

Amdocs SaaS Bill Experience 23.09.01.00 - Document Designer Dashboard User Guide

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Introduction

Amdocs SaaS Bill Experience is a cloud-based product that provides capabilities to create templates for customer documents, such as contracts and letters. Using the Document Designer application, users can design, update, and delete templates as per the requirements.

This document describes how to use the Document Designer dashboard.

Scope

This document explains how to use the Document Designer to design the content and appearance of your customer documents.

Feedback

Amdocs welcomes feedback on documentation. Report any errors or omissions to [Amdocs Product Support](#).

Document Designer Overview

Document Designs is an online tool that enables users to define templates for customer documents (such as letters or contracts) and manage them.

The dashboard provides an easy WYSIWYG editor to design the documents in many ways. Some examples of the design elements that you can use in the documents are:

- The service provider's logo, which you can upload as an image file to the document.
- The font and topology, which you can apply to the text in the entire document or part of the document.
- The variables that you can insert and manage for multiple customers.
- The personalized messages in the documents, for example, including a customer name with a greeting or promotional message.

Accessing Document Designer Dashboard

Users at service providers are given access to the Amdocs SaaS Bill Experience application UI when a user account is created for them. The access to different functionalities in UI is given based on user's business role.

User role-based access rights are as follow:

- Admin can access all the functionalities such as design, approve, publish, or delete the documents.
- Designer can design the documents but cannot publish or delete.
- Guest can only view the documents but cannot edit, publish, or delete.

To access the Document Designer dashboard:

- Browse to the Amdocs SaaS Bill Experience application URL.
 - If you are already logged in to your company SSO, the Document Designer dashboard is displayed as the home page or one of the tabs along with other tabs, depending on the implementation of the products in your company.
 - If you are not logged in to your company SSO, a sign-in screen is displayed.
 - a. In the sign-in screen, enter your username and password.
 - b. Click **Sign in**.

The Document Designer dashboard is displayed as the home page or one of the tabs along with other tabs, depending on the implementation of the products in your company.

The screenshot displays the Document Designer dashboard interface. At the top, there is a dark header with the Amdocs logo and the text "Document Designs". Below the header, there is a navigation bar with a button labeled "+ Design a new document" and a dropdown menu labeled "All documents" with a search input field. The main content area shows a list of documents, each represented by a card. The cards contain the following information:

- Document 1: "Welcome_Letter" with ID "t-1001" and description "test".
- Document 2: "designName-2" with description "testDescription".
- Document 3: "designName-1" with description "testDescription".
- Document 4: "Welcome_Letter" with ID "example2" and description "Sample document.".
- Document 5: "Business_Contract" with ID "example" and description "This is a sample document".

Each document card has a three-dot menu icon and a dropdown arrow on the right side.

Viewing Document Details

Using the Document Designer dashboard, users can view the list of documents (letters and templates) and their details such as versions and statuses.

The home page of the Document Designer dashboard lists the available documents, with their names and descriptions.

The screenshot shows the 'Document Designs' dashboard. At the top left is a logo and the text 'Document Designs'. Below this is a navigation bar with a button '+ Design a new document', a dropdown menu 'All documents', and a search box. The main area displays a list of five document cards. Each card shows a document name, a unique ID, and a description, with a three-dot menu and a downward arrow on the right.

Document Name	ID	Description
Welcome_Letter	t-1001	test
designName-2		testDescription
designName-1		testDescription
Welcome_Letter	example2	Sample document.
Business_Contract	example	This is a sample document

You can view the further details of an existing document, including its versions and their statuses.

To view the details of a document:

- Click the Down arrow next to the name of the document.

This close-up shows the 'example2' document card. The three-dot menu and the downward arrow are highlighted with a red square, indicating the action to click.

All existing versions of the document are listed.

The screenshot shows the details for the 'example2' document. It includes a table of versions and an 'Add new version' button.

Name	Status	Last updated
example2_v1	Draft	Oct 17, 2022 by bbadmin

Buttons: '+ Add new version' and a three-dot menu.


The following details of the document are provided:

- Name of the document version. This can be sorted in alphabetical order.
- Status of the document version. A document can have any of the following statuses:
 - *Draft* – The document design that is created and saved, but not published. Designs in the Draft status can be changed.
 - *Unpublished* – The document design that was earlier published. When another version of the document design is published, the status of the earlier published version changes to Unpublished. Designs in the Unpublished status can be changed.
 - *Published* – The document design that is published. Designs in the Published status cannot be changed.

Note

Only one design in the entire list of document versions can be in the Published status.

The column can be sorted in alphabetical order.

- Last updated date and time with the name of the user who updated this document version. This field can be sorted in alphabetical order.
- The Add new version button to a new version of the document (see Designing Documents).
- The **Ellipsis** icon  to perform additional tasks for a document version (see Designing Documents).

Tip

For more information on designing documents, you can click on **Download Guide** button on the right side of the dashboard.

Designing Documents

Designing Documents

Users can design a new document with a unique name and its description. Each document must belong to a document type that is pre-configured during the implementation of the product. The document type can be a contract, welcome letter, new offer letter, apology letter, collection letter, information letter, finance receipt letter, and so on.

The system automatically generates a revision in the Draft status when a new document design is created. The revision includes the revision name and its status.

The Document Designer dashboard enables you to edit, duplicate, or delete a document design.

- Only the document designs with the Draft and Unpublished statuses can be changed.
- Only the document designs with the Published status can be downloaded.
- Document designs with the Draft, Unpublished, and Published statuses can be duplicated.

Designing a New Document

To design a new document:

1. In the home page of the Document Designer dashboard, click **Design a new document**.

The screenshot shows the Document Designer dashboard. At the top left, there is a dark navigation bar with the 'a' logo and 'Document Designs' text. A green profile icon is in the top right. Below the navigation bar, a red box highlights a button labeled '+ Design a new document'. To the right of this button are two input fields: 'All documents' (a dropdown menu) and 'Search'. On the right side of the dashboard, there is a pink promotional card titled 'How to connect your billing data?' with a sub-heading 'Map your customers billing data with our Java based SDK' and a 'Learn More' button. The main content area displays a list of document templates, each with a title, a preview, and a three-dot menu icon. The templates shown are: 'Billing_Letter' with '123' as a preview; 'Billing_Letter' with 'document_example' as a preview and 'This is a sample template.' as a description; 'do sint ipsum' with 'nostrud_2' as a preview and 'minim pariatur esse' as a description; 'Billing_Letter' with 'example1' as a preview and 'This is a sample document.' as a description; and 'Accounts_Receivable_Letter' with 'test123' as a preview.

The Create your document window is displayed.

The 'Create your document' window is displayed on a dark blue background. It features a close button (X) in the top right corner. The form contains the following fields:

- Name:** A text input field with the placeholder text 'Name your design'.
- Description:** A text area with the placeholder text 'Describe your design' and a character count '0 / 300' at the bottom right.
- Document type:** A dropdown menu with the placeholder text 'Select document type'.
- Locale:** A dropdown menu with the placeholder text 'Select locale'.
- Page size:** A dropdown menu with the placeholder text 'Select page size'.

