

# PORTA Billing 100°



# Customer Care Staff Interface

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# **Preface**

This document provides a general overview of the PortaBilling100 Customer Care Staff web interface.

### Where to get the latest Version of this guide

The hard copy of this guide is updated at major releases only and does not always contain the latest material for enhancements occurring between minor releases. The online copy of this guide is always up-to-date and integrates the latest changes to the product. You can access the latest copy of this guide at www.portaone.com/solutions/billing/docs.

# Conventions

This publication uses the following conventions:

- Commands and keywords are in **boldface**
- Terminal sessions, console screens, system file names are displayed in fixed width font

**Caution** means 'reader be careful'. You are capable of doing something that might result in program malfunction or loss of data.

**NOTE:** Means *reader take note*. Notes contain helpful suggestions or references to materials not contained in this manual

**Timesaver** means the described action saves time. You can save time by performing the action described in the paragraph.

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Tips Means the following information might help you solve a problem



# Hardware and software requirements

#### **Client System Recommendations**

- OS: Windows 95-XP, UNIX or Mac OS
- Browser: Internet Explorer 5 or higher, Netscape 6.2 or higher supporting DOM and with enabled JavaScript.
- Spreadsheet processor (MS Excel)
- Display Settings:
  - o Min Screen Resolution: 1024 x 768
  - Color Palette: 16 bit color (minimum)

**NOTE:** To view downloaded CDR files in Windows please do the following: My Computer -> Control Panel -> Regional Settings -> Number -> List Separator type "," to match PortaBilling default list separator.

# **1** Introduction



The front-end design and functionality of PortaBilling are simple and intuitive. The pure web interface of the PortaBilling Customer Care home page is the main door to all the objects and tools of this part of the system. Divided into two functional blocks the links load pages containing tools for managing the system and helping customers. Each second level page contains a link back to the home page.

The two functional areas are:



Changing password

Management



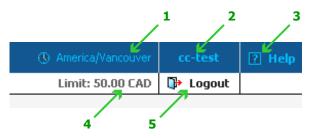
Tasks available to members of the Customer Care to help troubleshoot problems which clients may inquire about.

# **Common Features**

All of the functions available from the home page are also available from the drop down menus:



Right top side of the interface provides user with following information:



- 1. Time Zone where the current user operates
- 2. Login name of the currently logged in user
- 3. Context help for the current screen. Clicking this link will pop-up help window
- 4. Refund limit for the current day
- 5. Logout button. Used to finish current session or when necessary to re-login as another user

Also on the toolbar is often a list of available actions to take relative to the current page:



This toolbar acts as the equivalent of the "File" menu of the application as it is the usual location for "Save", "Close", and "Add New" operations.

#### **Sorting Tables**

on	Connect Time	Disconnect Time	Duration, min:sec	÷ Ac
atch es	24 Aug 2002 01:35:35	24 Aug 2002 01:35:35	0:00	
atch es	23 Aug 2002 20:51:50	23 Aug 2002 21:30:12	38:22	
atch	23 Aug 2002	23 Aug 2002		

This feature is available for the CDR browser and Call Trace screens where it necessary to sort viewed information by different criteria. Table header cell with orange triangle shows the sorted row. Triangle down represents descending order, and triangle directed up suggests the sorting is ascending.

The sorting is available for all columns with bi-directional white arrow in the top left corner of the header cell. To sort columns simply click on the header; click the same column again for the opposite sorting order.

Another cool feature of sorting tables is that table header is always visible.

# **2** Web Interface

## **Change Password**

The Change Password screen allows the users to change the password required to access this interface. To change the password, knowledge of the old one is required.

₫	•••		Chang	e password			
۲	属 Save	🗟 Save&Close	🛞 Close		Limit: 50.00 (	AD 🚺 Logout	
			Old p	assword			
			New	Password			
			Rety	oe New Password			

## **Trace Call**

The call tracing facility provides you with the ability to determine the characteristics of a specific call when you are aware of the **h323-conf-id**, or the **destination**, which may be specified exactly, or with a wild card. (For example, all calls to England may be specified as "44%" in the destination field). The date range within which to search must be specified, but it is highly recommended that this be set to the smallest range necessary to reduce wait time and load on the server. Ideally, the search window should be only one day.

To initiate the query, click the **Trace a Call** button. If no results appear, then try broadening the query. When the results appear, the desired call must be located within the result set. If there are too many results, they will be split across pages, though it may be advisable to narrow the query in this case.

<b>6</b>	20			Call	Trace	•			cc-test	
•	🛞 Close							Limit: 50.00 CAD	🕞 Logout	
				Des	stination [					
				Fro	m Date	20-08-2002	DD-MM-YYYY			
				<u>To I</u>	Date [	31-08-2002	DD-MM-YYYY			
					1	Trace a call				
					•	•				
Error Report	Disconnect Reason	Account ID	From	То	Country		Date/Time	Duration, min:sec	Charged time, min:sec	Amount, CAD
E	Normal, unspecified	<u>cc-test</u>				Balance adjustment	Aug 30, 2002 07:57:26 AM	0:00	0:00	<u>-10.00000</u>
E	Normal, unspecified	<u>cc-test</u>				Balance adjustment	Aug 30, 2002 07:55:32 AM	0:00	0:00	<u>-5.00000</u>

The result listing shows the status of the call while disconnecting, which is color coded according to the table below; Account ID number, linked to the Account info Screen (see the next section); origination number, the number dialed, the location of the destination, connect and disconnect time, duration, charge time and the amount charged. The operator can view the call charge details by clicking the amount link.

