

Porta <mark>≦</mark> Billing 100[™]



Web Reference Maintenance Release 16

www.portaone.com

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Table of Contents

| | Document Objectives How to Get Technical Assistance Hardware and Software Requirements | |
|----|--|-----|
| 1. | Introduction | 6 |
| | PortaBilling Security Common Features | |
| 2. | System Management | |
| | Company Info | |
| | Access Levels | |
| | User Management | |
| | Mailing List | |
| | Representatives Templates | |
| | Services | |
| | Destinations | |
| | Destination Group Sets | |
| 3. | Networking | |
| 5. | Nodes | |
| | Route Categories | |
| | Routing Plans | |
| | Test Dialplan | |
| | IP Phone Profiles | |
| | IP Phone Inventory | |
| | DID Inventory | |
| 4. | Adjusting Billing Parameters | |
| | Currencies | |
| | Exchange Rates | |
| | Tariffs | |
| | Volume Discount Plans | |
| | Subscription Plans Products | |
| | Vendor Management | |
| | Connections | |
| | Customer Classes | |
| | Customer Management | |
| | Account Management | |
| | E-Payments Log | |
| 5. | Help Desk | 147 |
| | Call Trace | |
| | Active Calls | |
| | SIP Log Viewer | |
| | Account Info | |

| 6 . | Statistics | 155 |
|------------|----------------------|-----|
| | System Load | |
| | Database | |
| | Connections | |
| | ASR | |
| | Cost/Revenue | |
| | Custom Reports | |
| | Vendor xDR Reports | |
| | Customer xDR Reports | |
| | Invoices | |

Preface

This document provides a general overview of the PortaBilling100 administrator 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 on 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/support/documentation/

Conventions

This publication uses the following conventions:

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

Caution indicates that the described action might result in program malfunction or data loss.

NOTE: Notes contain helpful suggestions about or references to materials not contained in this manual.

Timesaver means that you can save time by performing the action described in the paragraph.

Tips provide information that might help you solve a problem.







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Document Objectives

The target audience of this document are system administrators, VoIP engineers, and system or helpdesk operators who will be managing your services via the PortaBilling100 web interface.

How to Get Technical Assistance

The dealer from whom you purchased this product is the *first place* you should go for technical assistance. The dealer is usually the most qualified source of help, and is the person most familiar with your system and how this product should be installed. Many dealers have customer service and technical support programs that offer varying levels of support, depending on your needs and computer knowledge.

If your dealer cannot assist you

If you cannot get assistance from your dealer, the vendor provides varying levels of technical assistance.

PortaOne's Customer Support Service (e-mail: support@portaone.com) can supply quick answers to specific inquiries regarding product features and technical questions. You can visit our website (http://www.portaone.com) for more information.

Hardware and Software Requirements

Client System Recommendations



- OS: Windows 95-XP, UNIX or Mac OS
- Web Browser: Internet Explorer 6.0, FireFox 2.0 with JavaScript and cookies enabled.
- Spreadsheet processor (MS Excel)
- Display Settings:
 - o Min. Screen Resolution: 1024 x 768
 - o Color Palette: 16 bit color (minimum)

NOTE: To view downloaded CSV (Comma-Separated Values) files in Windows, please do the following to match PortaBilling's default list separator: My Computer -> Control Panel -> Regional Settings -> Number -> List Separator type ",".

1. Introduction

PortaBilling's front-end design and functionality are simple and intuitive. The web interface of the PortaBilling home page is the main point of entry to all system objects and tools. Divided into five functional blocks, the icons below link to pages containing tools for system management, VoIP networking, billing, customer help, and generating statistics. Each second-level page contains a link back to the home page.

| | > | \$: 🖌 | PortaBilli | ng100 - Main Menu | | demo-toor | |
|------|-------------|--|------------|---|---|------------|-----------|
| • | | | | | | 📲 Logout | |
| | ~ | Company Info Access Levels Users Mailing List Representatives Templates Services Destinations Destination Group Sets | \$ | Currencies Exchange Rates Tariffs Volume Discount Plans Subscription Plans Products Vendors Connections Customer Classes Customers | System Load Database Connections ASR Cost / Revenue Custom Reports Vendor xDR Customer xDR Invoices | | |
| | 80 | Nodes Route Categories Routing Plans Test Dialplan IP Phone Profiles IP Phone Inventory DID Inventory | | Trace a Call Active Calls BE Log Viewer SIP Log Viewer Account Info | | | |
| MR10 | 5-0 © 2001 | l-2007 PortaOne, Inc. All rights re | eserved. | | | >> Credits | and links |

These are the five functional blocks:



Normal system maintenance tasks, such as adding administrative users and maintaining the destinations database.



Configuration of network components: registering new nodes (network endpoints) in the system; configuration of User Agent profiles.



Tasks related to billing, such as customer, vendor and account management and rate plan definition; maintenance of currencies and exchange rates.



Tasks available to help desk staff for assistance in troubleshooting problems that clients may inquire about.



A variety of statistics and reports are available, reflecting the status of the system or providing information on call records, costing and revenue.

PortaBilling Security

PortaBilling100 is compliant with Visa Security Standards.

User Interface

- o Inactivity logout
- o Unconditional logout

User Passwords:

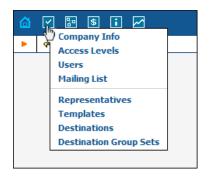
- The minimum password length is six (6) characters. In the case of long passwords, only a certain number of the leading characters will actually be used (however, at least eight (8) characters).
- Passwords include both alphabetical and numerical components.
- o Passwords are stored under irreversible encryption.
- It is required that the current password be used before allowing a new password to become effective.
- The user's last four (4) passwords cannot be re-used (see the note above about long passwords; new passwords must differ in at least one of their first 8 characters).
- It is prohibited to change a password within one (1) day of the previous change.
- o The initial password must be changed on the first login.
- Passwords must be changed at least once every 30 days.
- Use dictionary checking to restrict password selection.

Credit Card Information

- o Credit card information is displayed as 1234xxxxx567
- Credit card information is stored using the same encryption as for the Payment System password.

Common Features

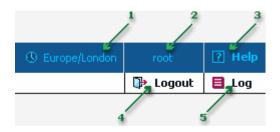
All of the functions available from the home page (main menu) are also available using the drop-down menus:



The Home icon for on the left also contains a menu with shortcuts to all the other PortaBilling interfaces:

Admin - Shortcut to this interface; same result as clicking the Home icon
Customers - Customer Self-Care interface
CC-Staff - Customer Care Staff interface
Accounts - Interface for account owners (end-users)
Vendors - Interface for your termination partners
Representatives – Interface for your sales agents or distributors

The top right-hand side of the interface provides users with the following information:



- 1. The time zone where the current user operates. Click on this link to select a time zone for your current session.
- 2. Login name of the user currently logged in.
- 3. Context help for the current screen. Click this link and the Help window will pop up.
- 4. Logout button. Used to end the current session or, when necessary, to re-login as another user.
- 5. View Log. This link is only available to users with corresponding access rights and where applicable. Clicking it will open a window showing all logged activities performed on the current screen.

The toolbar often also shows a list of available actions relative to the current page:



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

Delete an Object in the Database

If you see the icon in the list of objects, this means it can be deleted from the system. Note that only objects which are not used elsewhere in the system may be deleted. For instance, in the screenshot below, the **DID supplier costs** and **Termination services** tariffs can be deleted, whereas the rest of tariffs are being used by some product or connection.

| | - | \$ | : | | | | Tar | iff Man | agement | | | | dem | | 2 H | |
|---|--------|-------|-----------|---|--|--|--|--|--|---|---|---|--|---|---|---|
| ÷ | Add | ۲ | Close | | xDR Re- | -rating | | | | | | | ال ا | Logout | 🔳 L | o |
| | | | | | | | | | | | | | | | | |
| | | 1 | Applied | d To | | | Service | | Manag | ed By | | Searc | h | | | |
| | ANY | | | | ~ | ANY | | ~ 1 | JNY | | ~ | | S | earch | | |
| | | | | | | | | | | | | | | | | |
| | | | lame | | Cu | rrency | Applied To | Service | Managed By | Routing | De | escription | Rates | Delete | | |
| | DID su | pplie | rcosts | <u>s</u> | | USD | Vendor | Voice Call | s | No | DID Suppli | er | | × | | |
| | Pre-pa | id ca | rds | | | USD | Customer | Voice Call | s Administrator only | 1 | Prepaid car | rds | | | | |
| | SIP Ph | one (| Subsci | ibers | | USD | Customer | Voice Call | s Administrator only | (| SIP Phone | Subscriber's Tariff | | | | |
| | SIP Su | bscri | bers - | Incom | ing | USD | Customer | Voice Call | s Administrator only | 1 | SIP Subscr | ibers - Incoming | | | | |
| | Termir | ation | servio | es | | USD | Customer | Voice Call | s Administrator only | (| Terminatio | n services | | × | | |
| | WiFi | | | | | USD | Customer | Wi-Fi | Administrator only | (| | | | | | |
| | • | Add | Add S | Add So Close Applie Any Any Nerre DID supplier costs Pre-paid cards SilP Phone Subsci SilP Subscribers - Termination service | Add Close Add Close Applied To ANY Name DID supplier costs Pre-paid cards SIP Phone Subscribers SIP Subscribers - Incom Termination services | Add O Close Applied To Applied To Amy Amy Marne Cu DID supplier costs Pre-paid cards SIP Phone Subscribers SIP Subscribers SIP Subscribers - Incoming Termination services | Add Close Applied To Applied To ANY ANY Name Currency DID supplier costs USD Pre-paid cards USD SIP Phone Subscribers USD SIP Subscribers - Incoming USD Termination services USD | Add Close Image: Applied To Applied To Amy Amy Amy Amy Mame Currency Applied To Amy Amy Mame Currency Applied To Amy Mame Currency Applied To Amy Sip Subscribers USD Customer SiP Subscribers Incoming USD Customer Termination services USD Customer | Add Image: Close Image: Re-rating Applied To Service ANY Image: Re-rating Name Currency Applied To Service DID supplier costs USD Vendor Voice Call Pre-paid cards USD Customer Voice Call SIP Phone Subscribers USD Customer Voice Call SIP Subscribers - Incoming USD Customer Voice Call Termination services USD Customer Voice Call | Add Image: Close Image: Service Manage Applied To Service Manage ANY Image: Service Manage ANY Image: Service Manage ANY Image: Service Manage DID supplier costs USD Vendor Volce Calls Pre-paid cards USD Customer Volce Calls Administrator only SIP Phone Subscribers USD Customer Volce Calls Administrator only SIP Subscribers - Incoming USD Customer Volce Calls Administrator only Termination services USD Customer Volce Calls Administrator only | Add O Close ADR Re-rating Applied To Service Managed By ANY ANY ANY Name Currency Applied To Service Managed By DID supplier costs USD Vendor Voice Calls Managed By Routing DID supplier costs USD Customer Voice Calls Administrator only No SIP Phone Subscribers USD Customer Voice Calls Administrator only SIP Subscribers - Incoming USD Customer Voice Calls Administrator only Termination services USD Customer Voice Calls Administrator only Managed By | Add Image: Close Image: Close Amaged By Applied To Service Managed By ANY Image: Close Amaged By Name Currency Applied To Service Managed By DID supplier costs USD Vendor Voice Calls No DID Supplie Pre-paid cards USD Customer Voice Calls Administrator only Prepaid card SIP Subscribers USD Customer Voice Calls Administrator only SIP Subscribers SIP Subscribers - Incoming USD Customer Voice Calls Administrator only SIP Subscribers Termination services USD Customer Voice Calls Administrator only SIP Subscribers | Add Image: Close Applied To Service Managed By Search ANY Image: ANY </td <td>Add O Close XDR Re-rating PU Applied To Service Managed By Search ANY XNY XNY XNY Search Name Currency Applied To Service Managed By Routing Description Rates DID supplier costs USD Vendor Voice Calls No DID Supplier Image: Cost Cost Cost Cost Cost Cost Cost Cost</td> <td>Add Image: Close Image:</td> <td>Add Source Managed By Search Applied To Service Managed By Search ANY Name Currency Applied To Service Managed By Routing Description Rates Delete DID supplier costs USD Vendor Voice Calls No DID Supplier III X Pre-paid cards USD Customer Voice Calls Administrator only SIP Phone Subscriber's Tariff III SIP Subscribers - Incoming USD Customer Voice Calls Administrator only SIP Subscriber's - Incoming III Termination services USD Customer Voice Calls Administrator only SIP Subscriber's - Incoming III</td> | Add O Close XDR Re-rating PU Applied To Service Managed By Search ANY XNY XNY XNY Search Name Currency Applied To Service Managed By Routing Description Rates DID supplier costs USD Vendor Voice Calls No DID Supplier Image: Cost Cost Cost Cost Cost Cost Cost Cost | Add Image: Close Image: | Add Source Managed By Search Applied To Service Managed By Search ANY Name Currency Applied To Service Managed By Routing Description Rates Delete DID supplier costs USD Vendor Voice Calls No DID Supplier III X Pre-paid cards USD Customer Voice Calls Administrator only SIP Phone Subscriber's Tariff III SIP Subscribers - Incoming USD Customer Voice Calls Administrator only SIP Subscriber's - Incoming III Termination services USD Customer Voice Calls Administrator only SIP Subscriber's - Incoming III |