2. In the Name box, type the name of the document.

Note

The name must be in lower case.

3. In the Description box, type the description of the document.

4. In the Document type list, select the type of the document from the list of pre-configured document types.

5. In the Locale list, select the language in which you need to design the document.

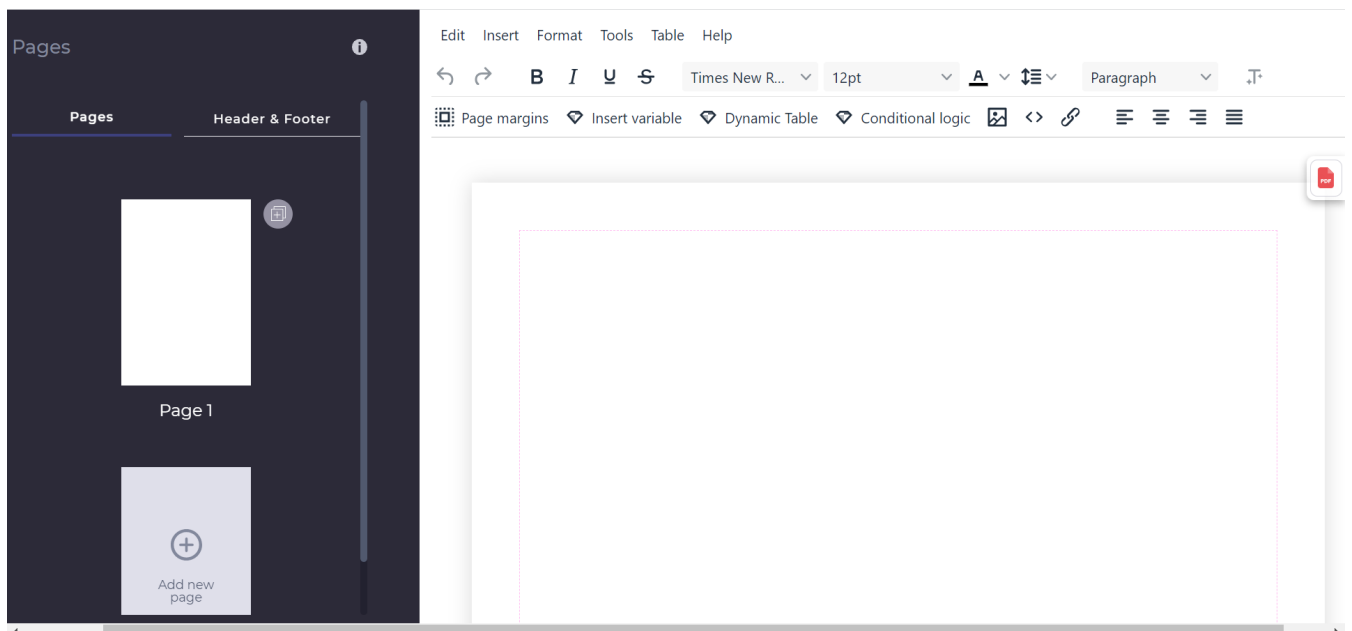
Note

You cannot change the locale of the document later.

6. In the Paper size list, select the size for the document from the list of pre-configured paper sizes.

7. Click **Get Started**.

The initial draft of the document is created and the document is open in the WYSIWYG editor.