#### **Error Report**

Customer Care Staff is provided with ability to submit error reports which will be send to correspondent mailing list set up by system administrator. Click icon to enter the Error Report screen.

	20		Ern	or Report			cc-test	
•	🗹 Submit	🛞 Close			Limit:	50.00 CAD	🕞 Logout	
			Account To From Date / Time Comments	cc-test 2002-08-30 07:57:26	Å			I

In order to submit the report, Customer Care operator must fill in the Comments field describing the error details.

#### List of possible Disconnect reasons:

Reason	Color
Normal completed call	
Normal uncompleted call	
Call progress code	
Calling side error	
Called side error	
Network error	

# **Account Info**

The Account Info page is provided for Customer Care staffs which are responsible for answering requests from Account holders and carrying out refunds. The interface requires that the Account holder provide the operator the Account ID, or the Batch and Control Number.

🙆 🖾 🚾	Acco	ount Info				🛛 Help
Sclose				Limit: 50.00 CAD	🕩 Logout	
	Account ID	Batch	Ctrl #			
	cc-test			Show Info		

Once specified, clicking on **Show Info** will take the user to the Account Information for that Account.



From the Account Information page, the majority of the Account details are read-only. The Customer Care staff has the ability to modify only the Web Password, the H.323 Password, the Account balance, Time Zone, Redirect Number, Blocked status, and Preferred Language. When making such changes, the Help Desk staff should also provide a comment in the Notepad, detailing the reason for the changes (for example, "user unable to call due to network outage, credited \$5"). Changes can be confirmed by selecting **Save**, or **Save&Close**.

Field	Description						
Account ID	The primary identification of this Account.						
Blocked	Specifies whether the Account is blocked or unblocked.						
	The Account will be unusable if this is checked, and is						
	usually unblocked automatically once the Account is						
	used for the first time.						
Product	The Product providing the pricing plans for this						
	Account.						
Balance	Balance for the Account.						
	Account Info Tab						

Account	The Account type may be one of "Debit", "Credit", or
Туре	"Voucher". Debit is usually associated with pre-paid
	cards. Credit is a type of Account that will be invoiced
	for incurred costs. Voucher accounts are "refill
	coupons" for debit accounts
Credit Limit	Only available when Account Type is set to "Credit".
	Defines the credit allowance in the currency specified in
	the Product.
H323	Password to be used to authenticate any calls made using
Password	this Account.
Batch	Accounts are grouped into batches. If a new batch name
	is provide in the text field, a new batch will be created
	when you add the Account. Otherwise, an existing batch
	should be selected from the drop-down list.
Control	Number of account in the current batch. Batch name
Number	and Control Number uniquely define the Account ID,
	which is often used in prepaid calling cards.
Web	Password to be used on the self-care web site.
Password	
Opening	Opening balance for this account
Balance	I O O O O O O O O O O O O O O O O O O O
Refunds	Amount refunded to the owner of account
Not Call	Maintenance fee or post-call surcharge for example
Related	
Charges	
U	Additional Info Tab
Preferred	The language the user would prefer to use when
Language	interacting with an IVR application, or web site.
Time Zone	The local time zone of the Account.
Redirect	Specifies a number to be sent to the Node as a redirect.
Number	For example, in an IVR application this might be a
	redirect to a technical support number. Another example
	might be a quick dial number for prepaid Accounts. (In
	this case, the redirect number may be maintained
	through web self-provisioning.)
	Life Cycle Tab
Activation	Date from which the Account is usable.
Date	
Expiration	The date from which the Account will be unusable. If
Date	you don't want the account to expire, the field may be
	left blank
Life Time	Relative to activation date, account will expire on first
	usage date + life time days. If you do not want to use
	this feature leave the field blank

The Customer Care operator can also browse CDRs for this account by selecting **Browse CDRs**.

	Call his	tory				
Browse CDRs Download .csv	🛞 Close				Limit: 50.00 CAD	🕻 Logout
<b>•</b> 1	Account	cc-test	Balance	515.00000 CAD		
blocked	Total Duration, min:sec	0:00	Charged by	'Test Product' produ	ct	
	Total Charged	0 CAD	Type	Debit		
	Total Tranactions	2	From	Aug 28, 2002 12:00:	00 AM	
	Refunds	15.00000 CAD	To	Sep 1, 2002 12:00:0	IO AM	
	Non-call related charges	0.00000 CAD				
Error Report 🗢 Disconnect Reason 🔅 From 🔅	To Country Descrip	rtion 🔻 Da	ate/Time	Duration, min:sec	Charged time, min:sec	🗢 Arnount, CAD
Normal, unspecified	Balance adj	ustment Aug 30, 20	002 07:57:26 AM	0:00	0:00	) <u>-10.00000</u>
E Normal, unspecified	Balance adj	ustment Aug 30, 20	002 07:55:32 AM	0:00	0:00	-5.00000

On the call history screen the operator can choose to download CDRs by clicking the **Download .csv** button. Report Error functionality is described in the previous section of this document.