Show Objects

The Objects icon is only available to the Root user; when selected, it shows the object properties, as seen in the illustration below. These object properties can be used by the administrator when configuring access levels for certain users in the system. See the **Access Levels** section for more information.



| 奋 | > | \$ | | | R | epres | entative | Manag | ement | | | demoro | ot 🕐 Help |
|-----|--------------------------|--------|-----------|----------|-----------|--------|---|-------------|--------------------------|-------------|---------|------------|-------------------|
| • | 🔁 Add | I 🛞 | Close | 1 |) Object | s | | | | | | 📲 Loga | out 📑 Log |
| | WebForms.Representatives | | | | | | | | | | | | |
| | | | | | P | | i <mark>tatives.i_cu</mark> s lanaged By | stomer | Representation Search | es.' | | | |
| | | | | | | ANY | | * | | Search | | | |
| Rep | resentati | ves.ir | nitials l | Repres | sentative | s.name | Representa | tives.email | Representatives | .i_customer | Represe | ntatives.* | Representatives.* |
| | Initia | ls | | | Name | | E-m | ail | Manage | l By | Sta | itus | Delete |
| | Ok | < | | Test | | | | | Administrator or | ly | | | × |

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 all xDR browsers in order to sort the displayed information according to different criteria, where necessary. The table header cell with the orange triangle shows the sorted row. A triangle pointing downward indicates descending order, while a triangle pointing upward means ascending order.

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

Another handy feature for sorting tables is that the table header is always visible, even if you scroll to the bottom of a large table which does not fit completely on the screen.

Multiple Languages

PortaBilling uses a flexible and extensible localization system. Every user of the system (admin user, account, customer, vendor, customer care admin) can choose the language of the web interface for his session. This does not, of course, affect other users; thus user John can work with the system using English as his interface language, while user Peter can make use of Chinese simplified as his language. Currently, PortaBilling supports such commonly-used languages as Arabic, Chinese, French, German, Portuguese, Russian and Spanish, in addition to English. New languages may easily be added on request; please contact Porta Software to obtain the XML template files if you would like to perform the translation yourself.

PORTA Billing 100°

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|---|---|---|--|---------------------------|--|
| 🕨 🖬 Save 🗐 | Save & Close 🛞 Close 🤞 | 🖅 Objects | | M Logout | E Log |
| Addr | ess Info User Interface | ife Cycle Mailing List Notepad |] | | |
| Login | demoroot * | Time Zone | America/Vancoux | 7er | ~ |
| Password | ******* Au | to Web Interface Language | - | | ~ |
| Access | vel Root 🗠 | | Default Languag ar - Arabic | le | |
| Output For | mat | | zh - Chinese Si zh-tw - Chinese cs - Czech en - English | | - |
| Date | YYYY-MM-DD | 2003-12-31 | et - Estonian | | |
| Time | HH24:MI:SS | User Defined | fr - French de - German | _ ~ … | 1 |
| Date & Tim | THE TYTY-MM-DD HH24:MI | SS User Defined | it - Italian lv - Latvian | | |
| Input Form | at | | lt - Lithuanian no - Norwegian pl - Polish | 1 | |
| Date | YYYY-MM-DD | 2003-12-31 | ru - Russian es - Spanish | | |
| Time | HH24:MI:SS | User Defined | sv - Swedish | | |
| | Internation | User Permed | | | |
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| Image: Constraint of the second secon | Editar Usu Guardar & Cerrar Guardar & Cerrar Ciclo Interfaz del Usuario Ciclo demoroot ******** Auto | Lario 'demoroot' (Am Cerrar () Objetos o de Vida (Mailing Lista) Block de Zona Horario () | Notas | Cerrar sesión | |
| ☑ ☑ ☑ ☑ Guarð ☑ Dirección Login Contraseña | Editar Usu Guardar & Cerrar Guardar & Cerrar Cera | Lario 'demoroot' (Am Cerrar () Objetos o de Vida (Mailing Lista) Block de Zona Horario () | Notas | Cerrar sesión | |
| ☑ ☑ ☑ ☑ Guarð ☑ Dirección Login Contraseña Nivel de Acceso | Editar Usu Guardar & Cerrar Guardar & Cerrar Cera | Lario 'demoroot' (Am Cerrar () Objetos o de Vida (Mailing Lista) Block de Zona Horario () | Notas | Cerrar sesión | |
| | Editar Usu Guardar & Cerrar Gu Interfaz del Usuario Ciclo demoroot * ******** Auto Koot V | Lerrar 4 Objetos de Vida Mailing Lista Block de Zona Horario A Web Interface Language e | Notas | Cerrar sesión | |
| | Editar Usu Guardar & Cerrar Gu Interfaz del Usuario Ciclo demoroot * ******** Auto Root VYYY-MM-DD | Jario 'demoroot' () An Cerrar () Objetos de Vida Mailing Lista Block de Zona Horario A Web Interface Language e | Notas | Cerrar sesión | |
| | Editar Usu Guardar & Cerrar Guardar & Cerrar Guardar & Cerrar Ciclo demoroot * * * * * * * * * * * * * * * * * * | Jario 'demoroot' () An Cerrar () Objetos de Vida Mailing Lista Block de Zona Horario A Web Interface Language e 2003-12-31 Usuario Definido | Notas | Cerrar sesión | |
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Tab Controls

Some forms (e.g. customer or account information) contain so much information that it is not feasible to display it all on a single screen. The standard practice in this case is to divide the information between multiple tabs, each of which contains only a portion of the information and can be individually selected for display. To provide a better user experience with a high number of tabs, PortaBilling provides two rows of tab controls.

| ۵ | v 🛛 🕯 🖬 | | | | Edit Cı | istomer | | | | demoroot | 🕐 Help |
|---|----------------|------------|---------------|--------------|---------------|-------------|----------|--------------|-----------|-----------|--------|
| • | 🖬 Save 📓 Sa | we & Close | 🛞 Close | 🔳 xDRs | 🗊 Accounts | 🙀 E-Paym | ents Log | Invoices | 街 Objects | N) Logout | 目 Log |
| | | | | | | | | | | | |
| | Customer Name | John Doe | | | Opening Bala | nce 0.00000 | USD | | | | |
| | Blocked | | | | Balance | 0.00000 | USD | | | | |
| | Туре | Retail | | | Customer Cla | ISS Defau | lt custo | mer class | * | | |
| | | | | | | | | | | | |
| | Taxation | _ | viated Dialin | - | scriptions | Notepad | | ce Features | | | |
| | Address Ini | o Mainter | hance Use | er Interface | Dialing Rules | Additiona | il Info | Payment Info | | | |
| | Company Name | | | | Contact | | | | | | |
| | Mr./Ms./ | | | | Phone | | | | | | |
| | First Name | | | | Fax | | | | | | |
| | Last Name | | | | Alt. Phone | 8 | | _ | | | |
| | Address | 11 Broadt | way. #710 | | Alt. Conta | ict | | | | | |
| | | | | | E-mail | | | _ | | | |
| | | | | | BCC | | | | | | |
| | | | | | | | | | | | |
| | | | | | Descripti | on | | | | | |
| | Province/State | | | | December | | | | | | |
| | Postal Code | | | | | | | | | | |
| | City | New York | | | | | | | | | |
| | Country/Region | | | | | | | | | | |
| | | ι | | | 1 | | | | | | |

When you click on a tab's name, it is selected (black font on a white background) and you can see the associated information. Note that even if a tab from the upper row is selected, the row order does **not** change, and all the tabs stay in their original location. Thus you can always remember where a particular tab control is located on the form; see below for an example where a tab from the upper row has been selected.

| } | v 📰 🕏 i 🛩 | 3 | | Edit Cu | stomer | | | ⊕ E | irope/Prague | demoroot | ? Help |
|---|-----------------------|--------------------|--------------|---------------|---------------|------------|----------------|-----------|--------------|----------|--------|
| | 🖬 Save 📓 Save & | Close 🛞 Close | 🔳 xDRs | 🗊 Accounts | 🙀 E-Paym | ents Log | Invoices | 🖑 Objects | | 💵 Logout | 目 Log |
| | Customer Name John | n Doe | | Opening Bala | nce 0.00000 | USD | | | | | |
| | Blocked 📃 | | | Balance | 0.00000 | USD | | | | | |
| | Type Reta | il | | Customer Cla | SS Defaul | t custo. | mer class | * | | | |
| | | | | | | | | 1 | | | |
| | Taxation | Abbreviated Dialir | ng Sut | scriptions | Notepad | Servi | ce Features | | | | |
| | Address Info | Maintenance Us | er Interface | Dialing Rules | Additiona | l Info 🛛 l | Payment Info | | | | |
| | | | | | | | | | | | |
| | Service Type Voice | Calls 💙 | | | | | | | | | |
| | | | | _ 1 | | | | | | | |
| | Set CLI To | Original | CLI (do n | Le | gal Intercept | | N | lo . | ~ | | |
| | Centrex Number | | | Lii | mit simultane | ous calls | N | io | * | | |
| | Hide CLI | No | | 🖌 🔰 Ma | ax number of | simultane | eous calls * 🗌 | | | | |
| | Hide CLI prefix | | | Mi | nimum funds | reserved | i per call | | USD | | |
| | Show CLI prefix | | | Ca | all Parking | | N | lo | * | | |
| | Voice VPN | No | | Pa | ark prefix | | | | | | |
| | Voice VPN Distinctive | Ring No | | Re Re | elease prefix | | | | | | |
| | | | | Fil | st Login Gre | eting | N | io | ~ | | |
| | Music On Hold No | Frills Cumbia (| c) 2001 Ke | ❤ Fa | vorite Numb | ers Enabl | ed N | io | ~ | | |

Date & Time Format

PortaBilling allows users to define both the input and output formats for date and time.

| Date | DD-MM-YYYY | 31-12-2003 | • |
|--------------|-----------------------|--------------|----------|
| Time | HH24:MI:SS | User Defined | • |
| Date & Time | DD-MM-YYYY HH24:MI:SS | User Defined | - |
| Input Format | | | |
| input rormat | | | |
| Date | DD-MM-YYYY | 31-12-2003 | _ |

Making changes to the date and/or time format on this page enables users to enter dates and times in the desired format throughout the entire PortaBilling100 web interface. Correspondingly, all pages generated at a user's request will contain the date and time in the previously set-up format.

Date/Time format strings are composed using specifiers that represent the values to be inserted into the formatted string.

In the following table, the specifiers are given in upper case. Formats are case-insensitive.

| Specifier | Value | Description | | | | |
|-----------------|-------------|---|--|--|--|--|
| | | Date | | | | |
| DD | 01-31 | Day of the month | | | | |
| D | 1-31 | Day of the month without a leading 0 | | | | |
| MM | 01-12 | Number of the month | | | | |
| MON | Jan-Dec | Name of the month | | | | |
| MONTH January- | | Full name of the month | | | | |
| | December | | | | | |
| YYYY | 2003 + | Year | | | | |
| YY | 00-99 | Last two digits of the year | | | | |
| | | Time | | | | |
| HH, HH24 | 0-24 | Hours | | | | |
| HH12 | 0-12 | 12-hour time format; requires AM/PM | | | | |
| | | Specifier | | | | |
| MI | 0-60 | Minutes | | | | |
| SS | 0-60 | Seconds | | | | |
| AM, PM, | AM, PM | | | | | |
| AM/PM | | | | | | |
| | | Separators | | | | |
| A separator can | be any symb | ol except for letters and digits, or may be | | | | |
| left blank | | | | | | |

| Example | Value |
|------------|------------|
| DD/MM/YYYY | 12/03/2003 |
| MON-DD-YY | MAR-12-03 |

| HH:MI:SS | 12:30:00 |
|------------|-----------------------------------|
| HH12 MI:SS | WRONG! AM/PM Specifier is missing |
| HH12mi pM | 1230 AM |

Current Release and Build information

In the bottom left corner of the main menu screen, you can see information about the maintenance release and build of the software currently installed, e.g. MR15-2 means "Maintenance Release 15" and "Build 2".