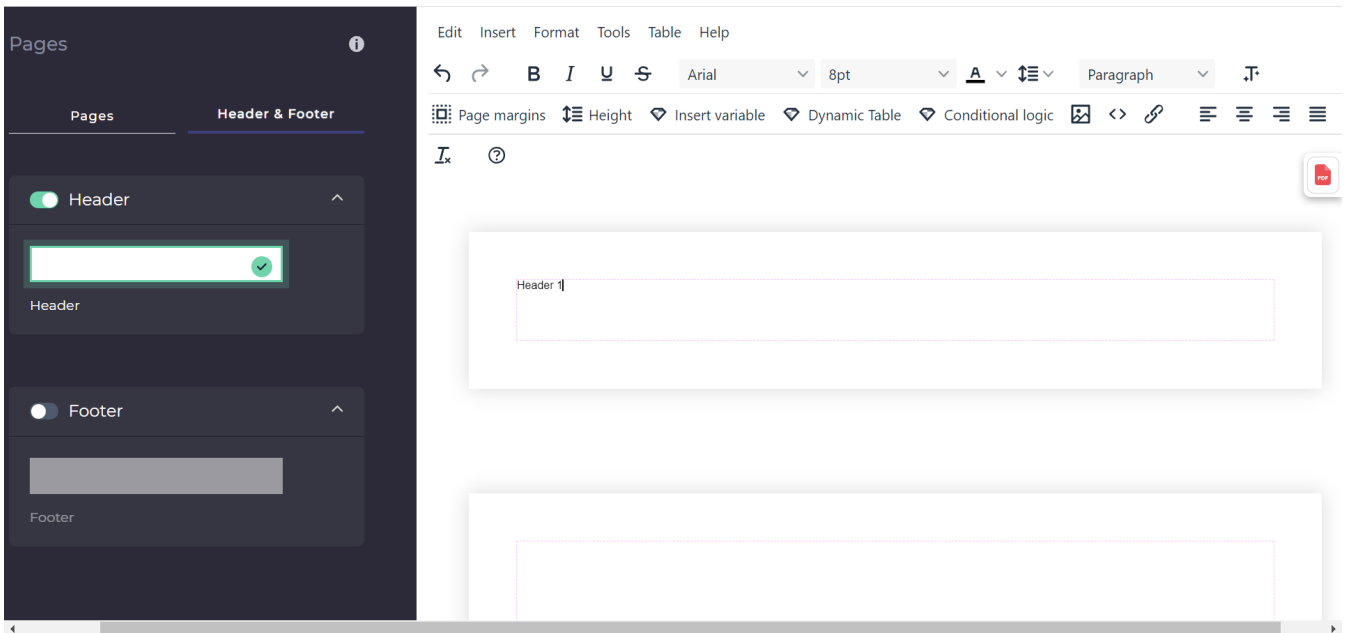


8. In the left panel, click in the document and make changes as required.

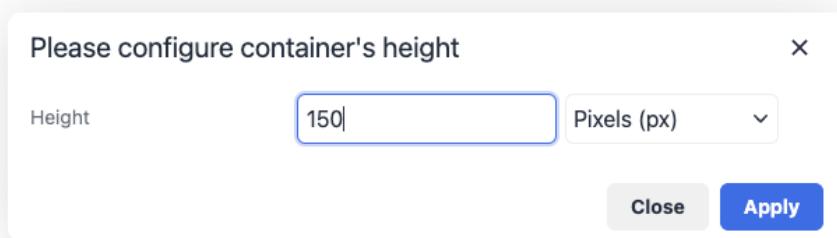
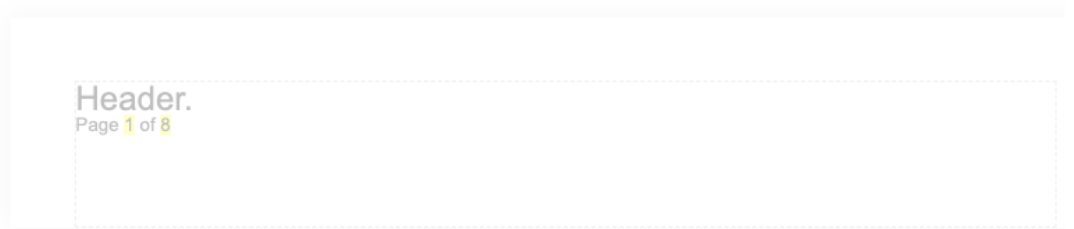
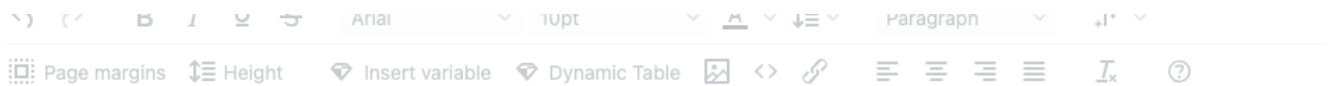
9. Select the layout for the page using the left panel.

10. Duplicate an existing page or add a new page.

11. In the left panel, click Header and Footer tab to configure the header and footer.



12. Click the radio button to enable or disable Header and Footer.
13. Enter content in the header and footer section in the text editor.
14. Click **Height** in the menu to configure the height of the header and footer.



15. Click **Page Margins** to configure margins of the page.
16. Using the menu tool bar, you can:

- Add fixed text and define its format using different font type, font size, font styles (such as bold, italics, and underline), color, and alignment.
- Insert a fixed hyperlink (URL).
- Insert special characters.
- Include lists (bulleted or numbered).
- Insert static images.
- Apply a background color.

- Include static tables with a fixed number of rows and columns.
- Insert dynamic tables and select the following information to display:
 - Collection
 - Columns
 - Header availability
- Insert variables of string, number, currency, and date types.

Note

Variables to be included for a specific document type are pre-configured.

Locale formatting of variables work providing the variable type and variable output are correctly configured.

A date variable or number is formatted based on the selected locale.

Example

The number "1234.56" in English is formatted as "1,234.56", but in Spanish it is formatted as "1.2345,00".

You can define the format for the variable using different font type, font size, font styles (such as bold, italics, and underline), color, and alignment.

- Insert **Conditional Logic**.

In conditional logic, you can configure dynamic rules which can be applied on multiple content blocks in a document template. The output of the document shows only the content that is relevant to the customer.

You can insert conditional logic in header and footer of the document as well. Conditional logic content block can contain text, links, and images.

Example

To create a bill template that can be used for customers across the USA, and UK. These customers have different addresses and country codes.

Configure conditional logic to show content based on customer's country codes, perform following steps:

Please setup conditional logic ✕

Rule name	conditional-logic-lmhklwj7		
Height	100	Pixels (px)	▼
Logic operator	Country Code ▼	equals ▼	
	United States	USA	🗑️
	United Kingdom	UK	🗑️
	Add		
Fallback condition	Others		🗑️

Cancel
Save

- a. Enter the Rule name.
- b. Enter the Height of the content block.
- c. Select Logic Operator as country code.
- d. Enter United States of America in Label field and US in Code field.
- e. Enter United Kingdom in Label field and UK in Code field.
- f. In **Add Fallback Condition** field, you can add a label for content block. The information entered in this content block is displayed when none of the condition is met.
- g. Click Save, conditional logic is applied to the content blocks.
- h. Select Label of the content blocks and enter the required content.

Please setup conditional logic ✕

Rule name

Height Pixels (px) ▼

Logic operator Country Code ▼ equals ▼

United States	USA	🗑️
United Kingdom	UK	🗑️

Add

Fallback condition 🗑️

Cancel
Save

i. To test the output, click PDF icon.

j. Click Edit and Test PDF.

k. Select country code in list of variables.

l. Enter country code for which you want to generate bills.

m. Click Generate PDF.

The bill generated for customers of USA have a block of relevant information. Based on country code of the customer, only specific information is displayed in the bill.

17. You can share your design with other users using the **Share** button and copying the link and sending it to other users.

18. After you have designed the document, save the document:


- To save the document design and continue making changes, click the **Save** icon .

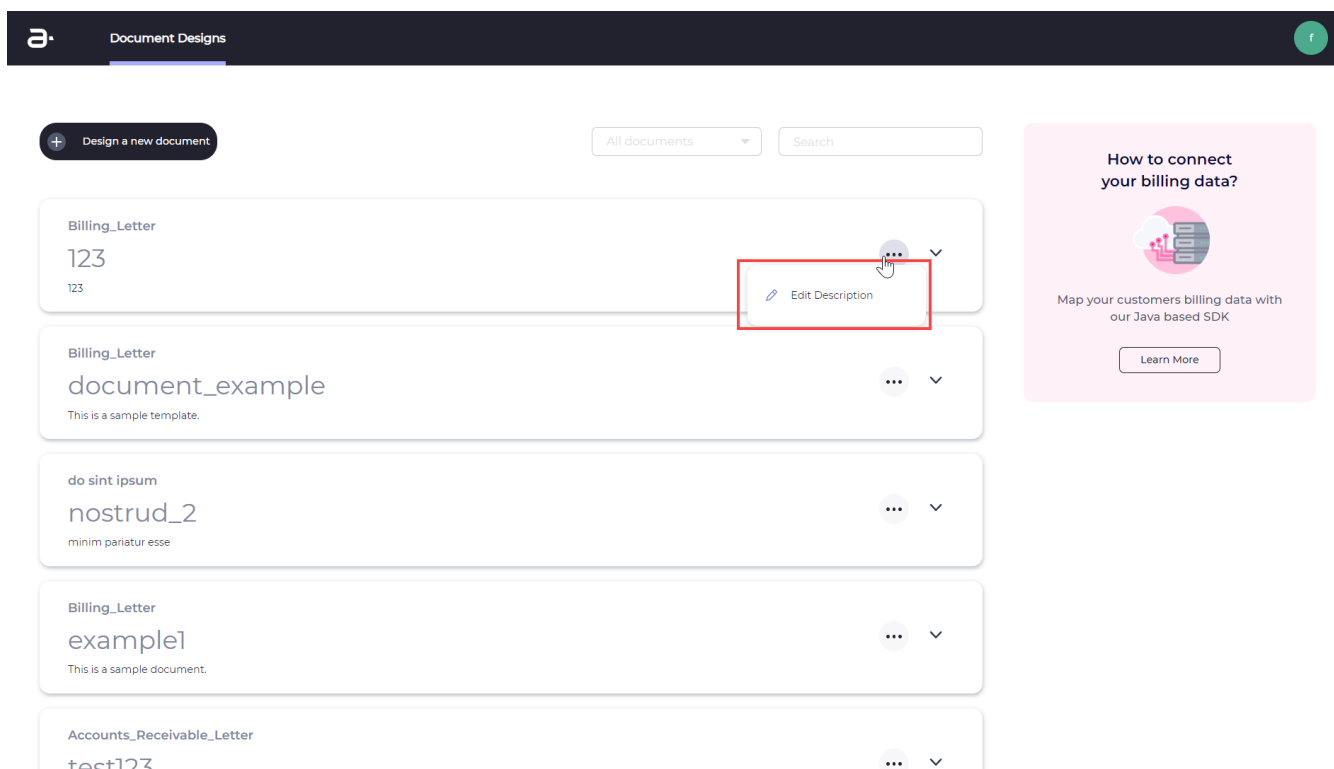
- To save the changes in the document design and close it, click the **Save & exit** icon .

