided to the Omnitouch operations team.

Predefined Message Templates

Annual Review: Predefined message templates should be reviewed annually by the NDMO to ensure:

- Message content reflects current emergency procedures
- Language translations are accurate
- Message identifiers are appropriate
- Contact information and instructions are current

Update Process: Updates can be provided via email to the Omnitouch operations team.

Message Approval Flows

Different regions have different requirements regarding issuing of messages and approval flows.

Two-Person Rule: Use of the two-person rule is advocated wherever practical to ensure oversight in message submission.

Granular User Roles: Individual user roles can be configured to:

- Allow only certain users to send predefined messages
- Restrict targeting to specific regions
- Require additional approval steps
- Minimize risk of misuse

2FA / Security Maintenance

The Omnitouch operations team can support with:

- Resetting 2FA tokens
- Re-issuing lost/damaged/expired tokens
- Security audit and token management

Token Security Procedures:

When tokens are issued, a procedure is detailed for steps to take should a token become lost or unaccounted for. The person accepting the token must follow these procedures to ensure the system is not abused.

Immediate Actions for Lost Tokens:

1. Report lost token immediately to authorized personnel
2. Token is deactivated in the system
3. Security review conducted
4. New token issued following security verification

External API Integration

A full suite of APIs is available for the Cell Broadcast Entity to allow 3rd party systems to integrate and interact with the CBE.

API Capabilities:

- **Reporting/Monitoring** - Verify status and reach of transmitted messages
- **Message Creation** - Create and broadcast new messages programmatically
- **Health Checks** - Periodically check system health with routine test message traffic generation
- **Status Queries** - Retrieve message status, delivery statistics, and system metrics

See the API Reference section below for detailed endpoint documentation.

API Reference

All CBC endpoints require authentication and appropriate permissions.

Create Message:

`PUT /crm/cbc/`

Get All Messages:

`GET /crm/cbc/`

Update Message:

`PATCH /crm/cbc/{cbc_message_id}`

Delete Message:

`DELETE /crm/cbc/{cbc_message_id}`

See the Swagger documentation at `/crm/docs/` for detailed API specifications.

Global Search

The Global Search feature provides a **unified search interface** to quickly find customers, contacts, services, inventory, and sites across the entire OmniCRM database.

See also: `Customers <basics_customers>`, `Inventory <administration_inventory>`, `Service Management <csa_service_management>`.

Access Global Search

From anywhere in the CRM:

Click the search icon in the top navigation bar or navigate to:

The global search page appears with a large search box and filter options.

How It Works

Global search performs a **cross-entity search** across five data types:

What Gets Searched:

1. **Customers** - Customer name
2. **Contacts** - First name, last name, email address, phone number
3. **Sites** - Site name
4. **Inventory** - Serial numbers, ICCIDs, identifiers (itemtext1, itemtext2)
5. **Services** - Service name, service UUID

Search Behavior:

- **Partial matching** - Searches for terms containing your query (e.g., "Smith" matches "John Smith" and "Smithson")
- **Case-insensitive** - "john" matches "John", "JOHN", and "john"

- **Multiple entities** - Single search returns results from all entity types
- **Paginated results** - Shows 10 results per page by default

Performing a Search

Basic Search

1. Enter your search term in the search box
2. Click **"Search"** or press Enter

Example search terms:

- Customer name: `"Acme Corp"`
- Phone number: `"+1234567890"` or `"1234567890"`
- Email: `"john@example.com"` or `"john"`
- Serial number: `"ICCID8944"` or just `"8944"`
- Service UUID: `"123e4567-e89b"`

Include Closed Accounts

By default, search only returns results from **Open** customer accounts.

To search across all accounts including closed ones:

1. Check the **"Include Closed Accounts"** checkbox
2. Click **"Search"** again

This will search:

- Customers with `customer_status = "Closed"`
- Contacts, services, sites, and inventory linked to closed customers

Use cases for closed account search:

- Finding historical customer records
- Locating equipment from deprovisioned services
- Looking up old phone numbers or services
- Recovering customer data for re-activation

Understanding Search Results

Result Display Format

Results are displayed in a scrollable list showing:

> John Smith Customer ID: 123 Type: customer
>
> John Smith (Contact) Customer ID: 123 Type: contact
>
> Mobile - +44 7700 900123 Customer ID: 123 Type: service

Each result shows:

- **Name/Title** - The primary identifier (clickable link)
- **Customer ID** - The parent customer this belongs to
- **Type** - The entity type (customer, contact, site, inventory, service)

Result Types Explained

Customer Results:

Clicking opens the customer overview page showing all details, services, contacts, etc.

Contact Results:

Clicking opens the customer page with the Contacts tab active, scrolling to the specific contact.

Site Results:

Clicking opens the customer page with the Sites tab active.

Inventory Results:

Clicking opens the customer page with the Inventory tab active. If inventory is unassigned (no customer_id), it links to the main inventory list instead.

Service Results:

Clicking opens the customer page with the Services tab active, highlighting the specific service.

Navigation from Results

All search results are **clickable links** that navigate directly to the relevant page:

Link Pattern:

- `/customers/{customer_id}` - Customer records
- `/customers/{customer_id}#4` - Contacts (tab 4)
- `/customers/{customer_id}#2` - Sites (tab 2)
- `/customers/{customer_id}#8` - Inventory (tab 8)
- `/customers/{customer_id}#3` - Services (tab 3)
- `/inventory-items-list` - Unassigned inventory

The hash (`#`) fragment automatically selects the correct tab when the customer page loads.

Pagination

Results are paginated with 10 items per page:

> Showing results 11-20 of 47

Navigate through pages using:

- **Previous/Next** buttons
- **Page numbers** - Click specific page
- **Keyboard** - Left/right arrows (if implemented)

Common Search Scenarios

Scenario 1: Find Customer by Phone

User calls in, provides phone number.

> Results: • John Smith (Contact) - Customer ID: 123 • Mobile - 555-0123 (Service) - Customer ID: 123

Click either result to access customer account.

Scenario 2: Locate SIM Card

Technician needs to find which customer has a specific SIM.

> Results: • 89445380000000001234 (Inventory) - Customer ID: 456

Click result to see SIM assignment, customer details.

Scenario 3: Find Inactive Customer

Need to locate a customer who closed their account 6 months ago.

> ☑ Include Closed Accounts
>
> Results: • Acme Corporation (customer) - Customer ID: 789

Scenario 4: Search by Email

Customer emails support, staff needs to find their account.

> Results: • John Smith (Contact) - Customer ID: 123

Scenario 5: Find Service by UUID

Provisioning log shows service UUID, need to find which customer.

> Results: • Mobile - +44 7700 900123 (Service) - Customer ID: 456

Search Tips

For Best Results:

- **Use partial terms** - "Smith" is better than "John Smith" for broader results
- **Try variations** - If "John" doesn't work, try phone or email
- **Include closed accounts** - When searching historical data
- **Be specific for equipment** - Use full serial numbers for inventory
- **Search service UUID** - When other identifiers aren't known

What Gets Searched (by Entity):

Customers:

- Customer name only (not address, notes, or other fields)

Contacts:

- First name
- Last name
- Email address
- Phone number

Sites:

- Site name only

Inventory:

- itemtext1 (typically ICCID, serial number, MAC address)
- itemtext2 (typically IMSI, secondary identifier)
- *Note: Does not search itemtext3-20 or inventory notes*

Services:

- Service name
- Service UUID

What Doesn't Get Searched:

- Customer addresses
- Customer notes
- Transaction descriptions
- Invoice details
- Provisioning logs
- Activity log entries
- Inventory notes (beyond itemtext1/2)

API Reference

Global Search Endpoint

```
GET /utilities/search_everything?
search=Smith&page=1&per_page=10&search_closed_records=false
Authorization: Bearer <token>
```

Query Parameters:

- `search` (required) - The search term
- `page` (optional) - Page number (default: 1)
- `per_page` (optional) - Results per page (default: 10)
- `search_closed_records` (optional) - Include closed accounts (default: false)

Response:

```
{
  "data": [
    {
      "id": 123,
      "name": "John Smith",
      "customer_id": 123,
      "type": "customer"
    },
    {
      "id": 456,
      "name": "John Smith",
      "customer_id": 123,
      "type": "contact"
    },
    {
      "id": 789,
      "name": "Mobile - +44 7700 900123",
      "customer_id": 123,
      "type": "service"
    }
  ],
  "pagination": {
    "current_page": 1,
    "per_page": 10,
    "total_pages": 5,
    "total_items": 47
  }
}
```


Search Logic (Backend):

The backend performs a SQL UNION across all entity tables:

```sql
-- Customers
SELECT customer_id AS id,
       customer_name AS name,
       customer_id,
       'customer' AS type
FROM customer
WHERE customer_name LIKE '%Smith%'
  AND customer_status = 'Open'

UNION ALL

-- Contacts
SELECT contact_id AS id,
       CONCAT(contact_firstname, ' ', contact_lastname) AS name,
       customer_id,
       'contact' AS type
FROM customer_contact
WHERE (contact_firstname LIKE '%Smith%' OR
       contact_lastname LIKE '%Smith%' OR
       contact_email LIKE '%Smith%' OR
       contact_phone LIKE '%Smith%')

UNION ALL

-- Sites
SELECT site_id AS id,
       site_name AS name,
       customer_id,
       'site' AS type
FROM customer_site
WHERE site_name LIKE '%Smith%'

UNION ALL

-- Inventory
SELECT inventory_id AS id,
       itemtext1 AS name,
       customer_id,
       'inventory' AS type
FROM inventory
WHERE itemtext1 LIKE '%Smith%' OR
      itemtext2 LIKE '%Smith%'
```

```
UNION ALL

-- Services
SELECT service_id AS id,
       service_name AS name,
       customer_id,
       'service' AS type
FROM customer_service
WHERE service_name LIKE '%Smith%' OR
      service_uuid LIKE '%Smith%'
```

Results are then paginated and returned.

Performance Considerations

Search Performance:

- Searches use LIKE queries with wildcards (`%term%`)
- No full-text indexing currently implemented
- Large databases (>100k customers) may experience slower searches
- Results limited to 10 per page for performance

Optimization Tips:

- Be specific with search terms to reduce result set
- Use closed account filter to reduce search scope
- Consider adding database indexes on frequently searched fields

Troubleshooting

No results found (but record exists)

- **Cause:** Search term doesn't match stored data format
- **Examples:**
  - Phone stored as "+44 7700 900123", searching "07700900123" won't match

    - Email stored as "<john.smith@example.com>", searching "john" won't match
- **Fix:** Try variations, use partial matches that definitely exist

Search too slow

- **Cause:** Large database, complex query across multiple tables
- **Fix:**
    - Use more specific search terms
    - Limit to open accounts only (uncheck closed accounts)
    - Contact administrator about database indexing

Results link to wrong customer

- **Cause:** Multiple customers/contacts with same name
- **Fix:** Use Customer ID to differentiate, or search by unique identifier (email, phone)

Closed accounts not appearing

- **Cause:** "Include Closed Accounts" checkbox not checked
- **Fix:** Check the box and search again

Related Documentation

- `basics_customers` - Customer management
- `basics_navigation` - General navigation
- `administration_inventory` - Inventory searches

Top-Up and Recharge System

The OmniCRM Top-Up system provides a **self-service prepaid recharge portal** for customers to add credit or extend service validity via the `Self-Care Portal <self_care_portal>`. This feature is commonly used for:

- **Mobile data services** - Prepaid SIM cards and data-only services
- **Hotspot services** - WiFi hotspot dongles and portable internet devices
- **Fixed wireless services** - Prepaid internet access

See also: `SIM Card Provisioning <concepts_sim_provisioning>` for information on provisioning mobile services and managing SIM inventory.

Overview

The top-up system allows customers to purchase additional days of service through a streamlined, multi-step checkout process with integrated Stripe payment processing.

Key Features:

- Self-service customer portal (no staff intervention required)
- Flexible duration selection (1-30 days)
- Real-time usage display before purchase
- Stripe-powered secure payment processing
- Automatic refunds if top-up fails
- Invoice and transaction generation
- Provisioning system integration for service activation

Access the Top-Up Portal

The top-up portal is accessed via a **public URL** that customers can visit without logging into the CRM:

How Customers Access It:

- Direct link sent via SMS when balance is low
- QR code on printed materials
- Link on self-care portal
- Shared via customer support

The portal automatically detects the customer's service based on their requesting IP address or IMSI.

Top-Up Process

The top-up flow consists of **4 steps**:

Step 1: Data Selection

Customers select how many days of service they want to purchase.

Interface:

- **Slider control** - Select 1 to 30 days
- **Live price calculation** - Shows total cost based on selection
- **Expiry date display** - Calculates and shows when service will expire
- **Current usage display** - Shows remaining balance/expiry before top-up

Example Display:

Pricing Configuration:

- Price per day is configured via environment variable `VITE_TOPUP_PRICE_PER_DAY`
- Default: $10 USD per day

- Currency is set via `VITE_CURRENCY_CODE`

Step 2: Billing Information

Customers provide their contact details for the transaction:

- **First Name**
- **Last Name**
- **Email Address**

This information is used for:

- Invoice generation
- Payment receipt email
- Transaction records
- Refund processing (if needed)

Step 3: Payment

Secure payment processing via **vendor-hosted payment forms** (Stripe Elements, PayPal SDK).

Payment Methods Supported:

- Credit cards (Visa, Mastercard, Amex)
- Debit cards
- Digital wallets (Apple Pay, Google Pay, PayPal) *if enabled by payment vendor*

Security Features:

- PCI-compliant payment vendor integration
- No card details stored in OmniCRM
- 3D Secure authentication support
- Encrypted payment transmission

Payment Flow:

1. Secure payment form displayed with card input
2. Customer enters payment details
3. Payment processed through configured vendor
4. Card charged immediately
5. Payment success/failure handled

Note

If the payment succeeds but the top-up provisioning fails (e.g., network error, OCS unreachable), the system automatically initiates a **full refund** to the customer's payment method.

Step 4: Completion

Success Screen:

> Your service has been extended. New expiry date: 17 Jan 2025
>
> Receipt sent to: <customer@example.com> Transaction ID: TXN-123456

Failure Screen:

If top-up fails, the system displays an error and automatically processes a refund:

> We were unable to complete your top-up. Your payment has been refunded.
>
> Error: Unable to connect to billing system
>
> Please try again or contact support.

Backend Processing

When a customer completes payment, the following happens automatically:

1. Payment Validation

The system validates:

- Payment Intent status is `succeeded`
- Payment amount matches selected days (`days × price_per_day`)
- Payment Intent hasn't been processed before (prevents double top-up)

2. Top-Up Operation

```
- API endpoint: POST /oam/topup_dongle
- Validates service_uuid and IMSI
- Calls OCS/CGRateS to add balance
- Creates provisioning job (play_topup_hotspot)
```

3. Record Creation

The system creates multiple database records:

- **HotspotTopup record** - Tracks the top-up transaction
  - payment_intent_id
  - service_uuid
  - imsi
  - days purchased
  - topup_amount
  - status (Success/Failed/Refunded)
- **Transaction record** - Financial transaction
  - Title: "Hotspot Topup - 7 Days"
  - Amount: topup_amount (positive)
  - Linked to service_id and customer_id
- **Invoice record** - Payment invoice
  - Contains the top-up transaction
  - Marked as paid immediately
  - Payment reference: Stripe payment_intent_id
- **Payment transaction** - Offsetting credit transaction
  - Title: "Payment for [Invoice Title]"
  - Amount: topup_amount (negative - credit)
  - Links invoice payment to customer account

4. Provisioning Job

A provisioning job is created with playbook `play_topup_hotspot` which:

- Connects to OCS/CGRateS API
- Adds balance to the account
- Extends expiry date
- Creates activity log entry
- Sends confirmation notification (if configured)

The API waits for provisioning to complete (polling with 0.2s intervals, max 25 iterations) before returning success to the customer.

5. Automatic Refund on Failure

If any step fails after payment:

```
if topup_provisioning_failed:
    refund = stripe.Refund.create(
        payment_intent=payment_intent_id,
        reason='requested_by_customer'  # Automatic system refund
    )
    status_message = "Topup Failed. Refunding payment..."
```

The refund is processed automatically and the customer is notified on-screen.

API Endpoints

Top-Up Endpoint

```
POST /oam/topup_dongle
Content-Type: application/json

{
  "service_uuid": "123e4567-e89b-12d3-a456-426614174000",
  "imsi": "310120123456789",
  "days": 7,
  "payment_intent_id": "pi_1234567890abcdef",
  "topup_amount": 70.00
}
```

Response (Success):

```
{
  "result": "OK",
  "status": 200,
  "provision_id": 456,
  "payment_intent_id": "pi_1234567890abcdef",
  "service_uuid": "123e4567-e89b-12d3-a456-426614174000",
  "invoice_id": 789
}
```

Response (Failure):

```
{
  "result": "Failed",
  "Reason": "OCS connection timeout",
  "status": 500
}
```

Validation Checks:

- All required fields present (service_uuid, imsi, days, payment_intent_id, topup_amount)

- topup_amount matches days: `topup_amount × 100 == days × 1000` (in cents)
- Payment Intent exists in Stripe
- Payment Intent amount matches: `payment_intent.amount == topup_amount × 100`
- Payment Intent status is `succeeded`
- Payment Intent not already processed (checks `HotspotTopup` table)

Usage Endpoint

Retrieves current usage and service information for the customer:

```
GET /oam/usage
```

Response:

```
{
  "imsi": "310120123456789",
  "service": {
    "service_uuid": "123e4567-e89b-12d3-a456-426614174000",
    "service_name": "Mobile Data - 0412345678",
    "service_status": "Active"
  },
  "balance": {
    "expiry": "2025-01-10T23:59:59Z",
    "unlimited": true
  },
  "requestingIp": "203.0.113.45"
}
```

This endpoint uses the requesting IP address to identify the customer's service automatically.

Configuration

Environment Variables

Configure these in the OmniCRM-UI `.env` file:

```
# Top-Up Portal Configuration
VITE_TOPUP_PRICE_PER_DAY=10
VITE_CURRENCY_CODE=AUD
VITE_SELF_CARE_NAME="YourCompany"

# Payment Configuration
VITE_PAYMENT_VENDORS="stripe"
VITE_STRIPE_PUBLISHABLE_KEY=pk_live_...
```

Stripe Configuration

The top-up system uses Stripe Payment Intents:

1. **Enable Payment Intents** in your Stripe Dashboard
2. **Configure Webhook** to receive payment status updates (optional but recommended)
3. **Set up payment methods** (cards, wallets, etc.)
4. **Test mode** - Use test keys for development

```
# Development
VITE_STRIPE_PUBLISHABLE_KEY=pk_test_...

# Production
VITE_STRIPE_PUBLISHABLE_KEY=pk_live_...
```

Playbook Configuration

The provisioning playbook `play_topup_hotspot.yaml` must be configured to:

- Accept `days` variable

- Connect to OCS/CGRateS API
- Add balance to account
- Update service expiry date

Example playbook structure:

```
- name: Top up hotspot service
  hosts: localhost
  tasks:
    - name: Add balance to OCS
      uri:
        url: "{{ ocs_api_url }}/add_balance"
        method: POST
        body:
          imsi: "{{ imsi }}"
          days: "{{ days }}"
          service_uuid: "{{ service_uuid }}"
```

Low Balance Notifications

The system can send automatic notifications when customer balance is low:

SMS Notifications:

When triggered by OCS events (`Action_Balance_Low`, `Action_Balance_Out`, `Action_Balance_Expired`):

Email Notifications:

Configured in the OCS/CGRateS action plans to send balance alerts.

Notification Triggers:

- `Action_Balance_Low` - Balance below threshold (e.g., 2 days remaining)
- `Action_Balance_Out` - Balance exhausted
- `Action_Balance_Expired` - Service expired

Each notification includes the top-up portal link for easy customer access.

Troubleshooting

Common Issues

"Payment system unavailable"

- **Cause:** Stripe library failed to load or invalid publishable key
- **Fix:**
  - Check `VITE_STRIPE_PUBLISHABLE_KEY` is set correctly
  - Verify Stripe account is active
  - Check browser console for JavaScript errors

"Top-up failed. Refunding payment..."

- **Cause:** Provisioning job failed (OCS unreachable, playbook error, etc.)
- **Fix:**
  - Check provisioning logs: `GET /crm/provision/provision_id/<id>`
  - Verify OCS/CGRateS API is accessible
  - Review playbook `play_topup_hotspot.yaml` for errors
  - Check Ansible logs

"Payment intent already processed"

- **Cause:** Customer attempting to reuse same payment (e.g., refresh after success)
- **Fix:** This is working as designed to prevent double billing. Customer should start a new top-up if needed.

"Payment intent amount does not match"

- **Cause:** Mismatch between UI calculation and backend validation
- **Fix:**
  - Verify `VITE_TOPUP_PRICE_PER_DAY` matches backend expectation (default $10)
  - Check currency configuration is consistent
  - Clear browser cache and retry

Monitoring Top-Ups

View Top-Up Records:

Query the `HotspotTopup` table to see all top-up attempts:

```
SELECT
  hotspot_topup_id,
  service_uuid,
  days,
  topup_amount,
  status,
  payment_intent_id,
  created
FROM hotspot_topup
WHERE status = 'Failed'
ORDER BY created DESC;
```

Check Provisioning Status:

```
GET /crm/provision/provision_id/<provision_id>
```

Shows the detailed status of the top-up provisioning job.

Stripe Dashboard:

Monitor payments, refunds, and failed transactions in your Stripe Dashboard at <https://dashboard.stripe.com>

Security Considerations

Payment Security:

- All card data handled by Stripe (PCI Level 1 compliant)
- No sensitive payment data stored in OmniCRM database
- Payment Intents prevent unauthorized charges
- Amount validation on both client and server side

Fraud Prevention:

- Duplicate payment Intent detection prevents double billing
- IP address tracking for usage correlation
- IMSI validation ensures top-up goes to correct service
- Automatic refunds limit financial exposure

Access Control:

- Top-up portal is public (by design - customers need access)
- Usage endpoint requires valid service identification (IP or IMSI)
- Backend validation prevents arbitrary service top-ups
- Admin can view all top-up records via CRM interface

Best Practices

For Operators:

1. **Test refund flow** - Regularly test failure scenarios to ensure refunds work
2. **Monitor failed top-ups** - Set up alerts for high failure rates
3. **Keep playbooks simple** - Top-up playbooks should be fast and reliable
4. **Verify OCS connectivity** - Ensure OCS API is always accessible
5. **Review pricing** - Update `VITE_TOPUP_PRICE_PER_DAY` as needed

For Customers:

1. **Bookmark the top-up URL** - Quick access when needed
2. **Save low balance notifications** - SMS contains direct link
3. **Keep email updated** - Receipts sent to email on file
4. **Check expiry before travel** - Top up before leaving coverage area

For Developers:

1. **Handle Stripe webhooks** - Implement webhook handlers for payment status updates
2. **Implement idempotency** - Always check payment_intent_id before processing

3. **Log extensively** - Top-up failures need detailed troubleshooting info
4. **Test error paths** - Verify refund automation works correctly
5. **Monitor performance** - Provisioning polling should complete in <5 seconds

Related Documentation

- `payments_process` - General payment processing
- `concepts_provisioning` - Provisioning system overview
- `Payment System Guide <payment_system_guide>` - Payment vendor integration details
- `payments_transaction` - Transaction management
- `payments_invoices` - Invoice handling

Complete Product Lifecycle Guide

This guide provides an end-to-end walkthrough of the product lifecycle in OmniCRM, from creating a product definition through provisioning services, adding addons, and deprovisioning. We'll cover pricing strategy, Ansible integration, and provide real-world examples throughout.

Overview: The Product-to-Service Journey

The lifecycle of a product in OmniCRM follows these stages:

1. **Product Definition** - Administrator creates product template with pricing and provisioning rules
2. **Service Creation** - Customer orders product, system provisions service instance
3. **Service Lifecycle** - Customer uses service, adds addons/topups, modifies service
4. **Deprovisioning** - Service is terminated, resources are released

Understanding Pricing: Wholesale vs Retail

Every product and service in OmniCRM has two pricing dimensions: **wholesale** and **retail**.

Wholesale Cost

The wholesale cost represents the actual cost to deliver the service:

- Infrastructure and bandwidth costs

- Licensing fees
- Equipment costs
- Operational expenses

Retail Cost

The retail cost is the amount charged to the customer.

Setup Costs

Both wholesale and retail have setup cost variants for one-time provisioning charges:

- `wholesale_setup_cost` - Your cost to provision
- `retail_setup_cost` - Amount charged to customer for activation

Example:

```
{
  "retail_cost": 15.00,
  "wholesale_cost": 5.00,
  "retail_setup_cost": 0.00,
  "wholesale_setup_cost": 1.00
}
```

Stage 1: Creating a Product Definition

Products are templates that define what gets provisioned and how customers are charged.

Creating a Mobile SIM Product

Let's create a prepaid mobile SIM product with 20GB data per month.

Step 1: Navigate to Product Management

From the admin UI, go to **Products → Create Product**.

Step 2: Define Basic Information

```
{
  "product_name": "Prepaid Mobile 20GB",
  "product_slug": "prepaid-mobile-20gb",
  "category": "standalone",
  "service_type": "mobile",
  "enabled": true,
  "icon": "fa-solid fa-sim-card",
  "comment": "Prepaid mobile SIM with 20GB data, unlimited calls & texts"
}
```

Field Explanations:

- `product_name` - Customer-facing name shown in catalog
- `product_slug` - URL-safe identifier used in API calls and links
- `category` - "standalone" means this creates a new service (vs addon/bundle)
- `service_type` - Groups related products, used for addon filtering
- `enabled` - Must be true for product to be orderable
- `icon` - FontAwesome icon displayed in UI
- `comment` - Internal notes for staff reference

Step 3: Set Pricing

```
{
  "retail_cost": 15.00,
  "wholesale_cost": 5.00,
  "retail_setup_cost": 0.00,
  "wholesale_setup_cost": 1.00,
  "contract_days": 30
}
```

Pricing Breakdown:

- Monthly revenue per customer: £15.00
- Monthly cost to deliver: £5.00
- Monthly profit margin: £10.00 (200% markup, 67% margin)
- Setup profit: -£1.00 (subsidized to attract customers)
- Contract length: 30 days (monthly renewal)

Step 4: Define Customer Eligibility

```
{
  "residential": true,
  "business": false,
  "customer_can_purchase": true,
  "available_from": "2025-01-01T00:00:00Z",
  "available_until": null
}
```

- Residential customers can order
- Business customers cannot (different product line)
- Self-service purchase enabled
- Available from Jan 1, 2025 onwards
- No end date (ongoing offer)

Step 5: Configure Auto-Renewal

```
{
  "auto_renew": "prompt",
  "allow_auto_renew": true
}
```

- `"prompt"` - Ask customer if they want auto-renewal at purchase
- `"true"` - Automatically renew without asking
- `"false"` - Never auto-renew (manual top-up only)
- `allow_auto_renew: true` - Customer can enable/disable auto-renewal later

Step 6: Specify Inventory Requirements

Inventory requirements define which physical or virtual resources must be allocated when provisioning this product. This is a critical step that connects your product catalog to your `Inventory Management System <administration_inventory>`.

```
{
  "inventory_items_list": "['SIM Card', 'Mobile Number']"
}
```

What Are Inventory Items?

Inventory items are trackable resources stored in the OmniCRM inventory system. Each item has:

- **Type** - Defined by the Inventory Template (e.g., "SIM Card", "Mobile Number", "Modem")
- **Unique attributes** - Serial numbers, MAC addresses, phone numbers, etc.
- **State** - In Stock, Assigned, Decommissioned, etc.
- **Location** - Physical or logical location

How Inventory Requirements Work:

The `inventory_items_list` is a Python list (as a string) containing inventory type names. Each name must exactly match an existing `Inventory Template <administration_inventory>` name.

Example Inventory Requirements:

```
# Mobile SIM product
inventory_items_list: "['SIM Card', 'Mobile Number']"

# Fixed internet service
inventory_items_list: "['Modem Router', 'Static IP Address']"

# Digital service (no physical items)
inventory_items_list: "[]"

# Fixed wireless with CPE
inventory_items_list: "['Fixed Wireless CPE', 'IPv4 Address',
'IPv6 Prefix']"
```

The Inventory Picker Process

When a user provisions a product with inventory requirements, the system enforces a mandatory selection process:

1. Provision Button Clicked

After selecting the product, the user clicks "Provision". Instead of immediately provisioning, the system checks `inventory_items_list`.

2. Inventory Picker Modal Appears

If inventory is required, a modal dialog appears with a separate dropdown for each inventory type:

3. Filtering Available Inventory

The dropdown for each inventory type only shows items that are:

- **Correct Type** - Matches the inventory template name exactly
- **Available Status** - `item_state` is "New" or "In Stock" (not "Assigned" or "Damaged")
- **Not Assigned** - `service_id` and `customer_id` are NULL
- **In Stock at Location** - Optionally filtered by warehouse/store location

Example Dropdown Options:

For "SIM Card" inventory type, the dropdown might show:

Each option displays:

- Inventory ID or reference number
- Primary identifier (`itemtext1` - e.g., ICCID for SIM, number for phone)
- Current location (`item_location`)

4. Selection Required to Proceed

Critical Rule: Provisioning CANNOT proceed without selecting all required inventory items.

- "Continue" button is disabled until all dropdowns have selections
- User must select one item for each inventory type
- System validates selections before proceeding

5. Selected Inventory Passed to Ansible

Once user clicks "Continue", the selected inventory IDs are passed to the Ansible playbook as variables:

```
# User selected:
# - SIM Card inventory_id: 5001
# - Mobile Number inventory_id: 5002

# Variables passed to Ansible:
{
    "product_id": 42,
    "customer_id": 123,
    "SIM Card": 5001,           # Inventory ID
    "Mobile Number": 5002,       # Inventory ID
    "access_token": "eyJ..."
}
```

Note: The variable name matches the inventory type exactly. The playbook uses `hostvars[inventory_hostname]['SIM Card']` to access the inventory ID.

6. Playbook Fetches Full Inventory Details

The Ansible playbook uses the inventory ID to fetch complete details:

```
- name: Get SIM Card details from inventory
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ hostvars[inventory_hostname]['SIM
Card'] }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: api_response_sim

- name: Extract ICCID and IMSI
  set_fact:
    iccid: "{{ api_response_sim.json.itemtext1 }}"
    imsi: "{{ api_response_sim.json.itemtext2 }}"
```

Now the playbook has all SIM details (ICCID, IMSI, etc.) to provision the subscriber in the HSS.

7. Inventory State Changed to "Assigned"

After the service record is created, the playbook updates inventory to link it to the service:

```
- name: Assign SIM Card to Service
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ hostvars[inventory_hostname]['SIM
Card'] }}"
    method: PATCH
    body:
      {
        "service_id": "{{
service_creation_response.json.service_id }}",
        "customer_id": "{{ customer_id }}",
        "item_state": "Assigned"
      }
```

Important: Inventory assignment happens **during playbook execution** as a specific task, NOT when the provision button is clicked. This means:

- **Risk of Double-Allocation**: Between clicking "Provision" and inventory being assigned, another user could theoretically select the same inventory item
- **Best Practice**: For high-volume operations, implement inventory locking or use database transactions
- **Rollback on Failure**: If the playbook fails before inventory assignment, inventory remains unassigned and available for reuse

Why Not Assign Earlier?

Inventory isn't assigned when "Provision" is clicked because:

1. **Service ID Needed**: The `service_id` doesn't exist until the service is created in the playbook
2. **Rollback Simplicity**: If provisioning fails early (e.g., OCS account creation fails), inventory doesn't need cleanup
3. **Flexibility**: Playbook can decide not to assign inventory based on conditional logic

Handling Failed Provisions:

When a provision fails after inventory is assigned, the rescue block should release inventory:

```
rescue:
  - name: Release inventory on failure
    uri:
      url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ hostvars[inventory_hostname]['SIM
Card'] }}"
      method: PATCH
      body:
        {
          "service_id": null,
          "customer_id": null,
          "item_state": "In Stock"
        }
    when: service_id is defined  # Only if service was created
```

This ensures inventory isn't left in an "Assigned" state for a non-existent or failed service.

When Inventory List is Empty

If `inventory_items_list: "[]"` (empty list), the inventory picker is skipped entirely and provisioning proceeds immediately. This is common for:

- **Digital products** - Software licenses, VPN accounts
- **Service addons** - Data top-ups that don't need new hardware
- **Virtual services** - That don't consume trackable resources

Example: A "5GB Data Boost" addon has `inventory_items_list: "[]"` because it just adds balance to an existing service without needing new hardware.

Inventory Template Setup

Before using an inventory type in `inventory_items_list`, you must create the Inventory Template:

1. Navigate to **Administration → Inventory → Templates**
2. Create template with exact name (e.g., "SIM Card")
3. Define fields:

- `itemtext1_label`: "ICCID"
- `itemtext2_label`: "IMSI"
- `itemtext3_label`: "PUK Code"

4. Add inventory items of this type to stock

For complete details on creating and managing inventory templates, see `Inventory Management <administration_inventory>`.

Multiple Items of Same Type

While the `inventory_items_list` is an array, having duplicate types (e.g., `"['SIM Card', 'SIM Card']"`) is **not recommended** as it may cause confusion in the UI and playbook variable naming.

For scenarios requiring multiple similar items:

Option 1: Create distinct inventory template names

```
# Dual-SIM phone service
inventory_items_list: "['Primary SIM Card', 'Secondary SIM Card',
'Mobile Number']"
```

Create separate templates: "Primary SIM Card" and "Secondary SIM Card" with same fields but different names.

Option 2: Use a single bundled inventory item

```
# Dual-SIM kit
inventory_items_list: "['Dual SIM Kit', 'Mobile Number']"
```

Where "Dual SIM Kit" inventory template has fields for both SIMs (`itemtext1`: Primary ICCID, `itemtext2`: Secondary ICCID, etc.).

Common Inventory Scenarios

Mobile Service:

```
inventory_items_list: "['SIM Card', 'Mobile Number']"
```

- SIM Card: Physical or eSIM with ICCID/IMSI
- Mobile Number: Phone number (MSISDN)

Fixed Internet:

```
inventory_items_list: "['Modem Router', 'Static IP Address']"
```

- Modem Router: CPE device with MAC address
- Static IP Address: IPv4 from address pool

Fixed Wireless:

```
inventory_items_list: "['Fixed Wireless CPE', 'IPv4 Address',
'IPv6 Prefix']"
```

- CPE: Customer premises equipment (antenna, modem)
- IPv4: Public IP address
- IPv6 Prefix: /56 or /64 prefix

Note: Appointments and scheduling are **not** inventory items. Use separate scheduling/calendar systems for installation appointments.

VoIP Service:

```
inventory_items_list: "['DID Number']"
```

- DID Number: Direct Inward Dialing phone number

Note: SIP usernames, passwords, and account configurations are **generated programmatically** by the provisioning playbook, not selected from inventory.

GPON/Fiber:

```
inventory_items_list: "['ONT Device', 'GPON Port', 'IPv4 Address',
'Fiber Drop Cable']"
```

- ONT Device: Optical Network Terminal with serial number
- GPON Port: Specific port on OLT with fiber connection
- IPv4 Address: Public or private IP
- Fiber Drop Cable: Physical fiber cable from street to premises (tracked for asset management)

Equipment Rental:

```
inventory_items_list: "['Rental Modem']"
```

- Tracks which modem is with which customer
- Important for recovering equipment on cancellation

Why Inventory Requirements Matter

1. Prevent Double-Allocation

Without inventory tracking, you could accidentally:

- Assign same SIM card to two customers
- Allocate same IP address to multiple services
- Ship same equipment serial to different locations

Inventory picker ensures each item is assigned to exactly one service.

2. Audit Trail

Inventory assignment creates complete audit trail:

- Which SIM card is with which customer
- When was it assigned
- Which service is using which phone number
- Equipment history (who had it, when, for what service)

3. Resource Planning

Track inventory levels:

- Alert when SIM cards running low
- Reorder before stockout
- Plan technician schedules based on CPE availability
- Manage IP address space allocation

4. Cost Tracking

Link wholesale cost to specific item:

- Track cost of each SIM card
- Calculate equipment depreciation
- Identify lost or stolen items
- Accurate COGS (Cost of Goods Sold)

5. Deprovisioning

When service is cancelled, inventory can be:

- Released back to stock (SIM cards, modems)
- Retired (damaged equipment)
- Returned to vendor (rental equipment)
- Kept for grace period (phone numbers before release)

Troubleshooting Inventory Picker Issues

Problem: "No inventory available" message appears

Causes:

- No inventory items of required type exist in database
- All items are already "Assigned" to other services
- Items are marked as "Damaged" or "Out Of Service"
- Inventory template name doesn't match exactly (case-sensitive)

Solution:

1. Verify inventory template exists: **Administration → Inventory → Templates**
2. Check template name matches exactly (including spaces, case)
3. Add inventory items of this type: **Administration → Inventory → Add Item**
4. Verify items are in "New" or "In Stock" state
5. Check items aren't already assigned (`service_id` should be NULL)

Problem: Inventory picker doesn't appear

Causes:

- `inventory_items_list` is empty: `"[]"`
- `inventory_items_list` is NULL or not set
- Product category is "addon" and inherits parent service inventory

Solution:

- If inventory is needed, set `inventory_items_list: "['Type1', 'Type2']"`
- Verify product definition saved correctly
- Check API response for product includes inventory_items_list

Problem: Playbook fails with "inventory not found"

Causes:

- Playbook references wrong variable name
- Inventory ID not passed correctly
- Inventory was deleted between selection and provisioning

Solution:

- Verify playbook uses correct variable: `hostvars[inventory_hostname]['SIM Card']`
- Check variable is integer: `{{ hostvars[inventory_hostname]['SIM Card'] | int }}`
- Add error handling in playbook for missing inventory

See `Inventory Management <administration_inventory>` for complete details on creating templates, adding items, and managing stock levels.

Step 7: Define Features and Terms

Features and terms are customer-facing marketing and legal content that helps customers understand what they're buying and the obligations involved.

```
{
  "features_list": "20GB High-Speed Data. Unlimited Calls & Texts.
EU Roaming Included. No Contract. 30-Day Expiry",
  "terms": "Credit expires after 30 days. Data, calls, and texts
valid only within expiry period. Fair use policy applies. See
website for full terms."
}
```

Purpose and Business Value

Features List - Marketing & Sales:

The features list serves multiple critical business functions:

1. **Product Differentiation** - Helps customers quickly compare products and choose the right one
   - "Prepaid Mobile 20GB" vs "Prepaid Mobile 50GB" - features clearly show the difference
   - Without features, customers only see price, missing value proposition
2. **Marketing Communication** - Key selling points prominently displayed
   - "EU Roaming Included" attracts international travelers
   - "No Contract" appeals to commitment-averse customers
   - Features drive purchase decisions
3. **Customer Expectations** - Sets clear expectations about what's included
   - Reduces support calls ("Does this include calls?" → clearly listed)
   - Prevents misunderstandings and refund requests
   - Builds trust through transparency
4. **Self-Service** - Enables customers to self-select appropriate products
   - Customer reads features, understands offering, makes informed choice

    - Reduces need for sales staff explanation
    - Speeds up purchase process
5. **SEO and Discoverability** - Features can be indexed for search
    - Customer searches "unlimited calls mobile plan" → product appears
    - Improves product catalog searchability

Terms and Conditions - Legal & Compliance:

Terms serve legal and operational purposes:

1. **Legal Protection** - Protects business from disputes and liability
    - "Credit expires after 30 days" - customer cannot demand refund at 31 days
    - "Fair use policy applies" - prevents abuse (tethering entire office on mobile plan)
    - Creates binding agreement
2. **Expectation Management** - Prevents customer dissatisfaction
    - "Valid only within expiry period" - customer knows usage deadline
    - "Cannot be refunded" (for addons) - prevents fraudulent purchases
    - Reduces chargebacks and complaints
3. **Regulatory Compliance** - Meets legal requirements
    - Consumer protection laws require clear terms
    - Telecommunications regulations mandate disclosure
    - GDPR/privacy terms can be referenced
4. **Operational Boundaries** - Defines service scope and limitations
    - "Subject to network coverage" - not liable for dead zones
    - "Speed may vary" - manages expectations on "up to" speeds
    - "Equipment must be returned" - ensures rental equipment recovery
5. **Audit Trail** - Proves customer was informed
    - Customer accepted terms at purchase
    - System logs acceptance timestamp
    - Defensible in disputes or legal proceedings

Real-World Example:

Customer buys "Unlimited Calls & Texts" plan, then uses it for telemarketing (10,000 calls/day). Without terms:

- Customer: "You said unlimited!"
- Provider: "We meant personal use..."
- Customer: "That's not what you advertised!"
- Result: Dispute, potential regulator complaint, brand damage

With terms: "Fair use policy applies. Service is for personal use only. Commercial use prohibited."

- Provider: Points to terms customer accepted
- Customer cannot claim ignorance
- Legal basis to suspend service
- Dispute resolved in provider's favor

Features List Format:

Understanding the correct format is critical because **improper formatting breaks the UI display**. Features might appear as one long string instead of bullet points, or not display at all.

The `features_list` field can be formatted in two ways:

Option 1: Period-Separated String (Recommended)

Features are separated by a period and space (". "). The UI splits on this delimiter and renders each feature as a bullet point.

Why this format?

- Simple to edit - just type features with periods between them
- No special characters to escape
- Works reliably across all UI components
- Easy to update without breaking JSON syntax

Correct vs Incorrect:

Option 2: JSON Array String

```
"['20GB High-Speed Data', 'Unlimited Calls & Texts', 'EU Roaming Included']"
```

The UI can also parse JSON arrays. Note this is a **string containing JSON**, not an actual JSON array in the database.

Why this format exists?

- Allows features with periods in them (e.g., "Up to 100Mbps. Subject to availability.")
- Programmatic generation from scripts/API is easier
- Imported from external product catalogs that use arrays

Important: This must be valid Python list syntax as a string. Single quotes around each item, double quotes around the whole string.

Which Format to Use?

- **Period-separated** - For manual product creation in UI (simpler, less error-prone)
- **JSON array** - For API/script-based product creation (more robust for complex features)

Both formats produce identical output in the UI - they just affect how you input the data.

Where Features Appear in the UI:

1. Product Catalog (Customer View)

When customers browse available products, features are displayed as bullet points on each product card:

2. Product Details Page

Clicking "View Details" shows full product information including:

- Product name and icon
- Pricing (monthly cost, setup cost)

- Full features list (bullet points)
- Terms and conditions (see below)
- Availability and eligibility

3. Provisioning Confirmation

During provisioning, features are shown for user to review before confirming:

> Features: • 20GB High-Speed Data • Unlimited Calls & Texts • EU Roaming Included • No Contract • 30-Day Expiry
>
> Cost: £15.00/month Setup: £0.00
>
> [Cancel] [Confirm & Provision]

4. Service Details (After Provisioning)

After service is active, features are displayed on the service detail page for customer reference.

Terms and Conditions Format:

The `terms` field is plain text that can include newlines:

Where Terms Appear in the UI:

1. Product Details Page

Terms are displayed in a collapsed section that expands when clicked:

2. Order Confirmation

During provisioning, a checkbox requires user to accept terms:

> [Provision] button disabled until checked

3. Invoices

Service terms may be included on invoices as footnotes for clarity.