2. System Management

Company Info

The Company Info screens allow the administrator to maintain corporate information relating to your business. This data will be included on reports such as invoices.

| ☆ 🗹 🖻 | \$: 🖂 | Edit Company Info |) | () America/Vancouver | demo-toor | ? Help |
|--------------|--|--------------------------|---|----------------------|-----------|--------|
| 🕨 🖬 Save | 🗟 Save & Close 🛞 | Close 🛛 🙀 E-Payments Log | | | 📲 Logout | 目 Log |
| | | | | | | |
| Contact info | Legal info Report in | nfo Payment Systems | | | | |
| Company Name | PortaOne, Inc. | * | | | | |
| Address | 902 - 2181 W 8th Vancouver, BC V6M 1R8 | Ave. | | | | |
| Country | CANADA | | ~ | | | |
| Phone | +1 866 SIP VOIP | | | | | |
| Fax | +1 866 SIP VOIP | | | | | |
| Email | contact@portaone.com | | | | | |
| Web | www.portaone.com | | | | | |

Contact Info

The information provided in the Contact Info tab is typically used on reports as the primary point of contact for your vendors and customers. This information is the same as that which appears on your letterhead and business cards, for example.

| Field | Description |
|---------|--|
| Company | The conventional form of your company's name. (For |
| Name | example, "EasyCall, Inc.") |
| Address | Street address of the company. |
| Country | The country may be selected from a drop-down list. |
| Phone | Primary telephone number for the company. |
| Fax | Primary fax number. |
| E-mail | Primary e-mail contact for the company. If defined, this email address will appear in the From: field of all outgoing emails, e.g. statistics/invoices or low credit warnings sent to your customers. |
| Web | Web address of the company. |

Legal Info

| ₫ | > | \$ i 🖂 | Ed | it Company Inf | fo | America | /Vancouver | demo-toor | ? Help |
|--------|-------------|------------------|--------------|-------------------|----|---------|------------|-----------|--------|
| • | 属 Save | 🚽 🗟 Save & C | lose 🛞 Close | : 🙀 E-Payments Lo | 9 | | | 🕅 Logout | 目 Log |
| | | | | | | | | | |
| C | ontact inf | D Legal info | Report info | Payment Systems | | | | | |
| Name | | Porta Software L | _td. | | | | | | |
| Addre | ss | 902 - 2181 W 8 | th Ave. | | | | | | |
| | | | | | | | | | |
| City | | Vancouver | | | | | | | |
| Count | try | CANADA | | | ~ | | | | |
| Provin | ice/State | BC - British | Columbia | × | | | | | |
| Posta | l Code | V6M 1R8 |] | | | | | | |

The Legal Info tab allows you to enter information about your company that could be used for any legal transactions, e.g. for taxation purposes.

| Field | Description |
|----------------|--|
| Name | Proper, legally-recognized form of the company's |
| | name. |
| Address | Address where this company name is legally |
| | registered. Two lines are provided. |
| City | City in which the company is legally registered. |
| Country | The country in which the company is legally |
| | registered. |
| Province/State | The province or state where the company is |
| | registered may be selected from a drop-down list, |
| | depending on the Country option selected. |
| Postal Code | Postal code for the company's registered location. |

Report Info

| ₫ | Image: Second | \$ 🖬 🗠 | Edi | t Company Info | | demo-toor | ? Help | |
|---|---|----------------|---------|------------------|--|-----------|--------|--|
| • | 🖬 Save | 📓 Save & Close | 🛞 Close | 🙀 E-Payments Log | | 🕅 Logout | 目 Log | |
| | | | | | | | | |
| Contact info Legal info Report info Payment Systems | | | | | | | | |
| Time. | Time Zone America/Vancouver | | | | | | | |
| Recor | nciliation Pe | riod Weekly | | × | | | | |
| Tax ID |) | 6358725 | | | | | | |
| Curre | ncy | USD | | | | | | |

The data contained in the Report Info tab may be used for any financial reports, e.g. for invoicing or taxation purposes.

| Field | Description |
|-----------|--|
| Time Zone | Time zone in which global reports for the |
| | environment (e.g. Cost/Revenue Report) will be |

| | generated. |
|--------------------------|--|
| Reconciliation Period | One of the following: daily, weekly, bi-weekly or monthly. This will also set up the periodicity of the Unresolved xDR Reports . (See the <i>Statistics</i> section below.) |
| TaxID | Locally-designated tax number. |
| Currency | The company's internal currency. You can use different currencies for your customers or vendors, but Cost/Revenue Reports will be generated in this currency. The value for this parameter is set permanently for the new environment, and cannot be changed later. |

Payment Systems

The Payment Systems tab lists all existing payment systems, and allows you to enter information related to payment gateways used to receive payments from customers.

| Contact info Legal info Report info Payment Systems Edit Namp* Processor Login * Password Test Mode Recurring Image: Contact info Ogone Image: Contact info Image: Contact info Ogone Image: Contact info Ogone Image: Contact info | curring Delete | Log |
|---|----------------|-----|
| Edit Namp* Processor Login * Password Text Mode Recurr Image: State of the st | | _ |
| Cardstream eSec LinkPoint Moneybookers Network:Financial Oggode PaylowFro Payment Express StreBopting StreBopting TripleDeal WorldPay Invisible | | |

One or more payment systems may be utilized for electronic payments. In order to make use of these services, you must first register with one of the currently-supported^{*} merchants, as shown below:

| Name | Web Page |
|--------------|-------------------|
| 2CheckOut | www.2checkout.com |
| Assist | www.assist.ru |
| AuthorizeNet | www.authorize.net |

^{*} Supported means that a corresponding Business::OnlinePayment plugin module is available at **www.cpan.org**. This does not guarantee that the module will support all the required features, and some extra work may be required to integrate it into the solution and perform testing. Please contact **support@portaone.com** for a current list of payment modules which have been thoroughly tested and work "out of the box", such as AuthorizeNet.

| Beanstream | www.beanstream.com |
|--------------------|--|
| BoV | www.bov.com |
| Cardstream | www.cardstream.com |
| eSELECTplus | www.moneris.com |
| LinkPoint | www.linkpoint.com |
| Moneybookers | www.moneybookers.com |
| Netaxept | www.paynet.no |
| Ogone | www.ogone.com |
| PayflowPro | www.verisign.com/products/payment.html |
| PaymentExpress | www.paymentexpress.com |
| SecureHosting | www.securehosting.com |
| WorldPay Invisible | www.worldpay.com |
| WorldPay Junior | www.worldpay.com |

To add a new payment system, click **Add** and enter the Account Name, Login, Password and Merchant in the edit row at the top of the listing. Choose one or several payment methods which will be used for payments made by these payment systems. To edit an existing account, click **Edit** and copy the information from the current row into the form above. Save changes using the **Save** button. A recurring payment allows customers to set up periodic payments on this payment system. Payment systems with recurring payment enabled are indicated by the **Save** icon.

After adding the payment system, it is necessary to assign it to one or several currencies in which payments will be processed using the chosen payment methods (see the *Currencies* section). Only after doing so can this payment system be used for payments by customers and accounts defined in these currencies. Please note that several (more than one) systems may not be assigned to the same currency using the same allowed payment method, i.e. you cannot have two systems with VISA as the allowed payment method assigned to the currency USD. However, you can assign both a system with VISA as the allowed method and another with MasterCard as the allowed method to the currency USD. Similarly, you can assign one system with VISA to the currency USD and another with the same method to the currency EUR.

Test Mode is a special mode of interaction with the system. It is useful during the initial setup phase, when a merchant may want to test its setup without processing live card data.

What is a Payment Processor?

A payment processor is a real-time transaction processing system that functions as a payment service using a secure transaction server on the Internet. Merchants with a valid merchant account at an acquiring bank ("payment system") can use this system to submit, authorize, capture and



settle credit card or eCheck transactions without the need for a separate transaction terminal.

Payment System Basics

This section is provided for information purposes only. The terms and conditions of your payment system are subject to agreement between you and your bank or merchant service provider, and should be consulted for specific information relating to your payment system.

A payment system is required to accept credit cards using the system. A payment system is a special account with a bank that is a member of the Visa and MasterCard associations (American Express may also be part of your payment system). Such a bank has been certified by the Visa and MasterCard associations and can provide you, as the merchant, with all the services related to your payment system.

You *must* have a credit card payment system in order to use a payment processor for credit card transaction processing. The payment processor system is separate from your payment system, but it may be purchased at the same time from the bank or merchant service provider which is creating your payment system.

The merchant service provider normally does the following:

- Assigns you a payment system number.
- Sets up your payment processor account.
- Assigns you a login ID and password for use with your payment processor account.
- Acts as your main point of contact for basic issues regarding your merchant and payment processor accounts.
- Enables you to add certain types of credit cards to your payment system.
- If the merchant service provider is also your payment processor reseller, it also activates the processing capability for these cards on your payment processor account.
- Deposits credit card funds to your account.

Your merchant service provider may also provide you with MID and TID numbers. The payment processor does not need these numbers, but some third-party solutions (such as certain Shopping Cart providers) may require them.

Once your payment system is set up and "live" on the credit card system, you can begin accepting credit cards from customers. It is your responsibility to configure the payment processor to meet your own needs, and to provide a hosting environment which is appropriate for the choices you have made within the payment processor.

The **E-Payments Log** button in the toolbar allows you to access information about credit card or direct debit charge attempts for the whole environment. Please see section *E-Payments Log* for further details.

Access Levels

Introduction to the ACL System

Different types of users have different responsibilities within the billing system. Some users may not be allowed to use or see certain portions of the system. To this end, PortaBilling supports the concept of **Access Control Lists** (ACL). ACLs allow the PortaBilling100 administrator to decide, for example, that a particular sales representative can look at customers' data, but cannot create new customers.

ACLs allow you to control what users of your site can and cannot do. Without such restrictions, it is almost impossible to guarantee that users will see or change only the information that they are allowed to.

ACL Types

An access level can be one of the following:

- Account
- CC Staff
- Component (cannot be assigned to users; used only as a building block to construct other access levels)
- Customer (to be applied to retail customers or sub-customers)
- Representative
- Reseller (to be applied to your resellers)
- User (access level for users of the admin interface)
- Vendor

These levels are composed of permissions and, optionally, other components. A permission is the lowest level of access control resources. It contains a set of permissions that are granted when using a component.

Newly created ACLs will be available in the select menu of the corresponding form when creating a new object or modifying an existing object's details. For instance, a User ACL will appear in the select menu of the **Add User** form (see below), a Customer ACL will be available when creating or editing a customer, and so on.

| ຝ | v 📰 🕸 i 🗸 | Add l | Jser | () America/Vancouver | demoroot | ? Help |
|---|--|------------------------|---|-------------------------------|----------|--------|
| • | 🗟 Save 🔒 Save & Close | 🛞 Close 🛛 🕀 Objec | ts | | 🕅 Logout | |
| | Login New Password Access Level <u>Admin</u> Bookkeepe Output Forma Helpdesk No access Date Test Time Utt Admin | r Interface Life Cycle | Mailing List Time Zone Web Interface Language 2003-12-31 User Defined User Defined | Europe/Prague en - English | v | |
| | Date YYYY-MM | 1-DD | 2003-12-31 | ~ | | |
| | Time HH24:MI | :SS | User Defined | ~ | | |

Permissions

A permission is the fundamental unit of exchange in the PortaBilling100 security model. Permissions are composed of an access type, whether or not this is an allowed action, the relevant object, and the relative attribute of the object.

Let's take the example of ASR reports. An access level called "Access to 'ASR' reports" is provided within the PortaBilling100 installation. It defines only one permission, which appears as in the following screenshot:

| ۵ | y 🗈 💲 i 🖌 | Edit Access Level | America/Vancouver | demo-root | |
|---|---|--------------------------|-------------------|-----------|-------|
| • | 🕑 Add 🖬 Save 🕞 Save & Close 🔇 | Close 🗈 Dependencies | | M) Logout | 目 Log |
| | Components Object/a | | ppe Component | | |
| | Edit Access type Allow/Deny Read V Allow Allow | Object * Attribute * Dek | | _ | |

The "Access type" is set to "Read", and the permission is to "Allow". This permission applies only to "WebForms" objects which have the attribute "ASR".

There are four possible access types:

- read view the specified resource
- update modify the resource
- insert create new instances of the resource type
- **delete** remove instances of the resource from the system

The field "Allow/Deny" defines whether this permission has been granted or withheld.

You should never have to provide fine-grain permission information yourself, as all possible permissions are already encapsulated in the components of your PortaBilling100 installation. For this reason, we will not discuss the "Object" and "Attribute" fields further in this section. However, it may be useful to know that wildcards can be used in these fields. For example, to allow Read access to all web pages, an ACL could be defined with the following permissions:

| Access type: | "Read" |
|--------------|------------|
| Allow/Deny: | "Allow" |
| Object: | "WebForms" |
| Attribute: | ···*·, |

As may be guessed, the "*" in the attribute field means "all attributes".