The Document Designer dashboard is displayed, showing your new document design in the list. The status of the design is Draft.

Editing Document Descriptions

To edit the description of a document:

1. In the home page of the Document Designer dashboard, click the **Ellipsis** icon  in the row of the document whose description you want to change.
2. Click **Edit Description**.



The Edit description window is displayed.

3. In the text box, enter the new description for the document.
 4. Click **Save**.
- The Document Designer dashboard is displayed, showing the new description of the document.

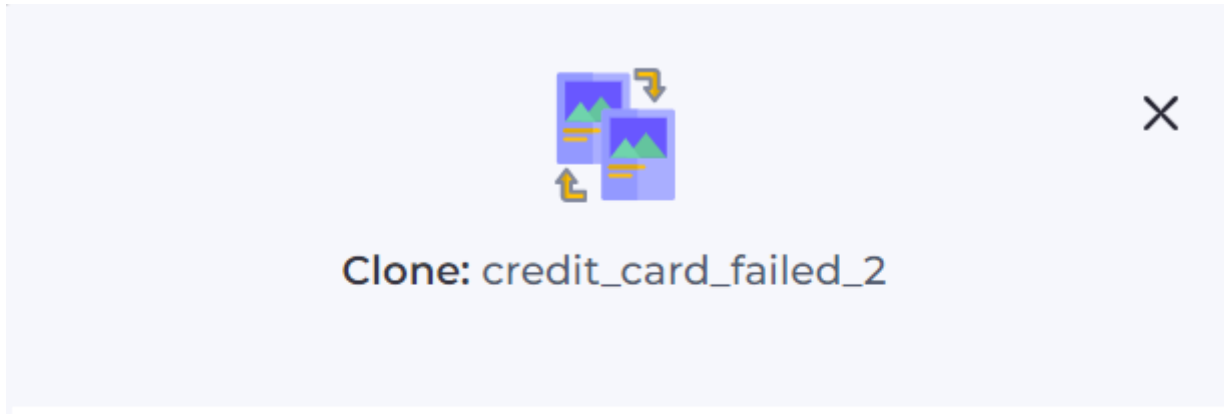
Using a Revision to Create a New Document

You can create a new document that is based on a revision of another document.

For example, after working on a particular document, making changes, and creating new revisions of the same document, you can then create a new document based on the last revision.

To do so:

1. In the home page of the Document Designer dashboard, click the Down arrow in the row of the document whose revision you want to copy.
2. Click the **Ellipsis** icon at the end of the row of the document revision that you want to base your document on and then click **Copy to New Document**.



* Name:

* Description:

9 / 300

* Revision Name:

Clone


No thanks

3. In the Name box, enter the name of the new document.
4. In the Description enter the description of the document.
5. Click **Clone**.

Adding a Document Version

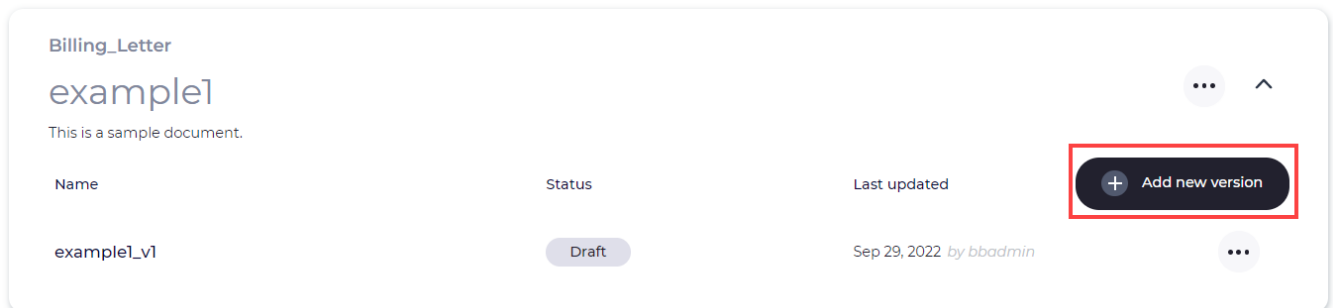
You can create a new version of an existing document.

To do so:

1. In the home page of the Document Designer dashboard, click the Down arrow  in the row of the document for which you want to add a new version.

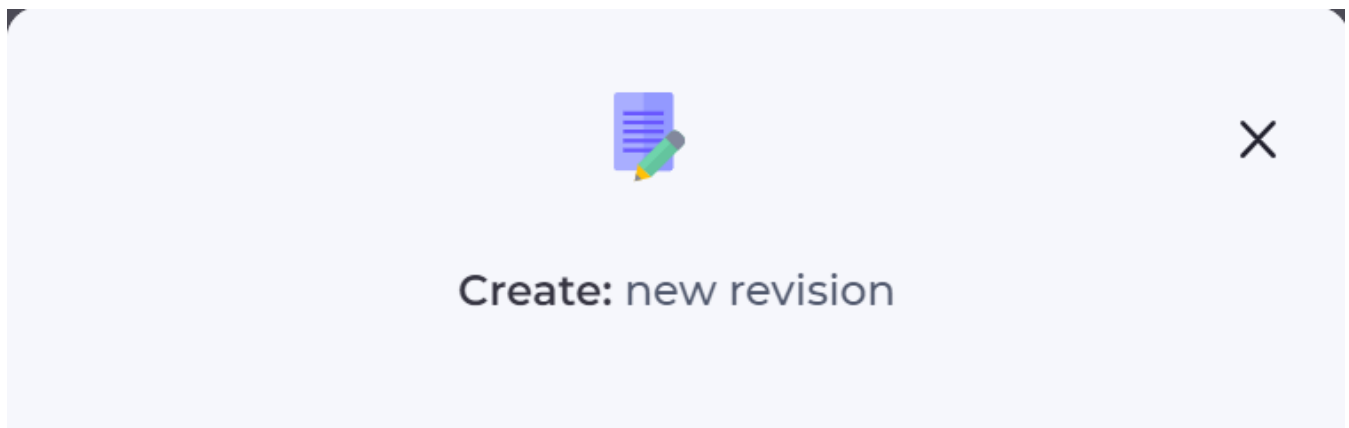
All available versions of the document are listed.

2. Click **Add new version**.



The screenshot shows a document card for "Billing_Letter example1". The card includes a sample text "This is a sample document." and a table of versions. The table has columns for Name, Status, and Last updated. The current version is "example1_v1" with a status of "Draft" and a last updated date of "Sep 29, 2022 by bbadmin". A red box highlights the "Add new version" button in the top right corner of the card.