Best Practices:

- **Features:** Keep concise (under 50 characters each), focus on key benefits
- **Terms:** Include critical legal requirements, expiration policies, fair use policies
- **Both:** Update when product changes to keep customers informed

Step 8: Link Ansible Provisioning Playbook

```
{
  "provisioning_play": "play_local_mobile_sim",
  "provisioning_json_vars": "{
    \"days\": 30,
    \"data_gb\": 20,
    \"voice_minutes\": \"unlimited\",
    \"sms_count\": \"unlimited\"
  }"
}
```

- `provisioning_play` - Name of Ansible playbook (without .yaml extension)
- `provisioning_json_vars` - Default variables passed to playbook
- Playbook must exist at: `OmniCRM-API/Provisioners/plays/play_local_mobile_sim.yaml`

Complete Product Definition

```
{
  "product_name": "Prepaid Mobile 20GB",
  "product_slug": "prepaid-mobile-20gb",
  "category": "standalone",
  "service_type": "mobile",
  "enabled": true,
  "icon": "fa-solid fa-sim-card",
  "comment": "Prepaid mobile SIM with 20GB data, unlimited calls & texts",

  "retail_cost": 15.00,
  "wholesale_cost": 5.00,
  "retail_setup_cost": 0.00,
  "wholesale_setup_cost": 1.00,
  "contract_days": 30,

  "residential": true,
  "business": false,
  "customer_can_purchase": true,
  "available_from": "2025-01-01T00:00:00Z",
  "available_until": null,

  "auto_renew": "prompt",
  "allow_auto_renew": true,

  "inventory_items_list": "['SIM Card', 'Mobile Number']",

  "features_list": "[
    '20GB High-Speed Data',
    'Unlimited Calls & Texts',
    'EU Roaming Included',
    'No Contract',
    '30-Day Expiry'
  ]",
  "terms": "Credit expires after 30 days. Data, calls, and texts valid only within expiry period. Fair use policy applies.",

  "provisioning_play": "play_local_mobile_sim",
  "provisioning_json_vars": "{
    \"days\": 30,
    \"data_gb\": 20,
    \"voice_minutes\": \"unlimited\",
    \"sms_count\": \"unlimited\"
```

```
  }"
}
```

Creating an Addon Product

Addons enhance or modify existing services. They come in two types: **virtual addons** (no physical resources) and **hardware addons** (require inventory).

Example 1: Virtual Addon (5GB Data Boost)

A digital addon that adds data to an existing mobile service:

```
{
  "product_name": "5GB Data Boost",
  "product_slug": "5gb-data-boost",
  "category": "addon",
  "service_type": "mobile",
  "enabled": true,
  "icon": "fa-solid fa-plus",
  "comment": "Add 5GB extra data to existing mobile service",

  "retail_cost": 5.00,
  "wholesale_cost": 1.50,
  "retail_setup_cost": 0.00,
  "wholesale_setup_cost": 0.00,
  "contract_days": 0,

  "residential": true,
  "business": true,
  "customer_can_purchase": true,

  "auto_renew": "false",
  "allow_auto_renew": false,

  "inventory_items_list": "[]",
  "relies_on_list": "",

  "features_list": "5GB High-Speed Data. Valid for 7 Days",
  "terms": "Data expires after 7 days or when exhausted. Cannot be
refunded.",

  "provisioning_play": "play_topup_charge_then_action",
  "provisioning_json_vars": "{
    \"data_gb\": 5,
    \"days\": 7
  }"
}
```

Example 2: Hardware Addon (Modem Rental)

An addon that provides physical equipment for an existing fiber service:

```
{
  "product_name": "WiFi 6 Modem Rental",
  "product_slug": "wifi6-modem-rental",
  "category": "addon",
  "service_type": "internet",
  "enabled": true,
  "icon": "fa-solid fa-router",
  "comment": "Add WiFi 6 modem to fiber service - rental",

  "retail_cost": 10.00,
  "wholesale_cost": 3.00,
  "retail_setup_cost": 0.00,
  "wholesale_setup_cost": 45.00,
  "contract_days": 30,

  "residential": true,
  "business": true,
  "customer_can_purchase": true,

  "auto_renew": "true",
  "allow_auto_renew": true,

  "inventory_items_list": "['Rental Modem']",
  "relies_on_list": "",

  "features_list": "WiFi 6 (802.11ax). Dual-band 2.4GHz + 5GHz. Up to 40 devices. Parental controls",
  "terms": "Equipment rental. Must be returned on service cancellation or £150 replacement fee applies. Equipment remains property of provider.",

  "provisioning_play": "play_addon_assign_modem",
  "provisioning_json_vars": "{
    \"device_type\": \"modem_router\",
    \"requires_configuration\": true
  }"
}
```


Key Differences for Addons:

- `category: "addon"` - Applied to existing service, not standalone
- `contract_days: 0` (virtual) or `30` (recurring rental) - Billing frequency

- `inventory_items_list: "[]"` (virtual) or `"['Rental Modem']"` (hardware) - Physical resources
- `auto_renew: "false"` (one-time) or `"true"` (rental) - Recurring behavior
- `relies_on_list: ""` - Empty means applies to any service of matching `service_type`

Why Hardware Addons Need Inventory:

Hardware addons require `inventory_items_list` because:

1. **Track Equipment** - Know which modem is with which customer
2. **Prevent Stockouts** - Can't provision addon if no modems in stock
3. **Recovery** - When customer cancels, know which equipment to recover
4. **Cost Tracking** - Link wholesale cost to specific serial number
5. **Depreciation** - Track equipment value over rental period
6. **Warranty** - Identify defective units by serial number

Addon Provisioning Flow with Inventory:

When a customer adds "WiFi 6 Modem Rental" to their fiber service:

1. **Addon Selected** - Customer clicks "Add to Service"
2. **Inventory Picker Appears** - Just like standalone services:
3. **Payment Processed** - £10.00 monthly rental charged
4. **Modem Assigned** - Inventory updated:
   - `service_id`: Linked to fiber service
   - `customer_id`: Linked to customer
   - `item_state`: "Assigned"
5. **Shipping Triggered** - Fulfillment system notified to ship modem
6. **Installation** - Customer receives modem, plugs into ONT
7. **Recurring Billing** - £10/month charged until addon cancelled

Deprovisioning Hardware Addons:

When customer cancels modem rental:

1. **Cancellation Initiated** - Customer clicks "Remove Addon"

2. **Return Process Started**:
    - Email sent with return instructions
    - Prepaid shipping label generated
    - 14-day grace period before penalty
3. **Equipment Returned**:
    - Inventory updated: `item_state` = "In Stock" (after refurbishment)
    - Or `item_state` = "Damaged" (if defective)
    - Linked to next customer once refurbished
4. **No Return**:
    - After 14 days, £150 replacement fee charged
    - Inventory marked: `item_state` = "Lost"
    - Wholesale cost (£45) + replacement value recovered

Pricing for Addons:

Addons can be priced differently from standalone services:

- Virtual addons typically have no setup costs
- Hardware addons may have wholesale setup costs for equipment
- Recurring rental addons use `contract_days` for billing frequency

Stage 2: The Provisioning Process

When a customer orders the "Prepaid Mobile 20GB" product, OmniCRM orchestrates provisioning through Ansible.

Provisioning Flow Diagram

Customer Orders → Inventory Selection → Provisioning Job Created ↓ ↓ Payment Authorized ← Variables Assembled ← Ansible Playbook Executed ↓ ↓ Service Record Created → OCS Account Setup → Inventory Assigned → Service Active

Step-by-Step Provisioning Flow

1. Customer Initiates Order

From customer page:

- Staff clicks "Add Service"
- Selects "Prepaid Mobile 20GB" from product carousel
- Product details and pricing displayed

2. Inventory Selection

System prompts for required inventory:

- **SIM Card** - Dropdown shows available SIM cards in stock
  - Example: "SIM-00123 - ICCID: 8944..."
- **Mobile Number** - Dropdown shows available phone numbers
  - Example: "+44 7700 900123"

Staff or customer selects items from available inventory.

3. Pricing Confirmation

System displays final pricing:

- Setup cost: £0.00 (free activation)
- Monthly cost: £15.00
- Due today: £15.00 (first month)
- Renewal date: 30 days from today

If auto-renew prompting enabled, customer chooses:

☐ Automatically renew this service every 30 days

4. Provision Button Clicked

When "Provision" is clicked, the API:

- Creates `Provision` record with status "Running" (status=1)
- Merges variables from product + request + inventory selections
- Spawns background thread to execute Ansible playbook
- Returns provision_id to UI for status tracking

5. Variables Assembled

System merges variables from multiple sources:

From Product:

```
{
  "days": 30,
  "data_gb": 20,
  "voice_minutes": "unlimited",
  "sms_count": "unlimited"
}
```

From Request:

```
{
  "product_id": 42,
  "customer_id": 123,
  "SIM Card": 5001,
  "Mobile Number": 5002
}
```

System-Added:

```
{
  "access_token": "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9...",
  "initiating_user": 7
}
```

Final Variables Passed to Ansible:

```
{
    "product_id": 42,
    "customer_id": 123,
    "SIM Card": 5001,
    "Mobile Number": 5002,
    "days": 30,
    "data_gb": 20,
    "voice_minutes": "unlimited",
    "sms_count": "unlimited",
    "access_token": "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9...",
    "initiating_user": 7
}
```


6. Ansible Playbook Execution

The playbook `play_local_mobile_sim.yaml` executes with these variables.

Understanding the Ansible Provisioning Playbook

Let's examine a real provisioning playbook to understand what happens behind the scenes.

Mobile SIM Provisioning Playbook Example

Location: `OmniCRM-API/Provisioners/plays/play_local_mobile_sim.yaml`

High-Level Structure:

```yaml
- name: Mobile SIM Provisioning
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Main block
      block:
        # 1. Load configuration
        # 2. Fetch product details from API
        # 3. Fetch customer details from API
        # 4. Fetch inventory details from API
        # 5. Create account in OCS (CGRateS)
        # 6. Add balances and allowances to OCS
        # 7. Create service record in CRM
        # 8. Assign inventory to service
        # 9. Record transactions
        # 10. Send welcome notifications

      rescue:
        # Rollback on failure
        # - Remove OCS account
        # - Release inventory
        # - Log error
```

Detailed Playbook Walkthrough:

Task 1: Load Configuration

```yaml
- name: Include vars of crm_config
  ansible.builtin.include_vars:
    file: "../../crm_config.yaml"
    name: crm_config
```

Loads system configuration including:

- OCS/CGRateS URL and credentials
- CRM base URL
- Tenant configuration

Task 2: Fetch Product Details

```
- name: Get Product information from CRM API
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/product/product_id/{{
product_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
    return_content: yes
  register: api_response_product
```

What This Does:

- Calls `GET /crm/product/product_id/42`
- Retrieves complete product definition
- Stores in `api_response_product` variable

Why: Even though we have `provisioning_json_vars` from the product, we fetch the full product to get:

- Latest pricing (may have changed since order started)
- Product name for service naming
- Features list for documentation
- Wholesale costs for margin tracking

Task 3: Set Package Facts

```
- name: Set package facts
  set_fact:
    package_name: "{{ api_response_product.json.product_name }}"
    monthly_cost: "{{ api_response_product.json.retail_cost }}"
    setup_cost: "{{ api_response_product.json.retail_setup_cost
}}"
```

Extracts commonly-used values into simple variables for readability.

Task 4: Fetch Inventory Details

```
- name: Get SIM information from CRM API
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ hostvars[inventory_hostname]['SIM
Card'] }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: api_response_sim

- name: Set IMSI from Inventory response
  set_fact:
    imsi: "{{ api_response_sim.json.itemtext2 }}"
    iccid: "{{ api_response_sim.json.itemtext1 }}"
```

What This Does:

- Looks up SIM Card inventory ID 5001
- Retrieves SIM details:
  - `itemtext1` = ICCID (SIM card number)
  - `itemtext2` = IMSI (subscriber identity)
- Does same for Mobile Number inventory (retrieves phone number)

Why This Matters:

- IMSI is needed to provision subscriber in HSS (Home Subscriber Server)
- ICCID is recorded in service notes for troubleshooting
- Phone number (MSISDN) is displayed to customer and used for routing

Task 5: Generate Service UUID

```
- name: Generate UUID Fact
  set_fact:
    uuid: "{{ 99999999 | random | to_uuid }}"

- name: Set Service UUID
  set_fact:
    service_uuid: "Local_Mobile_SIM_{{ uuid[0:8] }}"
```

What This Does:

- Generates random UUID
- Creates service_uuid like `Local_Mobile_SIM_a3f2c1d8`

Why:

- Service UUID is the unique identifier in OCS/CGRateS
- Used for all charging operations
- Must be globally unique across all services

Task 6: Create OCS Account

```
- name: Create account in OCS
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    headers:
      Content-Type: "application/json"
    body:
      {
        "method": "ApierV2.SetAccount",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "ActionPlanIds": [],
          "ExtraOptions": {
            "AllowNegative": false,
            "Disabled": false
          },
          "ReloadScheduler": true
        }]
      }
  register: ocs_create_response
```

What This Does:

- Calls CGRateS JSON-RPC API
- Creates new account with service_uuid

- Sets account to active (not disabled)
- Prevents negative balance (prepaid mode)

Why:

- OCS account is where all charging happens
- Balances (data, voice, SMS, money) are stored here
- Usage is tracked and rated in real-time

Task 7: Add Data Balance

```
- name: Add 20GB Data Balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Tenant": "{{ crm_config.ocs.ocsTenant }}",
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "DATA_20GB_Monthly",
            "Value": 21474836480,
            "ExpiryTime": "+720h",
            "Weight": 10,
            "DestinationIDs": "*any"
          }
        }]
      }
```

What This Does:

- Adds 20GB data balance to account
- Value: 21474836480 bytes (20 * 1024 * 1024 * 1024)
- Expires in 720 hours (30 days)
- Weight 10 (higher weight consumed first)

Task 8: Add Unlimited Voice & SMS

```
- name: Add Unlimited Voice
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Account": "{{ service_uuid }}",
          "BalanceType": "*voice",
          "Balance": {
            "ID": "VOICE_Unlimited",
            "Value": 999999999,
            "ExpiryTime": "+720h"
          }
        }]
      }
```

- Adds 999,999,999 seconds of voice (essentially unlimited)
- Expires in 30 days

Task 9: Create Service Record in CRM

```
- name: Add Service via API
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/service/"
    method: PUT
    body_format: json
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      {
        "customer_id": "{{ customer_id }}",
        "product_id": "{{ product_id }}",
        "service_name": "Mobile - {{ phone_number }}",
        "service_type": "mobile",
        "service_uuid": "{{ service_uuid }}",
        "service_status": "Active",
        "service_provisioned_date": "{{ provision_datetime }}",
        "retail_cost": "{{ monthly_cost }}",
        "wholesale_cost": "{{
api_response_product.json.wholesale_cost }}",
        "icon": "fa-solid fa-sim-card"
      }
  register: service_creation_response
```

What This Creates:

- Service record linked to customer
- Links to OCS via `service_uuid`
- Stores retail and wholesale costs
- Sets status to "Active"
- Returns `service_id` for subsequent operations

Task 10: Assign Inventory to Service

```
- name: Assign SIM Card to Service
  uri:
    url: "{{ crm_config.crm.base_url
}}/crm/inventory/inventory_id/{{ hostvars[inventory_hostname]['SIM
Card'] }}"
    method: PATCH
    body_format: json
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      {
        "service_id": "{{
service_creation_response.json.service_id }}",
        "customer_id": "{{ customer_id }}",
        "item_state": "Assigned"
      }
```

What This Does:

- Updates SIM Card inventory record
- Sets `service_id` to link SIM to service
- Changes state from "In Stock" to "Assigned"
- Repeats for Mobile Number inventory

Why:

- Tracks which SIM is assigned to which customer
- Prevents double-allocation of inventory
- Enables inventory reporting and auditing

Task 11: Record Setup Cost Transaction

```
- name: Add Setup Cost Transaction
  uri:
    url: "{{ crm_config.crm.base_url }}/crm/transaction/"
    method: PUT
    body_format: json
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      {
        "customer_id": "{{ customer_id }}",
        "service_id": "{{
service_creation_response.json.service_id }}",
        "title": "{{ package_name }} - Setup",
        "description": "Activation fee",
        "retail_cost": "{{ setup_cost }}",
        "wholesale_cost": "{{
api_response_product.json.wholesale_setup_cost }}"
      }
```

What This Does:

- Records £0.00 setup charge to customer (retail)
- Records £1.00 wholesale cost
- Creates transaction record for invoicing

Task 12: Rescue Block (Error Handling)

```
rescue:
  - name: Remove account in OCS on failure
    uri:
      url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
      method: POST
      body:
        {
          "method": "ApierV2.RemoveAccount",
          "params": [{
            "Account": "{{ service_uuid }}"
          }]
        }

  - name: Fail the provisioning
    fail:
      msg: "Provisioning failed, rolled back OCS account"
```

What This Does:

- If any task fails, rescue block executes
- Deletes OCS account that was partially created
- Releases inventory back to "In Stock"
- Fails the provision job with error message

Why:

- Prevents orphaned accounts in OCS
- Ensures clean rollback on errors
- Maintains data consistency

Provisioning Complete: What Was Created

After successful provisioning, the system has:

1. OCS Account (CGRateS):

- Account ID: `Local_Mobile_SIM_a3f2c1d8`
- Balances:
  - 20GB data (expires in 30 days)

    - Unlimited voice (999M seconds, expires in 30 days)
    - Unlimited SMS (999M messages, expires in 30 days)

2. CRM Service Record:

- Service ID: 1234
- Customer: John Doe (customer_id: 123)
- Product: Prepaid Mobile 20GB (product_id: 42)
- Service Name: "Mobile - +44 7700 900123"
- Service UUID: `Local_Mobile_SIM_a3f2c1d8`
- Status: Active
- Monthly Cost: £15.00 (retail), £5.00 (wholesale)
- Profit: £10.00/month

3. Inventory Assignments:

- SIM Card 5001: Assigned to service 1234, customer 123
- Mobile Number 5002: Assigned to service 1234, customer 123

4. Transaction Records:

- Setup cost transaction created
- First month charge recorded

5. Customer Can Now:

- View service in self-care portal
- See 20GB data balance
- Make calls and send SMS
- Top up or add addons
- View usage in real-time

Stage 3: Adding Addons and Topups

After a service is active, customers can purchase addons to enhance their service.

Addon Provisioning Flow

Let's say customer has used 18GB of their 20GB allowance and wants to buy the "5GB Data Boost" addon.

1. Customer Navigates to Service

- Opens "Mobile - +44 7700 900123" service page
- Sees current usage: 18GB of 20GB used (90%)
- Clicks "Add Addon" or "Top Up"

2. System Filters Available Addons

Only shows addons where:

- `category = "addon"`
- `service_type = "mobile"` (matches service type)
- `residential = true` (if customer is residential)
- `enabled = true`

Customer sees: "5GB Data Boost - £5.00"

3. Customer Selects Addon

- Clicks "5GB Data Boost"
- Confirms purchase for £5.00
- System captures payment authorization

4. Addon Provisioning Initiated

System calls `play_topup_charge_then_action.yaml` with variables:

```
{
    "product_id": 43,  # 5GB Data Boost product
    "customer_id": 123,
    "service_id": 1234,  # Existing service
    "access_token": "eyJ...",
    "data_gb": 5,  # From provisioning_json_vars
    "days": 7      # From provisioning_json_vars
}
```

Key Difference from Standalone:

- `service_id` is included (existing service to modify)
- No inventory required
- No service creation (modifies existing)

Addon Provisioning Playbook Walkthrough

Task 1: Fetch Service Details

```
- name: Get Service information from CRM API
  uri:
    url: "http://localhost:5000/crm/service/service_id/{{
service_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: api_response_service

- name: Set service facts
  set_fact:
    service_uuid: "{{ api_response_service.json.service_uuid }}"
    customer_id: "{{ api_response_service.json.customer_id }}"
```

Why:

- Need `service_uuid` to add balance to correct OCS account
- Verifies service exists and is active
- Ensures service belongs to the customer

Task 2: Charge Customer

```
- name: Get Customer's Default Payment Method
  uri:
    url: "http://localhost:5000/api/payments/methods/default?
customer_id={{ customer_id }}"
    method: GET
    headers:
      Authorization: "Bearer {{ access_token }}"
  register: api_response_payment_method

- name: Get default payment method ID
  set_fact:
    payment_method_id: "{{
api_response_payment_method.json.data.payment_method_id }}"

- name: Charge customer
  uri:
    url: "http://localhost:5000/api/payments/charge"
    method: POST
    body_format: json
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      {
        "customer_id": "{{ customer_id | int }}",
        "amount": 5.00,
        "currency": "USD",
        "payment_method_id": "{{ payment_method_id }}",
        "metadata": {
          "description": "5GB Data Boost",
          "service_id": "{{ service_id | int }}",
          "product_id": "{{ product_id | int }}",
          "invoice": true
        }
      }
  register: charge_response

- name: Assert payment successful
  assert:
    that:
      - charge_response.json.success == true
```

What This Does:

- Finds customer's default Stripe payment method
- Charges £5.00 to the card
- Records wholesale cost £1.50 for margin tracking
- Creates transaction linked to service
- Adds to next invoice
- Fails provision if payment fails

Why Charge First:

- No credit delivered until payment confirmed
- Prevents fraud
- Matches payment to addon provision

Task 3: Add Data Balance to OCS

```
- name: Add 5GB Data Balance
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body_format: json
    body:
      {
        "method": "ApierV1.AddBalance",
        "params": [{
          "Account": "{{ service_uuid }}",
          "BalanceType": "*data",
          "Balance": {
            "ID": "DATA_5GB_Boost_{{ uuid }}",
            "Value": 5368709120,
            "ExpiryTime": "+168h",
            "Weight": 20
          }
        }]
      }
```

What This Does:

- Adds 5GB (5368709120 bytes) to account
- Expires in 168 hours (7 days)
- Weight 20 (higher weight consumed first - boost before monthly allowance)

Customer Balance After Addon:

- Original monthly: 2GB remaining (expires in 25 days)
- New boost: 5GB (expires in 7 days)
- Total available: 7GB
- Usage order: Boost consumed first, then monthly

Task 4: Record Transaction

```
- name: Add Addon Transaction
  uri:
    url: "http://localhost:5000/crm/transaction/"
    method: PUT
    body_format: json
    headers:
      Authorization: "Bearer {{ access_token }}"
    body:
      {
        "customer_id": "{{ customer_id }}",
        "service_id": "{{ service_id }}",
        "title": "5GB Data Boost",
        "description": "Additional 5GB data valid for 7 days",
        "retail_cost": 5.00,
        "wholesale_cost": 1.50
      }
```

What This Does:

- Records £5.00 charge to customer
- Records £1.50 wholesale cost
- Links transaction to service for reporting

Complete Addon Flow Summary

1. Customer selects addon from filtered list

2. Payment authorized and charged
3. Data balance added to OCS account
4. Transaction recorded in CRM
5. Customer immediately sees updated balance: 7GB available

Financial Tracking:

- Service monthly charge: £15 retail, £5 wholesale
- Addon purchase: £5 retail, £1.50 wholesale

Auto-Renewal: Recurring Addons

Some addons can be set to auto-renew (monthly data plans, subscriptions, etc).

Product Configuration:

```
{
  "product_name": "Monthly 10GB Data Plan",
  "category": "addon",
  "retail_cost": 10.00,
  "contract_days": 30,
  "auto_renew": "true",
  "provisioning_play": "play_topup_charge_then_action"
}
```

Provisioning Creates ActionPlan:

```
- name: Create ActionPlan for Auto-Renewal
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body:
      {
        "method": "ApierV1.SetActionPlan",
        "params": [{
          "Id": "ServiceID_{{ service_uuid }}__ProductID_{{
product_id }}__MonthlyRenewal",
          "ActionPlan": [{
            "ActionsId": "Action_{{ product_slug }}",
            "Years": "*any",
            "Months": "*any",
            "MonthDays": "*any",
            "WeekDays": "*any",
            "Time": "00:00:00",
            "Weight": 10
          }],
          "Overwrite": false,
          "ReloadScheduler": true
        }]
      }
```

What This Does:

- Creates scheduled task in OCS
- Executes `Action_{{ product_slug }}` every 30 days
- Action charges customer and re-applies data balance
- Continues until customer cancels

Customer Management:

- Customer sees "Next Renewal: Feb 1, 2025 - £10.00" in service view
- Can click "Cancel Auto-Renewal" to stop future charges
- Can click "Renew Now" to immediately apply next month's allowance

Stage 4: Deprovisioning Services

When a customer cancels service, the system must cleanly remove all resources.

Deprovisioning Triggers

Deprovisioning can be triggered by:

1. **Customer cancellation** - Customer clicks "Cancel Service"
2. **Administrative action** - Staff marks service for deactivation
3. **Non-payment** - Service expires due to lack of renewal
4. **Contract end** - Fixed-term contract reaches end date

Deprovisioning Flow

1. Customer Initiates Cancellation

- Navigates to service
- Clicks "Cancel Service"
- System prompts: "Are you sure? Any remaining balance will be forfeited."
- Customer confirms

2. Grace Period (Optional)

Some operators implement grace period:

- Service marked "Pending Cancellation"
- Remains active for 7-30 days
- Customer can reverse cancellation during grace period
- Automatic deprovisioning after grace period

3. Deprovisioning Job Created

System creates provision job with:

```
{
    "action": "deprovision",
    "service_id": 1234,
    "customer_id": 123,
    "service_uuid": "Local_Mobile_SIM_a3f2c1d8"
}
```

Calls playbook specified in `service.deprovisioning_play` or rescue block of original playbook.

4. Ansible Deprovision Playbook

```
- name: Deprovision Mobile Service
  hosts: localhost
  tasks:
    - name: Disable OCS Account
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body:
          {
            "method": "ApierV2.SetAccount",
            "params": [{
              "Account": "{{ service_uuid }}",
              "ExtraOptions": { "Disabled": true }
            }]
          }

    - name: Remove ActionPlans (stop auto-renewals)
      uri:
        url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
        method: POST
        body:
          {
            "method": "ApierV1.RemoveActionPlan",
            "params": [{
              "Id": "ServiceID_{{ service_uuid }}__*"
            }]
          }

    - name: Update Service Status in CRM
      uri:
        url: "http://localhost:5000/crm/service/{{ service_id }}"
        method: PATCH
        body:
          {
            "service_status": "Deactivated",
            "service_deactivate_date": "{{ current_datetime }}"
          }

    - name: Release Inventory to Stock
      uri:
        url: "http://localhost:5000/crm/inventory/inventory_id/{{
sim_card_id }}"
        method: PATCH
```

```
        body:
          {
            "service_id": null,
            "customer_id": null,
            "item_state": "Decommissioned"
          }
```

What This Does:

1. **Disables OCS account** - Stops all charging, usage blocked
2. **Removes ActionPlans** - Cancels auto-renewals
3. **Updates CRM service** - Status "Deactivated", date recorded
4. **Releases inventory** - SIM marked "Decommissioned", available for reuse (after refurbishment)

5. Post-Deprovisioning

System performs cleanup:

- Customer no longer sees service in self-care portal
- Service remains in CRM for historical reporting
- Transactions and invoices preserved for accounting
- Inventory can be refurbished and reused
- OCS account can be archived after retention period

Partial vs Full Deprovisioning

Partial Deprovisioning (Suspension):

- Used for non-payment or temporary suspension
- OCS account disabled but not deleted
- Balances preserved
- Can be re-enabled when payment received

```
- name: Suspend Service
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body:
      {
        "method": "ApierV2.SetAccount",
        "params": [{
          "Account": "{{ service_uuid }}",
          "ExtraOptions": { "Disabled": true }
        }]
      }
```

Full Deprovisioning (Permanent Cancellation):

- Used for permanent cancellation
- OCS account deleted entirely
- Balances forfeit
- Cannot be re-enabled

```
- name: Remove OCS Account
  uri:
    url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
    method: POST
    body:
      {
        "method": "ApierV2.RemoveAccount",
        "params": [{
          "Account": "{{ service_uuid }}"
        }]
      }
```

Best Practices for Product Management

Product Lifecycle Management

Product States:

- `enabled: true` - Product available for new orders
- `enabled: false` - Product disabled, existing services continue

Disabling Products:

- Mark product as `enabled: false` to prevent new orders
- Existing services remain active
- Customers can still renew/modify existing services
- Useful for sunsetting old products

Inventory Management

Inventory States:

- `New` - Fresh stock, ready to assign
- `In Stock` - Available for provisioning
- `Assigned` - Linked to customer service
- `Decommissioned` - Can be refurbished and reused
- `Damaged` - Needs repair or disposal

Reusing Inventory:

After deprovisioning:

- SIM cards: Refurbish and mark "In Stock"
- Phone numbers: Release after porting period (30 days)
- Equipment: Test, refurbish, mark "Used"

Provisioning Metrics

Monitor:

- Provisioning success rate
- Average provisioning time
- Common failure points
- Inventory turnover

Mailjet Integration with OmniCRM

OmniCRM integrates with **Mailjet** to manage all email communication with customers and staff, ensuring professional, branded, and reliable email delivery for both transactional emails and marketing campaigns.

Overview

The Mailjet integration provides:

- **Automated Transactional Emails** - Password resets, invoices, welcome emails, notifications
- **Marketing Consent (double opt-in)** - Auditable opt-in/opt-out for marketing email, including confirmation and re-permission flows
- **Email Templates** - 10+ pre-configured email types with customizable Mailjet templates
- **Marketing Campaigns** - Segmented email campaigns based on customer data (segments can be built from CRM data or CSV upload)
- **Reliable Delivery** - Professional email infrastructure with tracking and analytics

OmniCRM does **not** maintain a live Mailjet contact-list sync. Use **Customers → All Contacts** in the admin UI (or `GET /crm/contact/export`) to export contacts for external list management when needed.

Configuration

Mailjet is configured in `OmniCRM-API/crm_config.yaml` under the `mailjet` section.

Basic Configuration

```yaml
mailjet:
  api_key: your_mailjet_api_key
  api_secret: your_mailjet_api_secret
```

Obtaining API Credentials:

1. Create account at <https://www.mailjet.com>
2. Navigate to **Account Settings → API Keys**
3. Copy **API Key** and **Secret Key**
4. Paste into `crm_config.yaml`

Email Template Configuration

OmniCRM uses **10 distinct email template types** for automated communications. Each template is configured with:

- **from_email** - Sender email address
- **from_name** - Sender display name
- **template_id** - Mailjet template ID (numeric)
- **subject** - Email subject line

Template Types and Configuration

Customer Welcome Email

Sent when a new customer account is created.

```yaml
api_crmCommunicationCustomerWelcome:
  from_email: "support@yourcompany.com"
  from_name: "Your Company Support"
  template_id: 5977509
  subject: "Welcome to Your Company"
```

When Sent:

- New customer signs up via Self-Care portal
- Staff creates new customer account
- Customer activates service for first time

Template Variables Available:

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:email }}` - Customer's email address
- `{{ var:company_name }}` - Your company name
- `{{ var:login_url }}` - Link to Self-Care portal
- `{{ var:support_url }}` - Link to support page

Customer Invoice Email

Sent when an invoice is generated and ready for payment.

```
api_crmCommunicationCustomerInvoice:
  from_email: "billing@yourcompany.com"
  from_name: "Your Company Billing"
  template_id: 6759851
  subject: "Your Invoice - "
```

When Sent:

- Invoice automatically generated for billing period
- Manual invoice created by staff
- Customer requests invoice copy

Template Variables Available:

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:invoice_number }}` - Invoice ID/number
- `{{ var:invoice_date }}` - Invoice issue date
- `{{ var:due_date }}` - Payment due date
- `{{ var:total_amount }}` - Total amount due
- `{{ var:invoice_url }}` - Link to view/download invoice PDF
- `{{ var:pay_url }}` - Link to pay invoice online

Invoice Attachment:

The invoice PDF is automatically attached to the email.

Customer Invoice Reminder

Sent to remind customers of overdue invoices.

```
api_crmCommunicationCustomerInvoiceReminder:
  from_email: "billing@yourcompany.com"
  from_name: "Your Company Billing"
  template_id: 6759852
  subject: "Payment Reminder - Invoice Overdue"
```

When Sent:

- Invoice is X days past due (configurable)
- Manual reminder triggered by staff
- Automated reminder workflow (if configured)

Template Variables Available:

- `{{ var:customer_name }}`
- `{{ var:invoice_number }}`
- `{{ var:due_date }}`
- `{{ var:days_overdue }}`
- `{{ var:total_amount }}`
- `{{ var:pay_url }}`

Staff User Welcome Email

Sent when a new staff user account is created.

```
api_crmCommunicationUserWelcome:
  from_email: "admin@yourcompany.com"
  from_name: "Your Company Admin"
  template_id: 5977510
  subject: "Welcome to the Team"
```

When Sent:

- Admin creates new staff user
- "Send Welcome Email" button clicked in user management

Template Variables Available:

- `{{ var:user_name }}` - Staff user's full name
- `{{ var:email }}` - Staff user's email
- `{{ var:role }}` - Assigned role(s)
- `{{ var:login_url }}` - Link to admin portal login
- `{{ var:temp_password }}` - Temporary password (if applicable)
- `{{ var:support_email }}` - IT support contact

User Password Reset

Sent when a user requests to reset their password.

```
api_crmCommunicationUserPasswordReset:
  from_email: "noreply@yourcompany.com"
  from_name: "Your Company Security"
  template_id: 5977511
  subject: "Password Reset Request"
```

When Sent:

- User clicks "Forgot Password" on login page
- User submits password reset request

Template Variables Available:

- `{{ var:user_name }}`
- `{{ var:reset_url }}` - Time-limited password reset link (typically 1 hour)
- `{{ var:expiry_time }}` - When reset link expires

Security Note:

Reset links expire after configured time period (default 1 hour).

User Password Reset Success

Sent to confirm password was successfully changed.

```
api_crmCommunicationUserPasswordResetSuccess:
  from_email: "noreply@yourcompany.com"
  from_name: "Your Company Security"
  template_id: 5977512
  subject: "Password Changed Successfully"
```

When Sent:

- User successfully completes password reset
- Immediately after new password is set

Template Variables Available:

- `{{ var:user_name }}`
- `{{ var:change_date }}` - Date/time password was changed
- `{{ var:ip_address }}` - IP address of change (optional)
- `{{ var:support_email }}` - Contact if change was unauthorized

User Password Change

Sent when a user changes their password from settings.

```
api_crmCommunicationUserPasswordChange:
  from_email: "noreply@yourcompany.com"
  from_name: "Your Company Security"
  template_id: 5977513
  subject: "Password Change Notification"
```

When Sent:

- User changes password from profile/settings
- Admin resets user password

Template Variables Available:

- `{{ var:user_name }}`
- `{{ var:change_date }}`
- `{{ var:changed_by }}` - "Self" or admin name
- `{{ var:support_email }}`

Email Verification

Sent to verify a user's email address.

```
api_crmCommunicationEmailVerification:
  from_email: "noreply@yourcompany.com"
  from_name: "Your Company"
  template_id: 5977514
  subject: "Verify Your Email Address"
```

When Sent:

- New account created (customer or staff)
- User changes email address
- Email verification required for security

Template Variables Available:

- `{{ var:user_name }}`
- `{{ var:verification_url }}` - Link to verify email
- `{{ var:verification_code }}` - Code to enter manually (alternative to link)

Balance Expired Notification

Sent when a customer's service balance/allowance has expired.

```
api_crmCommunicationsBalanceExpired:
  from_email: "support@yourcompany.com"
  from_name: "Your Company Support"
  template_id: 5977515
  subject: "Your Service Balance Has Expired"
```

When Sent:

- Prepaid balance expires
- Monthly allowance renewal date passed
- Service expiry date reached

Template Variables Available:

- `{{ var:customer_name }}`
- `{{ var:service_name }}` - Name of expired service
- `{{ var:expiry_date }}`
- `{{ var:balance_type }}` - "Data", "Voice", "Monetary", etc.
- `{{ var:renewal_url }}` - Link to renew/top-up

Low Balance Alert

Sent when a customer's balance falls below configured threshold.

```
api_crmCommunicationsBalanceLow:
  from_email: "support@yourcompany.com"
  from_name: "Your Company Support"
  template_id: 5977516
  subject: "Low Balance Alert"
```

When Sent:

- Balance drops below threshold (e.g., 20% remaining)
- Configured in service plan or OCS
- Real-time monitoring triggers alert

Template Variables Available:

- `{{ var:customer_name }}`
- `{{ var:service_name }}`
- `{{ var:current_balance }}`
- `{{ var:threshold }}`
- `{{ var:balance_type }}`

- `{{ var:topup_url }}` - Link to add balance

eSIM Delivery Email

Sent when an eSIM is provisioned and ready for activation.

```
api_crmCommunicationEsimDelivery:
  from_email: "support@yourcompany.com"
  from_name: "Your Company Support"
  template_id: 0
  subject: "Your eSIM is Ready"
```

When Sent:

- eSIM provisioned during self-signup
- eSIM assigned to a customer service

Template Variables Available:

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:iccid }}` - eSIM ICCID
- `{{ var:activation_code }}` - LPA activation code string
- `{{ var:has_qr_code }}` - Boolean, true if QR code image is attached
- `{{ var:has_activation_code }}` - Boolean, true if activation code is available

Built-in Fallback:

When `template_id` is `0` (or the template key is missing from config), OmniCRM uses a built-in branded HTML email with the eSIM QR code rendered inline. The colours and brand name are controlled by the `branding` section in `crm_config.yaml` — see Configuration Guide for details.

Creating Mailjet Email Templates

For each email type, you need to create a corresponding template in Mailjet.

Step 1: Create Template in Mailjet

1. Login to Mailjet dashboard
2. Navigate to **Email Templates → Transactional Templates**
3. Click **Create a New Template**
4. Choose **Code your own template** (for advanced users) or **Use template builder**

Step 2: Design Template

Use Mailjet's drag-and-drop builder or HTML editor to design your email.

Essential Elements:

- **Header** - Company logo and branding
- **Greeting** - Personalized with `{{ var:customer_name }}` or `{{ var:user_name }}`
- **Content** - Main message body
- **Variables** - Insert template variables from list above
- **Call to Action** - Buttons/links for user actions
- **Footer** - Unsubscribe link, company address, support contact

Example Template (Password Reset):

```
<!DOCTYPE html>
<html>
<head>
    <style>
        body { font-family: Arial, sans-serif; }
        .button { background-color: #4CAF50; color: white;
padding: 14px 28px; }
    </style>
</head>
<body>
    ![Logo](https://yourcompany.com/logo.png)

    <h2>Password Reset Request</h2>

    <p>Hello {{ var:user_name }},</p>

    <p>We received a request to reset your password. Click the
button below to create a new password:</p>

    <a href="{{ var:reset_url }}" class="button">Reset
Password</a>

    <p>This link expires in {{ var:expiry_time }}.</p>

    <p>If you didn't request this, please ignore this email.</p>

    <hr>
    <p style="font-size: 12px; color: #666;">
        Your Company | support@yourcompany.com<br/>
        123 Business St, City, Country
    </p>
</body>
</html>
```

Step 3: Get Template ID

1. Save template in Mailjet
2. Note the **Template ID** (numeric, e.g., `5977509`)
3. Copy this ID to `crm_config.yaml`

Step 4: Test Template

1. In Mailjet, use **Test Email** feature
2. Provide sample values for all variables
3. Send test email to yourself
4. Verify formatting, links, and branding

Step 5: Configure in OmniCRM

Add template configuration to `crm_config.yaml`:

```
mailjet:
  api_key: your_api_key
  api_secret: your_secret

  api_crmCommunicationUserPasswordReset:
    from_email: "noreply@yourcompany.com"
    from_name: "Your Company Security"
    template_id: 5977511
    subject: "Password Reset Request"
```

Restart OmniCRM API for changes to take effect:

```
cd OmniCRM-API
sudo systemctl restart omnicrm-api
```

Contacts export (CRM)

For reporting, compliance, or manual import into Mailjet (or another ESP), admins can browse and export contacts from the CRM without a live Mailjet list sync.

Admin UI

Customers → All Contacts (`/contacts`) provides a paginated table with search, filters (`marketing_consent_status`, `customer_status`), and **Export**

CSV. The export uses the same filters and search as the table.

API

Both endpoints require `VIEW_CUSTOMER_CONTACT` permission.

Method	Path	Purpose
`GET`	`/crm/contact/search`	Paginated contact list with `search`, `page`, `per_page`, `sort`, `order`, `filters` (JSON)
`GET`	`/crm/contact/export`	CSV download with the same query parameters (max 50,000 rows)

CSV columns: `contact_id`, `customer_id`, `customer_name`, `customer_status`, name, email, phone, job title, `contact_types`, `marketing_consent_status`, `marketing_consent_granted_at`, `created`, `last_modified`.

Filter on `marketing_consent_status=granted` when preparing a list for marketing use. Import the CSV into Mailjet (or your ESP) using their contact-import workflow.

Implementation: `OmniCRM-API/services/contact_service.py` (`search_contacts`, `export_contacts_csv`).

Marketing Consent (double opt-in)

Mailjet refuses to approve a contact-list import unless the sender can demonstrate that each recipient explicitly consented to receive marketing email. To meet that requirement, OmniCRM stores per-contact marketing consent and exposes a double-opt-in ("confirmation email") flow that produces an auditable consent trail.

The implementation lives in `OmniCRM-API/services/marketing_consent_service.py`. Only contacts with

`marketing_consent_status == 'granted'` should be used for marketing sends or external list imports.

Data model

Two tables are involved:

- `contact.marketing_consent_status` (`Enum: none | pending | granted | revoked`) and `contact.marketing_consent_granted_at` - the denormalised current state used for fast filtering in the contacts table and export.
- `marketing_consent` - an **append-only audit log**. Every state transition (signup tick, confirmation click, self-care toggle, webhook-driven revoke, admin re-permission) writes a new row capturing the contact ID, email at the time of the event, source, consent text version, IP address, user-agent, signed token, and confirmation / revocation timestamps. The log is the source of truth if Mailjet ever asks for proof of consent for a given recipient.

The "consent text version" is configured under `marketing_consent.consent_text_version` in `crm_config.yaml` and is stamped on every audit row, so changing the wording of the consent copy in the future is non-destructive: existing rows continue to point at the version the user actually saw.

Configuration

Add the `marketing_consent` block to `crm_config.yaml`:

```yaml
marketing_consent:
  consent_text_version: "v1-2026-05"
  confirmation_url_path: "/marketing/confirm"
  token_expiry_days: 30
  re_permission_batch_size: 200
  re_permission_rate_per_second: 5
  re_permission_skip_pending_within_hours: 72
```

Optionally also configure a Mailjet template for the confirmation email (otherwise a hard-coded HTML/text body is used):

```yaml
mailjet:
  api_crmCommunicationMarketingConfirm:
    from_email: "support@example.com"
    from_name: "Norfone Support"
    template_id: 0       # 0 = use built-in HTML body
    subject: "Please confirm your subscription"
```

Mailjet template variables exposed to a custom template: `firstname`, `confirmation_link`, `consent_text_version`.