NOTE: Should you find it necessary to modify these basic components or create new ones, please contact PortaOne Support. We can provide you with a list of Object and Attribute resources, or otherwise assist you in maintaining ACLs.

Components and User ACLs

Components will be made up of zero or more permissions, and can include other components (as dependencies). If access level ACLX includes access levels ACL1, ACL2 and ACL3 (or, in other words, is *derived* from ACL1, ACL2 and ACL3), then ACLX will contain all the permissions defined in ACL1, ACL2 and ACL3 (along with all of the access levels they in turn are derived from).

What happens if there is a contradiction; for example, if ACL1 denies read access to Accounts.password, and ACL2 grants it? In such a case, the first available definition will be used. Thus, in the example above, access will be denied according to ACL1, which is first in the list of included access levels. In addition to these, a component has several other aspects.

When editing a component, you will first see a screen as in the following screenshot:

| â 🗹 🗈 | s i 🖌 | Edit Access Level | | demo-root | |
|-------|---|---|---|-----------|-------|
| Save | 🗟 Save & Close 🛞 Close | Dependencies | | 🔰 Logout | 目 Log |
| | Component | Admin Access PB100 PD100 ACL prototypes ACL prototypes | Type Component Hidden | | |
| | Components Object/ | ttribute permissions Notepad | | | |
| | Available | | Included | | |
| | ACL prototypes Advanced Neseller Bookkeeper access Helpdesk access No access No access Representative Reseller Reseller Reseller Reseller Sentor CC Staff access Vendor Vendor access kccounts Access to account's sel | Currencies Destination Nodes read Products F Repost ful Representa Tarifs fu Trace a ca Vendors fu Usadours fu Customers Accounts f Bead STD Templates Schanger Connection Nodify av Access to Vendory fu | ns read-only only ull access tives full access ll access ll access full access full access full access full access | | |

Including components as dependencies within other components gives the system its power. Here we see that the "Admin access" level is defined by over a dozen dependant components. Note that this component does not actually define a permission itself, but rather relies on the implementation of its dependants.

By deriving new components from existing components in the system, you can implement fine-grain access control and define User ACLs specific to your operational environment.

ACLs for Sub-customers and Visibility

Normally you would not want reseller A to be able to use (or even see) ACLs for his sub-customers that were designed for reseller B. To ensure this, you can mark certain ACLs as visible only to a particular reseller.

ACL Subsystems

In some cases, the same object and attribute can be interpreted differently according to the context. For instance, a reseller can access his own customer information, or information about his sub-customer. Although in both cases he will work with the same physical fields in the database, he needs to have fundamentally different sets of permissions. This is accomplished using subsystems in the ACL definition. In this example, there would be two ACLs defining applicable operations with the **Customers.name** attribute (or other attributes of a customer). One of these ACLs will have the subsystem **PB100**, defining access in a global context, i.e. the reseller's access to his own information. The other ACL will have the subsystem **Sub-customers**, which defines the reseller's access to information about his sub-customers.

Access Level Management Interface

In this discussion of the ACL system, we have proceeded by starting with the fundamentals and building up your skills from there. Now we will discuss the entry point for ACL management. On the PortaBilling100 administrative interface you will find a link to "Access Levels". This link takes you to the Access Level Management main screen pictured below.

This screen is similar to many others in the PortaBilling100 system, including a search interface at the top and a results listing at the bottom. (By default, all ACLs are shown in a paged format on this screen.) You may search for ACLs using any combination of Name and Type.

In the results listing, you may also see the dependencies icon and delete icon. ACLs can only be deleted when they are not in use. If a component contains any included components, you will be able to click on the dependencies and see search results for all dependants. The following screenshot shows all dependants for "Accounts full access". Note that some of the dependants have their own dependencies.

| 🗹 🗈 💲 🖬 🗹 | | Access Level M | lanagement | | | | | | |
|-------------|--------------|-------------------|------------------|----------------|------|--------|---------------|-----------|-------|
| Add 🛞 Close | | | | | | | | M) Logout | 目 Log |
| | Name | Subsystem | Group | Туре | | | | | |
| | | | ACL prototy | V ANY V | Sho | w ACLs | | | |
| | | | | | | | | | |
| | Dependencies | Name | Subsyst | | | Delete | | | |
| | | Admin | PB100 | ACL prototypes | | | | | |
| | 1 | Admin Access | PB100 | ACL prototypes | - 👎 | | | | |
| | | Advanced Reseller | PB100 | ACL prototypes | . 🔏 | × | | | |
| | 11 | Bookkeeper | PB100 | ACL prototypes | 2 | | | | |
| | (71) | Bookkeeper access | PB100 | ACL prototypes | - 🐙 | | | | |
| | 1 | Helpdesk | PB100 | ACL prototypes | 2 | | | | |
| | (71) | Helpdesk access | PB100 | ACL prototypes | - 😽 | | | | |
| | | No access | PB100 | ACL prototypes | 2 | × | | | |
| | - | Representative | PB100 | ACL prototypes | . 🎄 | × | | | |
| : : . | ` | Access Level De | ependencie | 5 | | 🖲 Amei | ica/Vancouver | demo-root | ? He |
| id 🛞 Close | | | | | | | | MØ Logout | 目 Lo |
| | Name | Subsystem | Group | Туре | | | | | |
| | | × | | V ANY V | Sho | w ACLs | | | |
| | | Dependa | nts of 'Helpdesk | access' | | | | | |
| | Dependencies | s Name S | Subsystem | Group | Туре | Delete | | | |
| | (71) | Helpdesk | PB100 | ACL prototypes | 2 | | | | |

We have already talked about the necessary parameters for creating or editing components, but we have not yet discussed component inclusion in detail. Each access level may have zero or more dependant components. These components are ordered, and likewise are applied in order until the first matching permission is reached.

In order to understand this better, we will use the previous example. Suppose a user is trying to view ASR reports. His access level must allow reading of "WebForms.ASR" (object "WebForms", attribute "ASR"). For the sake of simplicity, we will say that his access level includes "A", "B", and "C", where "B" allows this permission, but "C" explicitly denies it. In this case, the user's ability to view these reports is based on the ordering of these components. If "B" appears before "C", then it will work. In the opposite case, he will not have access.

This may sound complex, but in practice the user interface is quite simple. Two columns are shown on the "Components" tab of the edit screen for each access level. On the left, you have a list of the available components, while on the right are the included components. Between these two columns you have the "Include->" and "<-Remove" buttons, which move selected items between the two lists. As for ordering, the "Up" and "Down" buttons on the far right-hand side of the screen allow you to rearrange selected elements of the "Included" column. The "Go To" button opens the edit screen for the selected component.

Creating a New User ACL

From time to time you will find that the predefined user ACLs (Admin, Helpdesk, and so on) offer too few, or too many, restrictions for a particular class of user. In such a case, it is time to create a new user ACL.

The easiest method is to take an existing access level and create a new one modeled on it, and then modify it to fit your needs. You should examine the permissions granted to the model access level, and verify that you want to grant access to those resources. Next, you can include other components to suit your needs. As a style recommendation, we suggest that you first create a component containing the dependant components you wish to utilize. Finally, create a new user ACL which includes only this new component. Now you can assign this ACL to new users.

The PortaBilling100 ACL management system contains style conventions which you would be well-advised to follow:

- The name of a component should be descriptive, based on the actions which it allows. Examples are "Delete a node", "Currencies read-only", and "Access to Vendor Reports".
- Create a new group for any components or user ACLs which you define, so as to keep them separate from PortaBilling100's built-in ACLs.
- By convention, when defining a new user ACL (for example, "DemoUser"), we append "access" to the name of a component ("DemoUser access") to include any dependant components.

You should now have the skills necessary to implement the PortaBilling100 security model and customize it to suit your business environment.

Default User ACLs

PortaBilling is supplied with the following predefined ACLs:

| Name | Description |
|------------|---|
| Root | Super User, read and write access to all PortaBilling |
| | objects |
| Admin | Like Root user, but with some limitations: |
| | - cannot create new users |
| | - cannot modify company info |
| | - read-only access to Destinations, Currencies, Nodes |
| Bookkeeper | Read-only access to billing information (Tariffs, |
| | Products); can change balances for |
| | Accounts/Customers, block/unblock.; no access to |
| | xDRs; access to reports. |
| Helpdesk | Read-only access to billing information (Tariffs, |
| | Products); can modify Customer and Account |
| | parameters; access to Trace Call. |

Default Customer ACLs

PortaBilling is supplied with the following predefined ACLs for customers (or sub-customers):

| Name | Description |
|--|---|
| Retail Access to xDRs, ability to change customer | |
| | information, make online payments and access |
| | information about all accounts under this customer. |

Default Reseller ACLs

PortaBilling is supplied with the following predefined ACLs for resellers:

| Name | Description | |
|----------|--|--|
| Reseller | Ability to set up online payment processors, change | |
| | rates in the subscriber's tariff, modify parameters of | |
| | the subscriber's product, create sub-customers and | |
| | accounts under them, make online payments, and | |
| | create CC staff accounts. | |
| Advanced | anced Same as above, plus read-only access to customer's | |
| Reseller | own tariff (the tariff used by the PortaBilling owner to | |
| | charge the reseller). | |

Default Customer Care ACLs

PortaBilling is supplied with the following predefined ACLs for customer care administrators:

| Name | Description | |
|--|---|--|
| Customer Care Ability to see customer/account information and | | |
| | change service parameters, give refunds (daily and | |
| | transaction limits applied), and trace a call and see the | |
| | call details. | |

Default Vendor ACLs

PortaBilling is supplied with the following predefined ACLs for vendors:

| Name | Description |
|--------|--|
| Vendor | Access to CDR data and the vendor's information. |

Default Representative ACLs

PortaBilling is supplied with the following predefined ACLs for representatives:

| Name | Description | | |
|----------------|--|--|--|
| Representative | Read-only access to customer information, customer's | | |
| | XDR records, and account information. | | |

User Management

The User Management screen shows existing users registered in the system, and also allows you to edit current user information or add and delete users. To add a new user, select the **Add** button from the User Management screen. The user list table contains the following information and operations:

| 3 | User Manag | | | User Ma | nagement (§ America | /Vancouver | demo-root | ? He |
|---|------------|------------------|--------------|----------------------------------|--|------------|-----------|------|
| • | 🛃 Add | 🛞 Close | 2 | | | | 🔰 Logout | 🔒 Lo |
| | | | | | | | | |
| | | Login | Access Level | E-mail | Description | Status | Delete | |
| | | demo-root | Screenshots | kzhilenko@portaone.com | User for screenshots taking | | × | |
| | | <u>helpdesk</u> | Helpdesk | helpdesk@portaone.com | Helpdesk staff | | × | |
| | | <u>keeper</u> | Bookkeeper | keeper@portaone.com | | | × | |
| | | <u>kzhilenko</u> | Root | konstantin zhilenko@portaone.com | Konstantin Zhilenko | | × | |
| | | <u>pb-root</u> | Root | monitor@portaone.com | ROOT - created on installation please change the passwor | rd | × | |

| Column | Description |
|--------|--|
| Login | The username for login and user identification. The |
| | username provides a link to the edit screen for that |

| | particular user. |
|--------------|---|
| Access Level | The privilege level or role assigned to the user. See the |
| | Access Levels section for more information. |
| E-mail | An e-mail contact for the user. For convenience, this |
| | is provided as a link, so you can send an e-mail to the |
| | user directly from this screen. |
| Description | A short description associated with the user. |
| Delete | A delete button appears next to all users except for |
| | the Root user created on installation. This |
| | permanently deletes the user from the system. |

Add/Edit User

The Add User screen allows you to enter details to create a new user account. The Edit User screen allows you to change details for a particular user account.