The Create: new revision window is displayed.



The screenshot shows a modal window titled "Create: new revision". It features a central icon of a document with a pencil and a close button (X) in the top right corner.

* Name:

Create

Cancel

3. In the Name box, type a name for this version of the document.

4. Click **Create**.

The Document Designer dashboard is displayed, showing the new version of the document under the specific document name.


5. Click the version name to edit the design of the document.

When you edit the design, the changes are autosaved in local browser and can be resumed.

6. Click **Save and Exit** to save the design of the new version of the document.

Renaming a Document Version

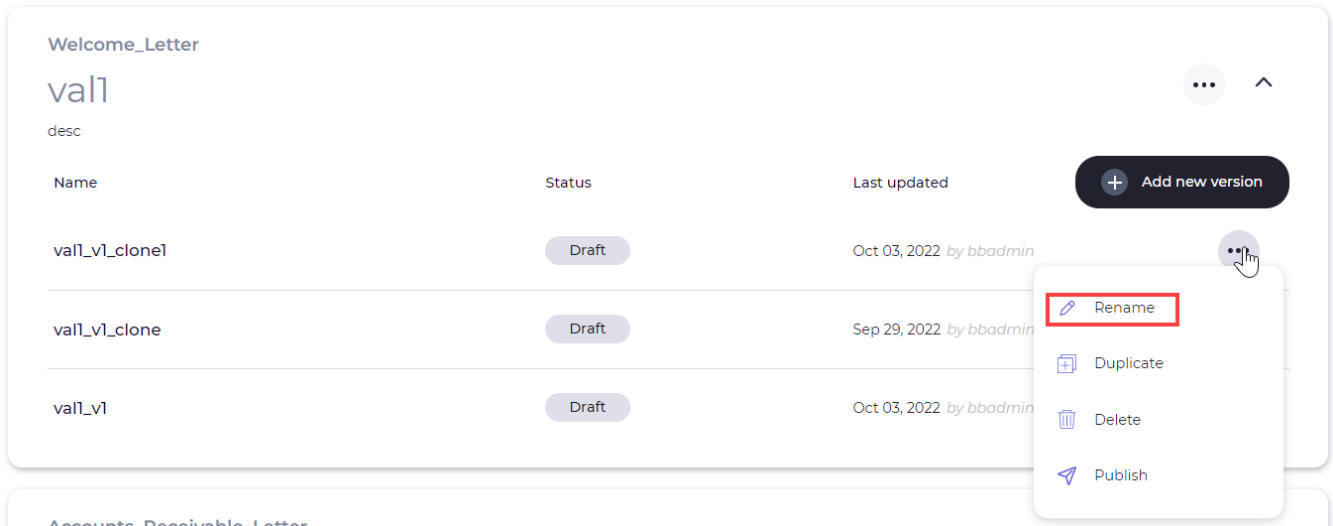
To rename a version of the document:

1. In the home page of the Document Designer dashboard, click the Down arrow  in the row of the document whose version name you want to rename.

All available versions of the document are listed.

2. Click the **Ellipsis** icon  at the end of the row of the document version that you want to rename and then click

Rename.



The screenshot shows a document titled "Welcome_Letter" with a version name "val1". Below it, a table lists several versions of the document. The first version, "val1_v1_clone1", is in "Draft" status and was last updated on "Oct 03, 2022 by bbadmin". A dropdown menu is open for this version, showing options: "Rename", "Duplicate", "Delete", and "Publish". The "Rename" option is highlighted with a red box. Below the table, another document titled "Accounts Receivable Letter" is partially visible.

Name	Status	Last updated
val1_v1_clone1	Draft	Oct 03, 2022 by bbadmin
val1_v1_clone	Draft	Sep 29, 2022 by bbadmin
val1_v1	Draft	Oct 03, 2022 by bbadmin

The Rename window is displayed.


3. In the Name box, type a new name for the document version.

4. Click **Rename**.

The Document Designer dashboard is displayed, showing the new name of the document version.

Duplicating a Document Version

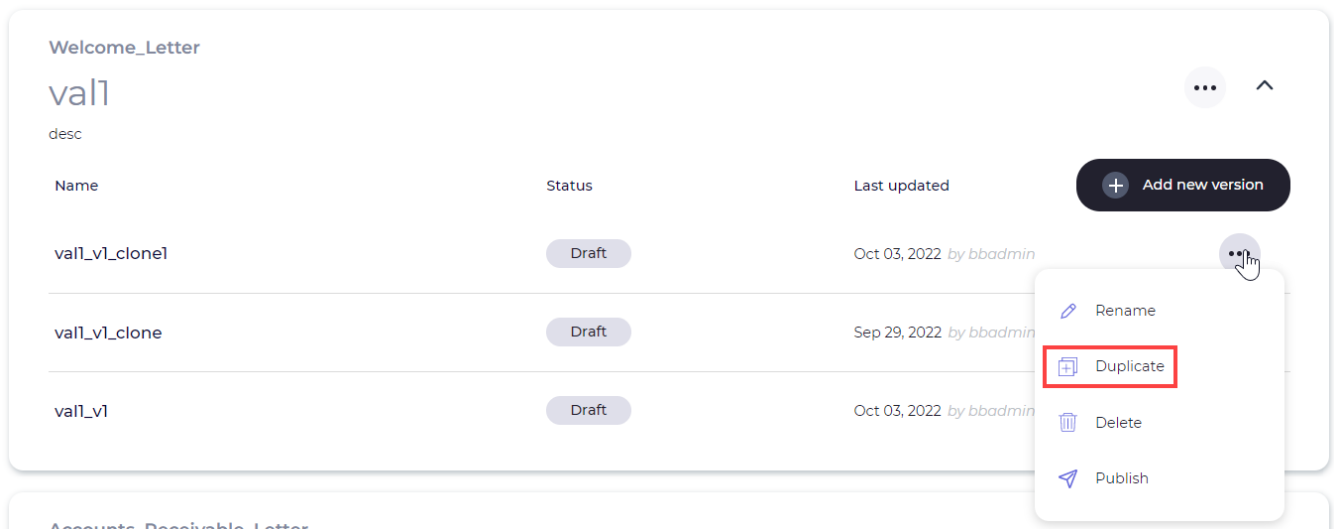
To duplicate a document version:

1. In the home page of the Document Designer dashboard, click the Down arrow  in the row of the document that you want to duplicate.

All available versions of the document are listed.

2. Click the **Ellipsis** icon  at the end of the row of the document version that you want to duplicate and then click

Duplicate.



The screenshot shows a document titled "Welcome_Letter" with a version "val1". Below it is a table of document versions:

Name	Status	Last updated
val1_v1_clone1	Draft	Oct 03, 2022 by bbadmin
val1_v1_clone	Draft	Sep 29, 2022 by bbadmin
val1_v1	Draft	Oct 03, 2022 by bbadmin

A dropdown menu is open for the "val1_v1_clone1" version, showing options: Rename, Duplicate (highlighted), Delete, and Publish. An "Add new version" button is also visible in the top right of the table.