Flow A: New signups

The self-signup form renders a "Sign up to Norfone e-News for the latest news, events & promotions" checkbox. When ticked:

1. `routes/auth.py /self-signup-partial` extracts `customer.subscribe_to_newsletter` from the request body.
2. After the contact is created, `marketing_consent_service.request_consent` is called with `source='signup'`, the request IP, and User-Agent.
3. A `marketing_consent` audit row is written with `granted=True`, `confirmed_at=NULL`, and a signed URL-safe token. The contact's `marketing_consent_status` is set to `pending`.
4. A transactional Mailjet email is sent containing `${public_url}${confirmation_url_path}?token=...`.
5. When the user clicks the link, `GET /crm/marketing-consent/confirm` redeems the token: `confirmed_at` is stamped on the audit row and `marketing_consent_status` flips to `granted`.

Flow B: Self-care (logged-in users)

Self-care surfaces a "Preferences" page (`/self-care/preferences`) which calls:

Method	Path	Purpose
`GET`	`/crm/marketing-consent/me`	Current status + full audit history
`POST`	`/crm/marketing-consent/me/subscribe`	(Re)start the double-opt-in flow
`POST`	`/crm/marketing-consent/me/unsubscribe`	Revoke marketing consent immediately

Revocation writes a `granted=False` audit row and sets the status to `revoked`. The contact should be removed from any external marketing lists maintained outside OmniCRM.

Flow C: Existing base re-permission (admin)

Legacy contacts created before this feature shipped do not have a consent record and are therefore in `marketing_consent_status='none'`. Admins can ask them to opt in via the re-permission campaign:

Method	Path	Purpose
`GET`	`/crm/oam/marketing-consent/stats`	Per-status counts + candidate list + samples
`POST`	`/crm/oam/marketing-consent/re-permission?dry_run=true`	Plan (no email sent)
`POST`	`/crm/oam/marketing-consent/re-permission?dry_run=false`	Execute. Paced and bounded by config.

The job scans every contact whose status is `none`, `revoked`, or `pending` older than `re_permission_skip_pending_within_hours`, has a valid email, is not unsubscribed, and whose customer status is not `Closed`. For each candidate it

calls the same `request_consent` used by the signup flow, so the audit row format and token semantics are identical regardless of origin.

The send is rate-limited via a token-bucket sized from `re_permission_rate_per_second`, keeping us comfortably under Mailjet's transactional throughput cap. An optional `limit` query parameter caps the per-run send count so the first execution can be a small smoke test.

Recommended first-time rollout

1. Confirm the database migration for `marketing_consent` has run.
2. Visit **Email Marketing → Marketing Consent** in the admin UI (`/email-marketing/marketing-consent`). Review the per-status breakdown — most legacy contacts will be `none`.
3. Run **Dry-run re-permission** and inspect the counts.
4. **Send confirmation emails** with the `limit` query parameter set to a small batch (e.g. 50) to validate deliverability and support inbox volume.
5. Run again without `limit` to cover the rest of the base. The job is idempotent: contacts with a recent pending request are skipped.
6. After opt-ins plateau, use **Customers → All Contacts**, filter `marketing_consent_status = granted`, and **Export CSV** for import into Mailjet (or your ESP) if you maintain a marketing list there.

Prometheus metrics

Metric	Labels	Notes
`omnicrm_marketing_consent_events_total`	`event`	`confirmation_sent`, `confirmation_faile` `granted`, `revoked`, `token_redeemed`, `token_invalid`, `token_expired`
`omnicrm_marketing_consent_status_total`	`status`	Gauge per `none

Transactional Mailjet API metrics (`omnicrm_mailjet_api_*`, `omnicrm_mailjet_emails_sent_*`) are documented in Monitoring & Metrics.

Troubleshooting

Email not sending

- **Cause:** Invalid API credentials, Mailjet account suspended, or template ID wrong
- **Fix:**
  - Verify `api_key` and `api_secret` in `crm_config.yaml`
  - Check Mailjet account status and billing
  - Verify template ID exists in Mailjet
  - Check API logs for errors

Template variables not substituting

- **Cause:** Variable name mismatch or missing data in OmniCRM
- **Fix:**
  - Verify variable names match exactly (case-sensitive)
  - Use `{{ var:variable_name }}` format
  - Check OmniCRM is passing variable data in API call
  - Test with sample data in Mailjet

Invoice PDF not attaching

- **Cause:** PDF generation failed or file size too large
- **Fix:**
  - Check invoice generation logs
  - Verify invoice template renders correctly
  - Ensure PDF under 15MB (Mailjet limit)
  - Test invoice PDF generation separately

Need a marketing contact list in Mailjet

- **Cause:** OmniCRM no longer pushes contacts to Mailjet automatically

- **Fix:**
  - Collect opt-ins via the marketing consent flow (`granted` status)
  - Export from **Customers → All Contacts** with consent filter, or `GET /crm/contact/export?filters={"marketing_consent_status":["granted"]}`
  - Import the CSV into Mailjet using their contact-import UI

Related Documentation

- `administration_configuration` - Complete Mailjet configuration reference
- `payments_invoices` - Invoice generation and email delivery
- `authentication_flows` - Password reset and verification emails
- `customer_care` - Self-Care portal welcome emails
- Monitoring & Metrics - Mailjet API metrics, email delivery tracking, and performance monitoring

Further Reading

- Mailjet Documentation: <https://dev.mailjet.com/>
- Mailjet API Reference: <https://dev.mailjet.com/email/reference/>

Notification API for External Systems

The OmniCRM Notification API allows external systems and 3rd party integrations to send in-app notifications to users. This enables automated alerts, status updates, and important information to be delivered directly to users within the OmniCRM interface.

See also: `Using the API <concepts_api>` for authentication methods, `Support Ticket System <support_tickets>` for ticket-related notifications, `Monitoring & Metrics <monitoring_metrics>` for system monitoring.

Overview

The Notification API provides a flexible way for any system to send notifications to OmniCRM users. Notifications appear in the user's notification dropdown in the OmniCRM interface and can optionally link to specific pages or resources.

Key Features

1. **Flexible Integration** — Any system can send notifications via API
2. **Multiple Notification Types** — Support for various event types (provisioning, billing, tickets, custom)
3. **Rich Metadata** — Include structured data with notifications
4. **Link Navigation** — Notifications can link to specific pages
5. **API Key Authentication** — Secure server-to-server integration
6. **Real-time Delivery** — Notifications appear immediately in user interface
7. **Persistent Storage** — Notifications are stored and retrievable

Common Use Cases

Provisioning Systems:

- Notify users when service activation completes
- Alert on provisioning failures
- Update users on long-running provisioning tasks

Billing & Payment Systems:

- Alert users when new invoices are generated
- Confirm payment processing
- Warn about upcoming service expirations

Monitoring & Alerting:

- Send system health alerts to administrators
- Notify on threshold breaches
- Alert on critical events

Custom Integrations:

- External workflow systems
- Third-party service integrations
- Automated reporting systems

Authentication

The Notification API supports two authentication methods:

API Key Authentication (Recommended for External Systems)

API keys provide secure, long-lived authentication for server-to-server integrations. This is the recommended method for external systems.

Configure API Key:

Add your API key to `crm_config.yaml`:

```yaml
api_keys:
  your-secure-api-key-minimum-32-characters:
    roles:
      - admin
    description: "Provisioning notification system"
```

Use API Key:

Include the API key in the `X-API-KEY` header:

```
curl -X POST "https://yourcrm.com/crm/notification/send" \
  -H "X-API-KEY: your-secure-api-key-minimum-32-characters" \
  -H "Content-Type: application/json" \
  -d '{
    "user_id": 123,
    "type": "provision_complete",
    "title": "Service Activated",
    "message": "Your mobile service has been successfully
activated",
    "link": "/services/167"
  }'
```

Bearer Token Authentication

For interactive systems or user-initiated notifications, use Bearer token authentication.

See `Using the API <concepts_api>` for details on obtaining Bearer tokens.

API Endpoint

Send Notification

Endpoint: `POST /crm/notification/send`

Authentication: API Key (X-API-KEY) or Bearer Token

Description: Send a notification to a specific user

Request Body


```
{
  "user_id": 123,
  "type": "provision_complete",
  "title": "Service Activated",
  "message": "Your mobile service has been successfully
activated",
  "link": "/services/167",
  "metadata": {
    "service_id": 167,
    "provision_job_id": "prov-2026-00042",
    "duration_seconds": 45
  },
  "related_ticket_id": 42,
  "related_user_id": 5
}
```


Request Parameters

Field	Type	Required	Description
`user_id`	integer	**Yes**	ID of the user to notify
`type`	string	**Yes**	Notification type (see types below)
`title`	string	**Yes**	Notification title (max 255 chars)
`message`	string	No	Detailed notification message
`link`	string	No	URL/path to navigate when clicked
`metadata`	object	No	Additional structured data (JSON)
`related_ticket_id`	integer	No	Associated ticket ID
`related_user_id`	integer	No	Related user ID (e.g., who caused event)

Notification Types

Type	Description	Common Use Case
`provision_complete`	Provisioning completed successfully	Ansible playbook finished
`provision_failed`	Provisioning failed	Service activation error
`ticket_mention`	User @mentioned in ticket	Collaboration alert
`ticket_assigned`	Ticket assigned to user	Support workflow
`ticket_updated`	Ticket was updated	Ticket subscriber notification
`customer_reply`	Customer replied to ticket	Support alert
`system_alert`	System-wide alert	Critical system event
`billing_invoice`	New invoice generated	Billing system integration
`billing_payment`	Payment processed	Payment gateway webhook
`service_expiring`	Service expiring soon	Automated monitoring
`custom`	Custom notification type	Any other purpose

Success Response

Status: `201 Created`

```
{
  "result": "Success",
  "message": "Notification sent successfully",
  "notification": {
    "notification_id": 1234,
    "user_id": 123,
    "type": "provision_complete",
    "title": "Service Activated",
    "message": "Your mobile service has been successfully
activated",
    "link": "/services/167",
    "metadata": {
      "service_id": 167,
      "provision_job_id": "prov-2026-00042",
      "duration_seconds": 45
    },
    "is_read": false,
    "created_at": "2026-01-11T14:30:00Z"
  }
}
```


Error Responses

Missing Required Field (400 Bad Request):


```
{
  "result": "Failed",
  "reason": "user_id is required"
}
```


User Not Found (404 Not Found):


```
{
  "result": "Failed",
  "reason": "User 999 not found"
}
```


Authentication Failed (401 Unauthorized):

```
{
  "message": "Invalid API key"
}
```

Code Examples

Python Example

```python
import requests

# Configuration
CRM_URL = 'https://yourcrm.com'
API_KEY = 'your-secure-api-key-minimum-32-characters'

def send_notification(user_id, notification_type, title,
message=None, link=None, metadata=None):
    """Send a notification to a user via OmniCRM API"""

    headers = {
        "Content-Type": "application/json",
        "X-API-KEY": API_KEY
    }

    payload = {
        "user_id": user_id,
        "type": notification_type,
        "title": title
    }

    # Add optional fields
    if message:
        payload["message"] = message
    if link:
        payload["link"] = link
    if metadata:
        payload["metadata"] = metadata

    response = requests.post(
        f"{CRM_URL}/crm/notification/send",
        headers=headers,
        json=payload
    )

    if response.status_code == 201:
        print(f"✓ Notification sent successfully:
{response.json()}")
```

```
        return response.json()
    else:
        print(f"✗ Failed to send notification: {response.text}")
        response.raise_for_status()

# Example usage
if __name__ == "__main__":
    # Notify user of provisioning completion
    send_notification(
        user_id=123,
        notification_type="provision_complete",
        title="Mobile Service Activated",
        message="Service ID 167 has been successfully provisioned
and activated",
        link="/services/167",
        metadata={
            "service_id": 167,
            "provision_job_id": "prov-2026-00042",
            "duration_seconds": 45,
            "playbook": "mobile_service_activation"
        }
    )
```

Bash/cURL Example

```
#!/bin/bash

# Configuration
CRM_URL="https://yourcrm.com"
API_KEY="your-secure-api-key-minimum-32-characters"

# Send notification
curl -X POST "${CRM_URL}/crm/notification/send" \
  -H "X-API-KEY: ${API_KEY}" \
  -H "Content-Type: application/json" \
  -d '{
    "user_id": 123,
    "type": "provision_complete",
    "title": "Service Activated",
    "message": "Your mobile service has been successfully
activated",
    "link": "/services/167",
    "metadata": {
      "service_id": 167,
      "provision_job_id": "prov-2026-00042",
      "duration_seconds": 45
    }
  }'
```

Node.js Example

```
const axios = require('axios');

const CRM_URL = 'https://yourcrm.com';
const API_KEY = 'your-secure-api-key-minimum-32-characters';

async function sendNotification(userId, type, title, options = {})
{
    try {
        const response = await axios.post(
            `${CRM_URL}/crm/notification/send`,
            {
                user_id: userId,
                type: type,
                title: title,
                message: options.message,
                link: options.link,
                metadata: options.metadata,
                related_ticket_id: options.relatedTicketId,
                related_user_id: options.relatedUserId
            },
            {
                headers: {
                    'X-API-KEY': API_KEY,
                    'Content-Type': 'application/json'
                }
            }
        );

        console.log('✓ Notification sent:', response.data);
        return response.data;
    } catch (error) {
        console.error('✗ Failed to send notification:',
error.response?.data || error.message);
        throw error;
    }
}

// Example usage
sendNotification(
    123,
    'provision_complete',
```

```
    'Service Activated',
    {
        message: 'Your mobile service has been successfully
activated',
        link: '/services/167',
        metadata: {
            service_id: 167,
            provision_job_id: 'prov-2026-00042',
            duration_seconds: 45
        }
    }
);
```

Integration Scenarios

Ansible Provisioning Playbook

Notify users when Ansible playbooks complete:

```python
# At the end of your Ansible callback plugin or post-playbook
script
import requests

def notify_provisioning_complete(service_id, user_id,
success=True):
    """Notify user of provisioning result"""

    notification_type = "provision_complete" if success else
"provision_failed"
    title = "Service Activated" if success else "Service
Activation Failed"
    message = f"Service {service_id} provisioning {'completed
successfully' if success else 'encountered an error'}"

    requests.post(
        "https://yourcrm.com/crm/notification/send",
        headers={"X-API-KEY": "your-api-key"},
        json={
            "user_id": user_id,
            "type": notification_type,
            "title": title,
            "message": message,
            "link": f"/services/{service_id}",
            "metadata": {
                "service_id": service_id,
                "playbook": "mobile_service_activation",
                "success": success
            }
        }
    )
```

Billing System Integration

Send invoice notifications from billing system:

```
def notify_invoice_generated(customer_id, invoice_id, amount,
due_date):
    """Notify customer contact of new invoice"""

    # Find user associated with customer
    user_id = get_customer_primary_contact_user_id(customer_id)

    if user_id:
        requests.post(
            "https://yourcrm.com/crm/notification/send",
            headers={"X-API-KEY": "your-billing-api-key"},
            json={
                "user_id": user_id,
                "type": "billing_invoice",
                "title": f"New Invoice #{invoice_id}",
                "message": f"Invoice for ${amount} is now
available. Due date: {due_date}",
                "link": f"/invoices/{invoice_id}",
                "metadata": {
                    "invoice_id": invoice_id,
                    "amount": amount,
                    "due_date": due_date,
                    "customer_id": customer_id
                }
            }
        )
```

Monitoring System Integration

Send alerts from monitoring systems:

```
def send_monitoring_alert(admin_user_ids, alert_title,
alert_message, severity="warning"):
    """Send system alert to administrators"""

    for user_id in admin_user_ids:
        requests.post(
            "https://yourcrm.com/crm/notification/send",
            headers={"X-API-KEY": "your-monitoring-api-key"},
            json={
                "user_id": user_id,
                "type": "system_alert",
                "title": alert_title,
                "message": alert_message,
                "metadata": {
                    "severity": severity,
                    "alert_time": datetime.now().isoformat(),
                    "source": "prometheus_alertmanager"
                }
            }
        )

# Example: Disk space alert
send_monitoring_alert(
    admin_user_ids=[1, 2, 3],
    alert_title="⚠ Disk Space Warning",
    alert_message="Database server disk usage has exceeded 85%",
    severity="warning"
)
```

Payment Gateway Webhook

Notify users when payments are processed:

```
from flask import Flask, request

app = Flask(__name__)

@app.route('/webhook/payment', methods=['POST'])
def payment_webhook():
    """Handle payment gateway webhook"""

    payment_data = request.json

    if payment_data['status'] == 'succeeded':
        # Notify user of successful payment
        requests.post(
            "https://yourcrm.com/crm/notification/send",
            headers={"X-API-KEY": "your-payment-webhook-api-key"},
            json={
                "user_id": payment_data['user_id'],
                "type": "billing_payment",
                "title": "Payment Received",
                "message": f"Payment of ${payment_data['amount']}
has been processed successfully",
                "link": f"/payments/{payment_data['payment_id']}",
                "metadata": {
                    "payment_id": payment_data['payment_id'],
                    "amount": payment_data['amount'],
                    "payment_method":
payment_data['payment_method']
                }
            }
        )

    return {"status": "ok"}
```

Service Expiration Monitor

Automated script to notify users of expiring services:

```
import datetime
from sqlalchemy import create_engine, text

def check_expiring_services():
    """Check for services expiring in next 7 days and notify
users"""

    engine = create_engine("postgresql://...")

    # Query services expiring soon
    query = text("""
        SELECT s.service_id, s.end_date, u.id as user_id,
s.service_name
        FROM services s
        JOIN customer_contacts cc ON s.customer_id =
cc.customer_id
        JOIN users u ON cc.contact_id = u.contact_id
        WHERE s.end_date BETWEEN CURRENT_DATE AND CURRENT_DATE +
INTERVAL '7 days'
        AND s.deleted = false
    """)

    with engine.connect() as conn:
        results = conn.execute(query)

        for row in results:
            days_until_expiry = (row.end_date -
datetime.date.today()).days

            requests.post(
                "https://yourcrm.com/crm/notification/send",
                headers={"X-API-KEY": "your-automation-api-key"},
                json={
                    "user_id": row.user_id,
                    "type": "service_expiring",
                    "title": f"Service Expiring in
{days_until_expiry} Days",
                    "message": f"Your {row.service_name} will
expire on {row.end_date}",
                    "link": f"/services/{row.service_id}",
                    "metadata": {
                        "service_id": row.service_id,
                        "days_remaining": days_until_expiry,
```

```
                        "expiry_date": str(row.end_date)
                    }
                }
            )

# Run daily via cron
if __name__ == "__main__":
    check_expiring_services()
```

Best Practices

API Key Security

1. **Generate Strong Keys** — Use cryptographically secure random generators:

   ```
   openssl rand -base64 48
   ```

2. **Separate Keys per System** — Use different API keys for different external systems

3. **Document Key Purpose** — Always include a description in `crm_config.yaml`

4. **Rotate Keys Regularly** — Change API keys periodically (e.g., quarterly)

5. **Never Commit Keys** — Keep API keys out of version control

6. **Minimal Permissions** — Only grant necessary roles to each API key

Notification Design

1. **Clear Titles** — Make titles descriptive and actionable (e.g., "Service Activated" not "Update")

2. **Concise Messages** — Keep messages brief but informative

3. **Include Links** — Always provide a link for users to get more details
4. **Use Metadata** — Store structured data for future reference and debugging
5. **Choose Correct Type** — Use appropriate notification types for categorization
6. **Test Notifications** — Test with real users before deploying to production

Error Handling

1. **Handle Failures Gracefully** — Don't let notification failures break main workflows
2. **Log All Attempts** — Log notification attempts for debugging
3. **Retry on Transient Errors** — Implement retry logic for network issues
4. **Validate User IDs** — Verify user exists before sending
5. **Check API Responses** — Always check response status codes

Performance

1. **Batch When Possible** — For multiple users, consider sending in parallel
2. **Async Processing** — Send notifications asynchronously to avoid blocking
3. **Rate Limiting** — Implement rate limiting to prevent API abuse
4. **Connection Pooling** — Reuse HTTP connections for better performance

Testing

Test API Key Setup

Before deploying, verify your API key works:

```
# Test authentication
curl -X POST "https://yourcrm.com/crm/notification/send" \
  -H "X-API-KEY: your-api-key" \
  -H "Content-Type: application/json" \
  -d '{
    "user_id": 1,
    "type": "custom",
    "title": "Test Notification",
    "message": "This is a test notification to verify API key
authentication"
  }'
```

Expected response: `201 Created` with notification details

Test in Development

Use a test user ID to verify notifications appear:

```
# Send test notification
response = send_notification(
    user_id=1,  # Your test user
    notification_type="custom",
    title="Integration Test",
    message="Testing notification API integration"
)

print(f"Notification ID: {response['notification']
['notification_id']}")
```

Then log in to OmniCRM as that user and verify the notification appears in the notification dropdown.

Troubleshooting

Issue: 401 Unauthorized

- **Cause:** Invalid or missing API key
- **Solution:** Verify API key in `crm_config.yaml` and request header

- **Check:** Ensure API key is at least 32 characters

Issue: 404 User Not Found

- **Cause:** Invalid user_id
- **Solution:** Verify user exists in database
- **Check:** Query users table: `SELECT id FROM users WHERE id = ?`

Issue: 400 Bad Request - "user_id is required"

- **Cause:** Missing required field in request
- **Solution:** Include all required fields: user_id, type, title
- **Check:** Validate JSON payload structure

Issue: Notification sent but not appearing

- **Cause:** User not logged in or browser cache
- **Solution:** Refresh page or clear cache
- **Check:** Query database: `SELECT * FROM notifications WHERE user_id = ? ORDER BY created_at DESC`

Issue: 500 Internal Server Error

- **Cause:** Server-side error
- **Solution:** Check CRM server logs for details
- **Check:** Review `/var/log/omnicrm/api.log` for errors

API Reference Summary

Endpoints

Method	Endpoint	Description	Auth
POST	`/crm/notification/send`	Send notification to user	API Key or Bearer
GET	`/crm/notification/`	Get current user's notifications	Bearer
GET	`/crm/notification/unread-count`	Get unread count	Bearer
POST	`/crm/notification/{id}/mark-read`	Mark notification as read	Bearer
POST	`/crm/notification/mark-all-read`	Mark all as read	Bearer
DELETE	`/crm/notification/{id}`	Delete notification	Bearer

Required Permissions

- **Send Notification:** Requires valid API key or admin role
- **View Notifications:** User can only view their own notifications
- **Manage Notifications:** User can only manage their own notifications

Related Documentation

- `Using the API <concepts_api>` — Complete API authentication guide

- `Support Ticket System <support_tickets>` — Ticket notifications and @mentions
- `Provisioning System <concepts_provisioning>` — Ansible integration
- `Monitoring & Metrics <monitoring_metrics>` — System monitoring and alerting
- `RBAC <rbac>` — Roles and permissions

Changelog

This contains the last 50 changes made to the OmniCRM software stack or it's dependencies.

Note: This does not track changes to inididual customer setups.

Monitoring & Metrics

OmniCRM API provides comprehensive Prometheus-based metrics for monitoring application performance, business operations, and external integrations. All metrics are exposed at the `/crm/metrics` endpoint in Prometheus exposition format.

Overview

The metrics system tracks:

- **Provisioning Operations** - Job execution, duration, success/failure rates
- **Database Performance** - Query times, connection pool health
- **External Integrations** - OCS/CGRateS, Stripe, Mailjet API calls
- **Background Jobs** - Async task execution and performance
- **HTTP Requests** - API endpoint usage and response times (auto-generated)

Metrics Endpoint

URL: `http://your-omnicrm-api:5000/crm/metrics`

Format: Prometheus exposition format

Authentication: The metrics endpoint is publicly accessible for scraping by Prometheus. In production, it's recommended to restrict access using firewall rules or reverse proxy authentication.

Metric Categories

1. Provisioning Metrics

Provisioning metrics track the execution of Ansible playbooks that provision services, manage inventory, and configure external systems. See Provisioning System and Ansible Playbooks for more details.

omnicrm_provision_jobs_total

Type: Counter

Labels:

- `status` - Job completion status: `success`, `failed`, `running`

Description: Total number of provision jobs created. Incremented when provision jobs complete with their final status.

omnicrm_provision_job_duration_seconds

Type: Histogram

Labels:

- `playbook` - Name of the Ansible playbook executed
- `status` - Job completion status: `success`, `failed`

Buckets: `[1, 5, 10, 30, 60, 120, 180, 300, 600]` seconds (1s to 10min)

Description: Time taken for provision jobs to complete. Records the duration of entire playbook execution from start to finish.

omnicrm_provision_jobs_active

Type: Gauge

Description: Number of currently running provision jobs. Incremented when a job starts, decremented when it completes.

omnicrm_provision_tasks_total

Type: Counter

Labels:

- `playbook` - Name of the Ansible playbook
- `status` - Task result: `ok`, `failed`, `ignored`

Description: Total number of Ansible tasks executed within playbooks. Incremented for each individual task that completes (success or failure).

omnicrm_provision_errors_total

Type: Counter

Labels:

- `error_type` - Type of error: `fatal`, `task_failed`, `timeout`
- `playbook` - Name of the Ansible playbook

Description: Total number of provision errors by type. Incremented when provisioning tasks fail or fatal errors occur during execution.

---

2. Database Metrics

Database metrics monitor query performance and connection pool health. OmniCRM uses SQLAlchemy with automatic instrumentation. See System Architecture for data model details.

omnicrm_db_query_duration_seconds

Type: Histogram

Labels:

- `operation` - SQL operation type: `SELECT`, `INSERT`, `UPDATE`, `DELETE`
- `table` - Database table name

Buckets: `[0.001, 0.005, 0.01, 0.05, 0.1, 0.5, 1.0, 5.0, 10.0]` seconds

Description: Database query execution time. Automatically tracked via SQLAlchemy event listeners on every query.

omnicrm_db_pool_size

Type: Gauge

Description: Current database connection pool size. The total number of connections in the pool (both checked out and available).

omnicrm_db_pool_overflow

Type: Gauge

Description: Current database connection pool overflow. The number of connections created beyond the normal pool size limit.

omnicrm_db_pool_connections_checked_out

Type: Gauge

Description: Number of connections currently checked out from the pool and in use by application code.

omnicrm_db_errors_total

Type: Counter

Labels:

- `error_type` - Type of database error
- `operation` - Operation that caused the error: `connection_error`, `query_error`, etc.

Description: Total number of database errors.

Status: Defined but not actively used in current code (reserved for future use)

---

3. OCS/CGRateS Metrics

OCS (Online Charging System) metrics track interactions with the CGRateS billing engine. See Billing Overview and CGRateS Integration for more details.

omnicrm_ocs_api_calls_total

Type: Counter

Labels:

- `method` - OCS API method: `GetBalance`, `SetBalance`, `SetAccount`, `RemoveAccount`, etc.
- `status` - Call result: `success`, `failed`

Description: Total number of OCS/CGRateS API calls. Incremented for every async API call to the OCS system.

omnicrm_ocs_api_duration_seconds

Type: Histogram

Labels:

- `method` - OCS API method: `GetBalance`, `SetBalance`, `GetAccount`, etc.

Buckets: `[0.1, 0.25, 0.5, 1.0, 2.0, 5.0, 10.0, 30.0]` seconds

Description: OCS/CGRateS API call duration. Records the time taken for each API call including network latency.

omnicrm_ocs_api_errors_total

Type: Counter

Labels:

- `method` - OCS API method that failed
- `error_type` - Error category: `timeout`, `connection_error`, `json_error`, `http_error`, etc.

Description: Total number of OCS/CGRateS API errors. Incremented when OCS API calls fail with specific error types.

omnicrm_ocs_balance_queries_total

Type: Counter

Labels:

- `query_type` - Type of balance query: `single_account`, `multiple_accounts`

Description: Total number of balance queries to OCS. Used for tracking usage of balance inquiry operations.

omnicrm_ocs_action_plan_operations_total

Type: Counter

Labels:

- `operation` - Action plan operation: `create`, `remove`, `query`

Description: Total number of action plan operations. Tracks creation, removal, and querying of CGRateS action plans for recurring charges.

---

4. Stripe Payment Metrics

Stripe metrics track payment processing operations. See Payment System Guide and Payment Methods for integration details.

omnicrm_stripe_api_calls_total

Type: Counter

Labels:

- `operation` - Stripe operation: `create_customer`, `charge`, `refund`, `update_payment_method`, etc.
- `status` - Operation result: `success`, `failed`

Description: Total number of Stripe API calls. Incremented for every payment processing operation.

omnicrm_stripe_api_duration_seconds

Type: Histogram

Labels:

- `operation` - Stripe operation type

Buckets: `[0.1, 0.5, 1.0, 2.0, 5.0, 10.0, 30.0]` seconds

Description: Stripe API call duration including network latency.

omnicrm_stripe_api_errors_total

Type: Counter

Labels:

- `operation` - Stripe operation that failed
- `error_type` - Error category: `card_declined`, `network_error`, `api_error`, etc.

Description: Total number of Stripe API errors. Incremented when payment operations fail.

omnicrm_stripe_payment_amount_cents

Type: Counter

Labels:

- `payment_type` - Payment direction: `charge`, `refund`

Description: Total payment amount processed through Stripe in cents. Useful for tracking transaction volume and revenue.

omnicrm_stripe_payment_failures_total

Type: Counter

Labels:

- `reason` - Failure reason: `card_declined`, `insufficient_funds`, `expired_card`, etc.

Description: Total number of Stripe payment failures categorized by decline code.

---

5. Mailjet Email Metrics

Mailjet metrics track email delivery operations. See Mailjet Integration for configuration details.

omnicrm_mailjet_api_calls_total

Type: Counter

Labels:

- `email_type` - Email template type: `welcome`, `user_welcome`, `invoice`, `notification`
- `status` - Delivery result: `success`, `failed`

Description: Total number of Mailjet API calls. Tracked via the `@track_mailjet_call` decorator.

omnicrm_mailjet_api_duration_seconds

Type: Histogram

Labels:

- `email_type` - Email template type

Buckets: `[0.1, 0.5, 1.0, 2.0, 5.0, 10.0, 30.0]` seconds

Description: Mailjet API call duration. Time taken to submit email via Mailjet API (not delivery time).

omnicrm_mailjet_api_errors_total

Type: Counter

Labels:

- `email_type` - Email template type
- `error_type` - Error category

Description: Total number of Mailjet API errors. Incremented when email sends fail.

omnicrm_mailjet_emails_sent_total

Type: Counter

Labels:

- `email_type` - Email template type
- `template_id` - Mailjet template ID

Description: Total number of emails successfully sent via Mailjet. Distinct from API calls as one call can send to multiple recipients.

omnicrm_mailjet_email_recipients_total

Type: Counter

Labels:

- `email_type` - Email template type

Description: Total number of email recipients across all sent emails.

---

6. Background Job Metrics

Background job metrics track async operations like playbook chains and scheduled tasks. See Provisioning System for background job details.

omnicrm_background_jobs_total

Type: Counter

Labels:

- `job_type` - Job category: `playbook_single`, `playbook_chain`, `periodic_task`

Description: Total number of background jobs started. Tracked via the `BackgroundJobTimer` context manager.

omnicrm_background_jobs_active

Type: Gauge

Labels:

- `job_type` - Job category

Description: Number of currently running background jobs. Incremented at job start, decremented at job completion.

omnicrm_background_job_duration_seconds

Type: Histogram

Labels:

- `job_type` - Job category
- `status` - Job result: `success`, `failed`

Buckets: `[1, 5, 10, 30, 60, 120, 180, 300, 600, 1800, 3600]` seconds (1s to 1hr)

Description: Background job execution time. Includes the full duration of multi-step operations.

omnicrm_background_job_errors_total

Type: Counter

Labels:

- `job_type` - Job category
- `error_type` - Error category

Description: Total number of background job errors. Incremented when background jobs fail with exceptions.

---

7. Flask HTTP Metrics (Auto-generated)

These metrics are automatically generated by the `prometheus-flask-exporter` library and track all HTTP requests to the API.

flask_http_request_duration_seconds

Type: Histogram

Labels:

- `method` - HTTP method: `GET`, `POST`, `PUT`, `DELETE`, etc.
- `endpoint` - Flask route name
- `status` - HTTP status code

Description: HTTP request duration for all API endpoints. Automatically instrumented.

flask_http_request_total

Type: Counter

Labels:

- `method` - HTTP method
- `endpoint` - Flask route name
- `status` - HTTP status code

Description: Total HTTP requests by endpoint, method, and status code.

flask_http_request_exceptions_total

Type: Counter

Labels:

- `method` - HTTP method
- `endpoint` - Flask route name

Description: Total unhandled exceptions in HTTP requests. Indicates bugs or unexpected errors.

---

8. API Error Metrics (Reserved)

These metrics are defined but not currently instrumented. They are reserved for future use.

omnicrm_api_errors_total

Type: Counter

Labels:

- `endpoint` - API endpoint
- `error_type` - Error category
- `status_code` - HTTP status code

Status: Defined but not actively used

omnicrm_api_auth_failures_total

Type: Counter

Labels:

- `auth_method` - Authentication method: `jwt`, `api_key`, `ip_whitelist`
- `reason` - Failure reason

Status: Defined but not actively used

---

9. Application Info Metric

omnicrm_api

Type: Info

Labels:

- `version` - API version string
- `environment` - Environment name: `production`, `staging`, `development`

Description: OmniCRM API information metric. Set once at application startup with version and environment information.

Periodic Updates

update_db_pool_metrics(engine)

Automatically called every 30 seconds to update database connection pool gauges.

Prometheus Configuration

Scrape Configuration

Add OmniCRM to your `prometheus.yml`:

```yaml
scrape_configs:
  - job_name: 'omnicrm-api'
    scrape_interval: 15s
    scrape_timeout: 10s
    static_configs:
      - targets: ['omnicrm-api:5000']
    metrics_path: '/crm/metrics'
```

Example Alerts

High Provision Failure Rate

```yaml
- alert: HighProvisionFailureRate
  expr: |
    (
      rate(omnicrm_provision_jobs_total{status="failed"}[5m]) /
      rate(omnicrm_provision_jobs_total[5m])
    ) > 0.1
  for: 5m
  labels:
    severity: warning
  annotations:
    summary: "High provision job failure rate"
    description: "{{ $value | humanizePercentage }} of provision
jobs are failing"
```

Database Connection Pool Exhausted

```yaml
- alert: DatabasePoolExhausted
  expr: omnicrm_db_pool_overflow > 0
  for: 2m
  labels:
    severity: critical
  annotations:
    summary: "Database connection pool overflow detected"
    description: "Connection pool is using overflow connections,
may indicate pool size is too small"
```

Slow Database Queries

```yaml
- alert: SlowDatabaseQueries
  expr: |
    histogram_quantile(0.99,
      rate(omnicrm_db_query_duration_seconds_bucket[5m])
    ) > 1.0
  for: 5m
  labels:
    severity: warning
  annotations:
    summary: "Slow database queries detected"
    description: "99th percentile query time is {{ $value }}s"
```

OCS API Down

```yaml
- alert: OCSAPIDown
  expr: |
    (
      rate(omnicrm_ocs_api_calls_total{status="failed"}[5m]) /
      rate(omnicrm_ocs_api_calls_total[5m])
    ) > 0.5
  for: 2m
  labels:
    severity: critical
  annotations:
    summary: "OCS API failure rate critical"
    description: "{{ $value | humanizePercentage }} of OCS API
calls are failing"
```

Stripe Payment Issues

```yaml
- alert: StripePaymentFailures
  expr: rate(omnicrm_stripe_payment_failures_total[5m]) > 5
  for: 5m
  labels:
    severity: warning
  annotations:
    summary: "Elevated Stripe payment failures"
    description: "{{ $value }} payment failures per second"
```

Best Practices

Monitoring Strategy

1. **Set Up Core Alerts** - Configure alerts for critical metrics:
    - Provision failure rate > 10%
    - Database connection pool exhaustion
    - OCS/CGRateS API failures
    - Stripe payment processing errors
2. **Track Business Metrics** - Monitor operational KPIs:
    - Revenue processed via Stripe
    - Provisioning throughput
    - Customer email delivery rates
3. **Performance Monitoring** - Watch for degradation:
    - API response time percentiles
    - Database query performance
    - External API latency
4. **Capacity Planning** - Use metrics to forecast:
    - Database connection pool sizing
    - Background job worker scaling
    - API server capacity

Metric Retention

Prometheus Retention Recommendations:

- **15 days** - High-resolution metrics (15s scrape interval)
- **90 days** - Downsampled metrics (5m aggregation)
- **1 year** - Long-term aggregated metrics (1h aggregation)

Use Thanos, Cortex, or VictoriaMetrics for long-term storage and global query.

Troubleshooting

Metrics Not Appearing

By default the `/metrics` endpoint is only exposed to internal (non public address space) sources. You can change this in your nginx config if required.

Check the metrics endpoint:

```
curl http://localhost:5000/crm/metrics
```

Verify Prometheus can scrape:

```
# Check Prometheus targets page
http://prometheus:9090/targets
```

Missing Specific Metrics

Some metrics are only created after their first use:

- Provisioning metrics appear after first provision job
- Stripe metrics appear after first payment
- OCS metrics appear after first billing operation

High Cardinality Issues

If Prometheus is slow or consuming excessive memory, check for high-cardinality labels:

```
# Count unique time series per metric
count by (__name__) ({__name__=~".+"})
```

Metrics with >10,000 series may indicate a cardinality problem.

Metrics Summary

Total Metrics: 34 (31 custom + 3 auto-generated Flask metrics)

By Type:

- **Counters:** 20
- **Gauges:** 5
- **Histograms:** 8
- **Info:** 1

By Category:

- Provisioning: 5 metrics
- Database: 5 metrics
- OCS/CGRateS: 5 metrics
- Stripe: 5 metrics
- Mailjet: 5 metrics
- Background Jobs: 4 metrics
- HTTP/Flask: 3 metrics
- Application Info: 1 metric
- Reserved (future use): 2 metrics

Related Documentation

- System Architecture - Overall system design and component relationships
- Provisioning System - Provisioning workflow and job execution
- Ansible Playbooks - Playbook structure and execution
- API Documentation - API endpoints and authentication
- Billing Overview - Billing and charging system

- Payment System Guide - Stripe integration and payment processing
- Mailjet Integration - Email service configuration
- Administration Configuration - System configuration options

Payment Methods Management

OmniCRM's Payment Methods system allows customers and staff to securely manage payment cards using **multi-vendor payment processing** (Stripe, PayPal, etc.). Payment methods enable automatic billing for services, one-time payments, and recurring charges without storing sensitive card data in OmniCRM.

See also: `Payment System Guide <payment_system_guide>`, `Billing Overview <billing_overview>`, `Payment Processing <payments_process>`, `Invoices <payments_invoices>`.

Overview

The payment methods system provides:

- **Secure Card Storage** - Cards tokenized by payment vendors (Stripe, PayPal), never stored in OmniCRM
- **Multi-Vendor Support** - Stripe and PayPal payment methods supported
- **Multiple Cards** - Customers can store multiple payment methods
- **Default Selection** - Designate preferred payment method for automatic charges
- **Expiry Tracking** - Monitor and update expiring cards
- **Self-Service** - Customers can manage their own cards via `Self-Care Portal <self_care_portal>`
- **Staff Management** - Support staff can add/remove cards on behalf of customers

Supported Payment Methods:

- **Cards** (via Stripe or PayPal)
  - Credit Cards (Visa, Mastercard, American Express, Discover)
  - Debit Cards

    - Prepaid Cards (if supported by card network)
- **PayPal Accounts** (via PayPal integration)

Not Stored in OmniCRM:

Card details are tokenized by payment vendors and stored securely. OmniCRM only stores:

- Payment vendor (stripe, paypal)
- Card brand (Visa, Mastercard, etc.)
- Last 4 digits
- Expiry month/year
- Cardholder name/nickname
- Vendor-specific payment method token

Accessing Payment Methods

From Customer Page:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. Scroll to **Payment Methods** section

Or directly:

From Expiring Cards Dashboard:

View all customers with expiring cards:

This shows a system-wide list of cards expiring within the next 60 days.

Payment Methods List

The payment methods table displays all stored cards for a customer:

Column Descriptions:

- **Nickname** - Friendly name for the card (e.g., "Personal Card", "Work Visa")
- **Issuer** - Card brand and last 4 digits
- **Expiry** - Expiration month/year (MM/YYYY format)
- **Added** - Date card was added to account
- **Default** - Checkmark indicates default payment method for automatic charges

Actions Per Card:

Each row has an actions menu (⋮) with options:

- **Set as Default** - Make this the default payment method
- **Delete** - Remove card from account

Adding a Payment Method

Click **"Add Payment Method"** to open the secure payment modal.

Step 1: Enter Card Details

The secure payment form appears (powered by Stripe Elements or PayPal SDK):

Required Fields:

- **Card Information** - Card number, expiry, CVC (validated by Stripe)
- **Cardholder Name** - Name on the card
- **Country/Region** - Billing country

Optional Fields:

- **Card Nickname** - Friendly label to distinguish between cards

Security:

- Card details entered directly into vendor-hosted secure iframe (Stripe Elements / PayPal SDK)
- OmniCRM never sees or stores full card numbers
- PCI DSS compliance handled by payment vendor
- Real-time validation prevents invalid card numbers

Step 2: Submit and Tokenize

When you click **"Add Payment Method"**:

1. **Client-Side Validation:**
    - Payment vendor validates card number format
    - Checks expiry date is in the future

    - Verifies CVC format
2. **Tokenization:**
    - Card details sent directly to payment vendor (not OmniCRM)
    - Vendor creates a secure token (e.g., `pm_1A2B3C4D` for Stripe)
    - Token returned to OmniCRM
3. **Server Processing:**
    - OmniCRM saves token to customer record with vendor identifier
    - Stores last 4 digits, brand, expiry, and vendor name for display
    - No full card number ever touches OmniCRM servers

Step 3: Confirmation

Success message appears:

> Your Visa ending in 1234 has been added to your account.

The new card appears in the payment methods table.

Automatic Default Selection:

- If this is the customer's first card, it's automatically set as default
- If customer already has cards, new card is added as non-default
- Customer can change default after adding

Setting Default Payment Method

The default payment method is used for:

- Automatic recurring service charges
- Invoice payments
- Top-ups and recharges
- One-time transactions (unless specified otherwise)

To Change Default:

1. Locate the card you want to set as default in the payment methods table

2. Click the **actions menu (⋮)** next to the card
3. Select **"Set as Default"**
4. Confirmation appears

   Visa ending in 5678 is now your default payment method.

The checkmark moves to the newly selected card.

Visual Indicator:

Default cards show:

in the Default column, typically with a green checkmark badge.

Deleting a Payment Method

Remove cards that are expired, lost, or no longer needed.

Step 1: Initiate Deletion

1. Find the card to delete in the payment methods table
2. Click the **actions menu (⋮)**
3. Select **"Delete"**

Step 2: Confirm Deletion

A confirmation modal appears:

> Are you sure you want to delete this payment method?
>
> Card: Visa ending in 1234 Expiry: 12/2026
>
> ⚠ Warning: If this is your only payment method, you will need to add a new one to continue using services that require automatic billing.
>
> [Cancel] [Delete Payment Method]

Click **"Delete Payment Method"** to confirm.

Step 3: Deletion Complete

Success message:

The card is removed from the table and deleted from the payment vendor.