Address Info

| ຝ | \$ | i 🗹 | Edi | t User 'de | emore | oot' | () America/Vancouver | demoroot | ? Help |
|---|-----------|-------------|----------------|------------|---------|--------------|-----------------------|----------|--------|
| • | 🔒 Save 🔓 | 🛛 Save & Cl | lose 🛞 Close | 📲 Objects | | | | 💵 Logout | 📒 Log |
| | | | - | | | | | | |
| | Ad | dress Info | User Interface | Life Cycle | Mailing | List Notepa | b | | |
| | Compan | y Name 🛛 Po | rtaOne | |] | Contact | DeeJason | | |
| | Mr./Ms./ | . Mr | ъ |] | | Phone | | | |
| | First Nar | ne De | ie - | M.I. | | Fax | | | |
| | Last Nar | ne Ja: | son |] | | Alt. Phone | | | |
| | Address | 12 | 3 Hard Drive | | 1 | Alt. Contact | | | |
| | | | | | | E-mail | demoroot@portaone.com | × | |
| | | | | ~ | | | | | |
| | Province. | /State cz | , | | 1 | Description | Doc and Demo root | | |
| | | | · | | | | | | |
| | Postal C | ode 12 | 8 00 | | | | | | |
| | City | Pra | ague | | | | | | |
| | Country/F | Region sla | ovenia | | | | | | |

Mandatory fields for user contact information:

| Field | Description |
|-------------|---|
| Description | A short description of the user that will be visible on |
| | the main User Management screen. |
| E-Mail | An e-mail contact for this user. |

User Interface

| â 🖸 | ' 🖫 💲 i | | Edi | t User 'd | lemoroot' | | () America/Vancouver | demoroot | ? Help |
|-----|--------------|-------------|-------------|------------|---------------|----------|----------------------|----------|--------|
| | Save 🕞 Sa | we & Close | 🛞 Close | 📲 Object | ts | | | 💵 Logout | 目 Log |
| | | | | | | | | | |
| | Address | s Info User | r Interface | Life Cycle | Mailing List | Notepad | | | |
| | Login | demoroot | × | | Time Zone | | America/Vancouver | ~ | |
| | Password | ***** | * (| Auto | Web Interface | Language | en - English | * | |
| | Access Level | Root | | * | | | | | |
| | | | | | | | | | |
| | Output Forma | it | | | | | | | |
| | Date | YYYY-MM | 1-DD | | 2003-12-3 | 1 | ~ | | |
| | Time | HH24:MI | :SS | | User Defi | ned | ~ | | |
| | Date & Time | YYYY-MM | 1-DD HH24:M | 4I:SS | User Defi | ned | ~ | | |
| | Input Format | | | | | | | | |
| | Date | YYYY-MM | 1-DD | | 2003-12-3 | 1 | ~ | | |
| | Time | HH24:MI | :SS | | User Defi | ned | ~ | | |

| Field | Description | | | | | | | | |
|---------------|---|--|--|--|--|--|--|--|--|
| Login | The new user ID to be used at login and elsewhere | | | | | | | | |
| | throughout the system. | | | | | | | | |
| Password | The password for this login. A secure and easy-to- | | | | | | | | |
| | remember password may be automatically generated | | | | | | | | |
| | by pressing the "Auto" button. | | | | | | | | |
| Access Level | The privileges or role associated with this user. See the | | | | | | | | |
| | Access Levels section for more information. | | | | | | | | |
| Time Zone | The time zone in which this user will be operating. | | | | | | | | |
| Web Interface | The language to be used on the admin web interface | | | | | | | | |
| Language | for this user. | | | | | | | | |

For a description of the input and output formats, please refer to the **Common Features** section.

Life Cycle

This allows the administrator to set up the user account's activation and expiration dates.

| ₫ | > | \$ i 2 | 3 | | Ed | it User 'd | lemoroot' | | Ī | 🦉 Cal | enda | ır - M | ozill | a | | | - | | |
|---|-------------|------------------|-------------|---------|--------------|------------|--------------|---------|---|--|-----------|-----------|-----------|-----------|-----------|--|-----------|--|--|
| • | 🖬 Save | Save & | k Close | 🛞 Close | | | | | | Calendar - Mozilla ✓ | | | 📒 Log | | | | | | |
| | | | | | | | | | | | 2004 | | | | lugu | ust ▼ → Sa Su 31 1 7 8 14 15 | | | |
| | | | Address | Info Us | er Interface | Life Cycle | Mailing List | Notepad | | | | | | | | | | | |
| | | | | | | | | | | | Мо | Tu | We | Th | Fr | Sa | Su | | |
| | | | ctivation (| | | YY-MM-DD | | | | | 26 | 27 | 28 | 29 | 30 | 31 | 1 | | |
| | | <u> </u> | xpiration | Date | YY | YY-MM-DD | | | | | 2 | <u>3</u> | 4 | <u>5</u> | <u>6</u> | Z | 8 | | |
| | | | | | | | | | | | <u>9</u> | <u>10</u> | <u>11</u> | <u>12</u> | <u>13</u> | <u>14</u> | <u>15</u> | | |
| | | | | | | | | | | | <u>16</u> | <u>17</u> | <u>18</u> | <u>19</u> | <u>20</u> | <u>21</u> | <u>22</u> | | |
| | | | | | | | | | | | <u>23</u> | <u>24</u> | <u>25</u> | <u>26</u> | <u>27</u> | <u>28</u> | <u>29</u> | | |

The account will not expire if the Expiration Date field is left blank.

Mailing List

PortaBilling dispatches e-mail alerts (e.g. error messages and notifications) during normal production. E-mails are dispatched to each user according to the Mailing List settings.

| | Image: Second | \$ 🖬 🖂 | | Edit User | 'demoroo | ť' | (| America/Vancouver | demoroot | ? Help |
|---|---|------------------|------------------|--------------------|--------------|---------|---|-------------------|----------|--------|
| • | 🖬 Save | 🗟 Save & Close | 🛞 Close | 📲 Objects | | | | | M Logout | 目 Log |
| | | | | | | | _ | | | |
| | | Address Info | User Interfac | e Life Cycle | Mailing List | Notepad | | | | |
| | Ena | ble | Subject | | | | | | | |
| | E | CC Staff Error | Reports | | | | | | | |
| | E | Error in transla | ation rule | | | | | | | |
| | [| Fraud detectio | n (Ack/Rej/E | rr) | | | | | | |
| | E | General billing | ; misconfigurai | tions | | | | | | |
| | [| Merchant acco | unt error | | | | | | | |
| | [| Mismatch in th | e Destinations | s or Rates table | | | | | | |
| | [| Missing critica | l billing inform | ation (Account / T | ariff) | | | | | |
| | [| No currency e | «change rate fo | und | | | | | | |
| | [| No remote IP a | authentication | on your gateway | | | | | | |
| | [| Not defined or | empty Called- | Station-Id | | | | | | |
| | [| Payment error | | | | | | | | |
| | [| Profit monitor | event detected | | | | | | | |
| | [| Replication pr | oblems | | | | | | | |
| | E | Task rejected | | | | | | | | |
| | E | Time problem | s (NTP / Forma | at / Suspicious) | | | | | | |
| | [| User Error Re | port | | | | | | | |

To add different notifications for a specific user, check/uncheck one or more boxes on the left for the corresponding Subjects. The available alert types and their conditions of activation are as follows:

| Alert Type | Description |
|---------------------------|--|
| CC Staff Error Reports | Customer care (your reseller's customer |
| | support) may discover a problem they are |
| | unable to solve themselves, and thus may need |
| | to escalate this problem to your support staff. |
| | When they send an error report from the CC |
| | web interface, it will be received by users |
| | subscribed to this mailing list. |
| Error in translation rule | A translation rule could not be properly |
| | applied, due to a programming error. |
| Fraud detection (Ack / | Attempt to login more than once using the |
| Rej / Err) | same debit account number. |
| General billing | A debit account made a call that cost more |
| misconfiguration | than its available funds; an unresolved call was |
| | detected (unresolved calls may be normal |
| | when they are on-net calls, but in most cases |
| | they indicate connection misconfiguration); |
| | and so on. |
| Merchant account error | An error was received from the online |
| | payment processor while trying to execute a |
| | transaction. |

| Mismatch in | The cost of a call could not be determined, |
|--------------------------|---|
| Destinations or Rates | because no matching rate was found in the |
| table | specific tariff. |
| Missing critical billing | A call could not be billed due to missing |
| information (Account/ | information (e.g. unable to identify the |
| Tariff) | account which is to be charged for the call). |
| No currency exchange | Unable to do cost/revenue reconciliation for |
| rate found | some calls, since no exchange rate is defined |
| | for the base currency and currency used for |
| | those calls. |
| No remote IP | It seems that your gateway accepts all |
| authentication on your | incoming VoIP calls. See the "Remote IP |
| gateway | authentication" section in Portabilling100 User |
| | Guide vol. I for more details. |
| Not defined or empty | The Called-Station-ID (DNIS) field is empty |
| Called-Station-ID | in the request, so PortaBilling is unable to |
| | determine which number was dialed. This |
| | might happen due to a firmware problem on |
| | Quintum. |
| Payment error | Unable to perform periodic payment (credit |
| | card is blocked or no funds are available). |
| Profit monitor event | Sends an alert if the call cost (amount charged |
| detected | by a vendor) is greater than the revenue |
| | (amount charged to the customer). |
| Replication problems | Database replication may be performing |
| | poorly or not at all, so that CDRs for the most |
| | recent calls are absent from the slave database. |
| Task rejected | A deferred task (such as account generation) |
| | could not be run. |
| Time problems (NTP / | This alert may be generated if the time in the |
| Format / Suspicious) | accounting record is in the wrong format or |
| romat / Suspicious) | seems suspicious (such as a point in the future, |
| | or one too far in the past). |
| User error report | |
| User error report | Your customer support may discover a problem they are unable to solve themselves |
| | (e.g. only the network administrator can do it) |
| | () , , , , , , , , , , , , , , , , , , |
| | and thus may need to escalate this problem to your technical staff. When they send an error |
| | |
| | report from the web interface, it will be |
| | received by the admin users subscribed to this mailing list. |
| | manning list. |

Mailing List

The Mailing List Management page allows you to define which e-mail alerts are to be sent to different users (see **Mailing List Subscription**).

| 🙆 🗹 🗈 🕏 i 📈 | Ma | ailing L | ist Management | | | |
|-------------|----------|----------|---|---|----------|-------|
| S Close | | | | | 💵 Logout | 目 Log |
| | | | | | | |
| | User | r | Subject | | | |
| | All user | :s 🔽 . | All types | ~ | | |
| | | | | | | |
| | | User | Subject | | | |
| | de | emo-root | NONE | | | |
| | he | elpdesk | NONE | | | |
| | ke | eeper | General billing misconfigurations | | | |
| | kz | zhilenko | Merchant account error | | | |
| | | | Mismatch in the Destinations or Rates table | | | |
| | pi | b-root | Replication problems | | | |
| | | | | | | |

Select a user from the **User** drop-down list to view which mailing lists a particular user is subscribed to. Select a mailing list from the **Subject** drop-down list to view all users subscribed to a particular mailing list.

Representatives

You may need to track income associated with people with whom you have a business relationship. These people may sometimes be employees, while in other cases they are dealers, partners at a law firm, or independent contractors.

NOTE: Representatives do not participate in billing or revenue sharing. They are listed for information purposes only, as required when PortaBilling is integrated into back-office CRM for calculating commissions and the like.

Each sales representative is assigned initials. Their names and initials appear on sales forms, allowing you to associate specific sales reps with specific sales in order to track their income.

| Image: Save and Save & Close Image: Save | ۵ | 🖌 🔚 😫 | i 🖌 | | Add Repre | sentativ | e | demo-root | |
|---|---|----------|---|------------------|---------------|----------|---|-----------|--|
| Initials PS * Is Inactive Managed By Administrator only Image: State of the | • | 🖬 Save 📓 | Save & Close | 🛞 Close | | | | 🕅 Logout | |
| TaxID | | | Initials Managed By Address Categorizing a | PS * Administ | crator only 💌 | | | | |

| | Representati | presentative Management | | | | | | | | | |
|-----------------|----------------|-------------------------|--------------------|--------|--------|--|----------|-------|--|--|--|
| ► 🗄 Add 🛞 Close | | | | | | | M Logout | 目 Log | | | |
| | | | Search | | _ | | | | | | |
| | Managed | | | | | | | | | | |
| | ANY | ~ | | Sea | rch | | | | | | |
| | | | | | | | | | | | |
| | nitials Name | E-mail | Managed By | Status | Delete | | | | | | |
| | MK Mykola Kach | an | BestDeal Reseller | | × | | | | | | |
| | PS Peter Smith | | Administrator only | | × | | | | | | |
| | | | | | | | | | | | |

NOTE: Once a new representative is created, the **Currency** and **Managed By** properties cannot be changed.

Templates

The purpose of templates is to maintain all data uploaded to and downloaded from the system. Templates automate the processing of user input and create customized output in various data and media formats.