The Duplicate window is displayed.


3. In the Name box, type a name for the duplicate copy of the document version.

4. Click **Duplicate**.

The Document Designer dashboard is displayed, showing an additional version of the document.

Deleting a Document Version

To delete a document version:

1. In the home page of the Document Designer dashboard, click the Down arrow  in the row of the document that you want to delete.

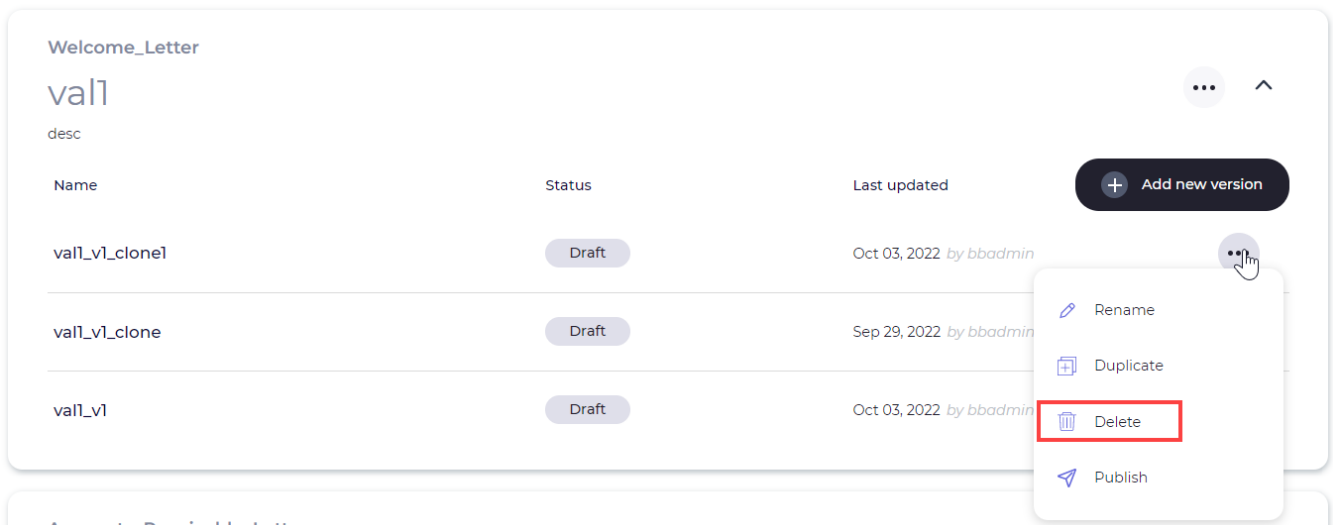
All available versions of the document are listed.

Note

Deleting all versions of the document deletes the document.

2. Click the **Ellipsis** icon  at the end of the row of the document version that you want to delete and then click

Delete.



The screenshot shows the Document Designer dashboard for a document titled "Welcome_Letter". The document name "val1" and a description "desc" are visible. Below this is a table of document versions:

Name	Status	Last updated
val1_v1_clone1	Draft	Oct 03, 2022 by bbadmin
val1_v1_clone	Draft	Sep 29, 2022 by bbadmin
val1_v1	Draft	Oct 03, 2022 by bbadmin

An "Add new version" button is located to the right of the table. A context menu is open over the "val1_v1" row, showing options: Rename, Duplicate, Delete (highlighted with a red box), and Publish.

The Delete window is displayed.


3. Click **Yes, delete it.**

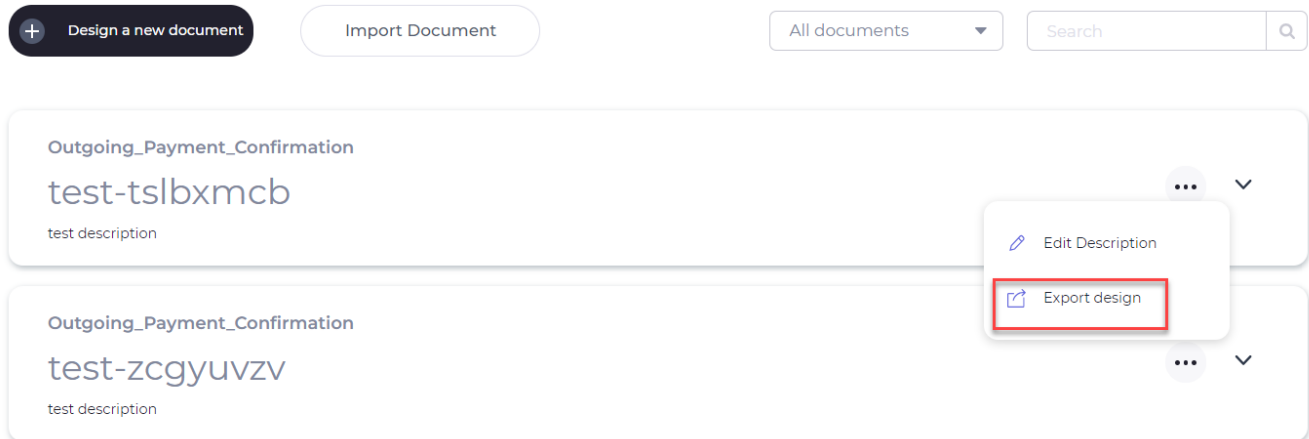
The Document Designer dashboard is displayed, showing that the document version is removed from the list of versions.

Export and Import a Document

The Document Designer dashboard enables exporting a document design and its revisions from one environment and importing them to another environment. This feature helps in using a document design in a testing environment first and then it can be migrated across to the production environment.