Important Restrictions:

- **Cannot delete default if other cards exist** - Set a different card as default first
- **Warning if deleting last card** - Services requiring payment may be suspended
- **No undo** - Deletion is permanent; customer must re-add card if needed

Managing Expiring Cards

OmniCRM tracks card expiry dates and provides tools to proactively update expiring cards.

Expiring Cards Dashboard

Navigate to **Billing → Expiring Cards** to see a system-wide list:

> Customer Card Expiry Days Until Action John Smith Visa **1234 02/2025 12 days Update Acme Corp MC5678 03/2025 45 days Update Jane Doe Amex**9012 01/2025 EXPIRED Update

Filters:

- **Expiry Range** - Next 30/60/90 days or already expired
- **Customer Type** - Individual vs Business
- **Service Type** - Filter by service requiring payment method

Actions:

- **Update** - Opens customer's payment methods page to add new card
- **Notify** - Send email reminder to customer (if Mailjet configured)

Expiry Notifications

If Mailjet is configured, automatic emails are sent:

- **60 days before expiry** - First reminder
- **30 days before expiry** - Second reminder
- **7 days before expiry** - Final warning
- **At expiry** - Card has expired notice

Customers can click a link in the email to update their payment method via the Self-Care portal.

Email Template Variables:

Mailjet templates receive:

- Customer name
- Card brand and last 4 digits
- Expiry date
- Link to Self-Care payment methods page

See `integrations_mailjet` for email template configuration.

Updating an Expiring Card

Recommended Workflow:

1. Customer receives expiry notification email
2. Customer logs into Self-Care portal
3. Navigates to **Billing → Payment Methods**
4. Clicks **"Add Payment Method"**
5. Enters new card details (same card with updated expiry, or replacement card)
6. Sets new card as default
7. Deletes old/expired card

Staff Workflow:

If customer calls support:

1. Staff opens customer account
2. Navigates to **Billing → Payment Methods**
3. Adds new card on customer's behalf (customer provides details over phone)
4. Sets new card as default
5. Deletes expired card
6. Confirms with customer

Warning

Never ask customers to email or text card details. Always use:

- Secure Self-Care portal for self-service
- Phone with staff entering details directly into system
- In-person at retail location

What Happens When Cards Expire

When a payment card reaches its expiry date and is not updated:

Immediate Effects:

1. **Automatic Payments Fail**
   - Payment vendor rejects transactions with expired cards
   - Monthly service renewals fail to process
   - Auto-top-ups fail
   - Invoice auto-payments fail
2. **Customer Notifications**
   - System attempts to charge card
   - Payment failure notification sent
   - "Update Payment Method" email sent with link to Self-Care portal
3. **Service Status Changes**
   - **Postpaid Services** - May continue temporarily with outstanding balance
   - **Prepaid Services** - Service suspension when balance depletes
   - **Auto-Renew Services** - Renewal fails, service may expire

Subsequent Actions:

Day 1-3 (Grace Period):

- Service continues normally
- Customer receives first payment failure notice
- System attempts retry (depending on configuration)

Day 4-7:

- Second payment attempt (if configured)
- Warning email sent
- Customer service may contact customer

Day 8-14:

- Service may be suspended for non-payment
- Suspended status prevents usage but preserves account
- Customer can restore by updating payment method and paying outstanding balance

Day 15+:

- Service may be terminated for non-payment
- Inventory (SIM cards, equipment) marked for return
- Final notice sent
- Account referred to collections (if applicable)

Preventing Service Interruption:

To avoid service disruption:

- Update cards **30 days before expiry**
- Add multiple payment methods for redundancy
- Enable payment failure alerts
- Monitor Expiring Cards dashboard weekly

Restoring Service After Expiry:

If service suspended due to expired card:

1. Add new valid payment method
2. Set as default
3. Pay outstanding balance (if any)
4. Contact support to reactivate service
5. Service restored within minutes to hours

Payment Method Security

Tokenization

OmniCRM uses vendor tokenization to ensure security:

1. **Customer enters card** → Sent directly to payment vendor servers
2. **Vendor validates and tokenizes** → Creates unique token
3. **Token stored in OmniCRM** → Full card number never stored
4. **Payment processing** → Token sent to vendor, vendor charges card

What OmniCRM Stores:

```
{
  "vendor": "stripe",
  "vendor_payment_method_id": "pm_1A2B3C4D5E6F",
  "payment_type": "card",
  "brand": "visa",
  "last4": "1234",
  "exp_month": 12,
  "exp_year": 2026,
  "name": "John Smith",
  "nickname": "Personal Card",
  "is_default": true
}
```

What OmniCRM Does NOT Store:

- Full card number
- CVV/CVC code
- Magnetic stripe data
- PIN numbers

PCI Compliance

By using vendor-hosted payment forms:

- **Reduced PCI scope** - Card data never touches OmniCRM servers

- **Vendor-hosted fields** - Card entry happens in vendor's secure iframe
- **No card storage** - Tokens used instead of raw card data
- **Secure transmission** - All communication over HTTPS/TLS

See `Payment System Guide <payment_system_guide>` for payment vendor security details.

Common Workflows

Workflow 1: Customer Adds First Payment Method

Scenario: New customer signing up for service

1. Customer creates account
2. Selects service plan
3. Prompted to add payment method during checkout
4. Enters card details in Stripe modal
5. Card tokenized and saved
6. Automatically set as default
7. Service provisioned
8. First charge processed

Workflow 2: Customer Updates Expiring Card

Scenario: Credit card about to expire

1. Customer receives email notification (60 days before expiry)
2. Logs into Self-Care portal
3. Navigates to **Billing → Payment Methods**
4. Reviews current card expiring 12/2025
5. Clicks **"Add Payment Method"**
6. Enters replacement card with expiry 12/2028
7. Sets new card as default

8. Deletes old card
9. Confirmation email sent

Workflow 3: Staff Helps Customer Over Phone

Scenario: Customer calls: "My card was declined"

1. Customer calls support
2. Staff verifies identity (security questions)
3. Staff checks payment methods: Card expired 01/2025
4. Staff: "Your card has expired. Do you have a new card?"
5. Customer provides new card details over phone
6. Staff navigates to **Customers → [Customer] → Billing**
7. Clicks **"Add Payment Method"**
8. Enters card details as customer reads them
9. Sets new card as default
10. Deletes expired card
11. Retries failed payment
12. Confirms with customer: "Payment successful, service restored"

Workflow 4: Business Customer with Multiple Cards

Scenario: Company wants different cards for different purposes

1. Business customer adds primary card (Visa ending 1111)
2. Sets as default for monthly service charges
3. Adds backup card (Mastercard ending 2222) for top-ups
4. Adds purchasing card (Amex ending 3333) for equipment purchases
5. When making top-up, selects Mastercard manually at checkout
6. Default Visa still used for automatic monthly billing

Workflow 5: Managing Expiring Cards (Admin)

Scenario: Proactive expiry management

1. Admin navigates to **Billing → Expiring Cards**
2. Filters: "Next 30 days"
3. Sees 15 customers with expiring cards
4. Selects all → **"Send Reminder Emails"**
5. Mailjet sends personalized emails to each customer
6. Customers update cards via Self-Care
7. Admin reviews list 1 week later
8. Calls remaining customers who haven't updated
9. Assists with card updates over phone

Troubleshooting

"Card declined" when adding payment method

- **Cause:** Payment vendor rejected card (insufficient funds, fraud prevention, issuer decline)
- **Fix:**
  - Try a different card
  - Contact card issuer to authorize transaction
  - Ensure card supports online purchases
  - Check billing address matches card on file

"Error adding payment method" (generic error)

- **Cause:** Payment vendor API error or network issue
- **Fix:**
  - Refresh page and try again
  - Check internet connection
  - Verify payment vendor configuration is correct in system settings
  - Check browser console for specific error message
  - Try different browser (disable ad blockers)

Cannot delete payment method (button disabled)

- **Cause:** Trying to delete the default card, or it's the only card

- **Fix:**
  - Set a different card as default first
  - If it's the only card, add a new card before deleting

Card shows as expired but not in "Expiring Cards" list

- **Cause:** Card expired recently, cache not refreshed
- **Fix:**
  - Refresh the page
  - Check filters on Expiring Cards dashboard
  - Expired cards may move to different view

New card not appearing immediately

- **Cause:** Page hasn't refreshed after adding card
- **Fix:**
  - Payment methods table should auto-refresh
  - If not, manually refresh browser
  - Check if error occurred during add process

Payment modal won't load

- **Cause:** Payment vendor SDK not loading, API key issue, or browser extension blocking
- **Fix:**
  - Check browser console for errors
  - Disable ad blockers and tracking protection
  - Verify payment vendor configuration in system settings
  - Ensure vendor SDK script loads (check Network tab)
  - Try incognito/private browsing mode

Customer doesn't receive expiry notifications

- **Cause:** Mailjet not configured or email template missing
- **Fix:**
  - Verify Mailjet credentials in crm_config.yaml
  - Check email template exists for card expiry

- Confirm customer email address is valid
- Check Mailjet logs for delivery failures

Best Practices

For Customers:

- Add payment method before service activation to avoid delays
- Keep at least 2 cards on file for redundancy
- Update expiring cards 30+ days before expiry
- Delete old/expired cards to avoid confusion
- Use descriptive nicknames ("Personal Visa", "Work Amex")
- Verify default payment method is correct for automatic billing

For Support Staff:

- Verify customer identity before accessing payment methods
- Never ask customers to send card details via email/SMS/chat
- Process card additions immediately during calls (don't defer)
- Confirm new card is set as default after adding
- Delete old cards only after confirming new card works
- Test payment after updating expired card (process £0.01 authorization)

For Administrators:

- Monitor Expiring Cards dashboard weekly
- Send reminder emails 60/30/7 days before expiry
- Keep payment vendor test/live keys separate for dev vs production
- Ensure Mailjet templates are configured for expiry notifications
- Review failed payment reports to identify expired cards
- Train staff on secure card handling procedures

Related Documentation

- `Payment System Guide <payment_system_guide>` - Complete payment API reference and architecture
- `payments_process` - Processing payments with stored payment methods
- `payments_invoices` - Automatic invoice payment using default card
- `features_topup_recharge` - Top-up system using payment methods
- `basics_payment` - General payment and billing concepts
- `customer_care` - Self-Care portal for customers to manage their own cards

OmniCRM Payment System API Guide

Overview

The OmniCRM payment system provides a comprehensive, **vendor-agnostic** payment processing infrastructure. Today it supports Stripe and PayPal, but the modular architecture allows integration with any payment provider (Square, Adyen, Braintree, etc.) without changing application code.

This document covers all payment APIs and workflows available in the system.

> **Ansible Playbook Integration**: For implementing these payment APIs in provisioning playbooks, see **Charging and Payments from Playbooks**

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1. Modular Architecture
2. Core Concepts
3. Financial Documents
4. Payment Method APIs
5. Payment Flow APIs
6. Wallet APIs
7. API Reference Summary
8. Common Use Cases

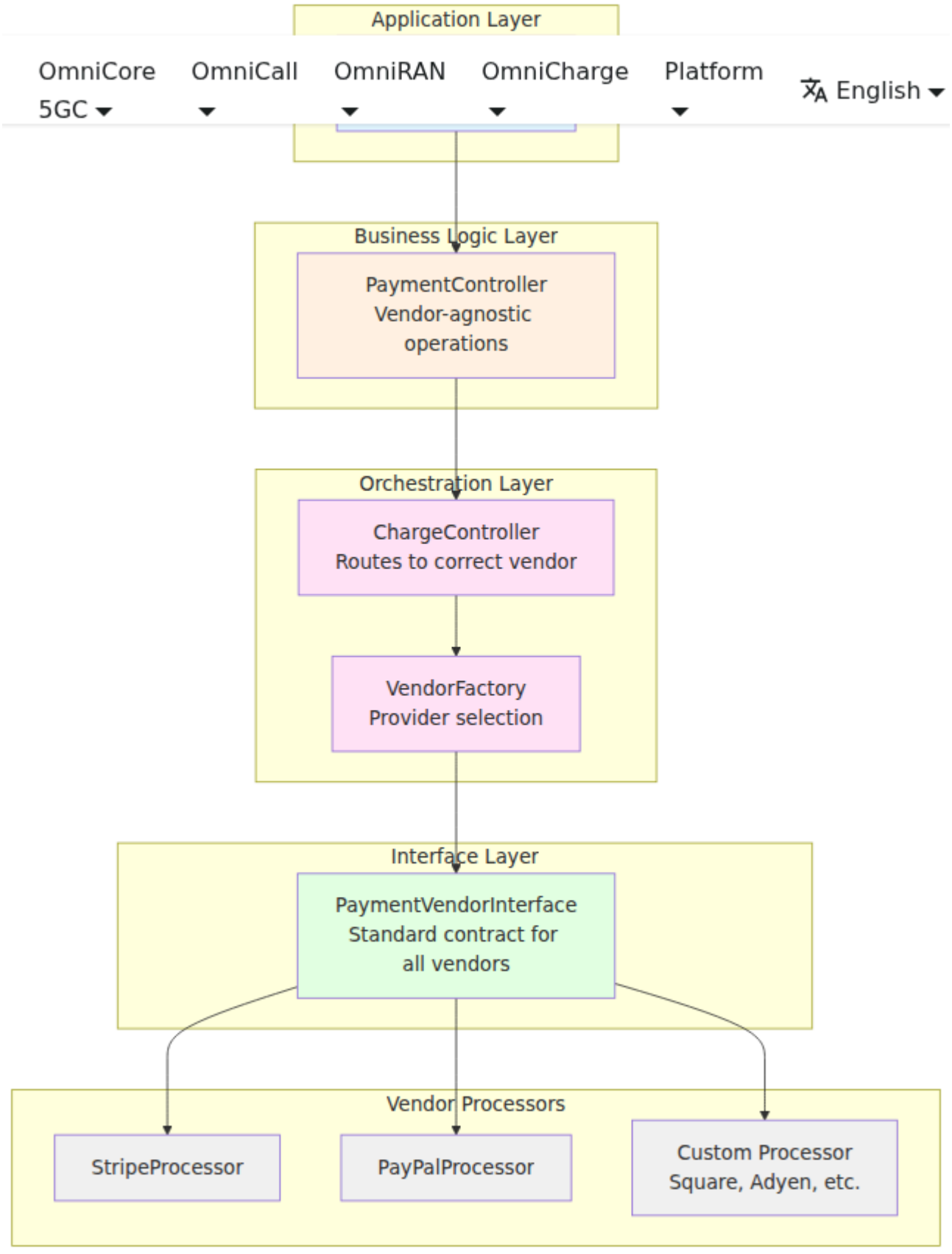
Modular Architecture

Why Vendor-Agnostic?

The system uses **abstraction layers** to separate business logic from payment vendor specifics. This means:

- □ Add new payment providers without touching application code
- □ Switch vendors without database migrations
- □ Support multiple vendors simultaneously
- □ Consistent API regardless of backend provider

Architecture Layers



Adding a New Payment Vendor

To add a new provider (e.g., Square, Adyen, Braintree), contact your OmniCRM technical team.

For configuration details on existing vendors (Stripe, PayPal), see **Vendor Configuration**.

Process Overview:



Steps:

1. **Implement processor class** with standard `PaymentVendorInterface` (authorize, capture, charge, refund, release)
2. **Register processor** in VendorFactory with vendor name
3. **Test integration** with vendor's sandbox environment
4. **Deploy** - All existing APIs automatically support the new vendor

Result: Once deployed, the new vendor works seamlessly:

```
# Add Square payment method
curl -X POST /api/payments/methods \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "vendor": "square",
    "payment_token": "sq_xxxxx"
  }'
```

All payment APIs automatically support the new vendor with no application code changes required.

Integration Time: Typically 1-2 days for a new vendor processor.

Vendor Configuration

Enabling Payment Vendors

The UI controls which payment vendors are available to customers. This is set via the `VITE_PAYMENT_VENDORS` variable in the UI `.env` file:

```
# Enable Stripe only (default)
VITE_PAYMENT_VENDORS="stripe"

# Enable both Stripe and PayPal
VITE_PAYMENT_VENDORS="stripe,paypal"

# Enable PayPal only
VITE_PAYMENT_VENDORS="paypal"
```

Important: `VITE_PAYMENT_VENDORS` is a **build-time** variable. Changing it requires rebuilding and restarting the UI.

Stripe Configuration

Stripe is the primary payment vendor, providing card processing with 3D Secure support.

1. Obtain Stripe API Keys

- Sign up at https://stripe.com
- Navigate to Developers → API Keys
- Copy your **Publishable Key** (pk_live_... or pk_test_...)
- Copy your **Secret Key** (sk_live_... or sk_test_...)

Important:

- Use **test keys** (pk_test_/sk_test_) for development
- Use **live keys** (pk_live_/sk_live_) for production only
- **Never** commit API keys to version control

2. Configure Backend

Add to `crm_config.yaml` (root level, not nested under `payment_vendors`):

```
stripe:
  secret_key: 'sk_live_YOUR_SECRET_KEY_HERE'
  publishable_key: 'pk_live_YOUR_PUBLISHABLE_KEY_HERE'
  currency: 'aud'
  statement_descriptor_suffix: 'YOUR_COMPANY'
```

The API reads Stripe credentials from `crm_config.yaml` at startup. Changing these values requires restarting the API.

3. Configure Frontend

Add to the UI `.env` file:

```
VITE_STRIPE_PUBLISHABLE_KEY=pk_live_YOUR_PUBLISHABLE_KEY_HERE
```

Security Note: Only the publishable key goes in the frontend. The secret key must **never** be exposed to the browser.

PayPal Configuration

PayPal provides card vaulting and PayPal account payments.

1. Obtain PayPal API Credentials

- Create a REST API app at https://developer.paypal.com/dashboard/
- Copy your **Client ID** and **Client Secret**
- For testing, use **Sandbox** credentials; for production, use **Live** credentials

2. Configure Backend

Add to `crm_config.yaml` (root level):

```yaml
paypal:
  client_id: 'YOUR_PAYPAL_CLIENT_ID'
  client_secret: 'YOUR_PAYPAL_CLIENT_SECRET'
  mode: 'sandbox'  # 'sandbox' for testing, 'live' for production
```

The API reads PayPal credentials from `crm_config.yaml` at startup. Changing these values requires restarting the API.

3. Configure Frontend

Add to the UI `.env` file:

```
VITE_PAYMENT_VENDORS="stripe,paypal"
VITE_PAYPAL_CLIENT_ID=YOUR_PAYPAL_CLIENT_ID
```

`VITE_PAYPAL_CLIENT_ID` should match the `paypal.client_id` value in `crm_config.yaml`.

Sandbox vs Live

	Sandbox	Live
Stripe API	`sk_test_` / `pk_test_`	`sk_live_` / `pk_live_`
PayPal API	`api-m.sandbox.paypal.com`	`api-m.paypal.com`
PayPal `mode`	`sandbox`	`live`
Money	Fake	Real

When switching from sandbox to live, update **both** `crm_config.yaml` (credentials and mode) and the UI `.env` (publishable key / client ID), then rebuild the UI and restart the API.

PCI Compliance

How OmniCRM Maintains PCI Compliance:

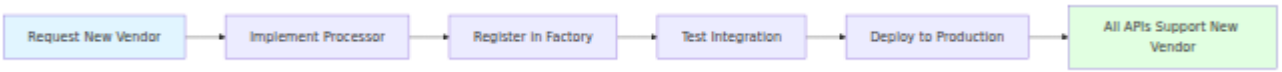
- Card data entered directly into vendor-hosted iframes (Stripe Elements, PayPal Card Fields)
- OmniCRM **never sees or stores** full card numbers
- Only tokenized payment methods stored in database
- Reduced PCI compliance scope for your business

Payment Processing Metrics

OmniCRM provides comprehensive metrics for monitoring payment processing operations. For complete details on Stripe payment metrics including API call tracking, payment volumes, failure rates, and response times, see Monitoring & Metrics.

Database Schema is Vendor-Agnostic

The database schema supports any payment vendor without migrations:



Example - Saving a Square card:

```
{
  "vendor": "square",
  "vendor_payment_method_id": "sq_card_abc123",
  "payment_type": "card"
}
```

No code changes. No migrations. Just works.

Core Concepts

Data Models

PaymentMethod

Vendor-agnostic storage of customer payment methods.

```
{
  "payment_method_id": 789,
  "customer_id": 123,
  "vendor": "stripe",                    // 'stripe', 'paypal', or
any added vendor
  "vendor_payment_method_id": "pm_xxx", // Vendor's internal ID
  "payment_type": "card",                // 'card', 'paypal',
'ach', etc.
  "is_default": true,
  "card_brand": "visa",
  "card_last4": "4242",
  "card_exp_month": 12,
  "card_exp_year": 2025,
  "card_nickname": "My Visa Card",
  "status": "active"
}
```

PaymentAuthorization

Two-phase commit authorization records (hold funds).

```
{
  "authorization_id": 301,
  "customer_id": 123,
  "payment_method_id": 789,
  "vendor": "stripe",                    // Which vendor
authorized
  "vendor_authorization_id": "auth_xxx", // Vendor's authorization
ID
  "amount": 200.00,
  "currency": "USD",
  "status": "authorized",                // 'authorized',
'captured', 'released'
  "authorized_at": "2025-12-27T10:00:00Z",
  "expires_at": "2026-01-03T10:00:00Z",
  "meta": {}
}
```

PaymentCapture

Captured/completed payments.

```
{
  "capture_id": 103,
  "authorization_id": 301,
  "customer_id": 123,
  "payment_method_id": 789,
  "vendor": "stripe",
  "vendor_transaction_id": "ch_xxx",     // Vendor's transaction
ID
  "amount": 200.00,
  "currency": "USD",
  "status": "succeeded",                 // 'succeeded', 'failed',
'refunded'
  "captured_at": "2025-12-27T10:30:00Z",
  "vendor_response": {},                 // Full vendor response
  "meta": {}
}
```

WalletAccount

Customer wallet with balance tracking (1-to-1 with customer).

```
{
  "wallet_account_id": 456,
  "customer_id": 123,
  "balance": 150.50,
  "currency": "USD",
  "auto_recharge_enabled": true,
  "auto_recharge_amount": 100.00,
  "auto_recharge_threshold": 10.00,
  "low_balance_warning_threshold": 10.00
}
```

WalletLedger

Full audit trail of all wallet transactions.

```
{
  "ledger_id": 501,
  "customer_id": 123,
  "wallet_account_id": 456,
  "transaction_type": "credit",          // 'credit', 'debit',
'refund', 'adjustment'
  "amount": 100.00,
  "balance_before": 150.50,
  "balance_after": 250.50,
  "currency": "USD",
  "description": "Card top-up",
  "reference_type": "payment_capture",   // Links to related
object
  "reference_id": 103,
  "meta": {},
  "created_at": "2025-12-27T10:35:00Z"
}
```

Financial Documents

For invoice templating and customization, see **Customer Invoices**.

Invoices

Definition: An invoice is a document that contains a list of **DEBIT transactions** (charges). When the API is called to create an invoice, an array of debit transaction IDs should be provided. Those transactions are "linked" to the invoice by setting their `invoice_id` field.

For transaction management details, see **Transactions**.

Key Fields:

```
{
  "invoice_id": 12345,
  "invoice_number": "INV-2025-000001",   // Auto-generated: INV-
YYYY-NNNNNN
  "customer_id": 123,
  "title": "Monthly Services Invoice",
  "paid": true,                          // Payment status
  "void": false,                         // Void status
  "payment_reference": "ch_xxxxx",       // Last/primary payment
ID
  "payment_type": "stripe_capture",      // Last payment type
  "payment_time": "2025-12-27T10:30:00",
  "start_date": "2025-12-01",
  "end_date": "2025-12-31",
  "due_date": "2026-01-15",
  "retail_cost": 500.00,                 // Total invoice amount
  "wholesale_cost": 250.00
}
```

Invoice Generation: Invoice numbers are automatically generated in format `INV-YYYY-NNNNNN`, sequential within the calendar year, resetting each January 1st.

Payments on Invoices

How Payments Work: Once an invoice is created from debit transactions, a **PAYMENT** can be applied by creating a **credit transaction** (negative `retail_cost`) linked to the invoice.

Payments should:

- Be listed on the invoice clearly marked as "PAYMENTS"
- Show the relevant payment date (which can differ from invoice creation date)
- Support multiple payments per invoice
- Net against debits to calculate invoice balance

Invoice Status:

- **PAID**: Total payments (credits) equal or exceed total debits
- **PARTIALLY PAID**: Some payments applied but balance remains
- **OVERPAID**: Not currently handled - requires credit splitting (future feature)

Double-Entry Accounting: The system implements proper accounting where every charge has an offsetting payment:

```
// 1. Debit transaction (charge)
{
  "transaction_id": 7001,
  "invoice_id": 12345,
  "retail_cost": 100.00,                // Positive = customer
owes
  "title": "Service Charge"
}

// 2. Credit transaction (payment)
{
  "transaction_id": 7002,
  "invoice_id": 12345,
  "retail_cost": -100.00,               // Negative = payment
received
  "title": "Payment for Invoice: Service Charge (12345)",
  "payment_type": "stripe_capture",
  "payment_reference": "ch_xxxxx"
}

// Net result: $0 balance → invoice marked as PAID
```

Supplementary Invoice Metadata: In addition to credit transactions, the invoice also stores summary fields (`payment_reference`, `payment_type`, `payment_time`) for quick lookups. However:

- **Primary method**: Credit transactions linked via `invoice_id` (Hayden's spec)
- **Secondary metadata**: Invoice fields store summary of last/primary payment
- **For multiple payments**: Query credit transactions for full history

Statements

Definition: A statement shows all **DEBITS and CREDITS** from a customer's transactions over a specified period. This is the only document type where both debits and credits are shown as line items together, like a bank statement.

Credit Notes

Purpose: Only applied to invoices with payments already applied. Must be done as part of the invoice voiding process.

Process:

1. An invoice is voided (along with its associated DEBIT transactions)
2. Any PAYMENTS already applied are linked to the created CREDIT NOTE
3. Customer's balance goes into credit by the equivalent amount
4. The credit note balance can then be:
    - Applied to another invoice as a PAYMENT, OR
    - REFUNDED to the customer

Refund Logic: If refund is chosen, it's invoked based on the associated CREDIT transactions and how they were originally paid (e.g., Stripe refund if the credit transaction type was Stripe).

Payment Method APIs

All endpoints use the base URL: `/api/payments/`

For detailed payment method management and card handling, see **Payment Methods**.

Add Payment Method

Save a new payment method for a customer.

Endpoint: `POST /api/payments/methods`

Request:

```
curl -X POST https://your-domain.com/api/payments/methods \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "vendor": "stripe",
    "payment_token": "pm_xxxxx",
    "is_default": false,
    "card_nickname": "My Visa Card"
  }'
```

Request Body:

```
{
  "customer_id": 123,
  "vendor": "stripe",                    // 'stripe', 'paypal', or
any added vendor
  "payment_token": "pm_xxxxx",           // One-time token from
frontend SDK
  "is_default": false,                   // Set as default payment
method?
  "card_nickname": "My Visa Card"        // Optional friendly name
}
```

Response (201 Created):

```
{
  "success": true,
  "message": "Payment method added successfully",
  "data": {
    "payment_method_id": 789,
    "customer_id": 123,
    "vendor": "stripe",
    "payment_type": "card",
    "card_brand": "visa",
    "card_last4": "4242",
    "card_exp_month": 12,
    "card_exp_year": 2025,
    "card_nickname": "My Visa Card",
    "is_default": false,
    "status": "active"
  }
}
```

Get Payment Methods

Retrieve all payment methods for a customer.

Endpoint: `GET /api/payments/methods?customer_id={id}`

Request:

```
curl -X GET "https://your-domain.com/api/payments/methods?
customer_id=123" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "success": true,
  "data": [
    {
      "payment_method_id": 789,
      "customer_id": 123,
      "vendor": "stripe",
      "payment_type": "card",
      "card_brand": "visa",
      "card_last4": "4242",
      "is_default": true
    },
    {
      "payment_method_id": 790,
      "customer_id": 123,
      "vendor": "paypal",
      "payment_type": "paypal",
      "paypal_email": "user@example.com",
      "is_default": false
    }
  ]
}
```


Get Default Payment Method

Get the default payment method for a customer.

Endpoint: `GET /api/payments/methods/default?customer_id={id}`

Request:

```
curl -X GET "https://your-domain.com/api/payments/methods/default?
customer_id=123" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "success": true,
  "data": {
    "payment_method_id": 789,
    "vendor": "stripe",
    "payment_type": "card",
    "card_brand": "visa",
    "card_last4": "4242",
    "is_default": true
  }
}
```


Set Default Payment Method

Set a payment method as the default.

Endpoint: `PUT /api/payments/methods/set-default`

Request:

```
curl -X PUT https://your-domain.com/api/payments/methods/set-
default \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "payment_method_id": 790
  }'
```

Response (200 OK):


```
{
  "success": true,
  "message": "Default payment method updated",
  "data": {
    "payment_method_id": 790,
    "is_default": true
  }
}
```

Delete Payment Method

Delete a saved payment method.

Endpoint: `DELETE /api/payments/methods/{payment_method_id}?customer_id={id}`

Request:

```
curl -X DELETE "https://your-domain.com/api/payments/methods/789?
customer_id=123" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "success": true,
  "message": "Payment method deleted successfully"
}
```

Payment Flow APIs

The system supports several payment flows depending on your use case.

1. Direct Payment (Simple Charge)

Use Case: Simple one-step payment without service provisioning.

Endpoint: `POST /api/payments/charge`

Request:

```
curl -X POST https://your-domain.com/api/payments/charge \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 50.00,
    "currency": "USD",
    "payment_method_id": 789,
    "metadata": {
      "order_id": "12345"
    }
  }'
```

Request Body:

```
{
  "customer_id": 123,
  "amount": 50.00,
  "currency": "USD",                    // Default: USD
  "payment_method_id": 789,             // Optional - uses
default if omitted
  "vendor": "stripe",                   // Required if using
payment_token
  "payment_token": "pm_xxxxx",          // Optional - one-time
token
  "save_method": false,                 // Save payment method
for future use?
  "metadata": {
    "order_id": "12345"
  }
}
```

Response (200 OK):

```
{
  "success": true,
  "message": "Payment successful",
  "data": {
    "transaction_id": "ch_xxxxx",
    "capture_id": 101,
    "amount": 50.00,
    "currency": "USD",
    "status": "succeeded"
  }
}
```


2. Invoice Payment (Wallet-First Routing)

Use Case: Pay an invoice using wallet balance first, then card for remainder.

Endpoint: `POST /api/payments/invoice`

Flow:

1. Check wallet balance
2. Use wallet funds first
3. Charge card for shortfall (if any)
4. Credit wallet with card amount
5. Debit wallet for full invoice amount

Request:

```
curl -X POST https://your-domain.com/api/payments/invoice \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 200.00,
    "payment_method_id": 789,
    "metadata": {
      "invoice_id": 12345,
      "description": "Invoice payment"
    }
  }'
```

Response (200 OK):

```
{
  "success": true,
  "message": "Invoice payment processed",
  "data": {
    "customer_id": 123,
    "service_amount": 200.00,
    "routing_mode": "hybrid",
    "initial_balance": 150.00,
    "wallet_portion_used": 150.00,       // Wallet covered this
much
    "card_portion_used": 50.00,          // Card charged for
remainder
    "charged_amount": 50.00,
    "wallet_credited": 50.00,
    "wallet_debited": 200.00,
    "final_balance": 0.00,
    "payment_method_used": true
  }
}
```

3. Authorization Hold (Reserve Funds)

Use Case: Hold funds for later capture (e.g., hotel reservations, rentals).

> **Playbook Implementation**: For Ansible playbook examples of two-phase payment flows, see Two-Phase Commit Pattern

Step 1: Create Authorization Hold

Endpoint: `POST /api/payments/authorize/hold`

Wallet-First Flow:

1. Check wallet balance
2. Calculate shortfall (amount - wallet_balance)
3. Authorize card for shortfall only
4. Wallet debit happens at capture time, not here

Request:

```
curl -X POST https://your-domain.com/api/payments/authorize/hold \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 200.00,
    "payment_method_id": 789,
    "use_wallet": true,
    "metadata": {
      "reservation_id": "RES-001"
    }
  }'
```

Request Body:

```
{
  "customer_id": 123,
  "amount": 200.00,
  "currency": "USD",
  "payment_method_id": 789,              // Optional - uses
default if omitted
  "vendor": "stripe",                    // Required if using
payment_token
  "payment_token": "pm_xxxxx",           // Optional - one-time
token
  "save_method": false,
  "use_wallet": true,                    // Enable wallet-first
routing (default: true)
  "metadata": {
    "reservation_id": "RES-001"
  }
}
```

Response (200 OK):

```
{
  "success": true,
  "message": "Payment authorized (hold created)",
  "data": {
    "authorization_id": 301,
    "vendor_authorization_id": "auth_xxxxx",
    "amount": 200.00,
    "currency": "USD",
    "status": "authorized",
    "wallet_balance": 150.00,
    "wallet_to_use": 150.00,             // Wallet will cover this
much
    "card_amount": 50.00,                // Card authorized for
this much
    "message": "Card authorized for $50 (wallet top-up). Wallet
debit of $200 will occur at capture."
  }
}
```

Step 2: Capture Authorization

Endpoint: `POST /api/payments/capture/{authorization_id}`

Wallet-First Capture Flow:

1. Capture card (if authorized) - tops up wallet
2. Credit wallet with captured card amount
3. Debit wallet for full service amount
4. Create invoice/transactions (if requested)

Request:

```
curl -X POST https://your-domain.com/api/payments/capture/301 \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "amount": 200.00,
    "metadata": {
      "invoice": true,
      "title": "Hotel Reservation",
      "description": "3-night stay",
      "wholesale_cost": 100.00,
      "contract_days": 3,
      "send_email": true
    }
  }'
```

Request Body:

```
{
  "amount": 200.00,                    // Optional - captures
full amount if omitted
  "metadata": {
    "invoice": true,                   // Create invoice and
transactions?
    "create_transaction": true,        // Create transaction
record?
    "title": "Hotel Reservation",
    "description": "3-night stay",
    "wholesale_cost": 100.00,
    "contract_days": 3,
    "send_email": true                 // Send invoice email?
  }
}
```

Response (200 OK):

```
{
  "success": true,
  "message": "Authorization captured",
  "data": {
    "capture_id": 103,
    "transaction_id": "ch_xxxxx",
    "authorization_id": 301,
    "amount": 200.00,
    "currency": "USD",
    "status": "succeeded",
    "wallet_credit": {                    // Card topped up wallet
      "ledger_id": 401,
      "amount": 50.00
    },
    "wallet_debit": {                     // Service charged from
wallet
      "ledger_id": 402,
      "amount": 200.00
    },
    "transaction": {                      // Created if
invoice=true
      "transaction_id": 7001
    },
    "invoice": {                          // Created if
invoice=true
      "invoice_id": 12345,
      "invoice_number": "INV-2025-000001"
    }
  }
}
```

Step 3: Release Authorization (Cancel)

Endpoint: `POST /api/payments/release/{authorization_id}`

Use Case: Cancel reservation, provision failed, or customer changed mind.

Request:

```
curl -X POST https://your-domain.com/api/payments/release/301 \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "success": true,
  "message": "Authorization released",
  "data": {
    "authorization_id": 301,
    "vendor_authorization_id": "auth_xxxxx",
    "status": "released",
    "released_at": "2025-12-27T10:45:00Z"
  }
}
```

Note: With wallet-first flow, no wallet refund is needed since wallet is not debited until capture time.

4. Top-Up Payment (Two-Phase with Provisioning)

Use Case: Process payment for service top-up that requires provisioning (e.g., hotspot/dongle activation). If provisioning fails, authorization is released.

Endpoint: `POST /api/payments/topup`

Flow: Authorize → Provision service → Capture

Request:

```
curl -X POST https://your-domain.com/api/payments/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 30.00,
    "payment_method_id": 789,
    "service_uuid": "svc-uuid-123",
    "imsi": "123456789012345",
    "days": 30,
    "metadata": {
      "is_rental": false
    }
  }'
```

For Anonymous Rental/Hotspot (payment method NOT saved):

```
curl -X POST https://your-domain.com/api/payments/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 1,
    "amount": 5.00,
    "vendor": "stripe",
    "payment_token": "pm_xxxxx",
    "service_uuid": "hotspot-uuid",
    "imsi": "123456789012345",
    "days": 1,
    "metadata": {
      "is_rental": true,
      "billing_email": "user@example.com"
    }
  }'
```

Response (200 OK):

```
{
  "success": true,
  "message": "Topup payment processed successfully",
  "data": {
    "transaction_id": "ch_xxxxx",
    "authorization_id": 302,
    "capture_id": 104,
    "amount": 30.00,
    "status": "succeeded",
    "provision_result": {
      "success": true,
      "topup_result": {...},
      "service_uuid": "svc-uuid-123",
      "imsi": "123456789012345",
      "days": 30
    },
    "payment_method_saved": false        // False for
anonymous/rental
  }
}
```

5. Rental Payment (Third-Party)

Use Case: Charge one customer's card to pay for another customer's service.

Endpoint: `POST /api/payments/rental`

Request:

```
curl -X POST https://your-domain.com/api/payments/rental \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "beneficiary_customer_id": 456,
    "charge_customer_id": 123,
    "amount": 75.00,
    "payment_method_id": 789,
    "service_description": "Rental service payment",
    "metadata": {
      "rental_agreement_id": "RA-001"
    }
  }'
```

For Anonymous Rental (renter's card NOT saved):

```
curl -X POST https://your-domain.com/api/payments/rental \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "beneficiary_customer_id": 456,
    "amount": 75.00,
    "vendor": "stripe",
    "payment_token": "pm_xxxxx",
    "service_description": "Anonymous rental payment",
    "metadata": {
      "billing_email": "renter@example.com"
    }
  }'
```

Response (200 OK):

```
{
  "success": true,
  "message": "Rental payment processed",
  "data": {
    "transaction_id": "ch_xxxxx",
    "amount": 75.00,
    "payment_method_saved": false        // Anonymous: no method saved
  }
}
```

6. Refund Payment

Endpoint: `POST /api/payments/refund`

Request:

```
curl -X POST https://your-domain.com/api/payments/refund \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "transaction_id": "ch_xxxxx",
    "vendor": "stripe",
    "amount": 50.00,
    "reason": "customer_request"
  }'
```

Request Body:

```
{
  "transaction_id": "ch_xxxxx",          // Vendor transaction ID
  "vendor": "stripe",                    // 'stripe', 'paypal', etc.
  "amount": 50.00,                       // Optional - full refund if omitted
  "reason": "customer_request"           // Optional refund reason
}
```

Response (200 OK):

```
{
  "success": true,
  "message": "Refund processed",
  "data": {
    "refund_id": "re_xxxxx",
    "amount": 50.00,
    "status": "succeeded"
  }
}
```

Wallet APIs

All wallet endpoints use the base URL: `/api/wallet/`

Get Wallet Balance

Endpoint: `GET /api/wallet/balance?customer_id={id}`

Request:

```
curl -X GET "https://your-domain.com/api/wallet/balance?
customer_id=123" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "customer_id": 123,
  "balance": 150.50,
  "currency": "USD"
}
```

Get Wallet Info

Get complete wallet and credit information including auto-recharge settings.

Endpoint: `GET /api/wallet/info?customer_id={id}`

Request:

```
curl -X GET "https://your-domain.com/api/wallet/info?
customer_id=123" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Response (200 OK):

```
{
  "customer_id": 123,
  "wallet": {
    "wallet_account_id": 456,
    "balance": 150.50,
    "currency": "USD",
    "auto_recharge_enabled": true,
    "auto_recharge_amount": 100.00,
    "auto_recharge_threshold": 10.00,
    "low_balance_warning_threshold": 10.00
  }
}
```

Wallet Top-Up

Top up wallet by charging a payment method.

Endpoint: `POST /api/wallet/topup`

Flow: Charge card/PayPal → Credit wallet

Request:

```
curl -X POST https://your-domain.com/api/wallet/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 100.00,
    "payment_method_id": 789
  }'
```

Request Body:

```
{
  "customer_id": 123,
  "amount": 100.00,
  "currency": "USD",                    // Default: USD
  "payment_method_id": 789              // Optional - uses
default if omitted
}
```

Response (200 OK):

```
{
  "success": true,
  "payment": {
    "transaction_id": "ch_xxxxx",
    "amount": 100.00
  },
  "wallet": {
    "ledger_id": 503,
    "balance_after": 250.50,
    "customer_transaction_id": 7001
  },
  "message": "Wallet topped up with 100.00 USD"
}
```

Creates a **billing credit line** (`customer_transaction` with `payment_type=wallet_topup_card`, negative `retail_cost`, `wallet_ledger_id` set). This is distinct from hybrid provisioning, where card shortfalls credit the wallet ledger as `card_capture_topup` without a top-up billing line.

Voiding Add Funds top-ups: `DELETE /crm/transaction/transaction_id/{transaction_id}` debits the wallet and refunds the card. See Void Transaction below.

Get Wallet Transactions

Get wallet transaction history (ledger).

Endpoint: `GET /api/wallet/transactions?customer_id={id}&limit={n}&offset={n}&type={type}`

Request:

```
curl -X GET "https://your-domain.com/api/wallet/transactions?
customer_id=123&limit=50&offset=0&type=credit" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Query Parameters:

- `customer_id` (required): Customer ID
- `limit` (optional): Number of records (default: 50)
- `offset` (optional): Pagination offset (default: 0)
- `type` (optional): Filter by transaction type ('credit', 'debit', 'refund', 'adjustment')

Response (200 OK):

```
{
  "customer_id": 123,
  "count": 2,
  "transactions": [
    {
      "ledger_id": 501,
      "transaction_type": "credit",
      "amount": 100.00,
      "balance_before": 150.50,
      "balance_after": 250.50,
      "description": "Card top-up",
      "reference_type": "payment_capture",
      "reference_id": 103,
      "created_at": "2025-12-27T10:35:00Z"
    },
    {
      "ledger_id": 502,
      "transaction_type": "debit",
      "amount": 50.00,
      "balance_before": 250.50,
      "balance_after": 200.50,
      "description": "Service charge",
      "reference_type": "service_charge",
      "reference_id": 789,
      "created_at": "2025-12-27T11:00:00Z"
    }
  ]
}
```

Void Transaction

Soft-void an uninvoiced customer transaction. Requires `delete_customer_transaction`.