Read more about using the templates functionality in the PortaBilling Template Guide, available for download from: www.portaone.com/support/documentation/

Add a New Template

To add a new template, select the 🖪 Add button.

| | > | \$ 🖬 🖂 | | Add | Template | demo-toor | ? Help |
|---|-------------|----------------|---------|-------------------------------------|-----------------------|-----------|--------|
| • | 🔒 Save | 📄 Save & Close | 🛞 Close | | | 🔰 Logout | |
| | | | | Name Type Media As Copy Of | Generic tariff upload | | |

| Field | | Description | | | |
|-------|-----------------------------------|--|--|--|--|
| Name | The | logical name of the template object | | | |
| Туре | One | One of the following: | | | |
| | - Inv | voice | | | |
| | - Ta | - Tariff Upload | | | |
| | - Tai | Tariff Download | | | |
| | | | | | |
| Media | One of the following media types: | | | | |
| | a, | CSV – Comma Separated Values | | | |
| | | XLS – Excel | | | |
| | | Print format (HTML, PDF) – only applicable for | | | |
| | | templates of the Invoice type | | | |

| As copy of | PortaBilling is supplied with a set of default templates for |
|--------------|---|
| | each type of document, i.e. for both information upload |
| | and download. Documents in print format, i.e. invoices, |
| | can only be "downloaded" from the system. |
| | After selecting Type and Media , the list will be |
| | populated with the default template (always at the top of |
| | the list); all existing templates with the current Type and |
| | Media formats will be listed under the "" separator. |
| Managed | By default – administrator only. The template can be |
| By (only for | assigned to a reseller so that it is visible in the list of |
| Туре | available invoices on the Customer Self-Provisioning web |
| Invoice) | interface. |

To enter editing mode for this template, save your input using the **Save&Close** button. Next, select the template you would like to edit from the Templates window.

Edit Template

| 🙆 ⊻ 📰 💲 🖬 🖉 | 2 | Edit Temp | olate | | (1) America/Vancouver | demoroot | ? Help |
|---------------------------------------|---------------|------------|-------------------|-------------|-----------------------|----------|--------|
| 🕨 🗟 Save 📓 Save & | Close 🛞 Close | 📲 Objects | | | | 🕅 Logout | 目 Log |
| CSV Type Tariff U | | | Media Timezone | CSV Auto | | • | |
| CSV Delimiter | | • •s) • | | | | | |
| No Header Header Data Start At Row | 2 | | | | | | |
| No Fields Fields Data Start At Row | 5 | | | | | | |
| Columns Data Start At Row | 2 | | | | | | |

Once a new template is saved, the document's Media, Type and Managed By properties cannot be changed.

Each Template object consists of several logical components. For example, the Invoice Template's components are Media, Header, Fields, and Footer.

The Media tab is present for all types of templates, and shows the media available for upload or download. For Tariff upload in CSV format, it is important to know what delimiter was used, whether there is a header, or in what row the tariff information starts. For Invoices, the Media tab contains a link to the PortaBilling Layout Designer, which allows you to customize the appearance of your invoices and receipts.

| s 🖸 🖬 🕏 🖬 🖂 | | | Edit Template | | | | |
|-----------------------|--|---|--------------------------------|-------------------|--------------------|----------|-------|
| 🕨 🖬 Save 📓 Save & Clo | se 🛞 Close | 🕀 Objects | | | | M Logout | 目 Log |
| (A) | e Default XLS Tariff Upload er Fields Colu | imns | * Media Excel Timezone Auto | | | | |
| Description | Source Column | | Format | Other Format Rule | Post Processing Ru | lle | |
| Off-peak Period | A (1) 💙 | Text | ~ | | | | |
| Off-Peak Description | B (2) 💙 | Text | ~ | | | | |
| Destination Group S | et C (3) 💙 🗄 | Text | ~ | | | | |
| Free Seconds | D (4) 💙 | sec | ~ | | | | |
| Post Call Surcharge | E (5) 💙 | 1234.12345 | ~ | | | | |
| Login Fee | F (6) 💙 | 1234.12345 | ~ | | | | |
| Connect Fee | | 1234.12345 | ~ | | | | |
| Formula | H (8) ¥ | 1234.10 1234,10 1234.10 1234 1234.12345 Dther: | | | | | |

The content of the Header, Fields, Columns, and Footer tabs is arranged in a similar way, and allows flexible mapping of information related to user documents and information in the PortaBilling Database.

| Column | Description |
|----------------------|---|
| Description | Description of template components. |
| Source Column | Defines the mapping of template information |
| | to the original/destination document. |
| Format | Data format. Choose a format from the list, |
| | or choose Other if the desired format is not |
| | available. Provide a format definition in the |
| | following field. |
| Other Format Rule | Perl code. Active only if Format = "Other:". |
| Post Processing Rule | Perl code. |

Layout Designer

The Layout Designer allows you to customize the appearance of all types of printed output in PortaBilling.

| Image: Section of the sectio | ;e |
|---|-----|
| Page T of 5 Page | ;e |
| Image: Second | |
| Image: Description of the second se | |
| B / U - T Serif ~ - 8 ~ - | |
| | |
| | |
| Black 2 Mo fill 2 Michael 2 | |
| Wall str. 22 New York UGA Header / Date | |
| Image: Solid v Image: Statement Period Fields Image: Image: Image: Statement Period Image: Statement Period Footer Custom Image: Image: Image: Statement Period | ber |
| Elack V Company Name From To for Insert Row Company Name Company Addressi | |
| 1/16 in V 4 February 1, 2006 February 22, 2006 E Remove Row Company Address2 | |
| iii Remove Col Company Address3 Send Back Company Address4 | |
| Previous Balance Dering To Front Company Country | |
| Payments Do Clone Company Phone Company Phone Company Pax | |
| Charges this period 90.18 USD Company E-mail | |
| Total due Company Web Company TaxID Customer Company M | - |

Layout Designer (LD) Quick Start

To launch, click the **Layout Designer** button on the Media tab in the Template Management window. The sliding toolbar on the left side provides most of the controls for manipulating content in the editor window. There are three different states for most of the toolbar icons: normal, active, and not available.

| Icon state | Description | | | |
|------------|------------------------------|--|--|--|
| | Normal - Click to activate | | | |
| | Active - Click to deactivate | | | |
| | Not available | | | |

| Icon | Description |
|------|---|
| * | Add Picture: Click to select a picture (e.g. your company logo) from a file select window. Click the Open button to place the picture on the worksheet. To remove the picture, right-click on it and choose Remove. Another way of deleting a picture is to press Delete on your keyboard. |
| F | Lock Aspect: Fixes image proportions during scale operations. |
| Ø | Preview: Click to preview your work in a browser window. |
| | Add Table: Click to place a table on the worksheet. A table can be removed by using the context (right-click) menu or by pressing Delete on your keyboard. Click the table cell to make it active. To add another table, click on the worksheet to deactivate the currently active object. Read more about tables below. |
| = | Text Align: A section of nine buttons used to align text in an |

| | active table cell. |
|---|--|
| Þ | Word Wrap |
| T | Text controls: The tools and selects from this section control font attributes such as font style (bold, italic, underline), font family (serif, sans-serif, cursive, fantasy, monospace), and font size. |
| T | Foreground Color: Change the text color by selecting from this list. |
| Τ | Background Color: Change the color of the active table cell by selecting from this list. |
| | Border: A section of six buttons for showing or hiding the border of the active table cell. |
| = | Stroke: A section of three controls for changing the active cell's border weight, style and color. |
| | Grid: On by default; click to turn off the grid. |
| | Snap to Grid: On by default; click to allow arbitrary positioning of elements on the worksheet. |
| | Envelope Window: Two half-transparent gray boxes displaying the positions of envelope windows; click to turn off. |
| ŝ | Undo: Click to cancel the last action. |
| | Save and Close: For convenience in editing the bottom of the worksheet, these controls duplicate the main toolbar controls. |



A straight line in the Layout Designer can be simulated by using a table with only one visible border.

Table

The main Layout Designer object is the table, which is a placeholder for all inserted information. A table or a table cell within a table can be moved and scaled by dragging the cell handlers. Double-click a table or a cell within a table to enter cell editing mode, where you can type in or edit a cell's text. To change the attributes of a cell's text, make sure the cell is selected (8 black square handlers are visible) and set the text attributes in the toolbar on the left.



Changing the text attributes of a cell in the toolbar will affect all text in the current cell. To change the attributes of part of the text, enter cell editing mode (double-click), select that part of the text, and use the keyboard shortcuts listed below.

Context Menu

| · · |
|------------------|
| Header 🕨 🕨 |
| Fields 🕨 🕨 |
| Footer 🕨 🕨 |
| 増 Insert Row |
| 🏙 Insert Col |
| 🛎 Remove Row |
| 🕅 Remove Col |
| 🔁 Send Back |
| 🔁 Bring To Front |
| 🗅 Clone |
| × Delete |
| |
| |
| |

The context (right-click) menu provides you with greater control over tables and other objects, and allows certain data located in the PortaBilling database to be displayed in the table cell. To show the menu, right-click on a table or cell. The three top elements of the context menu correspond to the template components (tabs); in the case of an invoice, for example, these would be Header, Fields and Footer. Users can also set the order of all objects in the window and clone or delete selected objects.

Select one of the menu elements to activate a submenu containing a list of all the fields specified in the template editing window. The selected item will appear in the selected cell as the item's value. Double-click the cell to enter editing mode; the cell now displays the corresponding variable.

Page/Print Setup

The page context menu (right-click on the worksheet) provides access to the Web-Page Dialog for page, envelope and print setup.

| 📕 https://de | mo2.portaor | ne.com - Por | ta 💷 🗆 🔀 |
|--------------|----------------|--------------|----------|
| Paper size: | Letter | ¥ | |
| Envelope: | #9-9903 | 2 wnd 💌 | |
| -Margins- | | | |
| Left: | 0.25in | Right | 0.25in |
| Top: | 0.25in | Bottom: | 0.25in |
| Header: 0 | .25in | Footer: | 0.25in |
| | | ОК | Cancel |



Open your browser prior to printing. In your browser's **File** menu, select **Page Setup**. In the dialog window, set up the paper size (A4 or Letter), delete all Header and Footer symbols, and set all margins to zero or a value close to zero.

Envelope Formats: America

| Envelope | Envelope Measurements | Window size | Window From Left | Window From Bottom |
|----------|--------------------------|-----------------|---------------------|--------------------------|
| #6-3/4 | 3-5/8" x 6-1/2" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #7 | 3-3/4" x 6-3/4" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #7-3/4 | 3-7/8" x 7-1/2" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #8-5/8 | 3-5/8" x 8-5/8" | 1" X 4" | 1" | 3 / 4" |
| #9 | 3-7/8" x 8-7/8" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #10 | 4-1/8" x 9-1/2" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #11 | 4-1/2" x 10-3/8" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #12 | 4-3/4" x 11" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |
| #14 | 5" x 11-1/2" | 1-1/8" X 4-1/2" | 7/8" | 1 / 2" |

Double-window envelopes

| Envelope | Window Size | Location | Placement | | |
|-----------------|-----------------|-------------|-----------|--|--|
| | TOP WINDOW | | | | |
| #9-9903 | 3 7/8" x 8 7/8" | From Left | 3/8" | | |
| | 57/0 × 07/0 | From Top | 1/2" | | |
| | BOTTOM WINDOW | | | | |
| 3 5/8" x 8 5/8" | 1" x 4" | From Left | 7/8" | | |
| | | From Bottom | 5/8" | | |
| | TOP WINDOW | | | | |
| # 8-5/8 | 7/8" x 3-1/2" | From Left | 5/8" | | |
| | 110 X0 112 | From Bottom | 2 1/4" | | |
| | BOTTOM WINDOW | | | | |
| 3 5/8" x 8 5/8" | 1" x 4" | From Left | 5/8" | | |
| | | From Bottom | 5/8" | | |
| | TOP WINDOW | 1. | | | |
| #9-13036 | 7/8" x 3-1/4" | From Left | 3/8" | | |
| | ., | From Bottom | 2-1/2" | | |
| | BOTTOM WINDOW | h | | | |
| 3 7/8 x 8 7/8" | 1-1/8" x 4-1/2" | From Left | 1/2" | | |
| | | From Bottom | 7/16" | | |
| | TOP WINDOW | 1 | | | |
| #9-13037 | 7/8" x 3-1/4" | From Left | 3/8" | | |
| | | From Bottom | 2-1/2" | | |
| | BOTTOM WINDOW | | | | |
| 3 7/8 x 8 7/8" | 1" x 4" | From Left | 1/2" | | |
| | | From Bottom | 3/4" | | |
| | TOP WINDOW | | | | |
| #9-13038 | 7/8" x 3-1/2" | From Left | 3/8" | | |
| | | From Bottom | 2-3/8" | | |
| 0.7/00.7/0" | BOTTOM WINDOW | | - / | | |
| 3 7/8 x 8 7/8" | 1-1/8" x 4" | From Left | 3/8" | | |
| | | From Bottom | 5/8" | | |

NOTE: Envelope #9-9903 (3 7/8" x 8 7/8") is QuickBooks compatible.