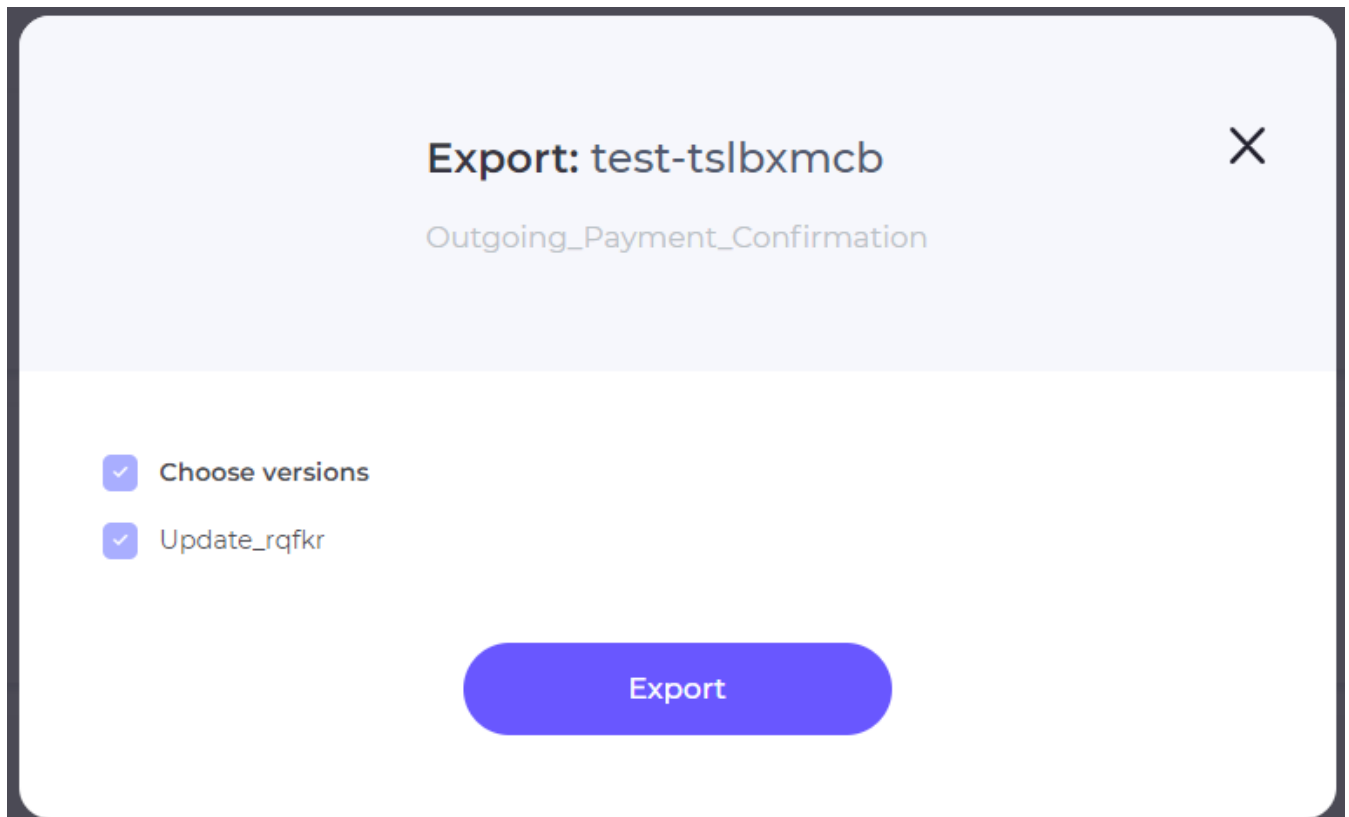
To export and import a document design:

1. In the home page of the Document Designer dashboard, click the **Ellipsis** icon  at the end of the row of the document that you want to export and then click **Export**.



The Export document window is displayed.

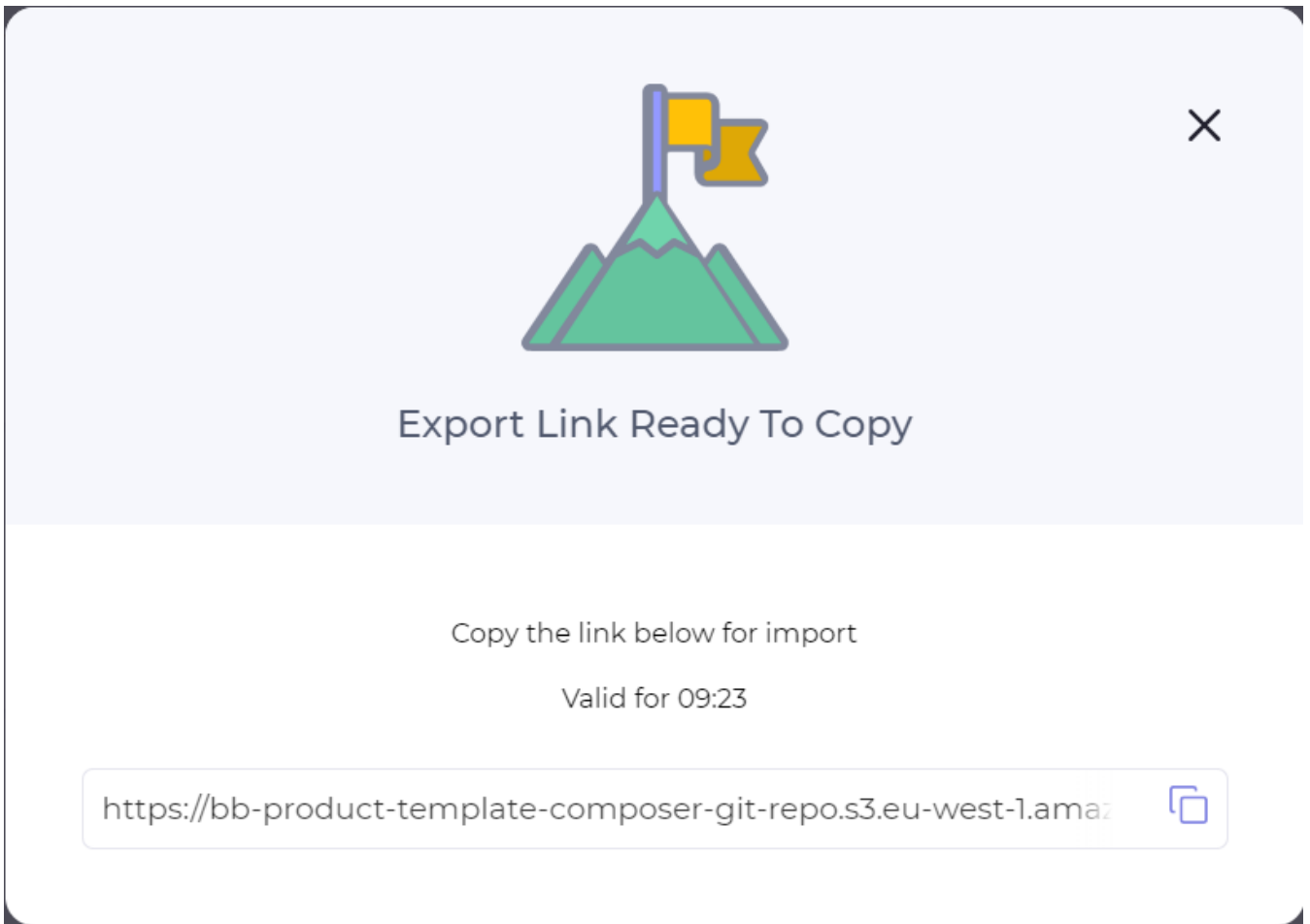
2. Choose a version of the document that you need to export.




3. Click **Export**.


A link to export the document is created.

4. Copy this export link.



5. Go to the Document Designer dashboard of the environment where you need to import this document.
6. Click on **Import** tab.
7. Paste the copied link in the **Add link** field and click **Import**.