Endpoint: `DELETE /crm/transaction/transaction_id/{transaction_id}`

Request:

```
curl -X DELETE "https://your-
domain.com/api/transaction/transaction_id/7001" \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Success (200 OK) — plain manual charge (no wallet link):

```
{
  "result": "Success"
}
```

Success (200 OK) — wallet-linked line (reversal only):

```
{
  "result": "Success",
  "wallet_reversal": {
    "wallet_reversed": true,
    "wallet_amount": 50.00,
    "wallet_ledger_id": 503
  }
}
```

Success (200 OK) — explicit Add Funds card top-up (`payment_type=wallet_topup_card`):

```
{
  "result": "Success",
  "wallet_reversal": {
    "wallet_reversed": true,
    "wallet_amount": 100.00,
    "wallet_ledger_id": 503,
    "refund": {
      "capture_id": 88,
      "vendor": "stripe",
      "vendor_transaction_id": "ch_xxxxx",
      "refund_id": "re_xxxxx",
      "status": "succeeded",
      "amount": 100.00
    }
  }
}
```


Void / refund policy

Transaction source	`wallet_ledger_id`	Wallet on void	Card refund on void
Manual charge/credit	No	No	No
Add Funds (`POST /wallet/topup`)	Yes	Debit wallet	**Yes** (`wallet_topup_card`)
Cash / manual wallet credit	Yes	Debit wallet	No
Invoice paid from wallet	Yes	Credit wallet	No
Service / provisioning (hybrid capture)	Usually **no** on the charge CT	No*	No

*Hybrid flows route card → wallet → service debit internally (`card_capture_topup` + `service_charge` ledger rows). The visible billing line is the service charge, not a top-up line. Richer reversal for those charges is planned on the financial-documents branch.

Errors (500):

```
{
  "result": "Failed",
  "Reason": "Insufficient wallet balance. Available: 0.00,
Required: 20.00"
}
```

- **Invoiced transaction:** `"Cannot delete a transaction that is associated with an invoice"`
- **Insufficient wallet:** customer already spent topped-up funds; void is rejected (no partial void)
- **Card refund failure:** wallet reversal is rolled back; transaction stays non-void

Note: Void marks `void=true` (excluded from invoicing/stats). It is not the same as invoice refund.

API Reference Summary

Payment Method Endpoints

Method	Endpoint	Description
POST	`/api/payments/methods`	Add payment method
GET	`/api/payments/methods?customer_id={id}`	Get all payment methods
GET	`/api/payments/methods/default?customer_id={id}`	Get default payment method
PUT	`/api/payments/methods/set-default`	Set default payment method
DELETE	`/api/payments/methods/{id}?customer_id={id}`	Delete payment method

Payment Flow Endpoints

Method	Endpoint	Description
POST	`/api/payments/charge`	Direct payment (one-step)
POST	`/api/payments/invoice`	Invoice payment (wallet-first)
POST	`/api/payments/topup`	Top-up with provisioning
POST	`/api/payments/authorize/hold`	Create authorization hold
POST	`/api/payments/capture/{id}`	Capture authorization
POST	`/api/payments/release/{id}`	Release authorization
POST	`/api/payments/rental`	Rental/third-party payment
POST	`/api/payments/refund`	Refund payment

Wallet Endpoints

Method	Endpoint	Description
GET	`/api/wallet/balance?customer_id={id}`	Get wallet balance
GET	`/api/wallet/info?customer_id={id}`	Get wallet info + settings
POST	`/api/wallet/topup`	Top up wallet via payment method (creates `wallet_topup_card` billing line)
GET	`/api/wallet/transactions?customer_id={id}`	Get transaction history

Transaction Endpoints

Method	Endpoint	Description
PUT	`/api/transaction/`	Create customer transaction
GET	`/api/transaction/`	List transactions (paginated)
DELETE	`/api/transaction/transaction_id/{id}`	Void transaction; wallet reversal; card refund only for Add Funds top-ups

PayPal-Specific Endpoints

Method	Endpoint	Description
POST	`/api/payments/paypal/vault/setup-token`	Create PayPal setup token for Card Fields SDK
POST	`/api/payments/paypal/vault/finalize`	Finalize PayPal vault and save payment method
POST	`/api/payments/paypal/vault/update-setup-token`	Update setup token for 3DS/SCA handling

Common Use Cases

Use Case 1: Charge Customer for Service (Prepaid)

Scenario: Customer paying for 30 days of service using wallet-first routing.

```
# Invoice payment (wallet first, card for shortfall)
curl -X POST https://your-domain.com/api/payments/invoice \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 99.99,
    "metadata": {
      "service_id": 456,
      "contract_days": 30,
      "description": "30-day Premium Service"
    }
  }'
```

Response:

```
{
  "success": true,
  "message": "Invoice payment processed",
  "data": {
    "service_amount": 99.99,
    "wallet_portion_used": 50.00,        // Wallet had $50
    "card_portion_used": 49.99,          // Card charged $49.99
    "final_balance": 0.00
  }
}
```

Use Case 2: Two-Phase Payment with Service Provisioning

Scenario: Provision a service only after payment is authorized. If provisioning fails, no charge occurs.

```
# Top-up payment with automatic provisioning
curl -X POST https://your-domain.com/api/payments/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 149.99,
    "payment_method_id": 789,
    "service_uuid": "fiber-svc-uuid",
    "imsi": "123456789012345",
    "days": 30,
    "metadata": {
      "service_type": "fiber_internet"
    }
  }'
```

Flow:

1. Authorize $149.99 on card
2. Provision fiber internet service
3. If provision succeeds → capture payment
4. If provision fails → release authorization (no charge)

Use Case 3: Hotspot Anonymous Payment

Scenario: Anonymous user pays for WiFi hotspot access. No customer record, no saved payment method.

```
# Anonymous hotspot payment
curl -X POST https://your-domain.com/api/payments/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 1,
    "amount": 5.00,
    "vendor": "stripe",
    "payment_token": "pm_xxxxx",
    "service_uuid": "hotspot-downtown",
    "imsi": "999999999999999",
    "days": 1,
    "metadata": {
      "is_rental": true,
      "billing_email": "user@example.com",
      "hotspot_location": "Cafe Downtown"
    }
  }'
```

Result:

- Payment processed
- Hotspot activated
- Payment method NOT saved
- No customer record created

Use Case 4: Hotel Reservation (Auth Hold + Capture)

Scenario: Hold funds for hotel reservation, capture on check-in, release if cancelled.

```
# Step 1: Check-in - hold funds
curl -X POST https://your-domain.com/api/payments/authorize/hold \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 500.00,
    "use_wallet": true,
    "metadata": {
      "reservation_id": "RES-2025-001"
    }
  }'

# Response: {"authorization_id": 301, "status": "authorized"}

# Step 2a: Customer checks in - capture
curl -X POST https://your-domain.com/api/payments/capture/301 \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "metadata": {
      "invoice": true,
      "title": "Hotel Stay - 3 Nights",
      "description": "Room 302, Dec 27-30",
      "send_email": true
    }
  }'

# Step 2b: Customer cancels - release hold
curl -X POST https://your-domain.com/api/payments/release/301 \
  -H "Authorization: Bearer YOUR_API_KEY"
```

Use Case 5: Add Payment Method (Stripe)

Scenario: Customer adds a new Visa card to their account.

```
# Step 1: Frontend creates Stripe token via Stripe.js
# const {token} = await stripe.createToken(cardElement);

# Step 2: Backend saves payment method
curl -X POST https://your-domain.com/api/payments/methods \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "vendor": "stripe",
    "payment_token": "pm_xxxxx",
    "is_default": true,
    "card_nickname": "Work Visa"
  }'
```

Use Case 6: Top Up Wallet

Scenario: Customer tops up their wallet with $100 using saved payment method.

```
curl -X POST https://your-domain.com/api/wallet/topup \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 100.00
  }'
```

Response:

```
{
  "success": true,
  "payment": {
    "transaction_id": "ch_xxxxx",
    "amount": 100.00
  },
  "wallet": {
    "balance_after": 250.50
  },
  "message": "Wallet topped up with 100.00 USD"
}
```

Error Handling

Common Error Responses

Insufficient Funds (400 Bad Request):


```
{
  "error": "Insufficient wallet balance. Available: 50.00,
Required: 200.00"
}
```


Payment Failed (400 Bad Request):


```
{
  "error": "Payment failed. Please try again."
}
```


Validation Error (400 Bad Request):


```
{
  "error": "customer_id and amount are required"
}
```

Not Found (404 Not Found):

```
{
  "error": "Authorization 999 not found"
}
```

Server Error (500 Internal Server Error):

```
{
  "error": "An error occurred processing your payment"
}
```

Refunds and Wallet-First Routing

Refund Options

The system supports **two types of refunds** depending on your business needs:

1. Refund to Payment Source (Stripe/PayPal)

Use Case: Customer requests full refund for cancelled service or defective product.

Flow: Money goes back to original payment method (card, PayPal account, etc.)

Endpoint: `POST /api/payments/refund`

Example:

```
curl -X POST https://your-domain.com/api/payments/refund \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "transaction_id": "ch_xxxxx",
    "vendor": "stripe",
    "amount": 100.00,
    "reason": "customer_request"
  }'
```

Result:

- Stripe/PayPal processes refund to original payment method
- Customer sees credit on their card/PayPal account within 5-10 business days
- Money does NOT go to wallet
- Full audit trail maintained in `PaymentCapture` table

When to Use:

- □ Customer cancelled order
- □ Service not delivered
- □ Billing error
- □ Customer explicitly requests refund to card

2. Credit to Wallet

Use Case: Partial refund, service credit, or keeping funds for future purchases.

Flow: Money credited to customer's wallet balance for immediate use.

Note: Wallet credits are typically handled internally by the system during error scenarios. For manual wallet credits, contact support or use admin tools.

Result:

- Funds immediately available in wallet
- No waiting period
- Can be used for future purchases

- Full audit trail in `WalletLedger` table

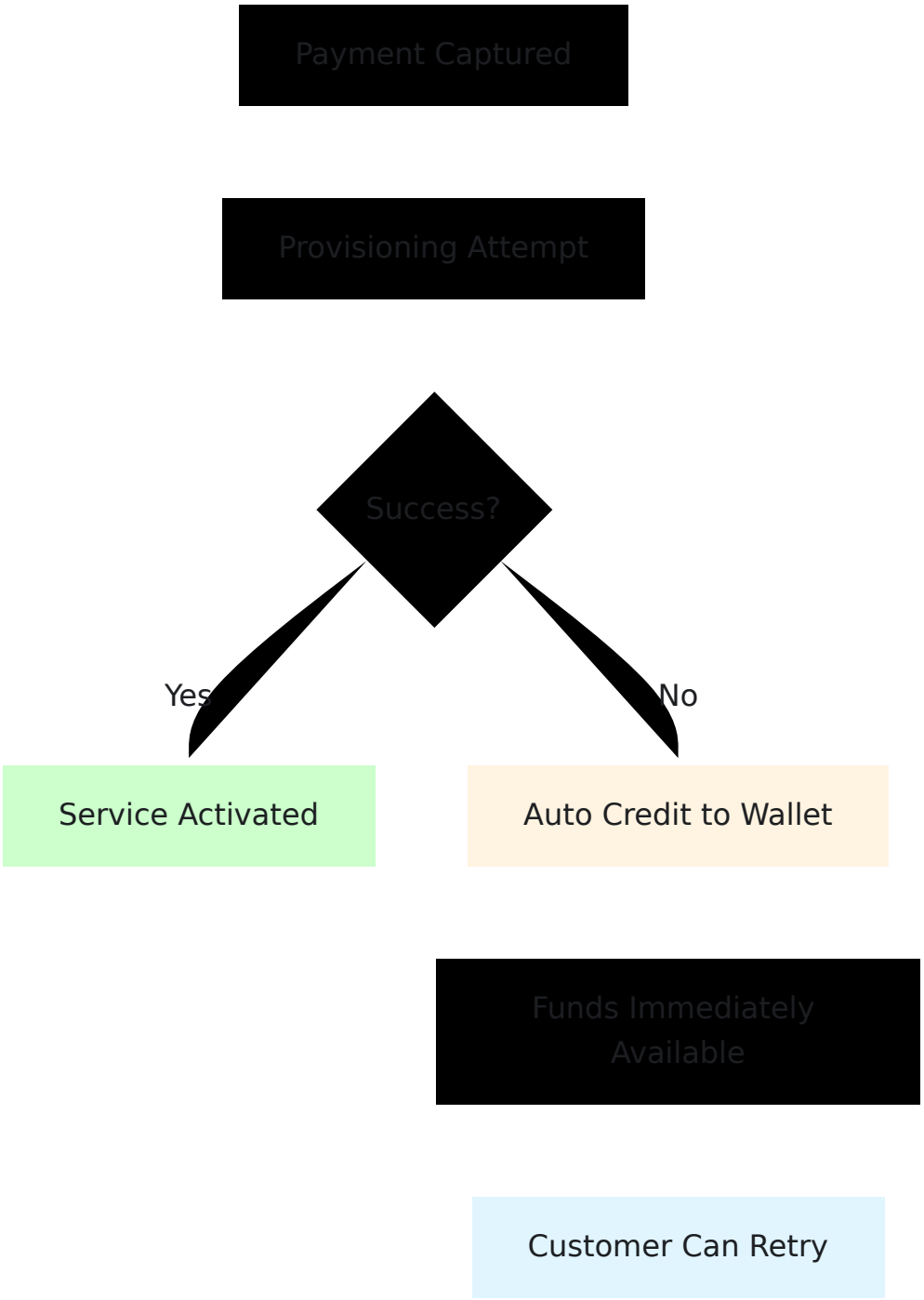
When to Use:

- □ Service credits (e.g., compensation for downtime)
- □ Partial refunds where customer will repurchase
- □ Error compensation (failed provisioning)
- □ Promotional credits

Hybrid Refund Strategy

Best Practice: For error scenarios during payment flow, the system automatically credits wallet instead of refunding card.

Automatic Error Recovery:



Example Scenario:

1. Customer pays $100 for service
2. Card charged successfully
3. Provisioning fails
4. Instead of refunding $100 to card (5-10 days + refund fees):
    - Credit $100 to wallet immediately
    - Customer can retry purchase instantly
    - No refund fees

- Better user experience

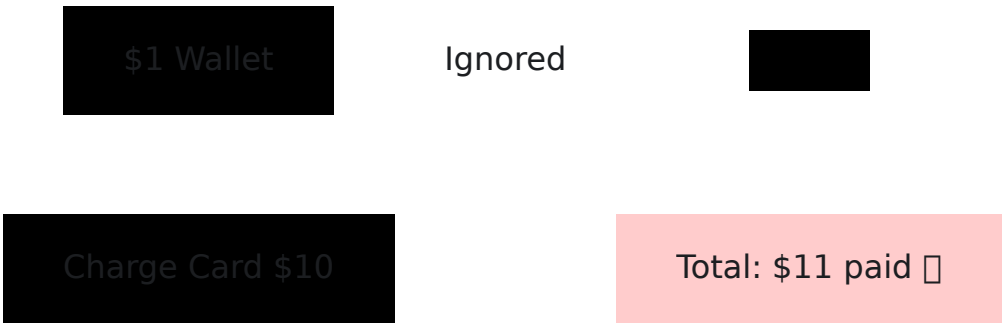
Wallet-First Routing: Optimized Card Charges

The system **only charges your card for the shortfall**, not the full amount, when you have wallet balance.

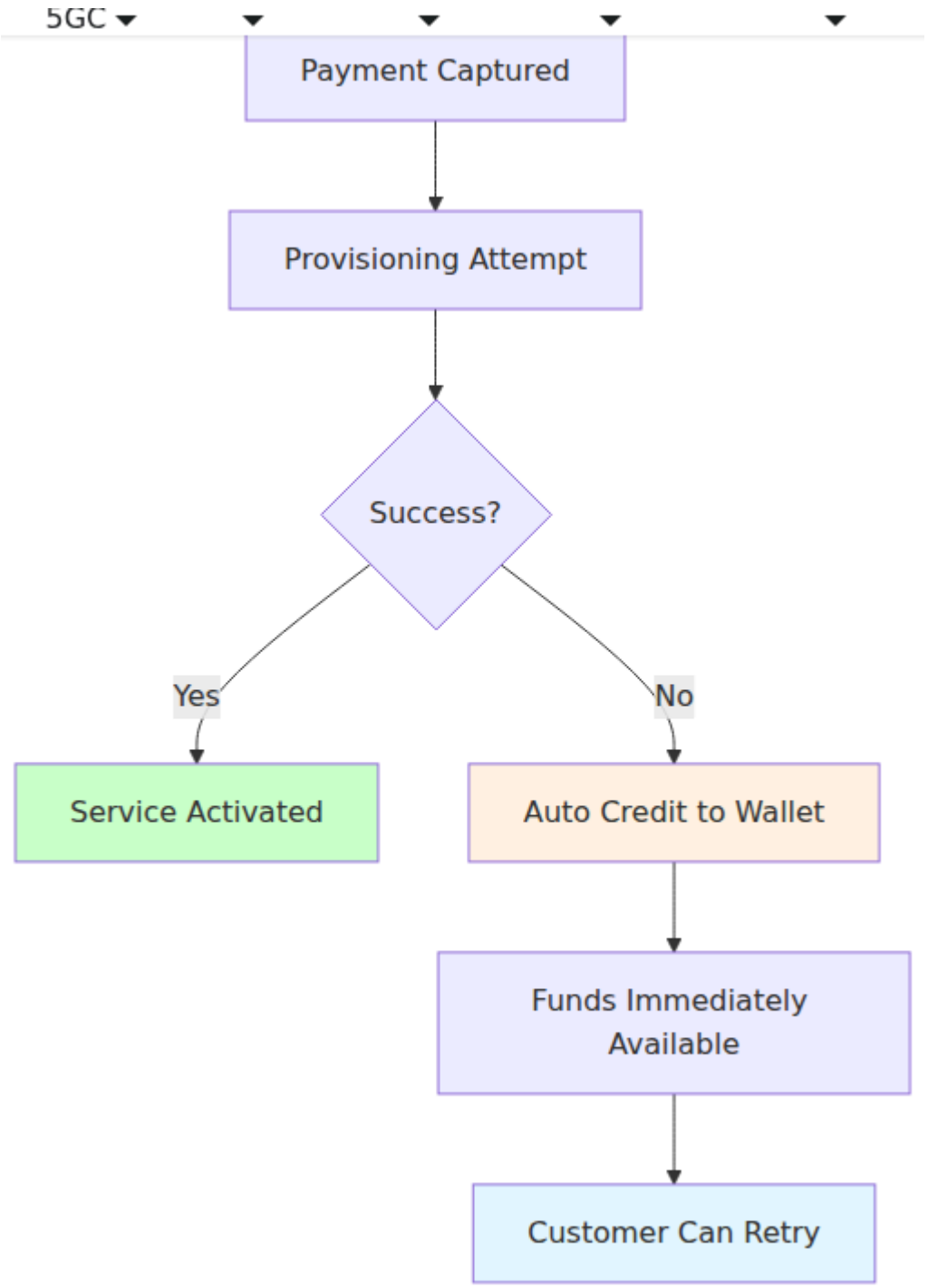
Example 1: $1 Wallet Balance + $10 Purchase

Scenario: You have $1 in your wallet and want to purchase a $10 addon.

Traditional Payment Flow (NOT how this system works):



OmniCRM Wallet-First Flow:


5GC
Payment Captured
Provisioning Attempt
Success?
Yes
No
Service Activated
Auto Credit to Wallet
Funds Immediately Available
Customer Can Retry

API Request:

```
curl -X POST https://your-domain.com/api/payments/invoice \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 10.00,
    "metadata": {
      "addon_id": 456
    }
  }'
```

API Response:

```
{
  "success": true,
  "message": "Invoice payment processed",
  "data": {
    "customer_id": 123,
    "service_amount": 10.00,
    "routing_mode": "hybrid",
    "initial_balance": 1.00,
    "wallet_portion_used": 1.00,     // Used existing $1
    "card_portion_used": 9.00,       // Only charged $9 shortfall
    "charged_amount": 9.00,          // ← Card charge
    "wallet_credited": 9.00,         // ← Topped up wallet
    "wallet_debited": 10.00,         // ← Service charge
    "final_balance": 0.00
  }
}
```

Example 2: $50 Wallet Balance + $30 Purchase

Scenario: You have $50 in wallet and purchase costs $30.

Wallet-First Flow:



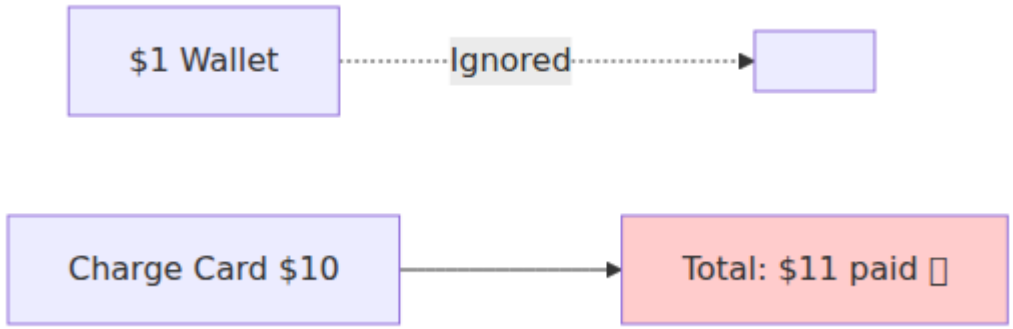
API Response:

```
{
  "success": true,
  "data": {
    "service_amount": 30.00,
    "initial_balance": 50.00,
    "charged_amount": 0,              // ← No card charge
    "wallet_debited": 30.00,
    "final_balance": 20.00,
    "payment_method_used": false      // ← Card not used
  }
}
```

Example 3: Authorization Hold with Wallet Balance

Scenario: Hotel hold $500 authorization with $150 wallet balance.

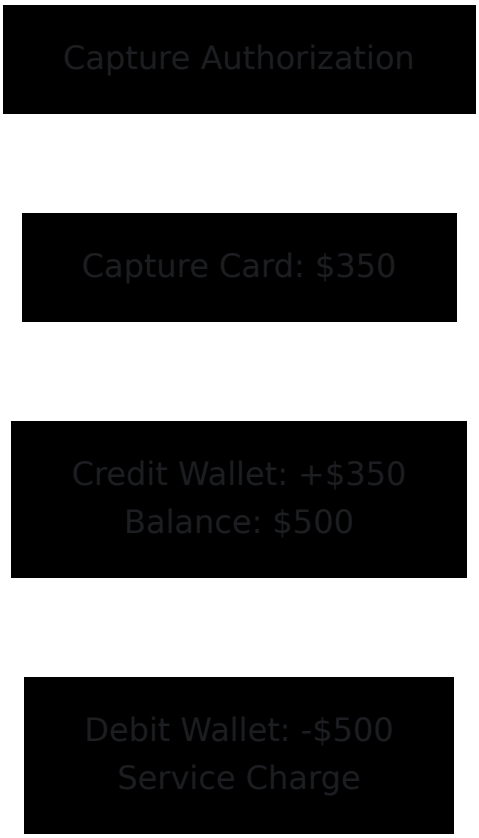
Step 1: Authorization (`POST /api/payments/authorize/hold`):



API Response:

```
{
  "authorization_id": 301,
  "amount": 500.00,
  "status": "authorized",
  "wallet_balance": 150.00,
  "wallet_to_use": 150.00,
  "card_amount": 350.00,
  "message": "Card authorized for $350 (wallet top-up). Wallet
debit of $500 will occur at capture."
}
```

Step 2: Capture (`POST /api/payments/capture/301`):

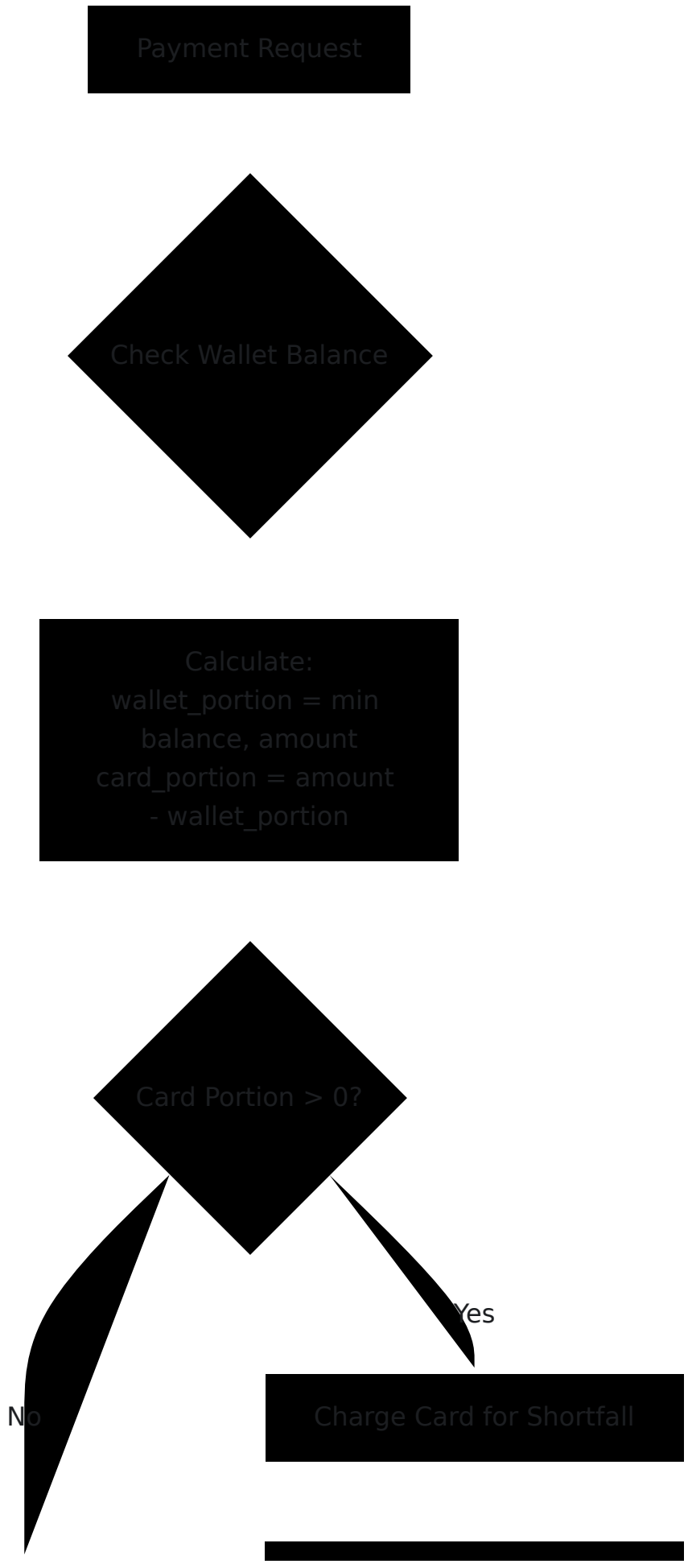


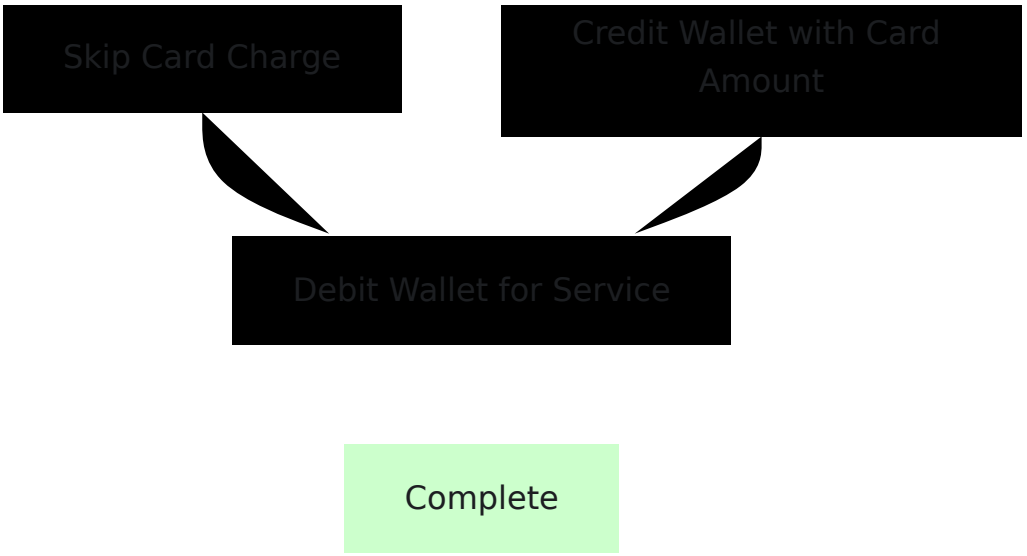
Why This Matters:

- □ Customer only has $350 "held" on their card, not $500
- □ Reduces customer's available credit impact
- □ More accurate authorization amounts
- □ Better customer experience

Implementation Details

Wallet-First Routing Logic:


Payment Request
Check Wallet Balance
Calculate:
wallet_portion = min
balance, amount
card_portion = amount
- wallet_portion
Card Portion > 0?
Yes
No
Charge Card for Shortfall



How It Works:

1. System checks current wallet balance
2. Calculates shortfall: `amount - wallet_balance`
3. If shortfall > 0, charges card for shortfall only
4. Credits wallet with card payment
5. Debits wallet for full service amount
6. Result: Customer only charged for what wallet couldn't cover

Routing Mode Override

You can override wallet-first behavior if needed:

Bypass Mode - Always charge card even if wallet has funds:

```
curl -X POST https://your-domain.com/api/payments/charge \
  -H "Content-Type: application/json" \
  -H "Authorization: Bearer YOUR_API_KEY" \
  -d '{
    "customer_id": 123,
    "amount": 100.00,
    "metadata": {
      "routing_mode": "bypass"
    }
  }'
```

Result: Card charged $100, wallet credited $100, wallet debited $100 (net: $0)

Use Case: Customer wants to use card for rewards/points even with wallet balance.

Best Practices

1. **Always use wallet-first routing** for customer payments to enable prepaid functionality
2. **Use two-phase payments** (topup endpoint) when provisioning services to avoid charging if provisioning fails
3. **Set metadata** for all payments to maintain audit trail
4. **Use anonymous payments** only for truly anonymous users (hotspots, rentals)
5. **Handle errors gracefully** and provide clear user feedback
6. **Test payment flows** in both success and failure scenarios
7. **Monitor authorization expirations** (typically 7 days for cards)
8. **Implement auto-recharge** for recurring services to improve customer experience

Playbook-Specific Best Practices

When implementing payment flows in Ansible playbooks:

1. **Always use block/rescue pattern** - Wrap provisioning in try/catch for automatic rollback
2. **Store authorization_id** - Save for capture/release operations
3. **Validate API responses** - Assert success before proceeding
4. **Round currency values** - Always use 2 decimal places
5. **Check payment methods** - Verify customer has default payment method before authorization

See Playbook Best Practices for complete details and examples.

Authentication

All API endpoints require authentication via API key in the `Authorization` header:

```
Authorization: Bearer YOUR_API_KEY
```

Contact your system administrator for API key provisioning.

Vendor Support

Currently Supported

- **Stripe** - Full support (cards, ACH)
- **PayPal** - Full support (PayPal accounts, cards via Card Fields SDK)

Adding New Vendors

The modular architecture makes it trivial to add new payment vendors. See Modular Architecture section for details.

Related Documentation

Implementation Guides

- **Charging and Payments from Playbooks** - Ansible playbook implementation
  - Two-Phase Commit Pattern
  - Authorization/Capture Examples
  - Direct Transaction Creation
  - Pro-Rata Calculations

Feature-Specific Guides

- **Customer Invoices** - Invoice generation, templating, and customization
- **Payment Methods** - Managing customer payment methods, cards, and PayPal accounts
- **Transactions** - Transaction management, manual charges, and credits
- **Payment Processing** - Payment workflows and processing
- **Billing Basics** - Customer billing fundamentals

Quick Navigation

- **Adding vendors?** → See Modular Architecture
- **Configuring Stripe/PayPal?** → See Vendor Configuration
- **Customizing invoices?** → See Customer Invoices
- **Provisioning services?** → See Playbook Integration

Customer Invoices

> **API Reference**: For invoice payment APIs and workflows, see **Payment System API Guide**

`Transactions </payments_transaction>` are grouped together to form an invoice, which is sent to the customer for payment.

Invoices have a start and end date, which is the period the invoice covers, and a due date, which is the date the invoice is due for payment.

Invoices can be automatically generated by the system, for example, when a service is billed, an invoice is created for the retail cost, or they can be manually created, for example, if a customer requests a copy of an invoice, or if a customer is billed for a one-time charge.

Customer invoices are fully templated with `Mailjet <integrations_mailjet>` and can be customized to include the company logo, address, and payment details, and can be sent to the customer via email, or downloaded as a PDF.

Customizing Invoice Templates

OmniCRM uses HTML templates with Jinja2 templating to generate invoices. You can fully customize the invoice design, branding, colors, and layout.

Invoice Template Location

Invoice templates are stored in `OmniCRM-API/invoice_templates/`

Default Templates:

- `norfone_invoice_template.html` - Sample invoice template
- `cifi_invoice_template.html` - Alternative template example

Configuration:

The active invoice template is specified in `OmniCRM-API/crm_config.yaml`:

```
invoice:
  template_filename: 'norfone_invoice_template.html'
```

Available Template Variables

Invoice templates have access to the following Jinja2 variables:

Invoice Information:

- `{{ invoice_number }}` - Unique invoice ID (e.g., `INV-2025-001234`)
- `{{ date }}` - Invoice issue date (ISO format: `2025-01-10T12:00:00`)
- `{{ due_date }}` - Payment due date (e.g., `2025-02-10`)
- `{{ start_date }}` - Billing period start date
- `{{ end_date }}` - Billing period end date
- `{{ total_amount }}` - Total invoice amount before tax (numeric)
- `{{ total_tax }}` - Total tax amount calculated from all transactions (numeric)

Customer Information:

- `{{ client.name }}` - Customer's full name or company name
- `{{ client.address.address_line_1 }}` - Address line 1
- `{{ client.address.address_line_2 }}` - Address line 2
- `{{ client.address.city }}` - City
- `{{ client.address.state }}` - State/province
- `{{ client.address.zip_code }}` - Postal/ZIP code
- `{{ client.address.country }}` - Country

Transaction Line Items:

Loop through transactions using:

```
{% for sub_transaction in transactions %}
    <tr>
        <td>{{ sub_transaction.transaction_id }}</td>
        <td>{{ sub_transaction.created.split("T")[0] }}</td>
        <td>{{ sub_transaction.title }}</td>
        <td>{{ sub_transaction.description }}</td>
        <td>${{ "%.2f"|format(sub_transaction.retail_cost) }}</td>
    </tr>
{% endfor %}
```

Transaction Fields:

- `sub_transaction.transaction_id` - Transaction ID
- `sub_transaction.created` - Transaction date/time
- `sub_transaction.title` - Transaction title
- `sub_transaction.description` - Detailed description
- `sub_transaction.retail_cost` - Line item amount
- `sub_transaction.tax_percentage` - Tax percentage applied (e.g., 10 for 10%)
- `sub_transaction.tax_amount` - Calculated tax amount in dollars

Displaying Tax in Templates:

```
<td>
    {% if sub_transaction.tax_amount and
sub_transaction.tax_amount > 0 %}
        ${{ "%.2f"|format(sub_transaction.tax_amount) }} ({{
sub_transaction.tax_percentage }}%)
    {% else %}
        -
    {% endif %}
</td>
```

Creating a Custom Invoice Template

Step 1: Copy Existing Template

```
cd OmniCRM-API/invoice_templates/
cp norfone_invoice_template.html
your_company_invoice_template.html
```

Step 2: Customize HTML/CSS

Edit `your_company_invoice_template.html` to match your branding:

Key Customization Areas:

1. **Company Logo and Branding**

```
<!-- Replace with your logo URL -->
![Your Company](https://yourcompany.com/logo.png)

<!-- Update company name -->
<h1>Your Company Name</h1>
```

2. **Color Scheme**

```
<style>
    /* Primary brand color */
    .navbar {
        background: linear-gradient(to bottom right, #your-
color-1, #your-color-2);
    }

    /* Table headers */
    .table thead th {
        background-color: #your-brand-color !important;
        color: white !important;
    }

    /* Buttons and links */
    .btn-primary {
        background-color: #your-brand-color;
    }
</style>
```

3. **Company Information Footer**

```
<footer>
    <p>Your Company Name</p>
    <p>123 Business Street, City, Country</p>
    <p>Phone: +1-555-123-4567 | Email:
billing@yourcompany.com</p>
    <p>ABN/Tax ID: 12345678900</p>
</footer>
```

4. **Payment Instructions**

```
<div class="payment-info">
    <h3>Payment Methods</h3>
    <p><strong>Online:</strong> Pay at
https://yourcompany.com/pay</p>
    <p><strong>Bank Transfer:</strong></p>
    <ul>
        <li>Account Name: Your Company Ltd</li>
        <li>BSB: 123-456</li>
        <li>Account Number: 987654321</li>
        <li>Reference: {{ invoice_number }}</li>
    </ul>
</div>
```

5. **Terms and Conditions**

```
<div class="terms">
    <h4>Payment Terms</h4>
    <p>Payment due within 30 days of invoice date.</p>
    <p>Late payment fees: 2% per month on overdue balances.</p>
    <p>For billing inquiries: billing@yourcompany.com</p>
</div>
```

Step 3: Update Configuration

Edit `OmniCRM-API/crm_config.yaml`:

```
invoice:
  template_filename: 'your_company_invoice_template.html'
```

Step 4: Restart API

```
cd OmniCRM-API
sudo systemctl restart omnicrm-api
```

Step 5: Test Invoice Generation

1. Navigate to a customer with transactions
2. Generate a test invoice
3. Download PDF to verify formatting
4. Email invoice to yourself to test email delivery

Advanced Customization

Conditional Content:

Use Jinja2 conditionals to show/hide content:

```
{% if total_amount > 1000 %}
    <div class="high-value-notice">
        <p><strong>Note:</strong> Large balance - Payment plan
available upon request.</p>
    </div>
{% endif %}

{% if client.address.country == "Australia" %}
    <p>GST Included: ${{ "%.2f"|format(total_amount * 0.10) }}</p>
{% endif %}
```

Multi-Language Support:

Create language-specific templates:

```
invoice_template_en.html
invoice_template_es.html
invoice_template_fr.html
```

Configure based on customer's language preference.

Custom Calculations:

```
<!-- Display subtotal and tax breakdown -->
<tr>
    <td colspan="4" class="text-right"><strong>Subtotal:</strong>
</td>
    <td>${{ "%.2f"|format(total_amount) }}</td>
</tr>
<tr>
    <td colspan="4" class="text-right"><strong>Tax:</strong></td>
    <td>${{ "%.2f"|format(total_tax) }}</td>
</tr>
<tr>
    <td colspan="4" class="text-right"><strong>Total:</strong>
</td>
    <td>${{ "%.2f"|format(total_amount + total_tax) }}</td>
</tr>
```

Note: The `total_tax` variable is automatically calculated by summing the `tax_amount` from all transactions in the invoice. Each transaction's tax is calculated based on its `tax_percentage` field, which defaults to the product's `tax_percentage` or 0% if not specified.

QR Code for Payment:

Generate QR code for mobile payment:

```
<div class="qr-payment">
    ![Scan to Pay](https://api.qrserver.com/v1/create-qr-code/?
size=150x150&data={{ payment_url }})
    <p>Scan with your phone to pay instantly</p>
</div>
```

PDF Styling Best Practices

OmniCRM uses **WeasyPrint** to convert HTML to PDF. Follow these guidelines:

Supported CSS:

- Most CSS 2.1 properties
- Limited CSS3 (flexbox, some transforms)
- Web fonts via `@font-face`

Not Supported:

- JavaScript
- CSS Grid (use tables instead)
- Complex animations
- Some modern CSS properties

Page Size and Margins:

```
@page {
    size: A4;
    margin: 1cm;
}

body {
    font-family: Arial, sans-serif;
    font-size: 10pt;
}
```

Print-Specific Styling:

```
@media print {
    .no-print {
        display: none;
    }

    .page-break {
        page-break-after: always;
    }
}
```

Table Layout:

```
.table {
    table-layout: fixed;
    width: 100%;
}

.table th, .table td {
    word-wrap: break-word;
    padding: 4px;
}
```

Font Embedding:

For custom fonts, use web-safe fonts or embed:

```
@font-face {
    font-family: 'YourFont';
    src: url('https://yourcompany.com/fonts/yourfont.woff2')
format('woff2');
}

body {
    font-family: 'YourFont', Arial, sans-serif;
}
```

Testing Invoice Templates

Test Checklist:

1. **Visual Inspection:**
   - Logo displays correctly
   - Colors match brand guidelines
   - Text is readable (not too small)
   - Tables align properly
   - All sections present
2. **Data Accuracy:**
   - Customer details correct
   - Transaction amounts sum correctly
   - Dates formatted properly
   - All variables substituting correctly
3. **PDF Quality:**
   - File size reasonable (<5MB)
   - Images sharp and clear
   - No text cutoff or overflow
   - Page breaks in appropriate places
4. **Multi-Page Invoices:**
   - Headers repeat on each page
   - Page numbers display
   - Long transaction lists paginate correctly
5. **Email Delivery:**
   - PDF attaches to email
   - File size under Mailjet limit (15MB)
   - Renders in Gmail, Outlook, Apple Mail

Test Command (Manual Generation):

You can test invoice generation via API:

```
curl -X GET "http://localhost:5000/crm/invoice/{invoice_id}/pdf" \
     -H "Authorization: Bearer YOUR_TOKEN" \
     --output test_invoice.pdf
```

Common Template Issues

Variables not substituting:

- **Cause:** Typo in variable name or missing data
- **Fix:** Check spelling exactly (case-sensitive), verify data exists in database

PDF styling broken:

- **Cause:** Unsupported CSS property
- **Fix:** Use CSS 2.1 properties, test with WeasyPrint-compatible CSS

Images not showing:

- **Cause:** Relative URLs or blocked external resources
- **Fix:** Use absolute HTTPS URLs, ensure images publicly accessible

Tables overflowing page:

- **Cause:** Fixed column widths too wide
- **Fix:** Use percentage widths, `table-layout: fixed`

Fonts not rendering:

- **Cause:** Font not embedded or unavailable
- **Fix:** Use web-safe fonts (Arial, Times New Roman, etc.) or properly embed custom fonts

PDF generation fails:

- **Cause:** HTML syntax errors or WeasyPrint crash
- **Fix:** Validate HTML, check WeasyPrint logs, simplify complex layouts

Invoice PDF Caching

To improve performance and reduce redundant PDF generation, OmniCRM includes an Invoice PDF caching system. When an invoice PDF is first generated, it is cached in the database for subsequent requests.

How PDF Caching Works:

1. **First Request** - When an invoice PDF is requested (download or email), the system:
   - Generates the PDF from the invoice template
   - Encodes the PDF as Base64
   - Calculates a SHA256 hash of the PDF content
   - Stores in `Invoice_PDF_Cache` table with:
     - Invoice ID reference
     - PDF data (Base64-encoded)
     - Filename
     - Content hash (for integrity verification)
     - Creation timestamp
2. **Subsequent Requests** - When the same invoice is requested again:
   - System checks for cached PDF by invoice_id
   - If cache exists and is valid, returns cached PDF immediately
   - Updates `last_accessed` timestamp to track cache usage
3. **Cache Invalidation** - Cached PDFs are invalidated when:
   - Invoice is modified (transactions added/removed, details changed)
   - Invoice template is updated
   - Manual cache clearing is triggered

Benefits:

- **Performance** - Instant PDF delivery for repeat requests (no regeneration delay)
- **Consistency** - Same PDF for all downloads of an invoice (unless invoice is modified)
- **Server Load** - Reduces CPU usage from PDF generation
- **User Experience** - Loading indicator appears during initial generation, subsequent requests are instant

Cache Management:

The Invoice PDF Cache is automatically managed by the system. Old or unused cache entries can be purged periodically based on:

- Age (e.g., remove cache entries older than 90 days)
- Access patterns (remove entries not accessed in 30 days)
- Storage limits (implement cache size limits if needed)

API Behavior:

When downloading an invoice via API or UI:

- First request: Shows loading indicator while PDF generates, then caches
- Subsequent requests: Immediate download from cache
- Cache hit/miss is transparent to the user

Important: When you update your invoice template, clear the cache to ensure new invoices use the updated design:

```
-- Clear all cached invoice PDFs (run in MySQL)
DELETE FROM Invoice_PDF_Cache;
```

Or update `crm_config.yaml` to automatically invalidate cache on template change.

Accessing Invoices

Invoices can be viewed at the system level or per-customer:

Per-Customer View:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. View invoices list in the third card

System-Wide View:

1. Navigate to **Billing → Invoices** (from main menu)
2. View all invoices across all customers

Invoice Statistics Widgets

At the top of the invoices page, four statistics cards display financial summaries.

Widget Descriptions:

- **Total Invoices** - Sum of all invoice retail costs (all time) and count of invoices sent
- **Unpaid Invoices** - Sum of invoices not yet paid and count of unpaid invoices
- **Invoices This Month** - Sum of invoices created this calendar month with count
- **Invoices Last Month** - Sum of invoices created last calendar month with count

Value Formatting:

- Values over 1,000: Display as "k" suffix (e.g., $1.5k)
- Values over 1,000,000: Display as "M" suffix (e.g., $2.3M)
- Values over 1,000,000,000: Display as "B" suffix (e.g., $1.1B)

Trend Indicators:

- Widgets for "This Month" and "Last Month" show percentage change

- Green arrow up: Increase from previous period
- Red arrow down: Decrease from previous period
- Gray arrow right: No change

Invoices List

The invoices table displays all invoices with the following columns:

Column Descriptions:

- **ID** - Unique invoice ID
- **Title** - Invoice title/description
- **Period** - Billing period (start date - end date) or "N/A" for one-time invoices
- **Due Date** - Payment due date
- **Created** - Invoice creation date
- **Amount** - Total invoice amount (retail cost)
- **Status** - Paid, Unpaid, or Refunded
- **Actions** - Available actions (varies by status)

Action Icons:

- ⬇ **(Download)** - Download invoice PDF
- 🗑 **(Delete)** - Void invoice (only if not paid)
- 💳 **(Pay)** - Pay invoice online (only if unpaid)
- ✉ **(Email)** - Send invoice email to customer
- 💸 **(Refund)** - Refund Stripe payment (only for paid Stripe invoices)

Generating an Invoice

Click **"+ Generate Proforma Invoice"** to create a new invoice.

Field Descriptions:

- **Search Customers** - Select customer (only shown in system-wide view, pre-filled in customer view)
- **Title** - Invoice title/name (optional, defaults to "Invoice for [Period]")
- **Start Date** - Beginning of billing period (defaults to 14 days ago)
- **End Date** - End of billing period (defaults to today)
- **Due Date** - Payment deadline (defaults to today)
- **Transaction Preview** - Shows all uninvoiced transactions in date range with ability to include/exclude specific transactions

Transaction Selection:

- ✓ **(Green Plus)** - Click to exclude a transaction from the invoice
- × **(Red X)** - Click to include a previously excluded transaction
- **Select All** - Include all displayed transactions
- **Clear All** - Exclude all transactions
- Excluded transactions appear grayed out with strikethrough text
- Real-time totals update as you select/deselect transactions

What Happens:

1. System finds all uninvoiced transactions for customer within date range
2. Displays transaction preview with ability to include/exclude individual transactions
3. Shows real-time calculation of subtotal, tax, and total based on selected transactions
4. Only selected (included) transactions are added to the invoice
5. Generates invoice PDF and caches it
6. Marks selected transactions as invoiced (`invoice_id` field populated)
7. Excluded transactions remain uninvoiced and available for future invoices
8. Invoice appears in list with "Unpaid" status

Example Use Cases:

Monthly Billing: Set start date to first of month, end date to last day of month, preview shows all uninvoiced transactions from that period. Select all or manually exclude specific ones.

Service-Specific Invoice: Use same date range, then manually exclude unwanted transactions (e.g., exclude non-mobile transactions to create mobile-only invoice).

One-Time Invoice: Set both start and end date to the same day, preview shows only transactions from that date. Exclude any charges not relevant to this specific invoice.

Viewing Invoice Details

Click on any invoice row in the table to view full invoice details including all transactions, totals, and available actions.

Invoice Details Modal:

- **Invoice Information** - Shows invoice ID, title, dates, payment status, and void status
- **Transactions List** - Displays all transactions included in the invoice with:
  - Transaction date
  - Title and description
  - Retail cost
  - Tax amount and percentage (formatted as `$10.00 (10%)`)
  - Tax-exempt transactions show "-" in Tax column
- **Totals Summary** - Real-time calculation showing:
  - Transaction count
  - Subtotal (sum of all retail costs)
  - Tax (sum of all tax amounts)
  - Invoice Total (subtotal + tax)
- **Action Buttons** - Same actions available as in the table:
  - **Download PDF** - Download invoice PDF (always available)
  - **Send Email** - Email invoice to customer (non-voided invoices)

- **Pay Invoice** - Process payment (unpaid, non-voided invoices only)
- **Refund** - Refund Stripe payment (paid Stripe invoices only)
- **Delete** - Void invoice (unpaid, non-voided invoices only)

Downloading Invoice PDFs

Click the **download icon (⬇)** in the table or **"Download PDF"** button in the invoice details modal to download an invoice as PDF.

Download Process:

1. Click download icon next to invoice
2. Loading spinner appears during generation (first time only)
3. Browser prompts to save file: `Invoice_01234.pdf`
4. PDF opens or saves to Downloads folder

PDF Caching Behavior:

- **First Download** - PDF generated from template, cached in database (may take 2-3 seconds)
- **Subsequent Downloads** - Instant download from cache
- **Cache Invalidation** - Cache cleared if invoice modified or template updated

Troubleshooting Download Issues:

- **Spinner never stops** - Check browser console, API may be down
- **PDF blank or corrupted** - Check invoice template for syntax errors
- **Download fails** - Check popup blocker settings, try different browser

Paying Invoices

Click the **pay icon (□)** to pay an invoice online.

Payment Process:

1. Click pay icon on unpaid invoice
2. Payment modal opens showing invoice details
3. Select payment method:
    - **Stripe Transaction** - Charge saved credit card (available to all users)
    - **Cash** - Manual cash payment (staff only)
    - **Refund** - Apply refund as payment (staff only)
    - **POS Transaction** - Point-of-sale terminal (staff only)
    - **Bank Transfer** - Manual bank transfer (staff only)
4. If Stripe selected:
    - Select card from saved payment methods
    - Default card pre-selected
    - Click to select different card
5. If other method selected:
    - Enter reference number (optional)
6. Click **"Pay Invoice"** to process
7. System processes payment:
    - **Stripe** - Charges card via Stripe API
    - **Other methods** - Creates negative transaction for payment amount
8. Invoice status changes to "Paid"
9. Success notification displayed

Self-Care vs Staff Payment:

:doc:`Self-Care Portal <self_care_portal>` (Customers):

- Only Stripe payment available
- Must have saved payment method
- Warning shown if no payment methods exist
- Link to add payment method provided

Staff Portal (Admins):

- All payment methods available
- Can mark invoice paid manually (cash, POS, bank transfer)
- Can enter reference numbers for tracking

Payment Method Warning:

If customer has no saved payment methods, a warning is displayed prompting them to add a payment method before they can pay invoices.

Emailing Invoices

Click the **email icon (✉)** to send invoice to customer.

What Happens:

1. Click email icon next to invoice

2. System retrieves invoice PDF from cache (or generates if not cached)
3. Sends email via `Mailjet <integrations_mailjet>` using `api_crmCommunicationCustomerInvoice` template
4. Email includes:
    - Invoice PDF as attachment
    - Customer name
    - Invoice number and due date
    - Total amount due
    - Link to pay invoice online
    - Link to view/download invoice
5. Success notification: "Invoice email successfully sent"

Email Recipients:

Email sent to all customer contacts with type "billing" or primary contact if no billing contact exists.

Email Template Variables:

- `{{ var:customer_name }}` - Customer's full name
- `{{ var:invoice_number }}` - Invoice ID
- `{{ var:invoice_date }}` - Invoice issue date
- `{{ var:due_date }}` - Payment due date
- `{{ var:total_amount }}` - Total amount due
- `{{ var:invoice_url }}` - Link to view/download PDF
- `{{ var:pay_url }}` - Link to pay invoice online

Troubleshooting Email Issues:

- **Email not sent** - Check Mailjet API credentials in `crm_config.yaml`
- **Customer not receiving** - Verify customer contact email addresses
- **PDF not attaching** - Check PDF generation succeeded (try downloading first)

Voiding Invoices

Click the **delete icon (🗑)** to void an invoice.

Requirements:

- Invoice must be **Unpaid**
- Paid invoices cannot be voided (must be refunded instead)

How to Void:

1. Locate unpaid invoice in list
2. Click delete icon (🗑)
3. Confirm in modal:

What Happens:

- Invoice marked as `void = true`
- All transactions unlinked from invoice (`invoice_id` set to null)
- Transactions become "uninvoiced" again
- Transactions can be included in new invoice
- Invoice appears in list with "Void:" prefix in title
- Invoice actions disabled (no download, pay, or email)
- Can be viewed by filtering for "Void" invoices

Important Notes:

- Voiding is NOT the same as refunding
- **Void** = "This invoice should never have existed" (billing error, duplicate)
- **Refund** = "Reverse a valid paid invoice" (return money to customer)

Refunding Invoices

Click the **refund icon (□)** to refund a paid invoice.

Requirements:

- Invoice must be **Paid**
- Invoice must be paid via **Stripe**
- Invoice must have a valid `payment_reference` (Stripe payment intent ID)
- Only available to staff users (not Self-Care)

How to Refund:

1. Locate paid Stripe invoice
2. Click refund icon (□)
3. Refund confirmation modal opens:

4. Click **"Confirm Refund"**
5. System processes Stripe refund:

    - Calls Stripe API to refund payment
    - Creates refund transaction in Stripe
    - Updates invoice with `refund_reference`
6. Invoice status changes to "Refunded"
7. Success notification displayed

What Happens After Refund:

- Invoice remains in system (not voided)
- Status shows "Refunded"
- Transactions remain linked to invoice
- Customer receives refund to original payment method (3-7 business days)
- Stripe dashboard shows refund transaction

Refund Restrictions:

- Cannot refund invoices paid via cash, POS, or bank transfer (manual reversal required)
- Cannot partial refund (full invoice amount only)
- Cannot refund twice

Searching and Filtering Invoices

Search

Use the search bar to find invoices. Searches across:

- Invoice ID
- Invoice title
- Customer name (system-wide view only)

Filters

Apply filters to narrow invoice list:

Available Filters:

- **Void Status** - All, Void, Not Void
- **Paid Status** - All, Paid, Not yet Paid

Filter Actions:

- **Apply Filters** - Apply selected filters to list
- **Reset Filters** - Clear all filters and show all invoices

Sorting

Click any column header to sort:

- **ID** - Sort by invoice ID (newest/oldest)
- **Title** - Sort alphabetically
- **Due Date** - Sort by due date
- **Created** - Sort by creation date
- **Amount** - Sort by retail cost (highest/lowest)
- **Status** - Sort by paid status (paid first or unpaid first)

Click again to reverse sort direction (ascending ↔ descending).

Pagination

Navigate through large invoice lists with page controls showing current page, total pages, and items per page selector (10, 25, 50, or 100 items).

Common Invoice Workflows

Workflow 1: Monthly Billing with Transaction Preview

1. End of month arrives (e.g., January 31)
2. Navigate to **Billing → Invoices**
3. Click **"+ Generate Proforma Invoice"**
4. Select customer (or do per-customer if billing many customers)

5. Set dates:
    - Start Date: 2025-01-01
    - End Date: 2025-01-31
    - Due Date: 2025-02-15 (15 days from now)
    - Title: "January 2025 Services" (optional)
6. **Transaction Preview** section appears showing all uninvoiced transactions from January
7. Review the preview:
    - All transactions are included by default
    - Check totals: Subtotal, Tax, and Invoice Total
    - Verify all charges are correct
8. Click **"Generate Invoice"** (button shows transaction count, e.g., "Generate Invoice (15)")
9. Invoice created with all selected transactions
10. Click invoice row to view details and verify
11. Click **"Send Email"** button in details modal or email icon in table
12. Customer receives invoice email with PDF and pay link

Workflow 2: Selective Transaction Invoicing

1. Customer has multiple services (Mobile + Internet) and misc charges
2. Wants separate invoices for each service
3. **Generate first invoice (Mobile Services):**
    - Click **"+ Generate Proforma Invoice"**
    - Title: "Mobile Services - January 2025"
    - Start/End: Jan 1-31
    - Due Date: Feb 15
    - In transaction preview, **exclude** all non-mobile transactions:
        - Click **X** button next to Internet transactions
        - Click **X** button next to miscellaneous charges
        - Only Mobile service transactions remain selected
    - Verify totals reflect only mobile services
    - Click **"Generate Invoice"** (shows count of mobile transactions)
4. **Generate second invoice (Internet Services):**

- Click **"+ Generate Proforma Invoice"** again
- Title: "Internet Services - January 2025"
- Start/End: Jan 1-31 (same period)
- In transaction preview:
  - Mobile transactions already invoiced (don't appear)
  - Exclude miscellaneous charges using **X** button
  - Only Internet service transactions remain
- Click **"Generate Invoice"**

5. **Generate third invoice (Additional Charges):**
   - Click **"+ Generate Proforma Invoice"** again
   - Title: "Additional Charges - January 2025"
   - Only uninvoiced misc charges appear in preview
   - Click **"Select All"** to include all
   - Click **"Generate Invoice"**
6. Email all three invoices to customer

Workflow 3: Excluding Disputed or Pending Transactions

1. End of billing period arrives
2. Navigate to customer **Billing** tab
3. Click **"+ Generate Proforma Invoice"**
4. Set billing period dates
5. Transaction preview shows 20 transactions
6. Customer has disputed one charge and another is pending investigation
7. In transaction preview:
   - Locate disputed transaction (e.g., "Data overage charge")
   - Click **X** button to exclude it
   - Locate pending transaction (e.g., "Installation fee")
   - Click **X** button to exclude it
   - Transaction count updates: "18 Transactions selected"
   - Totals recalculate automatically
8. Review updated totals (excludes disputed amounts)

9. Click **"Generate Invoice (18)"**
10. Invoice generated with only approved transactions
11. Disputed/pending transactions remain uninvoiced for next billing cycle

Workflow 4: Quick Invoice Review and Adjustment

1. Staff generates monthly invoice
2. Transaction preview shows unexpected high total
3. Review each transaction in the preview:
    - Notice duplicate charge for same service
    - Click **X** to exclude the duplicate
    - Notice test transaction that shouldn't be billed
    - Click **X** to exclude test transaction
4. Totals update in real-time
5. Verify new total matches expected amount
6. Click **"Generate Invoice"** with corrected transactions
7. Go back and void/delete the excluded transactions if needed
8. Email invoice to customer with confidence

Workflow 5: One-Time Installation Invoice

1. Field tech completes installation
2. Staff adds installation transaction manually
3. Navigate to customer **Billing** tab
4. Click **"+ Generate Proforma Invoice"**
5. Set dates:
    - Start Date: today
    - End Date: today
    - Due Date: today + 7 days
    - Title: "Installation Services"
6. Transaction preview shows only today's transactions
7. Verify installation charge appears
8. Exclude any recurring charges using **X** button (if present)

9. Click **"Generate Invoice"**
10. Email to customer immediately
11. Customer pays online via Stripe

Workflow 6: Reviewing Invoice Before Customer Contact

1. Customer calls with billing question
2. Staff navigates to customer's invoice list
3. **Click on invoice row** to open Invoice Details modal
4. Review invoice information:
    - Invoice ID, dates, status
    - All transactions included with descriptions
    - Tax breakdown per transaction
    - Subtotal, Tax, and Total amounts
5. Answer customer's questions with exact details
6. If customer requests PDF, click **"Download PDF"** button in modal
7. If customer requests email resend, click **"Send Email"** button
8. Close modal when done

Workflow 7: Correcting Billing Error

1. Customer reports incorrect charge
2. Staff clicks on invoice row to view details
3. Reviews transaction list in Invoice Details modal
4. Identifies incorrect transaction
5. Invoice is unpaid, so can be voided
6. Click **"Delete"** button in modal footer
7. Confirm void
8. Transactions become uninvoiced again
9. Staff modifies or removes incorrect transaction from transaction list
10. Generate new invoice with corrected transactions:
    - Use transaction preview to exclude corrected transaction if needed
    - Include only valid charges

11. Email corrected invoice to customer

Workflow 8: Processing Multiple Payments

1. Customer brings cash to pay multiple invoices
2. Navigate to customer **Billing** tab
3. View unpaid invoices
4. Click on first invoice row to view details
5. Verify amount and transactions
6. Click **"Pay Invoice"** button in modal footer
7. Select **"Cash"** payment method
8. Enter reference: "Cash paid 2025-01-15"
9. Click **"Pay Invoice"**
10. Modal closes, invoice marked as "Paid"
11. Repeat for remaining invoices
12. All invoices now marked as "Paid"

Workflow 9: Handling Refund Request

1. Customer requests refund for overpayment
2. Staff verifies invoice was paid via Stripe
3. Navigate to invoice in list
4. Click on invoice row to view details
5. Verify payment information and amount
6. Click **"Refund"** button in modal footer (only appears for Stripe invoices)
7. Confirm refund
8. System processes Stripe refund
9. Invoice status changes to "Refunded"
10. Customer receives refund in 3-7 business days
11. Staff follows up with customer to confirm receipt

Troubleshooting

Cannot generate invoice - No transactions found

- **Cause:** No uninvoiced transactions in specified date range
- **Fix:** Check transaction list, verify transactions exist and are not already invoiced. Adjust date range or remove filter.

Invoice PDF generation fails

- **Cause:** Template syntax error, WeasyPrint crash, or missing customer data
- **Fix:** Check invoice template HTML for errors, verify customer address fields populated, review API logs.

Payment fails with Stripe error

- **Cause:** Card declined, insufficient funds, expired card, or Stripe API issue
- **Fix:** Try different payment method, verify card valid, check Stripe dashboard for decline reason.

Cannot void invoice

- **Cause:** Invoice already paid
- **Fix:** Paid invoices cannot be voided. If refund needed, use refund function for Stripe invoices or create credit transaction manually.

Invoice email not sending

- **Cause:** Mailjet API credentials invalid, customer has no billing contact, or email template missing
- **Fix:** Verify Mailjet configuration in `crm_config.yaml`, check customer contacts, verify invoice email template exists.

Refund button not appearing

- **Cause:** Invoice paid via cash/POS/bank transfer (not Stripe), or invoice not paid
- **Fix:** Refund button only appears for Stripe payments. For other payment methods, create manual credit transaction.

Download PDF shows old template design

- **Cause:** PDF cached before template update
- **Fix:** Clear invoice PDF cache: `DELETE FROM Invoice_PDF_Cache WHERE invoice_id = X;`

Customer cannot pay invoice (no payment methods)

- **Cause:** No saved payment methods in Self-Care portal
- **Fix:** Customer must add credit card at **Payment Methods** page before paying invoices.

Multiple invoices generated for same period

- **Cause:** Staff generated invoice twice, or date ranges overlap
- **Fix:** Void duplicate invoice. Adjust date ranges to prevent overlap. Use transaction preview to ensure unique transaction sets.

Transaction preview shows no transactions

- **Cause:** All transactions in date range are already invoiced or no transactions exist
- **Fix:** Verify date range is correct. Check transaction list to confirm transactions exist. Filter invoices to see which invoice contains the transactions.

Cannot exclude transaction from invoice generation

- **Cause:** Transaction already invoiced or browser issue
- **Fix:** Verify transaction shows in preview with checkmark. Refresh page and try again. Clear browser cache if issue persists.

Invoice total doesn't match expected amount

- **Cause:** Unexpected transactions included, tax not calculated, or excluded transactions still counted
- **Fix:** Review transaction preview carefully. Check each transaction's retail cost and tax. Verify excluded transactions are grayed out. Check transaction count badge on Generate Invoice button.

Generate Invoice button is disabled

- **Cause:** No transactions selected or invalid date range
- **Fix:** Ensure at least one transaction is included (not excluded). Verify Start Date is before End Date. Check that Due Date is set.

Invoice Details modal not opening

- **Cause:** JavaScript error or page not fully loaded
- **Fix:** Refresh page. Check browser console for errors. Try different browser. Verify internet connection.

Transaction tax not displaying in Invoice Details

- **Cause:** Transaction has 0% tax or tax_amount is null
- **Fix:** Verify transaction has tax_percentage set. Check that tax_amount was calculated when transaction was created. Update transaction if needed.

Action buttons missing in Invoice Details modal

- **Cause:** Invoice is voided or user lacks permissions
- **Fix:** Voided invoices only show Download PDF button. Verify invoice status. Check user role and permissions.

Related Documentation

- `integrations_mailjet` - Email invoice delivery and templates
- `administration_configuration` - Invoice template configuration
- `payments_transaction` - Creating transactions that appear on invoices
- `payments_process` - Processing invoice payments
- `basics_payment` - Payment methods management
- `payment_system_guide` - Payment API reference and vendor configuration

Process Payments

The majority of payments will be processed automatically by the system, but there are times when you may need to process a payment manually.

To pay an invoice, select the unpaid invoice, and click on the "Pay" button.

This will open a payment form, where you can enter the payment method, and click "Submit" to process the payment.

The customer will automatically receive a receipt for the payment, and the invoice will be marked as paid.

For bank transfers, you can enter the Payment reference and the date the payment was made (if different from the current date).

Customer Transactions

Anything that costs money in the system is recorded as a transaction under the customer.

Every transaction has a monetary amount for wholesale cost and retail cost, and a description of what the transaction is for.

Transactions can be automatically generated by the system, for example, when a service is provisioned, a transaction is created for the setup cost, and when a service is billed, a transaction is created for the retail cost.

Transactions can also be manually created, for example, if a customer is given a credit, a transaction is created for the credit amount, or an installation fee is charged, a transaction is created for the installation fee.

Transactions are grouped together to form `Invoices <payments_invoices>`, which is sent to the customer for payment.

Accessing Transactions

Transactions can be viewed at the system level or per-customer:

Per-Customer View:

1. Navigate to **Customers → [Select Customer]**
2. Click **Billing** tab
3. View transactions list in the first card

System-Wide View:

1. Navigate to **Billing → Transactions** (from main menu)
2. View all transactions across all customers

Transaction Statistics Widgets

At the top of the transactions page, four statistics cards display financial summaries:

Widget Descriptions:

- **Total Transactions** - Sum of all transaction retail costs (all time)
- **Total Uninvoiced Transactions** - Sum of transactions not yet included in an invoice
- **Total Transactions This Month** - Sum of transactions created this calendar month

- **Total Transactions Last Month** - Sum of transactions created last calendar month

Value Formatting:

- Values over 1,000: Display as "k" suffix (e.g., $1.5k)
- Values over 1,000,000: Display as "M" suffix (e.g., $2.3M)
- Values over 1,000,000,000: Display as "B" suffix (e.g., $1.1B)

Transactions List

The transactions table displays all transactions with the following columns:

Column Descriptions:

- **ID** - Unique transaction ID
- **Date** - Transaction creation date
- **Title** - Short transaction name
- **Description** - Detailed description of what the transaction is for
- **Amount** - Retail cost (positive for charges, negative for credits)
- **Invoice** - Invoice ID if transaction has been invoiced (clickable link)
- **Status** - Checkmark if invoiced, dash if not yet invoiced

Actions Per Row:

Each row has an actions menu (⋮) with options:

- **View Details** - Opens transaction detail modal
- **Download Invoice PDF** - Download PDF (only if invoiced)
- **Void Transaction** - Mark transaction as void (only if not invoiced)

Transaction Types

Transactions fall into two main categories:

Debit Transactions (Charges)

Positive amounts that increase customer balance owed:

- **Service Setup Fees** - One-time charges when service provisioned
- **Monthly Service Fees** - Recurring charges for services
- **Installation Fees** - Charges for field technician visits
- **Equipment Charges** - Charges for modems, routers, SIM cards
- **Late Payment Fees** - Penalties for overdue invoices
- **Manual Charges** - Custom charges added by staff

Credit Transactions (Payments/Refunds)

Negative amounts that decrease customer balance owed:

- **Cash Payments** - Customer paid by cash
- **Card Payments** - Customer paid by credit/debit card
- **Bank Transfer Payments** - Customer paid via bank transfer
- **Account Credits** - Goodwill credits, compensation
- **Refunds** - Money returned to customer
- **Discounts** - Promotional or loyalty discounts

Adding a Transaction Manually

Click **"+ Add Transaction"** to open the add transaction modal.

Debit Transaction (Charge):

Credit Transaction (Payment/Refund):

Field Descriptions:

- **Transaction Type** - Select Debit (charge) or Credit (payment/refund)
- **Credit Type** - If Credit selected, choose payment method (Cash, Card, Bank Transfer)
- **Title** - Short name for transaction (required)
- **Description** - Detailed explanation (optional)
- **Retail Cost** - Amount customer pays (required, positive number)
- **Wholesale Cost** - Your cost (optional, for margin tracking)

- **Tax Percentage** - Tax rate applied to this transaction (optional, defaults to product tax or 0%)
- **Service** - Link transaction to specific service (optional)
- **Site** - Link transaction to specific site (optional)
- **Transaction Date** - Date of transaction (defaults to today)

Validation:

- Title and retail cost are required
- Retail cost must be a positive number
- If Credit type selected, a credit type must be chosen

What Happens:

1. Transaction created in database
2. Appears in customer's transactions list
3. Included in "Uninvoiced Transactions" count
4. Available for inclusion in next invoice generation
5. Activity log entry created

Searching and Filtering Transactions

Search

Use the search bar to find transactions. Searches across:

- Transaction ID
- Title
- Description
- Invoice ID

Filters

Apply filters to narrow transaction list:

Available Filters:

- **Void Status** - All, Void, Not Void
- **Invoice Status** - All, Invoiced, Not Invoiced

Filter Actions:

- **Apply Filters** - Apply selected filters to list
- **Reset Filters** - Clear all filters and show all transactions

Sorting

Click any column header to sort:

- **ID** - Sort by transaction ID (newest/oldest)
- **Date** - Sort by transaction date
- **Title** - Sort alphabetically
- **Amount** - Sort by retail cost (highest/lowest)
- **Invoice** - Sort by invoice ID

Click again to reverse sort direction (ascending ↔ descending).

Voiding Transactions

Transactions added in error can be **voided** (marked as deleted).

Requirements:

- Transaction must NOT be invoiced
- Once invoiced, transactions cannot be voided (must be refunded instead)

How to Void:

1. Locate transaction in list
2. Click actions menu (⋮)
3. Select "**Void Transaction**"
4. Confirm in modal

What Happens:

- Transaction marked as `void = true`
- No longer appears in default transaction list
- Excluded from invoice generation
- Can be viewed by filtering for "Void" transactions
- Deducted from "Uninvoiced Transactions" total

Wallet-linked transactions (`wallet_ledger_id` set):

- Wallet balance is reversed before void (debit to undo a credit, credit to undo a debit)
- **Add Funds card top-up** (`payment_type=wallet_topup_card`): wallet debited and card refunded
- **Cash top-up / wallet invoice payment / other wallet lines:** wallet adjusted only; **no card refund**
- **Insufficient wallet:** void fails if topped-up funds were already spent (transaction stays active)

Service / provisioning charges from hybrid capture usually have **no** `wallet_ledger_id` on the billing line (card → wallet → debit happens internally). Voiding those lines only sets `void=true` today; full wallet credit for service voids is planned on the financial-documents branch.

API: `DELETE /crm/transaction/transaction_id/{transaction_id}` — see payment_system_guide.md — Void Transaction.

Note: Voiding is NOT the same as refunding. Void means "this transaction should never have existed." Refund means "reverse a valid transaction."

Tax on Transactions

Transactions can include tax, which is automatically calculated based on the product's tax configuration or manually specified per transaction.

Tax Behavior:

- **Debit Transactions (Charges)** - Tax is applied to charges based on:
  - **Product Tax Percentage** - If the transaction is linked to a product, the product's tax percentage is automatically applied
  - **Manual Override** - Staff can override the tax percentage when creating a transaction
  - **Tax Amount** - Calculated as: `retail_cost × (tax_percentage / 100)`
  - **Display Format** - Shown as: `$10.00 (10%)` in transaction lists
- **Credit Transactions (Payments/Refunds)** - No tax is applied to credits
  - Tax percentage field is hidden for credit transactions
  - Tax is automatically set to 0% for all payments and refunds

    - Credits reduce the customer's outstanding balance without tax implications

Tax Calculation Example:

- Product: Mobile Plan with 10% tax, $50.00 retail cost
- Automatic Tax Calculation: $50.00 × 0.10 = $5.00
- Display: $5.00 (10%)

Zero Tax (NIL/Exempt):

- Products can be tax-exempt by setting tax percentage to 0
- Tax defaults to 0% if not specified
- Tax-exempt transactions show "-" in the Tax column

Transaction Details View

Click a transaction to view full details:

Invoiced vs Uninvoiced Transactions

Uninvoiced Transactions:

- Not yet included in any invoice
- Available for next invoice generation
- Can be voided
- Count toward "Uninvoiced Transactions" total
- Status shows dash (-)

Invoiced Transactions:

- Included in an invoice
- Cannot be voided (must refund if needed)
- Invoice ID clickable (links to invoice details)
- Status shows checkmark (✓)
- Cannot be modified

Invoice Generation:

When you generate an invoice for a customer:

1. System finds all uninvoiced transactions for that customer
2. Optionally filter by date range
3. Transactions included in new invoice
4. Transaction `invoice_id` field populated
5. Transaction now marked as "invoiced"

See `payments_invoices` for invoice generation details.

Common Workflows

Workflow 1: Manual Credit for Service Outage

1. Customer calls: "Service was down for 2 days"
2. Staff decides to credit £10
3. Navigate to customer **Billing** tab
4. Click **"+ Add Transaction"**
5. Select **Credit** transaction type

6. Select **Cash Payment** credit type
7. Enter title: "Service Outage Credit"
8. Enter description: "Compensation for 2-day outage 8-9 Jan"
9. Enter retail cost: 10.00
10. Select affected service from dropdown
11. Click **"Add Transaction"**
12. Transaction appears with -£10.00 amount
13. Will be included in next invoice as credit

Workflow 2: Manual Installation Fee

1. Field tech installs service
2. Staff needs to charge £75 installation fee
3. Navigate to customer **Billing** tab
4. Click **"+ Add Transaction"**
5. Select **Debit** transaction type
6. Enter title: "Installation Fee"
7. Enter description: "Field technician visit for fiber installation"
8. Enter retail cost: 75.00
9. Enter wholesale cost: 45.00 (optional, for margin tracking)
10. Select service installed
11. Select site where installed
12. Click **"Add Transaction"**
13. Transaction appears in uninvoiced list
14. Will be included in next invoice

Workflow 3: Voiding Duplicate Transaction

1. Staff notices duplicate transaction
2. Verify transaction NOT yet invoiced
3. Click actions menu (⋮) on duplicate transaction
4. Select **"Void Transaction"**
5. Confirm in modal

6. Transaction removed from list
7. Uninvoiced total decreases accordingly

Workflow 4: Finding Transactions for Invoice

1. Need to generate monthly invoice
2. Click **Invoice filter: "Not Invoiced"**
3. Click **Apply Filters**
4. View all uninvoiced transactions
5. Note total amount from widgets
6. Navigate to generate invoice
7. Select date range (e.g., 1-31 Jan)
8. Transactions in range included in invoice

Troubleshooting

Cannot void transaction

- **Cause:** Transaction already invoiced
- **Fix:** Transaction is part of invoice history. If refund needed, create a Credit transaction instead.
- **Cause:** Wallet top-up reversal failed (insufficient wallet balance)
- **Fix:** Customer already spent the topped-up funds. Use a manual wallet debit/adjustment or financial-docs reversal flows; cannot void the top-up line until the wallet covers the amount.
- **Cause:** Card refund failed (Add Funds top-up only)
- **Fix:** Wallet reversal is rolled back automatically. Resolve the payment vendor issue and retry void.

Duplicate transactions appearing

- **Cause:** Service charged multiple times or provisioning error

- **Fix:** Void the duplicate transaction(s) if not invoiced. If invoiced, issue credit.

Transaction not appearing in list

- **Cause:** Filters applied or transaction voided
- **Fix:** Click "Reset Filters" to show all transactions. To see voided transactions, filter by "Void: Void".

Uninvoiced total doesn't match expected

- **Cause:** Some transactions already invoiced, or voided transactions excluded
- **Fix:** Apply filter "Invoice: Not Invoiced" to see only uninvoiced. Check voided transactions separately.

Cannot add transaction (customer field disabled)

- **Cause:** Viewing customer-specific transactions page
- **Fix:** Customer is pre-selected. If you need to add transaction for different customer, go to system-wide Transactions page.

Related Documentation

- `payments_invoices` - Invoice generation and management
- `payments_process` - Processing payments against invoices
- `basics_payment` - Payment methods overview
- `csa_activity_log` - Viewing transaction history in activity log

Charging and Payments from Playbooks

This guide explains how to implement charging and payment processing within Ansible playbooks for OmniCRM provisioning workflows.

> **Complete API Reference**: For full details on payment APIs, wallet routing, refunds, and vendor-agnostic architecture, see **Payment System API Guide**

Overview

OmniCRM Ansible Playbooks can handle payment processing in a number of different ways, but all of them are just calling API calls on the CRM to charge.

1. **Two-Phase Commit Payment Flow** - For paid services requiring immediate payment authorization and capture (ie Prepaid Services)
2. **Direct Transaction Creation** - For adding charges/credits without immediate payment processing (e.g., setup fees, manual credits) which can later be processed (ie Postpad services)

These approaches ensure atomic transactions where customers are only charged if provisioning succeeds, with automatic rollback if any step fails.

Pricing Flexibility: Playbooks as a Scripting Engine

Important: The dollar values defined in products and services (e.g., `retail_cost`, `wholesale_cost`, `retail_setup_cost`) are simply **default values** stored in the database. They do not dictate what you must charge—the playbook has complete control over the final pricing.

The Ansible playbook is essentially a **scripting engine** that you can tailor to meet any business logic requirements. You can:

- **Use the stored prices as-is** - Simply reference `api_response_product.json.retail_cost` in your authorization
- **Override prices completely** - Charge a different amount regardless of what's in the product definition
- **Apply dynamic discounts** - Calculate percentages off based on customer tier, promotions, or loyalty
- **Implement tiered pricing** - Charge different rates based on quantity, usage levels, or contract terms
- **Bundle pricing** - Combine multiple products with custom bundle discounts
- **Time-based pricing** - Adjust prices based on time of day, season, or promotional periods
- **Customer-specific pricing** - Look up negotiated rates from customer contracts

Example: Overriding Product Price

```
# Product retail_cost is $99.00, but we want to charge $79.00 for
a promotion
- name: Set promotional price (ignoring product's retail_cost)
  set_fact:
    charge_amount: 79.00

- name: Authorize promotional payment
  uri:
    url: "http://localhost:5000/crm/payments/authorize/hold"
    method: POST
    body_format: json
    body:
      customer_id: "{{ customer_id | int }}"
      amount: "{{ charge_amount | float }}"  # Using our override,
not retail_cost
      # ...
```

Example: Customer Tier Discount

```
# Apply discount based on customer tier
- name: Get customer tier
  uri:
    url: "http://localhost:5000/crm/customer/{{ customer_id }}"
    # ...
  register: customer_info

- name: Calculate tier discount
  set_fact:
    base_price: "{{ api_response_product.json.retail_cost | float
}}"
    discount_percent: >-
      {% if customer_info.json.tier == 'gold' %}20
      {% elif customer_info.json.tier == 'silver' %}10
      {% else %}0{% endif %}

- name: Apply discount to final price
  set_fact:
    final_price: "{{ (base_price | float) * (1 - (discount_percent
| float / 100)) | round(2) }}"
```

Example: Wholesale Partner Pricing

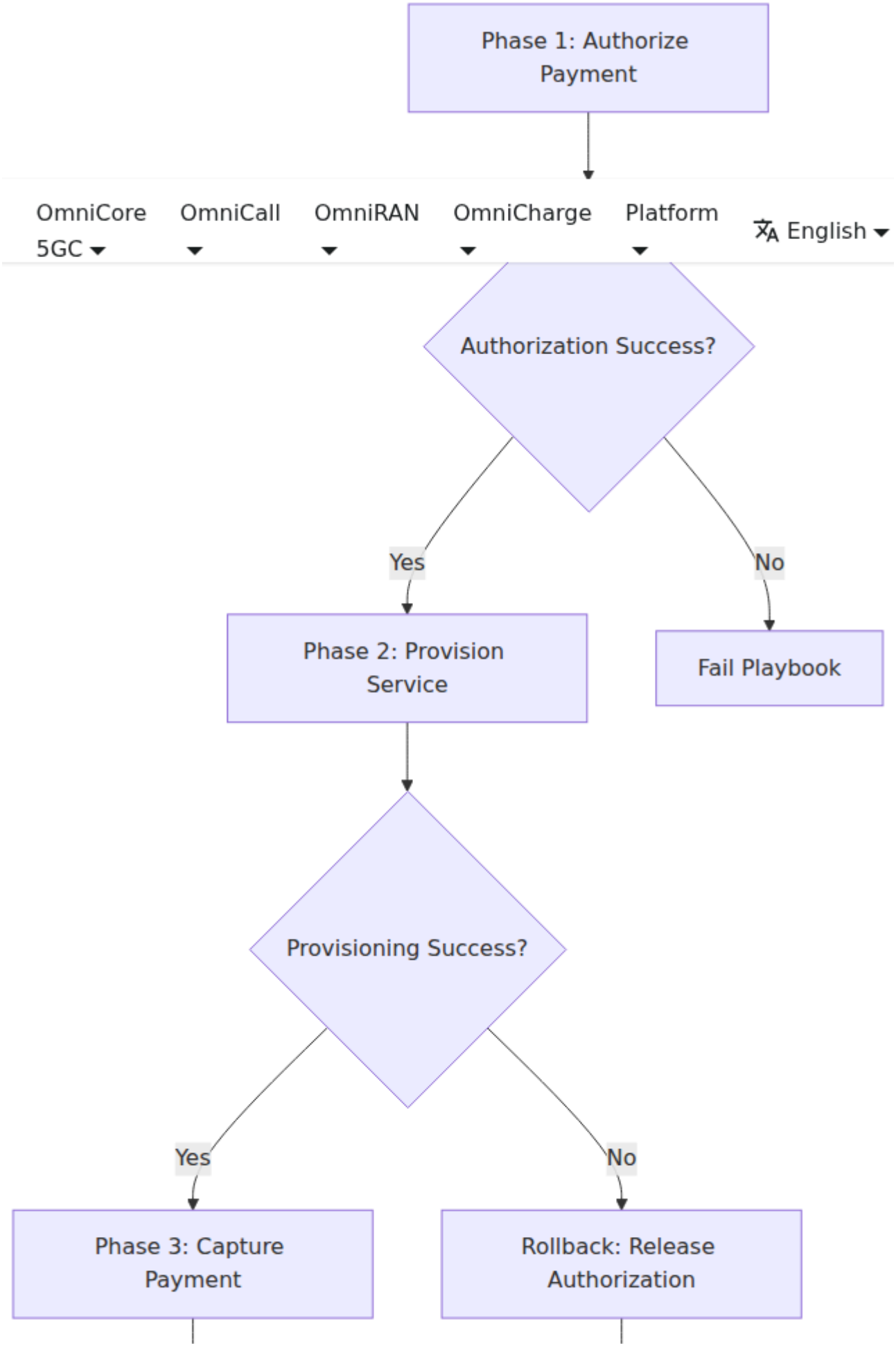
```
# Wholesale partners pay wholesale_cost instead of retail_cost
- name: Determine price based on customer type
  set_fact:
    charge_amount: >-
      {% if customer_info.json.is_wholesale_partner %}
      {{ api_response_product.json.wholesale_cost | float }}
      {% else %}
      {{ api_response_product.json.retail_cost | float }}
      {% endif %}
```

The key takeaway is that **you are not locked into any pricing model**. The playbook gives you full programmatic control to implement whatever business rules your organization requires. The product/service prices in the CRM are just convenient defaults that playbooks can use or ignore as needed.

Two-Phase Commit Payment Flow

The two-phase commit pattern is used when you need to charge a customer's payment method during provisioning. This ensures the customer is only charged if provisioning completes successfully.

Flow Overview


Phase 1: Authorize Payment
OmniCore 5GC
OmniCall
OmniRAN
OmniCharge
Platform
English
Authorization Success?
Yes
No
Phase 2: Provision Service
Fail Playbook
Provisioning Success?
Yes
No
Phase 3: Capture Payment
Rollback: Release Authorization



Implementation Pattern

The pattern follows these phases:

Phase 1: Authorization - Hold funds on the payment method **Phase 2: Provisioning** - Execute OCS balance/action updates **Phase 3: Capture** - Finalize payment upon successful provisioning **Rollback** - Release authorization if provisioning fails

Complete Example

Here's a complete example from `play_topup_charge_then_action.yaml`:

```yaml
- name: Play Topup - Charge card then action the Topup
  hosts: localhost
  gather_facts: no
  become: False

  tasks:
    - name: Include vars of crm_config
      ansible.builtin.include_vars:
        file: "../../crm_config.yaml"
        name: crm_config

    # Get product and service information
    - name: Get Product information from CRM API
      uri:
        url: "http://localhost:5000/crm/product/product_id//{{
product_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
        validate_certs: no
      register: api_response_product

    - name: Get Service information from CRM API
      uri:
        url: "http://localhost:5000/crm/service/service_id/{{
service_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
        validate_certs: no
      register: api_response_service

    - name: Set service and package facts
      set_fact:
        service_uuid: "{{ api_response_service.json.service_uuid
}}"
        customer_id: "{{ api_response_service.json.customer_id }}"
        package_name: "{{ api_response_product.json.product_name
}}"
        monthly_cost: "{{ api_response_product.json.retail_cost
}}"
```

```
        wholesale_cost: "{{
api_response_product.json.wholesale_cost }}"

    # Get customer's default payment method
    - name: Get the Customer Payment Methods from Payment
Controller
      uri:
        url: "http://localhost:5000/crm/payments/methods?
customer_id={{ customer_id }}"
        method: GET
        headers:
          Authorization: "Bearer {{ access_token }}"
        return_content: yes
        validate_certs: no
      register: api_response_payment_methods

    - name: Get the default payment_method_id from the response
      set_fact:
        payment_method_id: "{{ api_response_payment_methods.json |
json_query(query) }}"
      vars:
        query: "data[?is_default==`true`].payment_method_id | [0]"

    # ============================================================
    # TWO-PHASE COMMIT PAYMENT FLOW
    # ============================================================

    - name: "Phase 1: Authorize payment (hold funds)"
      uri:
        url: "http://localhost:5000/crm/payments/authorize/hold"
        method: POST
        headers:
          Content-Type: "application/json"
          Authorization: "Bearer {{ access_token }}"
        body_format: json
        body:
          {
            "customer_id": "{{ customer_id | int }}",
            "amount": "{{ monthly_cost | float }}",
            "currency": "{{ crm_config.currency | default('AUD')
}}",
            "payment_method_id": "{{ payment_method_id | int }}",
            "metadata": {
              "description": "{{ package_name }} on {{
```