Envelope Formats: Europe

| Format | Size [mm] | Content Format |
|--------|------------------|----------------------------|
| C6 | 114×162 | A4 folded twice = $A6$ |
| DL | 110×220 | A4 folded twice = $1/3$ A4 |
| C6/C5 | 114×229 | A4 folded twice = $1/3$ A4 |
| C5 | 162×229 | A4 folded once $=$ A5 |
| C4 | 229×324 | A4 |

DIN 680 specifies that a transparent address window should be 90×45 mm in size, and the window's left edge should be located 20 mm from the left edge of the envelope. For C6, DL, and C6/C5 envelopes, the bottom edge of the window should be 15 mm from the bottom edge of the

envelope. For C4 envelopes, the top edge of the window should be either 27 or 45 mm from the top edge of the envelope.

Keyboard Shortcuts

| | 7 |
|---|---|
|) | (|
| | |

| Shortcut | Action |
|--------------|---|
| Arrow keys | Move objects with grid size increments. |
| Ctrl - arrow | Use to scale table cells or images with current grid size |
| key | increments. |
| | cell editing mode |
| Ctrl-A | Selects all objects in the Template window if nothing is |
| | selected, or selects all text in an active table cell. |
| Ctrl-C | Copy selected text. |
| Ctrl-V | Paste clipboard text starting from the current cursor |
| | position. |
| Ctrl-X | Cut highlighted text. |
| Ctrl-I | Change selected text style to Italic. |
| Ctrl-B | Change selected text style to Bold . |
| Ctrl-U | Change selected text style to <u>Underline</u> . |
| Ctrl-K | Hyperlink selected text (opens hyperlink editing dialog). |



Netscape or Mozilla users may experience the lack of a movable cursor allowing them to select text from the keyboard in cell editing mode. Press the **F7** button to turn the edit cursor (caret browsing) on and off.

Users with a small screen resolution may enjoy the benefits of their browser's full-screen mode. Simply press the **F11** button to switch your Mozilla, Netscape or IE into full-screen mode.

Services

Services in PortaBilling define the naming and billing parameters of the physical services you offer to customers. Each service is associated with a particular service type (which defines what the customer is actually doing – making a phone call, sending a message, using WiFi, etc.). Services allows you to specify which parameters are used to calculate charges and, finally, what the rates for each service are.

For your convenience, PortaBilling now provides a set of pre-defined services with all the required parameters. You can easily change an existing service name to make it more descriptive for your administrators and customers; or you can define new services.

Add/Edit Services Online

Click the **Add** button to add a new service. Services you create can be edited later by clicking the **Edit** icon. Standard PortaBilling services cannot be changed, and are shown in gray. Press the **Save** button to save your work when done.

| Τ | | 🗜 💲 🖬 📈 | | Services | | | | | 2 | |
|----|-----|---------------------|--------------------|----------------|-------------|----------------|-----------|-----------------|-------|-----|
| | ÷ | Add 🖬 Save 🔙 | Save & Close 🛛 🛞 C | lose 🐗 Objects | | | | M Logout | | Log |
| Ee | dit | Name * | Service Type * | Rating Base * | Base Unit * | Billing Unit * | Billing:E | Base Ratio * De | elete | |
| | | Business IP Centrex | Voice Calls 💌 | session-time | second | minute | | 60 | × | |
| | | Conferencing | Conferencing | session-time | second | minute | | 60 | | |
| | | Data Service [KB] | Data Service | quantity | byte | kilobyte | | 1024 | | |
| | | Data Service [MB] | Data Service | quantity | byte | megabyte | | 1048576 | | |
| | | Dial-up | Dial-up Internet | session-time | second | minute | | 60 | | |
| | | Messaging Service | Messaging Service | quantity | message | message | | 1 | | |
| | | Quantity Based | Quantity Based | quantity | pcs. | pcs. | | 1 | | |
| | , | Voice Calls | Voice Calls | session-time | second | minute | | 60 | | |
| | 1 | Wi-Fi | Wi-Fi | session-time | second | minute | | 60 | | |

| Column | Description |
|--------------|--|
| Name | Service type name (currently this is the only column |
| | which can be changed by the user). |
| Service Type | Choose the service type (physical service) supplied to |
| | the customer. See below for a description of the |
| | available service types. |
| Rating Base | Specification of which particular parameter is used to |
| | calculate charges, e.g. "session time", "amount of |
| | data transferred" and the like. |
| Base Unit | Abbreviation for units in which service use is |
| | measured (your network nodes will report values to |
| | billing in these units). |
| Billing Unit | Abbreviation for units used to calculate service |
| | charges. You will use these units to specify your rates, |
| | and usage details in xDRs will be shown in these |
| | units. |
| Billing:Base | If billing units are different from base units, this |
| Ratio | parameter defines how many base units make up one |
| | billing unit (for instance, 1024 bytes makes 1 |
| | kilobyte). This parameter is extremely important, as it |
| | affects calculations in all xDRs for this service. |
| | If you decide to deploy a new service with a different |
| | ratio between units (e.g. 1 kilobyte equaling 1000 |
| | bytes), a new service type must be created before you |
| | attempt to do any further configuration. |

Supported Service Types

Once installed, PortaBilling supports the service types shown in the table below. The Rating Base column refers to the applicable rating base options. S ("session-based") means that the service type is charged based on the duration of its use, while Q ("quantity-based") means that some other numerical parameter supplied by the network node is used, e.g. the amount of data transferred.

| Name | Rating Base | Description |
|-----------------|----------------|---|
| Conferencing | S | Rating conference calls via PortaBridge (or some |
| | | other conferencing server). |
| Data Service | Q | Data transfers rated using the amount |
| | | transferred as the billing parameter. |
| Dialup Internet | S | Dialup Internet access sessions, rated based on |
| | | session duration. |
| Internet Access | S | Internet access sessions (DSL, PPPoE, etc.), |
| | | rated based on session duration. |
| Messaging | Q | Rating messages (text, SMS, MMS, other) based |
| Service | | on the number of messages sent. |
| Quantity- | Q | Generic quantity-based service type; can be used |
| Based | | to apply charges for any service use expressible |
| | | in numerical form (e.g. the number of pizzas |
| | | ordered). |
| Session-Based | S | Generic time-based service type; it can be used |
| | | to apply charges for any service use based on the |
| | | length of time the service was accessed. |
| Voice Calls | S | Rating telephony calls (incoming or outgoing) |
| | | made via PortaSIP, VoIP gateways or other |
| | | equipment. |
| Wi-Fi | S | Wireless Internet access sessions, rated based on |
| | | session duration. |

Destinations

Destinations are a list of all possible phone number prefixes to be used in your system, which will later be used in creating price lists (Tariffs). For convenience, destinations are grouped in alphabetical order by country.

In the case of a non-telephony service (e.g. video-on-demand), destinations define various service categories (e.g. VIDEO-NEWRELEASE and VIDEO-FOREIGN), and so a different rating may be defined. For some services (e.g. WiFi access) you would only need one destination for the whole service, since there is no further differentiation. Destinations may be edited and, if a destination is not being used in any tariff, it will also have a Delete button. Of course, it is not necessary to include every destination in a given price list; only enter the prefixes (destinations) used by this particular vendor or customer.

PortaBilling can support different numbering plans, but it is highly recommended to keep all of your destinations in the E.164 numbering space. The Destinations table contains the valid E.164 prefixes. Different standardization and governmental bodies control the E.164 numbering space, and some private numbering spaces also exist.

Click here to view the Official ITU Dialing Procedures document (PDF)

PortaBilling is supplied with a file containing a basic set of destinations. It covers all countries of the world and some of the major destinations in each country, linking prefix information to:

- o country (if applicable)
- o subdivision (if applicable)
- o description

Of course, you can edit the supplied destinations list according to your needs. Also, you can always add more destinations later, if needed.

Add/Edit Destinations Online

To add new destinations, click the **Add** button. The **Save New**. icon will appear on the Destinations form. Enter the prefix and choose a country from the drop-down list. After selecting the country, the subdivision field will be refreshed. Choose a subdivision if necessary. Click the **Save New** icon to save the new destination.

| ຝ | | <u></u> | • | | | D | estination | s | | | 0 | America, | Vancouver | demo-root | ? | Help |
|---|------|---------|----------|---|--------|------------|-------------|---------|------|---------|-------|----------|-----------|-----------|--------|------|
| • | 🗄 A | dd 📘 | Save | 8 | Close | Download | 🔳 Get defau | ılt set | | Upload | | | | ▶¶ Logout | : 8 | Log |
| | ► 4 | 40 | | | Prefix | Country | Description | ► A | ВC | DEF | GHI | KLMM | IOPQR | STUVW | хүг | |
| | Edit | | Prefix * | | | Country | | | | Subdivi | ision | | Desc | cription | Delete | |
| | | | | | Not | Applicable | ~ | Not a | Appl | icable | | ~ | | | | |
| | | 440 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4401 | | | UNITE | ED KINGDOM | | | | | | | | | × | |
| | | 4402 | | | UNITE | ED KINGDOM | | | | | | | | | × | |
| | | 4403 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4404 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4405 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4406 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4407 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4408 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | 4409 | | | UNITE | ED KINGDOM | | | | | | | Mobile | | × | |
| | | | | | | | | | | | | | | | | |

To edit an existing destination, enter a prefix, country or description (i.e. proper, mobile, etc.) in the search field and click the corresponding

button. You can also select a country alphabetically from the top righthand part of the interface. Choose the destination you wish to edit from the list by clicking the **Edit** icon. The content of the row will be copied into the Destinations form above, and the **Save Edit** icon **E** will

appear in the first column. Choose Subdivision from the refreshed dropdown list and type in the Description, if any. Save your work by clicking the **Save Edit** icon.

Destination Access Levels

| User Type | Access Description |
|--------------------|--|
| Root, or if ACL | Full access |
| includes Use | |
| country code | |
| during upload | |
| ACL which allows | Can perform all types of operations with |
| read/write | destinations <i>except</i> for manually specifying a |
| operations on | country during upload. If Admin uploads a new |
| Destinations, e.g. | destination, the system chooses the appropriate |
| Admin | country automatically, using the longest match |
| | from the available destinations. |
| all other types | Read-only |

Destination Upload/Download Procedures

Upload

The CSV file header contains the following fields: Action, Prefix, iso_3166_1_a2, Description.

| Field | Description | | | | |
|----------------|---|--|--|--|--|
| Action | Add or delete; encoded as "+" and "-" or "add" and | | | | |
| | "remove". | | | | |
| | Note: Only unused destinations that do not appear | | | | |
| | in the Rates table can be deleted. If the action is "+" | | | | |
| | and the prefix is already in Destinations, then the | | | | |
| | update action will be performed. | | | | |
| Prefix | Value to be stored in Destinations destination. | | | | |
| Two-letter ISO | Value to be stored in Destinations.iso_3166_1_a2. | | | | |
| Country Code | Note: Ignored if the uploader is not Root or does not | | | | |
| | have "Use country code during upload" in his ACL; | | | | |
| | in this case, the system chooses the appropriate | | | | |
| | country automatically, using the longest match from | | | | |
| | the available destinations. If the Country property is | | | | |
| | not applicable, then the value must be encoded as | | | | |
| | N/A. If the field is empty and the uploader's access | | | | |

| | level is Root, then the system chooses the |
|-------------|--|
| | appropriate country automatically, using the longest |
| | match from the available destinations. |
| Description | Value to be stored in Destinations.description. |

Download

The CSV file header contains the following fields: Action, Prefix, Country Code (iso_3166_1_a2), Description.

| Field | Description |
|------------------|--------------------------------|
| Action | Add or delete, encoded as "+". |
| Prefix | Missing prefix |
| All other fields | Empty |

NOTE: For tariff uploads, new destinations will be e-mailed as a CVS attachment in an error report using the Destinations Upload format: Action, Prefix, Country Code (iso_3166_1_a2), Description.

Uploading Destinations

The system is supplied with a predefined set of countries and the most common destinations for those countries. If required, new countries may be inserted into the database manually. When uploading new destinations, a super user can specify the country using its ISO country code. If empty, the system tries to find a country via existing destinations.

For example, if "16045" is uploaded, the system finds that "1604" is already in the database as "Canada". If it is not possible to find the country in this way, or if the country is "N/A", the destination will not be imported. An uploaded file with such a destination will be sent back for correction in a format suitable for upload.

ISO 3166-1 Country Codes

For more information on this standard, visit the **ISO 3166 Maintenance** Agency website.

The complete title of ISO 3166-1 is "Codes for the representation of names of countries and their subdivisions".

Country Codes

- ISO 3166-1 gives coded representations of more than 230 names of countries or areas dependent on a country.
- ISO 3166-1 contains a two-letter code (Alpha-2-code), a three-letter code (Alpha-3-code) and a three-digit numeric code, (Numeric-3-code) for every entry in its list of country names.