Import document

* Add link:

* Name:

Import

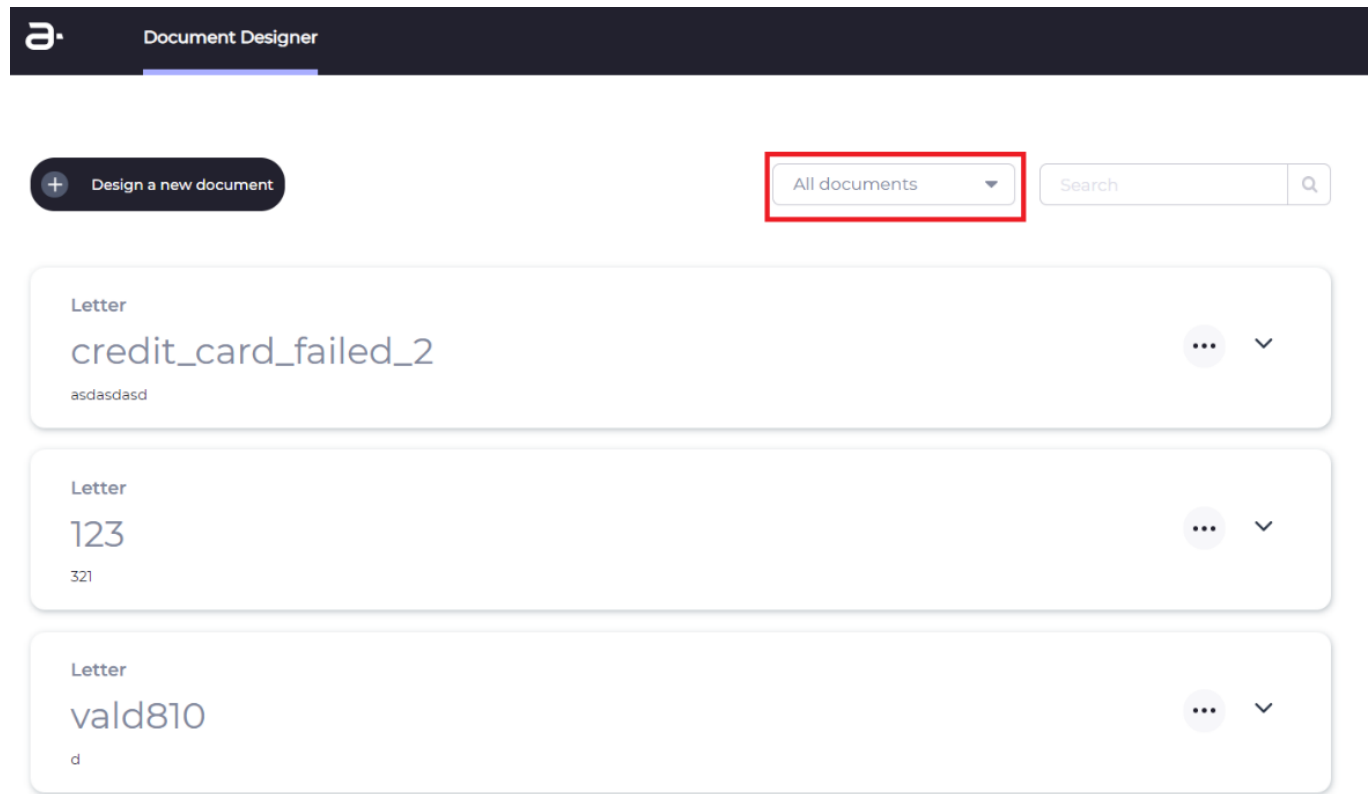
The document is imported to required environment.

Note

If the document with similar name already exists, you get the option to rename this document or merge it with the existing one.

Searching Documents

Users can search the different document types to find a specific design.



To search for a document design using the drop down:

- In the home page of the Document Designer dashboard, use the All documents dropdown to select between a letter or a contract.
All documents of that type appears.

To search for a document design using the search box:


- In the home page of the Document Designer dashboard, enter text in the search box next to All documents.
All documents matching the text appears.

Publishing Documents

When a document design is saved, it is saved as a Draft. You need to publish the document design for it to be used to create customer documents.

The status column in the Document Designer dashboard indicates whether a design is Draft, Unpublished, or Published.

To publish a document:

1. In the home page of the Document Designer dashboard, click the Down arrow  in the row of the document that you want to publish.

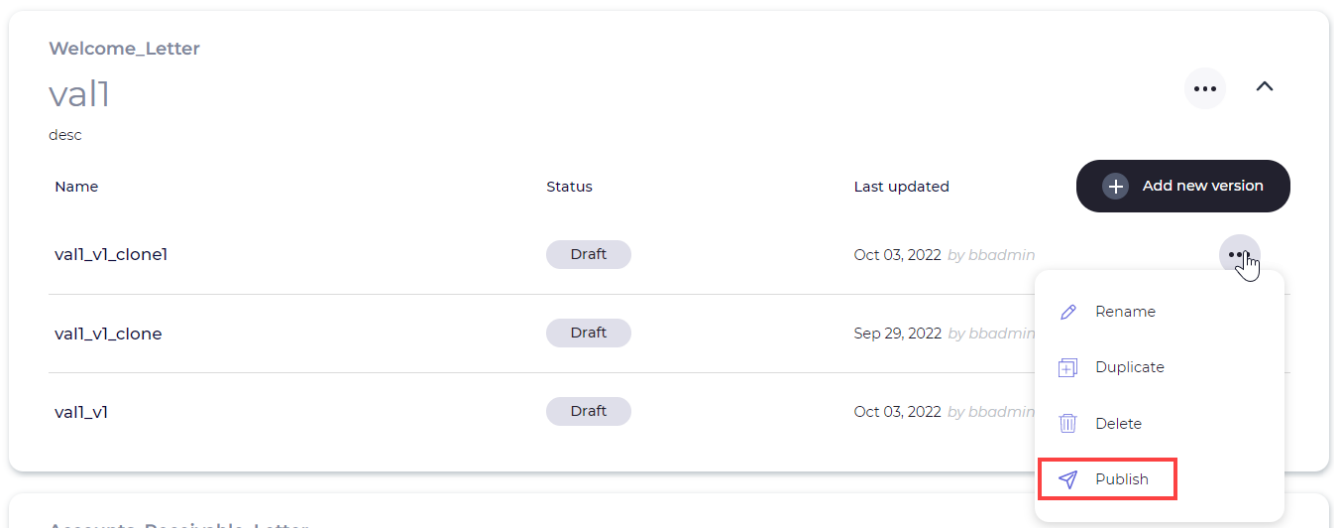
All available versions of the document are listed.

Note

Only one version of the document can be published. If any version of the document is already in the Published status and you publish another version, the status of the already published version changes to Unpublished.

2. Click the **Ellipsis** icon  at the end of the row of the document version that you want to publish and then click

Publish.



The screenshot shows a document titled "Welcome_Letter" with a version "val1". Below it is a table listing document versions:

Name	Status	Last updated
val1_v1_clone1	Draft	Oct 03, 2022 by bbadmin
val1_v1_clone	Draft	Sep 29, 2022 by bbadmin
val1_v1	Draft	Oct 03, 2022 by bbadmin

A dropdown menu is open for the first row, showing options: Rename, Duplicate, Delete, and Publish. The "Publish" option is highlighted with a red box.

The Publish window is displayed.

3. Click **Yes, Publish it.**

The Document Designer dashboard is displayed, showing the status of the document version changed to Published.