```
api_response_service.json.service_name }}",
              "service_id": "{{
api_response_service.json.service_id | int }}",
              "site_id": "{{ api_response_service.json.site_id |
int }}",
              "product_id": "{{ product_id }}",
              "user_id": "{{ (initiating_user | int) if
(initiating_user is defined and initiating_user is not none) else
omit }}",
              "title": "{{ package_name }}",
              "wholesale_cost": "{{ wholesale_cost | float }}",
              "invoice": true,
              "contract_days": "{{ days | int }}",
              "send_email": true
            }
          }
        return_content: yes
      register: api_response_authorization

    - name: Assert authorization was successful
      assert:
        that:
          - api_response_authorization.status == 200
          - api_response_authorization.json.success == true

    - name: Store authorization_id for capture/release
      set_fact:
        authorization_id: "{{
api_response_authorization.json.data.authorization_id }}"

    # Phase 2: OCS Provisioning (wrapped in block for
transactional rollback)
    - block:
        - name: "Phase 2: Execute CGRateS action"
          uri:
            url: "http://{{ crm_config.ocs.cgrates }}/jsonrpc"
            method: POST
            body_format: json
            headers:
              Content-Type: "application/json"
              Authorization: "Bearer {{ access_token }}"
            body:
              {
                "id": "{{ 999999999 | random }}",
```

```
                "method": "APIerSv1.ExecuteAction",
                "params": [{
                  "Tenant": "{{ crm_config.ocs.ocsTenant }}",
                  "Account": "{{ service_uuid }}",
                  "ActionsId": "{{ cgr_action_name }}"
                }]
              }
            status_code: 200
          register: action_execute_response

        - name: Assert that the response from the action is OK
          assert:
            that:
              - action_execute_response.status == 200
              - action_execute_response.json.result == "OK"

        # Phase 3: Payment Capture - Finalize transaction after
successful provisioning
        - name: "Phase 3: Capture authorized payment"
          uri:
            url: "http://localhost:5000/crm/payments/capture/{{
authorization_id }}"
            method: POST
            headers:
              Content-Type: "application/json"
              Authorization: "Bearer {{ access_token }}"
            body_format: json
            body:
              {
                "metadata": {
                  "provisioning_status": "success",
                  "cgr_action": "{{ cgr_action_name }}"
                }
              }
            return_content: yes
          register: api_response_capture

        - name: Assert capture was successful
          assert:
            that:
              - api_response_capture.status == 200
              - api_response_capture.json.success == true

      rescue:
```

```
        # Transaction Rollback: Void authorization to release held
funds
        - name: "Rollback: Release payment authorization"
          uri:
            url: "http://localhost:5000/crm/payments/release/{{
authorization_id }}"
            method: POST
            headers:
              Content-Type: "application/json"
              Authorization: "Bearer {{ access_token }}"
            body_format: json
            body:
              {
                "metadata": {
                  "release_reason": "provisioning_failed",
                  "cgr_action": "{{ cgr_action_name }}"
                }
              }
            return_content: yes
          register: api_response_release

        - name: Terminate playbook execution after rollback
          fail:
            msg: "OCS provisioning failed. Payment authorization
{{ authorization_id }} voided. Customer not charged."
```

Payment API Endpoints

> **Wallet-First Routing**: The payment system automatically optimizes card charges by using wallet balance first. If a customer has $1 in their wallet and purchases a $10 addon, only $9 is charged to their card. See Wallet-First Routing section for details.

1. Authorize/Hold Payment

Endpoint: `POST /crm/payments/authorize/hold`

This endpoint places a hold on the customer's payment method for the specified amount. Funds are reserved but not yet captured.

Wallet-First Behavior: The authorization automatically calculates the shortfall after checking wallet balance. If wallet balance is $150 and authorization is for $500, only $350 is authorized on the card. The wallet is debited at capture time.

Request Body:

```
{
  "customer_id": 123,
  "amount": 49.99,
  "currency": "AUD",
  "payment_method_id": 456,
  "metadata": {
    "description": "Package name and description",
    "service_id": 789,
    "site_id": 12,
    "product_id": "34",
    "user_id": 5,
    "title": "Package Name",
    "wholesale_cost": 25.00,
    "invoice": true,
    "contract_days": 30,
    "send_email": true
  }
}
```

Field Descriptions:

- **customer_id** (required) - Customer ID being charged
- **amount** (required) - Amount to authorize in decimal format
- **currency** (optional) - Currency code (defaults to system default)
- **payment_method_id** (required) - Payment method to charge
- **metadata** (optional) - Additional data for transaction creation:
  - **description** - Transaction description
  - **service_id** - Service being charged for
  - **site_id** - Site associated with service
  - **product_id** - Product being provisioned
  - **user_id** - User initiating the charge (optional)

- **title** - Transaction title
- **wholesale_cost** - Your cost (for margin tracking)
- **invoice** - If `true`, automatically create transaction when captured
- **contract_days** - Contract duration
- **send_email** - If `true`, send email notification

Response:

```
{
  "success": true,
  "message": "Payment authorized (hold created)",
  "data": {
    "authorization_id": 301,
    "vendor_authorization_id": "auth_xxxxx",
    "amount": 500.00,
    "currency": "USD",
    "status": "authorized",
    "wallet_balance": 150.00,
    "wallet_to_use": 150.00,
    "card_amount": 350.00,
    "message": "Card authorized for $350 (wallet top-up). Wallet
debit of $500 will occur at capture."
  }
}
```

Important:

- Save the `authorization_id` for use in capture or release calls
- Note the `card_amount` shows only the shortfall was authorized
- Wallet balance is checked but NOT debited until capture

2. Capture Payment

Endpoint: `POST /crm/payments/capture/{authorization_id}`

This endpoint finalizes the payment authorization and charges the customer. If `invoice: true` was set in the authorization metadata, a transaction is automatically created.

Request Body:

```
{
  "metadata": {
    "provisioning_status": "success",
    "cgr_action": "Action_Topup_Standard",
    "additional_info": "Any other relevant data"
  }
}
```

Response:

```
{
  "success": true,
  "data": {
    "payment_id": "pay_xyz789",
    "transaction_id": 1234
  }
}
```

What Happens:

1. **Card captured** for shortfall amount (if card was authorized)
2. **Wallet credited** with captured card amount
3. **Wallet debited** for full service amount
4. If `invoice: true` was in authorization metadata:
   - **Debit transaction** created (positive amount = charge)
   - **Invoice** created and linked to debit transaction
   - **Credit transaction** created (negative amount = payment received)
   - Invoice marked as PAID (debits and credits net to zero)
   - Transaction appears in customer's billing
5. Payment record is created in the database
6. If `send_email: true`, customer receives invoice email

Example: $500 authorization with $150 wallet balance:

- Card captured: $350

- Wallet credited: +$350 (wallet now $500)
- Wallet debited: -$500 (service charge)
- Final wallet: $0

See Wallet-First Routing Examples for detailed flow.

3. Release Payment Authorization

Endpoint: `POST /crm/payments/release/{authorization_id}`

This endpoint cancels a payment authorization and releases the held funds. Use this in rescue/rollback scenarios when provisioning fails.

Request Body:

```
{
  "metadata": {
    "release_reason": "provisioning_failed",
    "error_details": "OCS account creation failed"
  }
}
```

Response:

```
{
  "success": true,
  "message": "Authorization released"
}
```

What Happens:

1. **Card authorization released** (if card was authorized)
2. Held funds returned to customer's available credit
3. **Wallet NOT debited** (since debit only happens at capture)
4. Customer is NOT charged
5. No transaction is created

Note: With wallet-first routing, no wallet refund is needed since wallet is not debited until capture time.

Direct Transaction Creation

For charges that don't require payment processing (setup fees, manual credits, adjustments), you can create transactions directly via the API.

Adding a Transaction via API

Endpoint: `PUT /crm/transaction/`

Example from `play_simple_service.yaml`:

```
- name: Add Setup Cost Transaction via API
  uri:
    url: "http://localhost:5000/crm/transaction/"
    method: PUT
    headers:
      Content-Type: "application/json"
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "customer_id": {{ customer_id | int }},
        "service_id": {{ service_creation_response.json.service_id
| int }},
        "title": "{{ package_name }} - Setup Costs",
        "description": "Setup Costs for {{ package_comment }}",
        "invoice_id": null,
        "wholesale_cost": {{
api_response_product.json.wholesale_setup_cost | float }},
        "retail_cost": "{{
api_response_product.json.retail_setup_cost | float }}"
      }
    return_content: yes
  register: api_response_transaction

- name: Assert that the response from the transaction is OK
  assert:
    that:
      - api_response_transaction.status == 200
```

Request Body Fields:

- **customer_id** (required) - Customer ID
- **service_id** (optional) - Service ID to link transaction to
- **title** (required) - Short transaction name
- **description** (optional) - Detailed description
- **invoice_id** (optional) - Invoice ID if already invoiced (usually null)
- **wholesale_cost** (optional) - Your cost
- **retail_cost** (required) - Customer-facing cost
- **site_id** (optional) - Site ID to link transaction to

- **tax_percentage** (optional) - Tax rate percentage

Use Cases:

- Setup fees during service provisioning
- Installation charges
- Manual credits or adjustments
- Equipment charges
- Administrative fees

Note: Direct transaction creation does NOT process payment - it only creates a billing record. The transaction will appear as uninvoiced and can be included in future invoices.

Calculating Pro-Rata Charges

Pro-rata charging allows you to charge customers proportionally based on partial billing periods. This is common when:

- Customer signs up mid-month
- Service is upgraded/downgraded mid-cycle
- Billing is calculated based on days used

Pro-Rata Calculation Formula

```
pro_rata_charge = (monthly_cost × days_remaining) / days_in_month
```

Implementation Example

Here's how to calculate a pro-rata charge in a playbook:

```yaml
# Calculate pro-rata charge for partial month
# If customer signs up on the 15th and billing is on 1st,
# charge proportionally for remaining days

- name: Get current day of month
  command: "date +%d"
  register: current_day

- name: Get total days in current month
  command: "date -d 'last day of this month' +%d"
  register: days_in_month

- name: Get last day of month
  command: "date -d 'last day of this month' +%Y-%m-%d"
  register: last_day_of_month

- name: Calculate days remaining in month
  set_fact:
    days_remaining: "{{ (days_in_month.stdout | int) -
(current_day.stdout | int) + 1 }}"

- name: Calculate pro-rata cost
  set_fact:
    pro_rata_cost: "{{ ((monthly_cost | float) * (days_remaining |
float) / (days_in_month.stdout | float)) | round(2) }}"

- name: Display calculation details
  debug:
    msg:
      - "Monthly cost: ${{ monthly_cost }}"
      - "Days in month: {{ days_in_month.stdout }}"
      - "Days remaining: {{ days_remaining }}"
      - "Pro-rata charge: ${{ pro_rata_cost }}"

# Use pro_rata_cost in authorization or transaction creation
- name: "Authorize pro-rata payment"
  uri:
    url: "http://localhost:5000/crm/payments/authorize/hold"
    method: POST
    headers:
      Content-Type: "application/json"
      Authorization: "Bearer {{ access_token }}"
    body_format: json
```

```
    body:
      {
        "customer_id": "{{ customer_id | int }}",
        "amount": "{{ pro_rata_cost | float }}",
        "currency": "{{ crm_config.currency | default('AUD') }}",
        "payment_method_id": "{{ payment_method_id | int }}",
        "metadata": {
          "title": "{{ package_name }} (Pro-rata {{ days_remaining
}} days)",
          "description": "Pro-rated charge for {{ days_remaining
}}/{{ days_in_month.stdout }} days of {{ package_name }}",
          "service_id": "{{ service_id | int }}",
          "invoice": true
        }
      }
```

Pro-Rata from Custom Start Date

If you need to calculate pro-rata from a specific start date to a billing date:

```yaml
- name: Set custom start date and billing date
  set_fact:
    service_start_date: "2024-01-15"
    next_billing_date: "2024-02-01"

- name: Calculate days between dates
  shell: |
    echo $(( ( $(date -d "{{ next_billing_date }}" +%s) - $(date -
d "{{ service_start_date }}" +%s) ) / 86400 ))
  register: days_until_billing

- name: Get days in billing period (usually 30)
  set_fact:
    billing_period_days: 30

- name: Calculate pro-rata cost
  set_fact:
    pro_rata_cost: "{{ ((monthly_cost | float) *
(days_until_billing.stdout | float) / (billing_period_days |
float)) | round(2) }}"

- name: Display calculation
  debug:
    msg:
      - "Start date: {{ service_start_date }}"
      - "Next billing: {{ next_billing_date }}"
      - "Days until billing: {{ days_until_billing.stdout }}"
      - "Pro-rata charge: ${{ pro_rata_cost }}"
```

Pro-Rata Example Scenarios

Scenario 1: Mid-Month Sign-Up

- Customer signs up on January 15th
- Monthly cost: $60.00
- Days in January: 31
- Days remaining: 17 (15th to 31st inclusive)
- Pro-rata charge: `$60.00 × 17 ÷ 31 = $32.90`

Scenario 2: Service Upgrade

- Customer upgrades on the 10th day of billing cycle
- Old plan: $30/month
- New plan: $50/month
- Days in cycle: 30
- Days remaining: 21
- Difference: $20/month
- Pro-rata charge: `$20.00 × 21 ÷ 30 = $14.00`

Best Practices

1. Always Use Block/Rescue Pattern

Wrap payment capture and provisioning in a block/rescue to ensure rollback:

```
- block:
    # Provisioning tasks
    - name: Provision service
      uri: ...

    # Capture payment only after success
    - name: Capture payment
      uri: ...

  rescue:
    # Release authorization if anything fails
    - name: Release payment authorization
      uri: ...

    - name: Fail playbook
      fail:
        msg: "Provisioning failed, customer not charged"
```

2. Validate All API Responses

Always assert that critical operations succeeded:

```
- name: Authorize payment
  uri: ...
  register: api_response_authorization

- name: Assert authorization was successful
  assert:
    that:
      - api_response_authorization.status == 200
      - api_response_authorization.json.success == true
    fail_msg: "Payment authorization failed: {{
api_response_authorization.json }}"
```

3. Store Authorization ID

Always save the authorization_id for use in capture/release:

```
- name: Store authorization_id for capture/release
  set_fact:
    authorization_id: "{{
api_response_authorization.json.data.authorization_id }}"
```

4. Use Metadata Effectively

Include comprehensive metadata in authorization requests:

```
metadata:
  description: "Clear description of what customer is being
charged for"
  service_id: "{{ service_id | int }}"
  product_id: "{{ product_id }}"
  user_id: "{{ initiating_user | int }}"
  title: "Short title for transaction"
  wholesale_cost: "{{ wholesale_cost | float }}"
  invoice: true  # Auto-create transaction on capture
  send_email: true  # Send customer notification
```

5. Round Currency Values

Always round currency calculations to 2 decimal places:

```
- name: Calculate cost with rounding
  set_fact:
    final_cost: "{{ (base_cost | float * multiplier | float) |
round(2) }}"
```

6. Handle Missing Payment Methods

Check if customer has a default payment method before attempting authorization:

```
- name: Get default payment method
  set_fact:
    payment_method_id: "{{ api_response_payment_methods.json |
json_query(query) }}"
  vars:
    query: "data[?is_default==`true`].payment_method_id | [0]"

- name: Verify payment method exists
  assert:
    that:
      - payment_method_id is defined
      - payment_method_id != ""
      - payment_method_id != None
    fail_msg: "No default payment method found for customer {{
customer_id }}"
```

Common Patterns

Pattern 1: Paid Service Provisioning

For services that require immediate payment:

1. Get customer's payment method

2. Authorize payment
3. Provision service in OCS/CGRateS
4. Create service record in CRM
5. Capture payment
6. On failure: Release authorization and rollback

See `play_topup_charge_then_action.yaml` for complete example.

Pattern 2: Free Service with Setup Fee

For services that are free but have a one-time setup cost:

1. Provision service
2. Create service record
3. Add setup fee transaction directly (no payment processing)
4. Setup fee appears on next invoice

See `play_simple_service.yaml` at lines 202-232 for complete example.

Pattern 3: Free Topup/Addon

For free topups that don't require payment:

1. Get service information
2. Execute CGRateS action
3. Update service dates
4. No payment or transaction creation needed

Pattern 4: Recurring Charges via ActionPlan

For automatic recurring charges:

1. Create Action with `*http_post` to provisioning endpoint
2. Create ActionPlan with `*monthly` timing
3. Assign ActionPlan to account
4. CGRateS will automatically call the endpoint monthly

5. Endpoint playbook handles payment processing

Troubleshooting

Authorization Fails

Symptom: Authorization endpoint returns error

Common Causes:

- Payment method doesn't exist or is invalid
- Insufficient funds
- Payment method expired
- Customer ID mismatch

Solution: Check payment method status and customer balance.

Capture Fails After Successful Provisioning

Symptom: Service provisioned but payment capture fails

Issue: This is a critical failure state - service is active but customer not charged

Solution:

- Authorization may have expired (typically 7 days)
- Check authorization is still valid before attempting capture
- Implement monitoring for failed captures
- Manual intervention may be required

Transaction Not Created After Capture

Symptom: Payment captured but no transaction in billing

Cause: `invoice: true` was not set in authorization metadata

Solution: Either:

- Set `invoice: true` in authorization metadata, OR
- Manually create transaction after successful capture

Pro-Rata Calculation Incorrect

Symptom: Pro-rata charges don't match expected values

Common Issues:

- Off-by-one errors in day counting (include/exclude start/end dates)
- Wrong month used for day count
- Rounding errors

Solution:

- Use inclusive date ranges (include both start and end day)
- Always round to 2 decimal places
- Test calculations with known values
- Document which dates are included in calculations

Refunds and Error Handling

Refund Options

The payment system supports two types of refunds:

1. Refund to Payment Source - Money returned to original card/PayPal

```
- name: Refund payment to customer's card
  uri:
    url: "http://localhost:5000/crm/payments/refund"
    method: POST
    headers:
      Content-Type: "application/json"
      Authorization: "Bearer {{ access_token }}"
    body_format: json
    body:
      {
        "transaction_id": "{{ vendor_transaction_id }}",
        "vendor": "stripe",
        "amount": "{{ refund_amount | float }}",
        "reason": "customer_request"
      }
```

2. Credit to Wallet - Immediate balance for future purchases (handled automatically for error scenarios)

For provisioning failures, the system automatically credits wallet instead of refunding card to:

- Avoid refund fees
- Provide immediate availability for retry
- Improve customer experience

See Refund Options for complete details.

Vendor Support

The payment system is **vendor-agnostic** and currently supports:

- □ Stripe (cards, ACH)
- □ PayPal (PayPal accounts, cards)

New payment vendors (Square, Adyen, Braintree, etc.) can be added without changing playbooks.

See also:

- Modular Architecture - How vendor abstraction works
- Vendor Configuration - Stripe/PayPal setup and API keys

Related Documentation

Playbook-Specific Guides

- `concepts_ansible.md` - General playbook patterns and structure
- `concepts_provisioning.md` - Provisioning system overview

Payment System Documentation

- **Payment System API Guide** - Complete API reference, wallet routing, refunds
  - Payment Method APIs
  - Payment Flow APIs
  - Wallet-First Routing
  - Refund Options
  - Modular Architecture
- `payments_transaction.md` - Transaction management and manual charges
- `payments_process.md` - Processing payments and invoices
- `basics_payment.md` - Payment methods and customer billing

Rule Based Access Control

Roles, Permissions & Users in OmniCRM

OmniCRM uses **role-based access control (RBAC)**: people (Users) are assigned one or more Roles, and each Role is a bundle of Permissions. Permissions are the smallest unit of access (e.g., view_customer, create_inventory). A user's effective access is the **union** of permissions from all assigned roles.

Purpose

RBAC enables:

1. **Data Protection** — Users only see and do what they're allowed to.
2. **Operational Fit** — Roles mirror job functions (Admin, Support, Finance, Customer Admin).
3. **Simple Admin** — Grant access by assigning roles; avoid per-user micromanagement.
4. **Tenant Isolation** — "view own …" permissions limit visibility to a user's own customer/tenant data.

How Users, Roles, and Permissions Fit Together

- **Users** — Real people who sign in to OmniCRM.
- **Permissions** — Atomic capabilities (e.g., view_customer, delete_product).
- **Roles** — Named sets of permissions (e.g., *Admin*, *Support*, *Finance*).
- **Assignment** — Users receive one or more roles; permissions aggregate.

Authentication proves *who you are* (JWT, API key, or whitelisted IP). Authorization (roles/permissions) decides *what you can do*.

Managing Users

The OmniCRM user management system allows administrators to create and manage staff users (administrators, customer service agents), view and modify user roles, reset passwords, manage two-factor authentication, and control user access.

User Types

Customer Users - Created via self-signup or by administrators. Automatically assigned the "Customer" role. These users access the self-care portal to manage their services, view usage, pay invoices, etc.

Staff Users - Created by administrators with appropriate permissions. Can be assigned roles like Admin, Support, Finance, etc. These users access the CRM interface to manage customers, provision services, handle billing, etc.

Administrative Users - Users with the `admin` permission. Have full access to the system including user management, role management, and all protected endpoints.

The initial administrative user is created by the Omnitouch team when the system is deployed.

Adding New Users (Administrators and CSAs)

Administrators can create new staff users through the Web UI or API.

Via Web UI

1. **Navigate to Users & Roles** - Access the user management interface from the administration menu

2. **Click "Add User"** - Opens the user creation form

3. **Fill in User Details:**
    - **Username** - Unique username for login (required)
    - **Email** - User's email address (required, must be unique)
    - **Password** - Temporary password (required, user should change on first login)
    - **First Name** - User's first name (required)
    - **Middle Name** - User's middle name (optional)
    - **Last Name** - User's last name (required)
    - **Phone Number** - Contact phone number (optional)
    - **Role** - Select one or more roles to assign (required)
    - **Customer Contact** - Optionally link user to a customer contact record (for customer users)
4. **Click "Create User"** - User is created and can immediately log in with the provided credentials
5. **User receives notification** - Optionally send welcome email with login instructions

Best Practices:

- Use a temporary password like `TempP@ssw0rd!` and require user to change it on first login

- Assign appropriate roles based on job function (see Typical Role Designs below)
- Enable 2FA for all administrative and support staff
- Link customer users to their customer contact record for proper data scoping

Via API

Create a user programmatically:

Endpoint: `POST /auth/users`

Required Permission: `admin`

Request Body:

```
{
  "username": "john.smith",
  "email": "john.smith@company.com",
  "password": "TempP@ssw0rd!",
  "first_name": "John",
  "middle_name": "D",
  "last_name": "Smith",
  "phone_number": "+61412345678",
  "role": "Support"
}
```

Response:

```
{
  "id": 123,
  "username": "john.smith",
  "email": "john.smith@company.com",
  "first_name": "John",
  "last_name": "Smith",
  "roles": ["Support"],
  "created": "2025-01-04T10:30:00Z"
}
```

Assigning Multiple Roles:

Users can have multiple roles. Permissions are additive (union of all assigned role permissions).

To assign multiple roles, include them in the request:

```
{
  "username": "jane.doe",
  "email": "jane.doe@company.com",
  "password": "TempP@ssw0rd!",
  "first_name": "Jane",
  "last_name": "Doe",
  "role": "Support,Finance"
}
```

Or use the role assignment endpoint after user creation:

```
POST /auth/roles/{role_id}/users/{user_id}
```

Viewing and Searching Users

List All Users (Admin):

`GET /auth/users`

Returns paginated list of all users with their roles and basic information.

Search Users:

`GET /auth/users/search?search={query}&filters={"role":["Support"]}&page=1&per_page=50`

Filter by:

- Role name
- Email domain

- Active/deleted status
- 2FA enabled status
- Last login date

Get Specific User:

`GET /auth/users/{user_id}`

Returns full user details including:

- Personal information
- Assigned roles and effective permissions
- 2FA status
- Last login and session information
- Linked customer contact (if applicable)

Creating and Managing Roles

Roles are collections of permissions that can be assigned to users. Instead of assigning permissions individually to each user, you create roles that bundle related permissions and assign those roles to users.

Creating a New Role

Via Web UI:

1. Navigate to **Users & Roles** → **Roles** tab
2. Click **"Create Role"**
3. Enter role details:
   - **Name** - Short, descriptive name (e.g., "Tier2_Support")
   - **Description** - Explain the role's purpose and responsibilities
4. Click **"Create"**
5. Role is created with no permissions; add permissions in the next step

Via API:

Endpoint: `POST /auth/roles`

Required Permission: `admin`

Request:

```
{
  "name": "Tier2_Support",
  "description": "Level 2 support team with elevated provisioning
access"
}
```

Response:

```
{
  "id": 45,
  "name": "Tier2_Support",
  "description": "Level 2 support team with elevated provisioning
access",
  "permissions": [],
  "users": []
}
```

Adding Permissions to a Role

Once a role is created, assign permissions to define what users with that role can do.

Via Web UI:

1. Navigate to **Users & Roles** → **Roles** tab
2. Click on the role name to view details
3. In the **Permissions** section, click **"Add Permission"**
4. Select one or more permissions from the list
5. Click **"Add"** - Permissions are immediately assigned

Via API:

Endpoint: `POST /auth/roles/{role_id}/permissions`

Request:

```
{
  "permission_id": 123
}
```

Or add multiple permissions:

```
{
  "permission_ids": [123, 124, 125]
}
```

Example: Creating a "Provisioning Specialist" Role

This role can view customers, manage services, and provision:

1. Create the role:

```
POST /auth/roles
{
  "name": "Provisioning_Specialist",
  "description": "Can provision services and manage customer
services"
}
```

2. Add permissions:

```
POST /auth/roles/45/permissions
{
  "permission_ids": [
    1,   # view_customer
    20,  # view_customer_service
    21,  # create_customer_service
    22,  # update_customer_service
    30,  # view_provision
    31,  # create_provision
    40,  # view_inventory
    50,  # view_product
  ]
}
```

Removing Permissions from a Role

Via Web UI:

1. Navigate to role details
2. In **Permissions** list, click the **"X"** or **"Remove"** button next to the permission
3. Confirm removal

Via API:

Endpoint: `DELETE /auth/roles/{role_id}/permissions/{permission_id}`

Example:

```
DELETE /auth/roles/45/permissions/31
```

This removes `create_provision` permission from the role.

Editing Role Details

Update role name or description:

Via Web UI:

1. Navigate to **Users & Roles** → **Roles** tab
2. Click on the role to edit
3. Modify the role name or description
4. Click **"Save"**

Via API:

Endpoint: `PUT /auth/roles/{role_id}`

```
{
  "name": "Senior_Support",
  "description": "Senior support team with full customer access"
}
```

Deleting a Role

Warning: Deleting a role removes it from all assigned users. Ensure users have alternative roles or they will lose access.

Via API:

`DELETE /auth/roles/{role_id}`

Best Practice: Instead of deleting, consider archiving or renaming roles that are no longer needed.

Assigning Roles to Users

During User Creation:

Include role in the user creation request (see "Adding New Users" above).

For Existing Users:

Via Web UI:

1. Navigate to **Users & Roles** → **Users** tab
2. Click on the user to edit
3. In the **Roles** section, select/deselect roles
4. Click **"Save"**

Via API:

Update user's roles:

Endpoint: `PUT /auth/users/{user_id}`

```
{
  "role": "Support,Finance"
}
```

Or assign a single role to a user via role endpoint:

Endpoint: `POST /auth/roles/{role_id}/users/{user_id}`

Viewing Role Assignments

All users in a role:

`GET /auth/roles/{role_id}/users`

Returns list of all users assigned to that role.

All roles for a user:

`GET /auth/users/{user_id}`

The response includes `roles` array with all assigned roles.

Managing User Passwords

OmniCRM provides multiple methods for password management depending on the context.

User Self-Service Password Reset

Users who forgot their password can reset it themselves via the login page:

1. **Click "Forgot Password"** on the login page
2. **Enter email address** - System sends a password reset email
3. **Check email** - Email contains a secure reset link with token (valid for 1 hour)
4. **Click link** - Opens password reset form
5. **Enter new password** - Must meet password complexity requirements:
    - Minimum 8 characters
    - At least one uppercase letter
    - At least one lowercase letter
    - At least one number

- At least one special character

6. **Submit** - Password is immediately updated; user can log in with new password

API Flow:

1. **Request reset:**

   Endpoint: `POST /auth/forgot_password`

   ```
   {
     "email": "user@example.com"
   }
   ```

   System generates reset token and sends email.

2. **Reset with token:**

   Endpoint: `POST /auth/reset_password`

   ```
   {
     "token": "abc123...",
     "new_password": "NewSecureP@ssw0rd!"
   }
   ```

Administrator Password Reset

Administrators can reset a user's password without requiring email verification. This sets a temporary password that the user should change on next login.

Via Web UI:

1. Navigate to **Users & Roles** → **Users**
2. Find the user and click the **"Reset Password"** button
3. Enter a temporary password
4. Click **"Reset"**
5. Notify the user of their temporary password (via secure channel)

6. User should change password on next login

Via API:

Endpoint: `POST /auth/users/{user_id}/admin_reset_password`

Required Permission: `admin`

Request:

```
{
  "new_password": "TempP@ssw0rd!",
  "force_change": true
}
```

Parameters:

- `new_password` - Temporary password to set
- `force_change` (optional) - If true, user must change password on next login

User Change Own Password

Authenticated users can change their own password from their profile:

Endpoint: `POST /auth/change_password`

Request:

```
{
  "current_password": "OldP@ssw0rd!",
  "new_password": "NewSecureP@ssw0rd!"
}
```

System validates the current password before allowing the change.

Password Security

- Passwords are hashed using bcrypt (werkzeug security)

- Never stored in plaintext
- Reset tokens expire after 1 hour
- Failed login attempts can trigger account lockout (configurable)
- Password history tracking prevents reuse (configurable)
- Complexity requirements enforced

Managing Two-Factor Authentication (2FA)

OmniCRM supports TOTP-based two-factor authentication for enhanced security. Administrators can enable, disable, and reset 2FA for users.

Enabling 2FA for a User

Via Web UI:

1. Navigate to **Users & Roles** → **Users**
2. Click on the user to view details

3. In the **Security** section, click **"Enable 2FA"**
4. System generates:
    - TOTP secret (QR code displayed)
    - 10 backup codes (one-time use)
5. User scans QR code with authenticator app (Google Authenticator, Authy, etc.)
6. User enters verification code from app to confirm setup
7. User saves backup codes in secure location
8. 2FA is now enabled; required for all future logins

Via API:

1. **Generate TOTP secret:**

Endpoint: `POST /2fa/enable/user/{user_id}`

Response:

```
{
  "totp_secret": "JBSWY3DPEHPK3PXP",
  "qr_code_url": "otpauth://totp/OmniCRM:user@example.com?
secret=JBSWY3DPEHPK3PXP&issuer=OmniCRM",
  "backup_codes": [
    "12345678",
    "23456789",
    "34567890",
    ...
  ]
}
```

2. **Verify setup:**

   Endpoint: `POST /2fa/verify-setup/user/{user_id}`

   ```
   {
     "code": "123456"
   }
   ```

   Returns `{"verified": true}` on success.

2FA Login Flow

Once 2FA is enabled, the login process changes:

1. User enters username and password
2. System validates credentials
3. If valid, prompts for 2FA code
4. User enters code from authenticator app OR backup code
5. System verifies code
6. On success, user is logged in

Backup Codes:

- 10 codes generated during 2FA setup
- Single-use only (consumed after use)
- Used if authenticator app is unavailable
- Can be regenerated by user or admin

Verifying 2FA Code

Endpoint: `POST /2fa/verify/user/{user_id}`

```
{
  "code": "123456"
}
```

Accepts both:

- **TOTP code** (6 digits from authenticator app)
- **Backup code** (8 digits from backup code list)

Regenerating Backup Codes

If a user exhausts backup codes or loses them, generate new ones:

Via Web UI:

1. Navigate to user details
2. Click **"Regenerate Backup Codes"**
3. Display or send new codes to user
4. Old codes are invalidated

Via API:

Endpoint: `POST /2fa/backup-codes/regenerate/user/{user_id}`

Response:

```
{
  "backup_codes": [
    "98765432",
    "87654321",
    "76543210",
    ...
  ]
}
```

Administrator 2FA Reset

If a user loses access to their authenticator app and all backup codes, an administrator can disable and re-enable 2FA.

Via Web UI:

1. Navigate to **Users & Roles** → **Users**
2. Click on the user
3. Click **"Reset 2FA"** button
4. Confirm the reset
5. 2FA is disabled; user can log in with just password

6. Guide user to set up 2FA again with new secret

Via API:

Endpoint: `POST /2fa/admin/disable/user/{user_id}`

Required Permission: `admin`

This completely disables 2FA for the user:

- TOTP secret cleared
- Backup codes cleared
- `is_2fa_enabled` flag set to false

User can then re-enable 2FA to get new secret and backup codes.

User Self-Service 2FA Reset (New Device)

If a user gets a new device but still has access to backup codes:

Endpoint: `POST /2fa/reset-for-new-device/user/{user_id}`

```
{
  "backup_code": "12345678"
}
```

System validates the backup code, then generates new TOTP secret and backup codes. User can set up authenticator app on new device.

2FA Best Practices

- **Require 2FA for all admin and support staff**
- **Store backup codes securely** (password manager or secure note)
- **Regenerate backup codes** after using several

- **Use reputable authenticator apps** (Google Authenticator, Authy, Microsoft Authenticator)
- **Document 2FA reset procedures** for support staff
- **Audit 2FA usage** - monitor which users have 2FA enabled

Updating User Information

Administrators can update user details at any time.

Via Web UI:

1. Navigate to **Users & Roles → Users**
2. Click on user to edit
3. Modify any editable fields:
    - First name, middle name, last name
    - Email address (requires verification)
    - Phone number
    - Roles
    - Customer contact linkage
4. Click **"Save"**

Via API:

Endpoint: `PUT /auth/users/{user_id}`

```
{
  "first_name": "Jane",
  "last_name": "Doe-Smith",
  "email": "jane.doesmith@newcompany.com",
  "phone_number": "+61498765432",
  "role": "Support,Finance"
}
```

Email Changes:

When email is changed, the new email is marked as pending until verified:

- `pending_email` field stores new email
- Verification email sent to new address
- User clicks link to verify
- `email` field updated to new value
- `email_verified` flag set to true

Deleting Users

OmniCRM uses **soft deletes** for users - they are marked as deleted but not removed from the database. This preserves audit trails and historical data.

Deleting a User

Via Web UI:

1. Navigate to **Users & Roles** → **Users**
2. Find the user to delete
3. Click **"Delete"** button
4. Confirm deletion
5. User is immediately logged out and cannot log in again

Via API:

Endpoint: `DELETE /auth/users/{user_id}`

Required Permission: `admin`

What Happens:

- `deleted` flag set to `True`
- `deleted_at` timestamp recorded
- User cannot log in
- All active sessions invalidated
- User still appears in audit logs and historical records
- Linked data (customer contacts, activities) preserved

Viewing Deleted Users

Filter for deleted users:

`GET /auth/users/search?filters={"deleted":[true]}`

Restoring a Deleted User

If a user was deleted by mistake, administrators can restore them:

Endpoint: `PUT /auth/users/{user_id}`

```
{
  "deleted": false
}
```

This clears the `deleted` flag and allows the user to log in again.

Note: User's password remains unchanged, so they can use their previous password.

Permanently Deleting a User

Warning: This is irreversible and removes all user data from the database.

Not exposed via UI. Only available via direct database access for compliance reasons (e.g., GDPR data deletion requests).

Best Practices for User Deletion

- **Soft delete by default** - Preserves audit trails
- **Document deletion reasons** - Add note in activity log before deleting
- **Transfer ownership** - Reassign user's open tickets, tasks before deleting
- **Review access** - Ensure no critical processes depend on the user
- **Archive data** - Export user's work history if needed
- **Notify relevant teams** - Inform managers/colleagues of deletion

Permission Catalog

Permissions generally follow CRUD patterns:

- view_* — read/browse
- create_* — create/add
- update_* — edit/modify
- delete_* — delete/remove

Some entities also include **“view own …”** variants that restrict visibility to the current user’s customer/tenant.

Global / Administrative

- `admin` — Full administrative access (manage users, roles, and permissions; access all protected endpoints).
- `can_impersonate` — Temporarily act as another user (audited; for support/troubleshooting).
- `grafana_access` — Access to Grafana analytics dashboards for creating and viewing custom reports and visualizations. See the Grafana Analytics section below for details.

Customers & Related Records

- **Customer**
  - view_customer, create_customer, update_customer, delete_customer
  - **Own-scope:** *view own customer*
- **Customer Site**
  - view_customer_site, create_customer_site, update_customer_site, delete_customer_site
  - **Own-scope:** *view own customer site*
- **Customer Contact**
  - view_customer_contact, create_customer_contact, update_customer_contact, delete_customer_contact
  - **Own-scope:** *view own customer contact*
- **Customer Attribute** (see `Customer Attributes <administration_attributes>`)
  - view_customer_attribute, create_customer_attribute, update_customer_attribute, delete_customer_attribute
  - **Own-scope:** *view own customer attribute*
- **Customer Tag** (see `Customer Tags <administration_tags>`)
  - view_customer_tag, create_customer_tag, update_customer_tag, delete_customer_tag
  - **Own-scope:** *view own customer tag*
- **Customer Service**
  - view_customer_service, create_customer_service, update_customer_service, delete_customer_service
  - **Own-scope:** *view own customer service*
- **Customer Activity**
  - view_customer_activity, create_customer_activity, update_customer_activity, delete_customer_activity
  - **Own-scope:** *view own customer activity*

Billing

- **Stripe Card**

    - `view_customer_stripe_card`, `create_customer_stripe_card`, `update_customer_stripe_card`, `delete_customer_stripe_card`
    - **Own-scope:** *view own customer stripe card*
- **Transactions**
    - `view_customer_transaction`, `create_customer_transaction`, `update_customer_transaction`, `delete_customer_transaction`
    - **Own-scope:** *view own customer transaction*
- **Invoices**
    - `view_customer_invoice`, `create_customer_invoice`, `update_customer_invoice`, `delete_customer_invoice`
    - **Own-scope:** *view own customer invoice*

Communications

- view_communication, create_communication, update_communication, delete_communication
- **Own-scope:** *view own communication*

Inventory & Templates

- **Inventory**
    - `view_inventory`, `create_inventory`, `update_inventory`, `delete_inventory`
    - **Own-scope:** *view own inventory*
- **Inventory Template**
    - `view_inventory_template`, `create_inventory_template`, `update_inventory_template`, `delete_inventory_template`
    - **Own-scope:** *view own inventory template*

Products

- `view_product`, `create_product`, `update_product`, `delete_product`

Cell Broadcast (CBC)

- `view_cbc_message`, `create_cbc_message`, `update_cbc_message`, `delete_cbc_message`

Provisioning

- **Provision**
  - `view_provision`, `create_provision`, `update_provision`, `delete_provision`
  - **Own-scope:** *view own provision*
- **Provision Event**
  - `view_provision_event`, `create_provision_event`, `update_provision_event`, `delete_provision_event`

“View Own” Access

“View own …” permissions scope reads (and optionally edits, where implemented) to data associated with the user’s **own customer/tenant**. For example, a *Customer Admin* role can manage *their* tenant’s contacts, sites, invoices, and services, but cannot see other tenants.

Typical Role Designs

Role	Typical Permissions	Notes
System Admin	`admin`, optionally `can_impersonate`; plus broad CRUD as needed	Full control over users/roles/permissions
Support	`view_customer`, `view_customer_service`, `view_communication`, `view_provision`; optional updates	Add `can_impersonate` if permitted
Finance	`view_customer_invoice`, `view_customer_transaction`, `view_product`; optional `create_customer_invoice`	Read-heavy; limited write
Customer Admin (tenant)	"view own ..." across customer, sites, contacts, services, inventory, invoices, transactions, communications, provisioning	Tenant-scoped management
Read-only Auditor	Broad `view_*` only	No create/update/delete

Example Roles and Included Permissions (summary)

Managing Roles & Permissions via API

All endpoints require `admin` permission.

List permissions

Endpoint: `GET /auth/permissions`

Create a permission (rare)

Endpoint: `POST /auth/permissions`

Request Body:

```
{
    "name": "view_example",
    "description": "Read-only access to example objects"
}
```

List roles

Endpoint: `GET /auth/roles`

Create a role

Endpoint: `POST /auth/roles`

Request Body:

```
{
"name": "Support",
"description": "Tier-1 support team"
}
```

Add a permission to a role

Endpoint: `POST /auth/roles/{role_id}/permissions`

Request Body:

```
{
  "permission_id": 123
}
```

Remove a permission from a role

Endpoint: `DELETE /auth/roles/{role_id}/permissions/{permission_id}`

Assigning Roles to Users

Create a user with role

Endpoint: `POST /auth/users`

Request Body:

```
{
  "username": "sara",
  "email": "sara@example.com",
  "password": "TempP@ssw0rd!",
  "first_name": "Sara",
  "last_name": "Ng",
  "phone_number": "+61...",
  "role": "Support"
}
```

Update a user's role

Endpoint: `PUT /auth/users/{user_id}`

Request Body:

```
{
  "role": "Finance"
}
```

List users (Admin-only)

Endpoint: `GET /auth/users`

Impersonation (Controlled)

- **Required:** `can_impersonate` or `admin`

Start impersonation

Endpoint: `POST /auth/impersonate`

Request Body:

```
{ "user_id": 42 }
```

Stop impersonation

Endpoint: `POST /auth/stop_impersonation`

Best Practices

- **Least privilege first.** Start with minimal roles; add permissions as needed.
- **Prefer "view own ...".** Use tenant-scoped permissions for customer-facing roles.
- **Keep roles stable.** Update role permissions when features change—don't edit each user.
- **Audit regularly.** Review who has `admin` or `can_impersonate`.

Grafana Analytics and Dashboards

OmniCRM integrates with Grafana to provide powerful analytics and visualization capabilities. Users with the `grafana_access` permission can access Grafana to create custom dashboards, reports, and visualizations.

Accessing Grafana

If your user account has been granted the `grafana_access` permission, you can access Grafana by navigating to `/grafana` in your browser. You will be automatically authenticated using your OmniCRM credentials - no separate Grafana login is required.

From the Grafana interface, you can:

- Create custom dashboards with charts, graphs, and tables

- Build complex queries to analyze customer data, revenue trends, and service metrics
- Set up alerts based on key performance indicators
- Share dashboards with other team members

Embedding Dashboards in OmniCRM

Once you have created dashboards in Grafana, you can embed them directly into the OmniCRM interface. This allows you to view your most important metrics without leaving the CRM, while keeping the OmniCRM navigation intact.

To embed a dashboard:

1. **Create your dashboard in Grafana** - Navigate to `/grafana` and design your dashboard with the visualizations you need.

2. **Note the dashboard ID** - When viewing your dashboard in Grafana, check the URL. It will look like `/grafana/d/abc123/dashboard-name`. The ID is the part after `/d/` (in this example, `abc123`).

3. **Configure the dashboard in your environment** - Contact your system administrator to add the dashboard ID and a display name to the system configuration. Dashboards are configured via environment variables.

4. **Access from the sidebar** - Once configured, your dashboard will automatically appear in the OmniCRM sidebar under the "Dashboards" menu. You can click it to view the full dashboard while keeping the OmniCRM navigation visible.

Dashboard Configuration

Dashboards are configured by your system administrator using environment variables. Each dashboard requires:

- **Dashboard ID** - The unique identifier from the Grafana URL
- **Dashboard Label** - The friendly name shown in the OmniCRM sidebar

Multiple dashboards can be configured and they will appear as menu items in the order they are defined. See the Administration Configuration documentation for details on environment variable configuration.

Who Can Access Grafana?

Only users with the `grafana_access` permission can access Grafana and view embedded dashboards. This permission is typically granted to:

- Administrators who need full visibility into system metrics
- Business analysts who create reports and visualizations
- Finance teams who track revenue and billing metrics
- Operations teams who monitor service performance

FAQ

Can a user have multiple roles? Yes. Permissions are additive.

Do I need custom permissions? Usually not. The built-in catalog covers most needs.

How do "view own …" rules know what's mine? They evaluate the linkage between your user/contact and your customer (tenant).

Can I create my own Grafana dashboards? Yes, if you have the `grafana_access` permission. Navigate to `/grafana` to access the full Grafana interface.

Self-Care Portal

The Self-Care Portal is a customer-facing interface that allows end users to manage their own accounts, view usage, pay invoices, and modify services without requiring assistance from customer service staff.

Access Methods:

- Direct login via customer credentials
- `Staff impersonation <customer_care>` for troubleshooting (from Customers → Contacts → "Login as User")

See also: `Customer Care <customer_care>` for impersonation details, `Authentication Flows <authentication_flows>` for login process.

Purpose

The Self-Care Portal provides customers with:

1. **Account Management** - View and update personal information, contacts, and addresses
2. **Service Overview** - See all active services, usage, and expiry dates
3. **Usage Tracking** - Monitor data, voice, SMS, and monetary balances
4. **Billing Access** - View and pay invoices, manage payment methods
5. **Service Modifications** - Add top-ups, purchase add-ons, modify services
6. **24/7 Availability** - Access account information anytime without calling support

Portal Overview

When customers log in to the Self-Care Portal, they see a personalized dashboard with:

Navigation Sections:

- **Dashboard** - Quick overview of services and recent activity
- **Account** - Personal details, contacts, sites
- **Services** - List of all services with status and details
- **Usage** - Balance consumption and expiry information
- **Billing** - Invoices, transactions, payment methods
- **Top-Up** - Purchase data, voice, SMS, or monetary credit

Account Details

The Account section displays customer information and allows limited self-service updates.

Editable Fields:

Customers can update:

- Email address (requires verification)
- Phone number
- Password
- Notification preferences

View-Only Information:

- Customer ID
- Account creation date
- Customer type (Individual/Business)
- Sites (addresses)
- Linked contacts

Updating Account Information:

1. Navigate to **Account → Details**
2. Click **"Edit"** next to the field to update
3. Enter new information
4. Click **"Save Changes"**
5. For email changes, verify via link sent to new address

Security Features:

- Password changes require current password
- Email changes require verification
- Activity logged for audit trail
- 2FA settings (if enabled)

Services Overview

The Services section shows all active and inactive services for the customer.

Service Card Display:

Each service displays:

- **Service Name** - Human-readable identifier (e.g., "Mobile - +44 7700 900123")
- **Product** - Plan or product name
- **Status** - Active, Suspended, Expired, Cancelled
- **Created Date** - Service activation date
- **Expiry Date** - When service expires (if applicable)
- **Monthly Cost** - Recurring charge
- **Auto-Renewal** - Enabled/Disabled indicator

Service Actions:

- **View Usage** - See balance consumption (Data, Voice, SMS, Monetary)
- **Top-Up** - Add credit or data
- **Add-ons** - Purchase additional features
- **Modify** - Change service parameters (if allowed)
- **View Details** - See full service configuration

Service Status Indicators:

- ✅ **Active** - Service is operational
- ⚠️ **Expiring Soon** - Renews or expires in <7 days
- ⏸️ **Suspended** - Service temporarily disabled (payment issue, manual suspension)
- ● **Expired** - Service no longer active

Usage Tracking

Customers can monitor their usage across all balance types in real-time.

Data Usage

View data consumption with detailed breakdowns by bucket and expiry.

Data Usage Display:

- **Total Balance** - All data buckets combined
- **Used This Period** - Consumption since last renewal

- **Progress Bar** - Visual representation of consumption
- **Expiry Information** - When each bucket expires
- **Bucket Breakdown** - Multiple data buckets with priority order

Bucket Priority:

When multiple data buckets exist (e.g., base plan + top-ups), they consume in weight order:

- **Weight 10** - Consumed first (typically promotional/bonus data)
- **Weight 20** - Consumed second (typically top-up data)
- **Weight 30** - Consumed last (typically base plan data)

Voice Usage

Track call minutes remaining across all voice buckets.

Voice Usage Display:

- **Remaining Minutes** - Total voice balance
- **Used Minutes** - Consumption this period
- **Call History** - Recent calls (if enabled)

- **Expiry Dates** - When voice buckets expire
- **International Minutes** - Separate tracking (if applicable)

Usage Breakdown:

- On-Net Calls - Calls within same network
- Off-Net Calls - Calls to other networks
- International Calls - Calls outside country
- Premium Numbers - Special rate numbers

SMS Usage

Monitor SMS message allowances and consumption.

SMS Usage Display:

- **Remaining Messages** - SMS balance
- **Used This Month** - Messages sent
- **MMS Included** - Whether MMS counts toward balance
- **International SMS** - Separate tracking (if applicable)

Monetary Balance

View prepaid credit balance for pay-as-you-go services.

Monetary Display:

- **Current Balance** - Available credit
- **Last Top-Up** - Most recent recharge amount and date
- **Expiry Date** - When balance expires (if applicable)
- **Auto-Recharge** - Enabled/Disabled status

Billing Management

Customers can view invoices, transactions, and manage payment methods.

Invoices

View and pay outstanding invoices directly from the portal.

Invoice List Display:

- **Invoice Number** - Unique identifier
- **Date** - Invoice creation date
- **Due Date** - Payment deadline
- **Amount** - Total invoice amount
- **Status** - Paid, Unpaid, Overdue
- **Actions** - Download PDF, Pay Online

Paying an Invoice:

1. Navigate to **Billing** → **Invoices**
2. Find unpaid invoice in list
3. Click **"Pay Now"** button
4. Select payment method (saved card or new card)
5. Confirm payment
6. Receive confirmation email

Downloading Invoices:

1. Click **"Download"** icon next to invoice
2. PDF downloads with full invoice details
3. Saved for tax records and documentation

Transactions

View complete transaction history including charges, credits, and payments.

Transaction Display:

- **Date** - Transaction creation date
- **Description** - What the charge/credit is for
- **Amount** - Charge (positive) or credit (negative)
- **Invoice** - Which invoice includes this transaction
- **Status** - Invoiced or Uninvoiced

Payment Methods

Manage saved credit cards for automatic billing and online payments.

Payment Method Management:

- **Add Card** - Securely add new credit/debit card via Stripe
- **Set Default** - Choose primary payment method
- **Remove Card** - Delete expired or unused cards
- **Card Details** - View last 4 digits, expiry, card brand

See `Payment Methods <payment_methods>` for detailed payment management documentation.

Top-Up / Recharge

Purchase additional data, voice, SMS, or monetary credit instantly.

Top-Up Process:

1. Navigate to **Services** → Select service → **"Top-Up"**
2. Choose top-up product from catalog
3. Select amount (preset options or custom)
4. Review cost and expiry information
5. Select payment method
6. Confirm purchase
7. Balance updated immediately

Available Top-Ups:

- **Data Top-Ups** - 1GB, 5GB, 10GB, 20GB, 50GB options
- **Voice Top-Ups** - Additional call minutes
- **SMS Bundles** - Message packs
- **Monetary Credit** - Prepaid balance (£5, £10, £20, £50, £100)

See `Top-Up & Recharge <features_topup_recharge>` for detailed top-up workflows.

Service Add-Ons

Purchase additional features and enhancements for existing services.

Available Add-Ons:

- **International Roaming** - Enable service abroad
- **Static IP Address** - Fixed IP for home internet
- **Premium Content** - IPTV channels, streaming services
- **Hardware Upgrades** - Modem rental, set-top boxes
- **Speed Boosts** - Temporary bandwidth increases

Purchasing Add-Ons:

1. Navigate to **Services** → Select service → **"Add-Ons"**
2. Browse available add-ons for this service type
3. Click **"Add to Service"** on desired add-on
4. Review cost (one-time + recurring)

5. Confirm purchase
6. Add-on provisioned automatically

See `Modifying Services - Add-ons <csa_modify>` for add-on management details.

Notifications & Alerts

Customers receive automated notifications for important events:

Email Notifications:

- Invoice generated and ready for payment
- Payment received confirmation
- Service expiry warnings (7 days, 3 days, 1 day)
- Low balance alerts (data, voice, monetary)
- Service activation/deactivation
- Password reset requests
- Security alerts (login from new device)

In-Portal Alerts:

- Unpaid invoices
- Expiring services
- Low data warnings (10% remaining)
- Payment method expiring
- Required actions (verify email, update payment method)

Notification Preferences:

Customers can configure:

- Email notification frequency
- SMS alerts (if enabled)
- Alert thresholds (e.g., notify when <20% data remaining)
- Notification categories (billing, usage, service)

Self-Service Limitations

Some operations require staff assistance:

Requires Customer Service:

- Changing customer type (Individual ↔ Business)
- Transferring services between customers
- Cancelling services (may be self-service if enabled)
- Disputing invoices
- Requesting refunds
- Changing primary contact
- Complex provisioning issues

Security Restrictions:

- Cannot view or modify other users' accounts
- Limited to own customer data (tenant isolation)
- Cannot access administrative functions
- Cannot void invoices or transactions
- Cannot modify service configuration (only add-ons/top-ups)

Staff Impersonation Access

Support staff can access the Self-Care Portal as a customer for troubleshooting.

Impersonation Process:

1. Navigate to **Customers** → Select customer
2. Go to **Contacts** tab
3. Find the contact linked to user account
4. Click **"Login as User"** button
5. New tab opens with customer's Self-Care Portal view
6. All actions are logged and attributed to impersonated user
7. Staff sees exactly what customer sees

Use Cases:

- **Troubleshooting** - Reproduce customer-reported issues
- **Verification** - Confirm service configurations appear correctly
- **Training** - Demonstrate portal features
- **Support** - Guide customer through portal while viewing their screen

Security & Auditing:

- Requires `can_impersonate` or `admin` permission
- All actions logged to audit trail
- Customer sees impersonation in activity log
- Session timeout after inactivity
- Cannot change customer password while impersonating

See `Customer Care - User Impersonation <customer_care>` for complete impersonation documentation.

Mobile Responsiveness

The Self-Care Portal is fully responsive and optimized for mobile devices.

Mobile Features:

- Touch-optimized navigation
- Simplified layouts for small screens
- Swipe gestures for carousel navigation
- Mobile-friendly forms and inputs
- QR code scanning for eSIM provisioning
- One-tap phone calling
- GPS integration for address autocomplete

Progressive Web App (PWA):

- Install as app on home screen
- Offline viewing of recent data
- Push notifications (if enabled)
- Fast loading with service workers

Password Reset & Account Recovery

Customers can reset forgotten passwords without calling support.

Self-Service Password Reset:

1. Click **"Forgot Password"** on login page
2. Enter email address
3. Receive password reset email (valid 1 hour)
4. Click link in email
5. Enter new password (must meet complexity requirements)
6. Submit and login with new password

Password Requirements:

- Minimum 8 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number

- At least one special character (!@#$%^&*)

Account Lockout:

After 5 failed login attempts:

- Account locked for 30 minutes
- Password reset email sent automatically
- Security notification sent to registered email

Best Practices for Customers

Security Recommendations:

1. Enable 2FA for enhanced security
2. Use unique, strong password
3. Keep email address current for notifications
4. Set up default payment method for auto-renewals
5. Monitor usage regularly to avoid overage charges
6. Save backup codes in secure location (if 2FA enabled)
7. Logout after using shared/public computers

Usage Management:

1. Enable low balance alerts (10-20% remaining)
2. Top-up before balances expire to avoid service interruption
3. Review monthly invoices for unexpected charges
4. Update payment methods before cards expire
5. Monitor data usage throughout month to avoid throttling

Support Escalation:

If self-service doesn't resolve the issue:

1. Check knowledge base / help articles (if available)
2. Review activity log for recent changes
3. Contact customer service via phone, email, or chat

4. Provide customer ID and service details for faster resolution

API Access

Customers with technical requirements can use the API directly.

API Key Generation:

Available for business customers or upon request:

1. Navigate to **Account → API Access**
2. Click **"Generate API Key"**
3. Set permissions (read-only or read-write)
4. Set expiry date
5. Save API key securely (shown only once)

API Use Cases:

- Automated usage monitoring
- Integration with internal billing systems
- Programmatic top-ups
- Service provisioning via scripts
- Data exports for analytics

See `API Documentation <concepts_api>` for endpoint details and examples.

Frequently Asked Questions

Q: Why can't I see all my services?

A: Ensure you're logged in with the correct account. If you have multiple customer accounts, each has separate services. Contact support to merge accounts if needed.

Q: My payment failed but I was charged. What do I do?

A: Check your bank statement for pending charges. If charge appears but invoice still shows unpaid, contact support with transaction reference number.

Q: How do I cancel a service?

A: Navigate to service details and click "Cancel Service" (if self-service enabled). Otherwise, contact customer service to process cancellation.

Q: Can I transfer a service to another person?

A: No, service transfers require customer service assistance for security and compliance reasons.

Q: Why is my data balance decreasing faster than expected?

A: Check background app updates, video streaming quality, and automatic cloud backups. Review usage breakdown in portal for detailed consumption.

Q: I lost my 2FA device. How do I regain access?

A: Use backup codes to login, then disable and re-enable 2FA. If no backup codes, contact support for 2FA reset (requires identity verification).

Q: Can I pay an invoice without logging in?

A: Guest invoice payment may be available via direct invoice link. Otherwise, login required for security.

Q: How do I download all my invoices at once?

A: Currently requires downloading each invoice individually. For bulk downloads, contact support or use API if available.

Related Documentation

- `Customer Care - User Impersonation <customer_care>` - Staff troubleshooting access
- `Payment Methods <payment_methods>` - Managing cards and payment

- `Top-Up & Recharge <features_topup_recharge>` - Purchasing additional credit
- `Service Usage <csa_service_usage>` - Understanding balance tracking
- `Billing Overview <billing_overview>` - Billing concepts and invoices
- `Authentication Flows <authentication_flows>` - Login and security
- `2FA <2fa>` - Two-factor authentication setup
- `Service Modifications <csa_modify>` - Adding features and add-ons

FAQ Knowledge Base System

The FAQ (Frequently Asked Questions) system provides a self-service knowledge base for both customers and staff, reducing support ticket volume and enabling faster issue resolution.

See also: `Support Tickets <support_tickets>` for ticket management, `Customer Care <customer_care>` for customer support features.

Overview

The FAQ system enables:

1. **Self-Service** — Customers find answers without creating tickets
2. **Knowledge Base** — Centralized repository of solutions
3. **Staff Resource** — Quick reference for support staff
4. **Continuous Improvement** — Track which FAQs are most helpful
5. **Multi-Category** — Organize FAQs by topic and tags
6. **Visibility Control** — Public vs internal FAQs
7. **Analytics** — View counts and helpfulness ratings

Key Features

FAQ Management

- **Create FAQs** — Write questions and detailed answers
- **Rich Content** — Markdown formatting, images, code blocks
- **Categorization** — Organize by category and tags
- **Visibility** — Control customer vs staff-only access
- **Search** — Full-text search across titles and content

- **Versioning** — Track changes and updates over time

Analytics

- **View Tracking** — Count how many times FAQ is viewed
- **Helpfulness** — Customers rate if FAQ was helpful
- **Popular FAQs** — Most viewed questions
- **Most Helpful** — Highest rated solutions
- **Low Performers** — FAQs marked as unhelpful (need improvement)

Organization

- **Categories** — Group related FAQs (Billing, Technical, Account, etc.)
- **Tags** — Multiple tags per FAQ for cross-categorization
- **Search** — Quick find by keyword
- **Filtering** — Filter by category, tags, visibility
- **Sorting** — By date, views, helpfulness, alphabetical

FAQ Structure

Required Fields

- **Question** — Clear, concise question (the FAQ title)
- **Answer** — Detailed response with step-by-step instructions
- **Category** — Primary categorization
- **Visibility** — Customer-visible or staff-only

Optional Fields

- **Tags** — Additional categorization keywords
- **Related FAQs** — Links to similar questions (future feature)
- **Attachments** — Screenshots, documents, videos (future feature)
- **Author** — Staff member who created FAQ
- **Last Updated** — When FAQ was last modified

Example FAQ

Question: How do I check my data usage?

Category: Account Management

Tags: data, usage, balance, self-care

Answer:

```
You can check your current data usage in several ways:

## Via Self-Care Portal

1. Log in to your account at portal.example.com
2. Go to **Services** tab
3. Click on your mobile service
4. View **Balance** section
5. Your data usage displays as "Data Used / Total Data"

## Via Mobile App

1. Open the mobile app
2. Tap **My Services**
3. Select your mobile line
4. Data usage shows on the overview screen

## Via SMS

Send **BAL** to 123456 to receive your current balance via SMS.

## Need Help?

If you can't see your usage, please contact support at
support@example.com
```

Visibility: Customer Visible

Viewing and Editing FAQs

When viewing an FAQ, all markdown formatting is rendered as rich HTML with proper styling for headers, lists, code blocks, and links.

Figure 1: FAQ detail view showing rendered markdown content with formatted headers, lists, and code blocks

The FAQ detail page provides:

- **Rendered Content** — Markdown automatically converted to formatted HTML
- **Statistics** — View count and helpfulness ratings
- **Edit Mode** — Inline editing with markdown support
- **Visibility Toggle** — Show/hide from customers
- **Quick Actions** — Copy link, delete FAQ

Customer View

Customers see a clean, formatted view of FAQs without edit capabilities:

Figure 2: Customer-facing FAQ view with helpfulness rating and clean formatting

Creating FAQs

Via Web UI

1. Navigate to **Support → FAQs**
2. Click **Create FAQ**
3. Fill in FAQ details:
    - Question (title)
    - Answer (content with markdown)
    - Category
    - Tags (comma-separated)

- Visibility (customer-visible checkbox)

4. Click **Create**

Via API

```
POST /crm/faq/
```

Required Permission: `create_faq`

Request:

```
{
  "question": "How do I reset my password?",
  "answer": "To reset your password:\n1. Go to login page\n2.
Click 'Forgot Password'\n3. Enter your email\n4. Check your inbox
for reset link\n5. Click link and set new password",
  "category": "Account",
  "tags": "password,login,account,reset",
  "is_visible_to_customer": true
}
```

Response:

```
{
  "faq_id": 42,
  "question": "How do I reset my password?",
  "answer": "To reset your password:\n1. Go to login page...",
  "category": "Account",
  "tags": "password,login,account,reset",
  "is_visible_to_customer": true,
  "view_count": 0,
  "helpful_count": 0,
  "not_helpful_count": 0,
  "created": "2026-01-07T10:00:00Z",
  "last_modified": "2026-01-07T10:00:00Z",
  "created_by_user": {
    "id": 1,
    "username": "admin",
    "first_name": "Admin",
    "last_name": "User"
  }
}
```


Editing FAQs

Updating Content

1. Open FAQ from list
2. Click **Edit**
3. Modify question, answer, or metadata
4. Click **Save**

Changes are tracked with:

- Last modified timestamp
- Last modified by user
- Change history (audit log)

Toggling Visibility

Control whether customers can see an FAQ:

1. Open FAQ
2. Click **Visibility** toggle
3. Choose:
   - **Visible to Customers** — Appears in customer portal
   - **Staff Only** — Only visible to support staff
4. Save changes

Use Cases for Staff-Only:

- Internal procedures and workflows
- Troubleshooting guides with sensitive info
- Draft FAQs awaiting approval
- Deprecated solutions kept for reference

FAQ Categories

Standard Categories

Organize FAQs into logical groups:

- **Account Management** — Login, passwords, profiles
- **Billing** — Invoices, payments, charges
- **Technical Support** — Service issues, troubleshooting
- **Features** — How to use specific features
- **Mobile Services** — SIM cards, data, roaming
- **Internet Services** — Connectivity, speeds, equipment
- **VoIP Services** — Calling, voicemail, features
- **IPTV Services** — Channels, streaming, devices

Creating Categories

Categories are created automatically when used in an FAQ. To standardize:

1. Use consistent category names
2. Follow naming conventions
3. Review category list periodically
4. Merge duplicate/similar categories

Category Management

View All Categories:

```
GET /crm/faq/categories
```

Returns list of all categories with FAQ counts.

Customer View:

```
GET /crm/faq/customer/categories
```

Returns only categories with visible FAQs.

Tags

Purpose

Tags provide cross-cutting organization:

- Single FAQ can have multiple tags
- Tags supplement category structure
- Enable flexible filtering and search
- Help customers find related content

Tag Examples

- **Technical:** troubleshooting, error, bug, fix, reset
- **Account:** login, password, profile, settings, security
- **Billing:** invoice, payment, charge, refund, dispute
- **Service:** activation, deactivation, upgrade, change
- **Platform:** mobile, web, app, portal, self-care

Best Practices

1. **Consistent Naming** — Use lowercase, singular form
2. **Specific Tags** — "password-reset" not just "password"
3. **Avoid Redundancy** — Don't duplicate category in tags
4. **Limit Count** — 3-5 tags per FAQ
5. **Standardize** — Maintain tag glossary

Customer FAQ Portal

Accessing FAQs

Customers access FAQs through:

1. **Self-Care Portal** — Dedicated FAQ section
2. **During Ticket Creation** — "Check these FAQs first" suggestions
3. **Search** — Global search includes FAQ content
4. **Email** — Links in automated responses

FAQ Display

Customer view shows:

- **Question** — FAQ title/question
- **Answer** — Full formatted content
- **Category** — For browsing related FAQs

- **Tags** — Additional navigation
- **Helpful Rating** — Thumbs up/down feedback
- **Related FAQs** — Similar questions (future)

Search and Filtering

Customers can:

- **Search** — Full-text search across all visible FAQs
- **Filter by Category** — View FAQs in specific category
- **Filter by Tag** — Find FAQs with specific tags
- **Sort** — By popularity, recency, or alphabetically
- **Browse** — Explore all FAQs or category listings

Rating FAQs

Customers provide feedback:

1. Read FAQ
2. Scroll to bottom
3. Click **Was this helpful?**
4. Select **Yes** or **No**
5. Rating recorded

Ratings help identify:

- **Helpful FAQs** — High yes votes
- **Needs Improvement** — High no votes
- **Outdated Content** — Declining helpfulness
- **Popular Topics** — High views + high ratings

Staff FAQ Tools

Internal FAQs

Staff-only FAQs for:

- **Procedures** — Internal workflows and processes
- **Troubleshooting** — Advanced diagnostic steps
- **Escalation** — When and how to escalate issues
- **Tools** — How to use internal systems
- **Policies** — Company policies and guidelines

Quick Reference

Staff can:

- **Search All FAQs** — Including staff-only content
- **View Analytics** — See which FAQs are most useful
- **Copy Links** — Share FAQ links with customers
- **Suggest Edits** — Propose improvements to FAQs
- **Create from Ticket** — Convert ticket resolution to FAQ

FAQ Analytics

Track FAQ performance:

View Count:

- Total views per FAQ
- Views over time
- Most popular FAQs
- Trending FAQs (sudden spikes)

Helpfulness:

- Helpful votes (thumbs up)

- Not helpful votes (thumbs down)
- Helpfulness ratio
- Most/least helpful FAQs

API Endpoints:

```
GET /crm/faq/popular?limit=10
GET /crm/faq/helpful?limit=10
```

Continuous Improvement

Use analytics to:

1. **Identify Gaps** — Common searches with no results
2. **Update Content** — Improve low-rated FAQs
3. **Retire Outdated** — Remove or update obsolete FAQs
4. **Promote Best** — Feature highly-rated FAQs
5. **Create New** — Add FAQs for recurring tickets

Markdown Formatting

FAQ answers support markdown for rich formatting:

Text Formatting

```
**Bold text** for emphasis
*Italic text* for subtle emphasis
~~Strikethrough~~ for deprecated info
`inline code` for technical terms
```

Headers

```
## Section Header
### Subsection Header
#### Minor Heading
```

Lists

```
Ordered List:
1. First step
2. Second step
3. Third step

Unordered List:
- Point one
- Point two
- Point three
```

Links

```
[Link text](https://example.com)
[Email support](mailto:support@example.com)
```

Code Blocks

````
```bash
command --with-flags
```

```json
{
  "example": "data"
}
```
````

Images

```
<!-- ![Alt text](./image-url.png) -->
```

Tables

```
| Column 1 | Column 2 |
|----------|----------|
| Data 1   | Data 2   |
```

Blockquotes

```
> Important note or tip
> Continues on multiple lines
```

API Reference

Get All FAQs (Staff)

```
GET /crm/faq/
```

Required Permission: `view_faq`

Query Parameters:

- `page` — Page number (default: 1)
- `per_page` — Results per page (default: 20)
- `sort` — Sort field (created, view_count, helpful_count)
- `order` — Sort order (asc, desc)
- `search` — Search query
- `category` — Filter by category
- `tags` — Filter by tags (comma-separated)

- `is_visible_to_customer` — Filter by visibility (true/false)

Get Customer FAQs

```
GET /crm/faq/customer
```

Authentication Required: Yes **Permission:** Any authenticated user

Returns only customer-visible FAQs.

Get Single FAQ

```
GET /crm/faq/faq_id/{faq_id}
```

Staff View: Does not increment view count

```
GET /crm/faq/customer/faq_id/{faq_id}
```

Customer View: Increments view count

Update FAQ

```
PATCH /crm/faq/faq_id/{faq_id}
```

Required Permission: `update_faq`

Delete FAQ

```
DELETE /crm/faq/faq_id/{faq_id}
```

Required Permission: `delete_faq`

Performs soft delete (marks as deleted, preserves data).

Toggle Visibility

```
POST /crm/faq/faq_id/{faq_id}/visibility
```

Required Permission: `manage_faq_visibility`

Request:

```
{
  "is_visible_to_customer": true
}
```

Mark FAQ Helpful

```
POST /crm/faq/faq_id/{faq_id}/helpful
```

Authentication Required: Yes **Permission:** Any authenticated user

Request:

```
{
  "is_helpful": true
}
```

Get Popular FAQs

```
GET /crm/faq/popular?limit=10
```

Returns FAQs sorted by view count.

Get Most Helpful FAQs

```
GET /crm/faq/helpful?limit=10
```

Returns FAQs sorted by helpful count.

Best Practices

Content Writing

1. **Clear Questions** — Use natural language customers would use
2. **Complete Answers** — Include all steps, no assumptions
3. **Screenshots** — Add visual aids for complex procedures
4. **Links** — Reference related FAQs and resources
5. **Testing** — Verify instructions are accurate

Organization

1. **Consistent Categories** — Use standardized category names
2. **Specific Tags** — Use descriptive, searchable tags
3. **Avoid Duplication** — Merge similar FAQs
4. **Cross-Reference** — Link related FAQs together
5. **Regular Review** — Update outdated content quarterly

Maintenance

1. **Monitor Analytics** — Track views and helpfulness
2. **Update Regularly** — Keep content current
3. **Retire Old FAQs** — Remove obsolete information
4. **Incorporate Feedback** — Improve based on ratings
5. **Create from Tickets** — Turn common issues into FAQs

Troubleshooting

Issue: FAQ not appearing for customers

- Solution: Check "Visible to Customers" setting is enabled

- Solution: Verify FAQ is not marked as deleted
- Solution: Clear customer portal cache

Issue: Search not finding FAQ

- Solution: Check spelling and try different keywords
- Solution: Verify FAQ is in correct category
- Solution: Add more relevant tags to FAQ

Issue: Analytics not updating

- Solution: Wait for cache refresh (may take a few minutes)
- Solution: Check view tracking is enabled
- Solution: Verify customer is authenticated when viewing

Issue: Cannot edit FAQ

- Solution: Verify you have `update_faq` permission
- Solution: Check FAQ is not locked by another user
- Solution: Confirm FAQ exists and is not deleted

Support Ticket System

The OmniCRM Support Ticket System provides a comprehensive platform for managing customer support requests, tracking issues, and maintaining detailed communication history with customers.

See also: `FAQs <support_faqs>` for self-service knowledge base, `Customer Care <customer_care>` for impersonation and troubleshooting, `Customers <basics_customers>` for customer management.

Figure 1: Support tickets list showing all tickets with filtering, search, status, priority, and assigned staff

Overview

The ticket system enables:

1. **Centralized Support** — Track all customer issues in one place
2. **Email Integration** — Automatically create tickets from customer emails
3. **Collaboration** — Multiple staff can work on tickets together
4. **Knowledge Base** — Link FAQs to common issues for faster resolution

5. **SLA Tracking** — Monitor ticket age and response times
6. **Customer Portal** — Customers can view and respond to their tickets
7. **Audit Trail** — Complete history of all ticket interactions

Key Features

Ticket Management

- **Create Tickets** — Manual creation or automatic from email
- **Update Tickets** — Add comments, change status, reassign
- **Attachments** — Upload files (images, documents, logs)
- **Tags** — Categorize tickets for reporting and filtering
- **Search** — Full-text search across tickets, updates, and attachments
- **Filtering** — Filter by status, priority, assignee, customer, service
- **Real-Time Views** — Track who is currently viewing each ticket
- **Last Activity** — See when tickets were last viewed or updated

Communication

- **Email Notifications** — Automatic notifications on ticket updates
- **In-App Notifications** — Real-time notifications in the OmniCRM interface
- **@Mentions** — Mention staff members with @username to notify them
- **Subscribers** — Add staff and contacts to ticket notifications
- **Customer Visibility** — Control which updates customers can see
- **Internal Notes** — Add private notes not visible to customers
- **Email Threading** — Automatic email thread tracking
- **Active Viewers** — See who is currently viewing the ticket in real-time

Service Integration

- **Link to Services** — Associate tickets with specific customer services
- **Service Context** — View service details, usage, and history from ticket
- **Quick Actions** — Top-up, view addons, edit service directly from ticket

Ticket Lifecycle

1. Ticket Creation

Via Web UI:

1. Navigate to **Support → Tickets**
2. Click **Create Ticket**
3. Fill in ticket details:
    - Title (required)
    - Description (required)
    - Customer (optional, can be assigned later)
    - Service (optional, links to specific customer service)
    - Priority (Low, Medium, High, Urgent)
    - Status (Open, In Progress, On Hold, Resolved, Closed)
    - Tags (for categorization)
4. Click **Create**

Via Email:

Customers can create tickets by emailing your support address. The system automatically:

- Creates a ticket from the email subject and body
- Links to customer if sender email matches a contact
- Adds email attachments to the ticket
- Sends confirmation to customer

Via API:

```
POST /crm/ticket/
```

Request:

```
{
  "title": "Cannot access voicemail",
  "description": "Customer reports voicemail not working since
yesterday",
  "customer_id": 290,
  "service_id": 167,
  "priority": "High",
  "status": "Open",
  "tags": "technical,voicemail"
}
```

2. Ticket Assignment

Tickets can be assigned to support staff for handling:

1. **Manual Assignment** — Click "Assign" and select staff member
2. **Auto-Assignment** — Automatically assign based on rules (future feature)
3. **Reassignment** — Transfer tickets between staff members
4. **Unassigned** — Tickets can remain unassigned in queue

When a ticket is assigned:

- Assigned staff receives email notification
- Staff is automatically subscribed to ticket updates
- Ticket appears in their "My Tickets" view

3. Working on Tickets

Adding Updates:

1. Open the ticket
2. Click **Add Update** or reply to the ticket
3. Enter your message
4. Use **@username** to mention and notify specific staff members (e.g., "@john can you help with this?")
5. Choose visibility:
    - **Customer Visible** — Customer will see this update

    - **Internal Only** — Private note for staff
6. Click **Submit**

@Mentions:

When you mention a staff member using @username in a ticket update:

- They receive an in-app notification
- They are automatically subscribed to the ticket
- The notification includes a link directly to the ticket
- Works in both customer-visible and internal updates

Attaching Files:

1. Click **Attach Files** button
2. Select files (max 10MB each)
3. Files are uploaded and linked to ticket
4. Supported formats: PDF, images, documents, archives

Changing Status:

- **Open** — New ticket, awaiting initial response
- **In Progress** — Staff is actively working on the issue
- **On Hold** — Waiting for customer response or external dependency
- **Resolved** — Issue has been fixed, awaiting confirmation
- **Closed** — Ticket is complete and archived

Setting Priority:

- **Urgent** — Critical issue affecting service (SLA: 1 hour)
- **High** — Important issue, service degraded (SLA: 4 hours)
- **Medium** — Standard issue (SLA: 24 hours)
- **Low** — Minor issue or inquiry (SLA: 48 hours)

4. Ticket Resolution

When resolving a ticket:

1. Add final update explaining resolution
2. Change status to **Resolved**
3. Customer receives notification
4. Customer can reopen if issue persists
5. After confirmation, change to **Closed**

Ticket Details View

When viewing a ticket, you see the complete conversation thread with all updates, attachments, and a comprehensive sidebar showing customer and service information.

Figure 2: Ticket detail page showing the conversation thread, updates, and ticket metadata

Ticket Details Sidebar

Each ticket displays a comprehensive sidebar with customer information, service details, and quick actions:

Figure 3: Ticket sidebar with customer info, service details, assigned staff, and quick action buttons

The sidebar includes:

Customer Information

- **Customer Name** — With link to customer profile
- **Contact Email** — Primary email where responses are sent
- **Edit Customer** — Quick edit customer assignment

Service Information

When a service is linked:

- **Service ID** — Unique identifier
- **Service Name** — Descriptive name
- **Service Dates** — Start and end dates
- **Auto-Renew** — Renewal status

- **Service Status** — Active, Inactive, Suspended
- **Service Type** — Mobile, IPTV, Internet, VoIP
- **Quick Actions:**
  - **Add On** — Add packages/features to service
  - **Delete** — Remove service (with confirmation)
  - **Edit Service** — Full service management modal

Ticket Metadata

- **Ticket Number** — Unique reference (e.g., TKT-2026-00042)
- **Created Date** — When ticket was opened
- **Last Updated** — Most recent activity timestamp
- **Assigned To** — Current owner of ticket
- **Priority Level** — With color coding
- **Current Status** — With status badge
- **Tags** — Categorization labels

Subscribers

List of users and contacts receiving notifications:

- **Auto-subscribed** — Creator and assignee
- **Manual subscriptions** — Other staff or contacts
- **Add/Remove** — Manage subscriber list

Email Integration

Inbound Email Processing

The system processes incoming support emails:

1. **Email Received** — Email arrives at support address
2. **Parse Email** — Extract sender, subject, body, attachments
3. **Identify Customer** — Match sender email to contact

4. **Create or Update** — Create new ticket or add to existing thread
5. **Notify Staff** — Alert assigned staff or team
6. **Send Confirmation** — Confirm receipt to customer

Email Headers Used:

- `From` — Customer email address
- `Subject` — Ticket title (with ticket number if reply)
- `In-Reply-To` — Thread tracking for responses
- `Message-ID` — Unique message identifier

Outbound Notifications

Staff updates trigger email notifications to:

- **Customer** — If update is marked customer-visible
- **Subscribers** — All subscribed staff and contacts
- **Assignee** — When ticket is assigned or reassigned

Email Template Variables:

- `{{ticket_number}}` — Ticket reference
- `{{customer_name}}` — Customer name
- `{{update_text}}` — Update content
- `{{staff_name}}` — Name of staff who added update
- `{{ticket_url}}` — Direct link to ticket

Customer Portal Access

Customers can view their tickets through the self-care portal:

1. **Login** — Authenticate to customer portal
2. **Navigate** — Go to "Support" or "My Tickets"
3. **View Tickets** — See all their tickets and status
4. **View Details** — Read full ticket history (customer-visible updates only)
5. **Reply** — Add responses to open tickets

6. **Attachments** — View and download attachments
7. **Status** — See current ticket status and priority

Customer View Restrictions:

- Customers only see their own tickets
- Internal-only updates are hidden
- Staff-only attachments are not accessible
- System changes (assignments, status) are summarized

Subscribers and Notifications

Auto-Subscription

Automatically subscribed when:

- **Creating a ticket** — Ticket creator
- **Assigned to ticket** — Current assignee
- **Mentioned** — Staff @mentioned in updates using @username syntax

Manual Subscription

Add subscribers:

1. Open ticket
2. Click **Subscribers** section
3. Click **Add Subscriber**
4. Select user or contact
5. Click **Add**

Remove subscribers:

1. Click X next to subscriber name
2. Confirm removal
3. They will no longer receive notifications

Notification Preferences

Staff receive notifications through multiple channels:

- **In-App Notifications** — Real-time notifications in the notification dropdown
- **Email Notifications** — Configurable email notifications for ticket updates
- **@Mention Notifications** — Immediate alerts when mentioned in ticket updates
- **Frequency** — Immediate, hourly digest, daily digest
- **Types** — Which events trigger notifications (new tickets, updates, assignments, mentions)

Searching and Filtering

Quick Search

Global search bar searches:

- Ticket titles and descriptions
- Ticket numbers
- Customer names
- Update content
- Attachment names

Advanced Filtering

Filter tickets by:

- **Status** — Open, In Progress, Resolved, etc.
- **Priority** — Urgent, High, Medium, Low
- **Assigned To** — Specific staff member or unassigned
- **Customer** — Specific customer
- **Service** — Specific service
- **Tags** — One or more tags

- **Date Range** — Created or updated within dates
- **Has Attachments** — Tickets with/without files

Saved Filters

Create and save custom filter combinations:

1. **Apply Filters** — Set your desired filters
2. **Save Filter** — Click "Save Filter" button
3. **Name Filter** — Give it a descriptive name
4. **Quick Access** — Appears in filter dropdown

Common Saved Filters:

- "My Open Tickets" — Assigned to me, status Open or In Progress
- "Urgent Queue" — Priority Urgent, status Open
- "Needs Response" — Status On Hold, awaiting customer
- "Recently Closed" — Closed in last 7 days

Reporting and Analytics

Ticket Metrics

Track support performance:

- **Total Tickets** — Created, resolved, closed
- **Average Resolution Time** — Time to resolve by priority
- **First Response Time** — Time to first staff update
- **Tickets by Status** — Distribution across statuses
- **Tickets by Priority** — Urgent vs High vs Medium vs Low
- **Tickets by Staff** — Workload per staff member
- **Tickets by Tag** — Common issue categories

SLA Compliance

Monitor service level agreement adherence:

- **Within SLA** — Tickets resolved within target
- **SLA Breached** — Tickets exceeding target times
- **At Risk** — Tickets approaching SLA deadline
- **Average Response** — Actual vs target response times

Customer Insights

Analyze customer support patterns:

- **Top Ticket Creators** — Customers with most tickets
- **Repeat Issues** — Customers with recurring problems
- **Service-Related** — Tickets by service type
- **Resolution Success** — First-contact resolution rate

Integration with Services

Linking Services to Tickets

When a ticket relates to a specific service:

1. **Select Service** — Choose from customer's services
2. **Service Context** — View service details in sidebar
3. **Quick Actions** — Manage service from ticket
4. **Service History** — See related tickets and changes

Service Quick Actions

From ticket sidebar:

Add Ons:

1. Click **Add On** button

2. Addons modal opens
3. Select packages to add
4. Confirm and apply
5. Service updated automatically

Delete Service:

1. Click **Delete** button
2. Confirmation dialog appears
3. Confirm deletion
4. Service is removed
5. Ticket updated with action

Edit Service:

1. Click **Edit Service** button
2. Full service modal opens
3. Make changes to service configuration
4. Save changes
5. Return to ticket

Best Practices

Ticket Creation

1. **Descriptive Titles** — Clear, concise summary of issue
2. **Detailed Description** — Include all relevant information
3. **Correct Priority** — Set based on actual impact
4. **Link Service** — Always link to affected service if applicable
5. **Add Tags** — Use consistent tags for categorization

Ticket Management

1. **Timely Updates** — Update tickets regularly, even if "no progress"
2. **Status Accuracy** — Keep status current (don't leave resolved tickets open)

3. **Customer Communication** — Keep customers informed of progress
4. **Internal Notes** — Document troubleshooting steps internally
5. **Resolution Documentation** — Clearly state what fixed the issue

Knowledge Transfer

1. **Link FAQs** — Reference or create FAQs for common issues
2. **Document Solutions** — Add resolution details for future reference
3. **Tag Appropriately** — Makes finding similar tickets easier
4. **Share Learnings** — Discuss complex resolutions with team

Customer Experience

1. **First Contact** — Respond quickly to acknowledge receipt
2. **Set Expectations** — Tell customer when to expect resolution
3. **Professional Tone** — Maintain courtesy and professionalism
4. **Clear Language** — Avoid technical jargon with customers
5. **Confirm Resolution** — Ensure customer satisfied before closing

Notification System Integration:

- Added in-app notification support for ticket events
- @mention functionality to notify specific staff members
- Integration with Notification API for external systems
- Real-time notification delivery

Real-Time Collaboration:

- Active viewer tracking - see who is currently viewing each ticket
- Last activity timestamps for tickets
- Real-time updates when multiple users work on same ticket

Enhanced Communication:

- @mentions automatically subscribe mentioned users
- Improved notification preferences with multiple channels

- Better integration between email and in-app notifications

See also: `Notification API <integrations_notifications>` for details on sending notifications from external systems.

API Reference

Create Ticket

```
POST /crm/ticket/
```

Required Permission: `create_ticket`

Get Ticket

```
GET /crm/ticket/ticket_id/{ticket_id}
```

Required Permission: `view_ticket`

Update Ticket

```
PATCH /crm/ticket/ticket_id/{ticket_id}
```

Required Permission: `update_ticket`

Delete Ticket

```
DELETE /crm/ticket/ticket_id/{ticket_id}
```

Required Permission: `delete_ticket`

Add Ticket Update

```
POST /crm/ticket/ticket_id/{ticket_id}/updates
```

Upload Attachment

```
POST /crm/ticket/ticket_id/{ticket_id}/attachments
```

Required Permission: `upload_attachment`

Subscribe to Ticket

```
POST /crm/ticket/ticket_id/{ticket_id}/subscribe
```

Required Permission: `subscribe_ticket`

Troubleshooting

Issue: Emails not creating tickets

- Solution: Check email integration configuration
- Solution: Verify sender email matches a customer contact
- Solution: Review email processing logs

Issue: Customer not receiving notifications

- Solution: Verify contact email is correct
- Solution: Check update is marked "customer visible"
- Solution: Confirm email not blocked/spam

Issue: Cannot upload attachments

- Solution: Check file size (max 10MB)
- Solution: Verify file type is allowed

- Solution: Check uploads directory permissions

Issue: Service quick actions not working

- Solution: Verify service is properly linked to ticket
- Solution: Check user has required service permissions
- Solution: Confirm service data loaded successfully