ISO 3166-1 does not code:

- o Names of languages (e.g. Gaelic)
- o Names of nations or peoples (e.g. Dutch)
- o Names of groups of countries (e.g. Scandinavia)
- o Names of continents (e.g. Asia)
- o Names of organizations (e.g. OAS, NAFTA, WHO)
- o Top-level Internet domains

Applications

ISO 3166-1 codes are used in many applications in all branches of industry, trade and statistics worldwide. One example of their use are the "code elements from ISO 4217" codes for currencies and funds, which are based on the ISO 3166-1 Alpha-2-Code (e.g. USD for US Dollars, where US comes from ISO 3166-1).

ISO 3166-2 Country Subdivision Codes

ISO 3166-2 "Country Subdivision Codes" establishes a code for the names of principal administrative subdivisions within countries coded in ISO 3166-1. ISO 3166-2 was published on December 15, 1998. The code elements used consist of the Alpha-2 code element from ISO 3166-1 followed by a separator and a further string of up to three alphanumeric characters.

The names of the subdivisions are given in more than one language if the country has more than one official language (and if the alternative language versions were available to ISO). In Uzbekistan, for example, there are two official languages, Uzbek (uz) and Russian (ru), so the subdivision names are also listed in these two languages. The Romanization systems used to convert the country subdivision list from non-Roman to Roman script (e.g. from Cyrillic, in the case of Uzbekistan) are also given. The abbreviations and language codes (ISO 639) used in the header preceding the subdivision list for each country are explained in annexes to the standard.

Destination Group Sets

Very often a logical destination (e.g. Czech Republic – Mobile) will consist of multiple prefixes (420601, 420602, 420604, 420732 and so on). It would be quite inconvenient to repeat the same "create a new rate" operation for every individual prefix, since all of the price parameters are the same. Thus you could create a destination group "CZ-Mobile" and then perform "create a new rate" only once, with the rates for all of the prefixes being created automatically. However, since different carriers might include different prefixes in the "Czech Republic – Mobile" category, we need to be able to maintain different sets of destination groups.

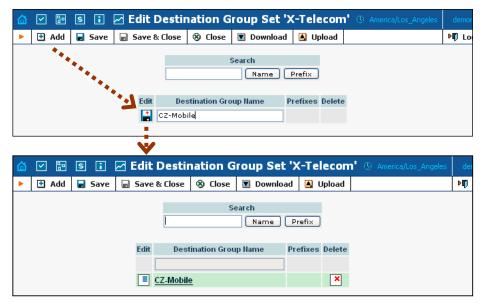
Creating a New Destination Group Set

To add a new destination group set, click the 🖿 Add button. The Save New 🖬 icon will appear next to the name.

| 🛕 🗹 📴 🕏 🖬 🗹 Dest | ination Group Sets 🤅 | | demoroot | ? Help |
|-------------------------|------------------------|--------|----------|--------|
| 🕨 🕑 Add 🗟 Save 🛞 Close | | | 💵 Logout | 目 Log |
| Edit | Name X-Telecom | Delete | | |
| | | | | |
| V | | | | |
| 🛕 🗹 📴 💲 🖬 🗹 Dest | ination Group Sets 🛛 🔇 | | demoroot | ? Help |
| 🕨 🕑 Add 🔒 Save 🛞 Close | | | 📲 Logout | 🔳 Log |
| | | | V 9 | |
| | | | V3 | , |
| Edit | Hame | Delete | V9 | ; |
| | Hame | Delete | v3 | |

After the destination group set has been saved, click on the hyperlinked name to manage the destination groups included in this set.

Creating a Destination Group

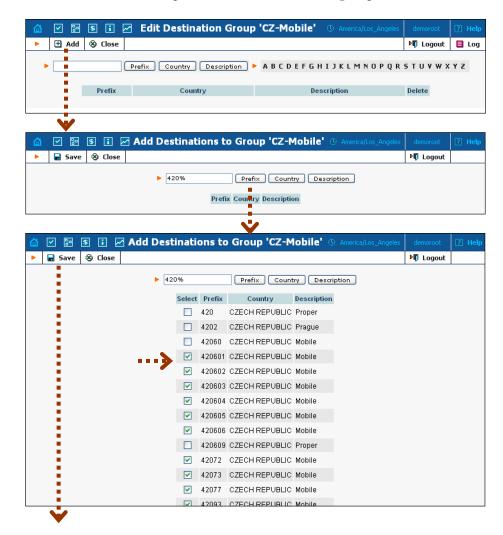


| Column | Description |
|-------------|---|
| Destination | Convenient short name for the destination group, e.g. |
| Group Name | UK-Mobile . This will be used to enter new rates for |
| | this group of destinations. |
| | |

| Prefixes | List of prefixes included in this group. For a |
|----------|--|
| | destination group with many prefixes, only the first |
| | few will be displayed. Click on Destination Group |
| | Name to see a complete list of destinations |
| | belonging to this group. |

Managing Destinations (Prefixes) within a Group

Click on the hyperlinked destination group name to edit its contents. Click on **Add** to add more prefixes to the destination group.



| | | - | \$ | 🗠 | Edit Des | tination | Group | 'CZ-M | obile' | ③ America/Los_Angeles | demoroot | 2 | He |
|------|------|--------|----------|-------|--------------|-------------|-------------|------------|-----------|-------------------------|--------------|------|-----|
| • | 🔁 A | bb | 🛞 Clos | | | | | | | | 📲 Logou | t E | L |
| | • | | | | Prefix Cour | try Desc | ription 🕨 🕨 | ABC | EFGH | IJKLMNOPOR | 5 T U V W | XYZ | |
| | | | | | | | | | | | | | |
| | | | Pre | tix 🛛 | | Country | | | Des | cription | Delete | | |
| | | | 420601 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 420602 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 420603 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 420604 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 420605 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 420606 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 42072 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| | | | 42073 | | CZECH REPU | BLIC | 1 | Mobile | × | | | | |
| | | | 42077 | | CZECH REPU | BLIC | 1 | Mobile | | × | | | |
| | | | 42093 | | CZECH REPU | BLIC | I | Mobile | | | × | | |
| | | | 42096 | | CZECH REPU | BLIC | 1 | Mobile | | | × | | |
| 3 | | - | \$: | | Edit Destir | | - | | | • ③ America/Los_Angeles | | | н |
| • | 🔁 Ad | d [| a Save | | Save & Close | 🛞 Close | Downle | oad 🔺 | Upload | | N Logou | t 🔳 | L L |
| | | | | | | | Sear | ch Name | Prefix | | | | |
| Edit | t I |)estii | nation G | roup | lame | | | | Prefixes | | | Del | ete |
| = | CZ-M | bile | | | 4206 | 01, 420602, | 420603, 42 | 0604, 420 | 605, 4206 | 06, 42072, 42073, 42077 | , 42093, 420 |)6 📑 | × |

3. Networking

Nodes

The Node Management screen enables registration, removal and maintenance of the gateway list. Nodes are gateways which provide accounting records to PortaBilling or exchange authentication/ authorization requests with it. On this screen the user is provided with a list of all nodes currently registered.

The search form at the top of the screen allows filtration by any combination of H.323 ID, IP address and/or whether or not the node is a Radius client. Providing any of this information and selecting **Show Nodes** will refresh the Node listing according to the new filtration criteria.

| ᢙ | | | \$ | i | | | Node Management Europe/Andorra | | | | | | | | |
|---|---|-----|----|------|--------|----------|--------------------------------------|--------------|--------------|----------|----------------------|--------|----------|--|-----|
| • | • | Add | 8 | Clos | e | | | | | | | Þ | 🖡 Logout | | log |
| | | | | | | H32 | 3-ID | IP | RADIUS Clie | | | | | | |
| | | | | | | | | | ○Yes ○No | | Show Nodes | | | | |
| | | | | | N | ame | h323-id | IP | Manufacturer | Туре | RADIUS Client | Delete | | | |
| | | | | | Mera | | 192.168.0.1 | 192.168.0.1 | Mera | MVTS | 2 | | | | |
| | | | | | Cisco | GW | cisco | 192.168.0.5 | Cisco | VOIP-GW | 2 | × | | | |
| | | | | | PortaL | JM | PortaUM | 192.168.0.11 | PortaOne | PortaUM | 2 | × | | | |
| | | | | | Quintu | im | Quintum | 192.168.0.3 | Quintum | VOIP-GW | 7 | × | | | |
| | | | | | Demo | PortaSIP | sip | 192.168.0.10 | PortaOne | PortaSIP | 7 | | | | |

To add a new node to the system, click **Add** in the toolbar. The following information is provided within the listing:

| Column | Description | | | | | | |
|--------------|--|--|--|--|--|--|--|
| Name | Logical name of the node. This is also a link to the | | | | | | |
| | edit screen for the given node. | | | | | | |
| h323-id | Registered H.323 ID of the node. | | | | | | |
| IP | IP address of the node. | | | | | | |
| Manufacturer | Choose "Cisco", "Quintum", "PortaOne" or another | | | | | | |
| | from the drop-down list, depending on the | | | | | | |
| | manufacturer of the equipment. | | | | | | |
| Туре | Select what role the node plays in the network from | | | | | | |
| | the drop-down list. The options are as follows | | | | | | |
| | (according to Cisco naming conventions): | | | | | | |
| | • VOIP-GW: the node functions as a gateway | | | | | | |
| | • H323-GW: the node is an H.323 proxy | | | | | | |
| | • H323-GK: the node is an H.323 gatekeeper | | | | | | |
| | PortaSIP: PortaSIP server | | | | | | |
| | PortaUM: PortaUM server | | | | | | |

| • | MVTS: Mera Networks VoIP Softswitch |
|---|-------------------------------------|

Add/Edit Node

| '☆ ⊻ ഈ \$: | | Edit 'Quin | itum' Node | | demo-root | ? Help |
|----------------------|--------------------|------------|---------------------|--------------------|-----------------|--------|
| 🕨 📄 Save 📓 Sav | ve & Close 🛞 Close | | | | N Logout | 🔒 Log |
| Node Name Quintum | ad | | | | | |
| h323-id c | Quintum | • | Manufacturer | Quintum 💌 | | |
| VoIP Password | cisco • Aut | to | Туре | VOIP-GW 🕶 | | |
| NAS-IP-Address | 192.168.0.3 | | RTP Proxying | Direct 💙 | | |
| Hostname | myhost | | VoIP User-Name | User-Name 💙 | | |
| Domain r | mydomain.com | | Telephony User-Name | Calling-Station-Id | | ~ |
| Auth. Transl. Rule 😰 | | | RADIUS Client | | | |
| | | | RADIUS Key | peb7ladt * Auto | | |
| | | | RADIUS Source IP | 192.168.0.3 | | |
| | | | RADIUS Dictionary | Quintum | | |

In order to register a new node in PortaBilling or edit an existing one, the following information must be provided:

| Field | Description | | | | | | |
|-----------|---|--|--|--|--|--|--|
| Node Name | The logical name of the node for use within | | | | | | |
| | PortaBilling | | | | | | |
| Node ID | Node identifier used by the terminating node within | | | | | | |
| | your network of trusted nodes in order to identify the | | | | | | |
| | originating gateway which is attempting to send a call. | | | | | | |
| | Enter the ID used for this node. The default behavior | | | | | | |
| | is to authenticate a node by its IP address; however, | | | | | | |
| | this may be changed if you use your own custom | | | | | | |
| | application to handle incoming VoIP calls. | | | | | | |
| | This field is available only if "Node ID" is enabled in | | | | | | |
| | advanced features. If you are not sure what value to | | | | | | |
| | choose, enter the same value as in the NAS-IP- | | | | | | |
| | Address. | | | | | | |
| H323-ID | For a VoIP node, the H.323 ID is equivalent to a | | | | | | |
| | hostname for an internet server (e.g. | | | | | | |
| | maill.cyberdyne.com), namely, a descriptive, human- | | | | | | |
| | readable name used for identification purposes. Make | | | | | | |
| | sure the value you enter here matches the "hostname" | | | | | | |
| | parameter configured on the gateway, since that value | | | | | | |
| | is returned from this node in the h323-gw-id attribute, | | | | | | |
| | and the ability to match these values with data in | | | | | | |
| | billing significantly simplifies troubleshooting. | | | | | | |
| VoIP | The password which will be used for remote IP | | | | | | |
| Password | authentication of calls originated on this node. If you | | | | | | |



| | are using the Cisco default |
|---------------|---|
| | app_remote_ip_authenticate, enter cisco here. |
| NAS-IP- | The IP address of the node. |
| Address | |
| Hostname | The internet hostname (without the domain). |
| Domain | The internet domain which the node is operating in. |
| Auth. Transl. | The authentication translation rule used to transform a |
| Rule | dialed phone number into the E.164 format used in |
| | PortaBilling. Node translation rules have become |
| | obsolete with the introduction of customer-based |
| | translation rules. |
| Manufacturer | Choose "Cisco", "Quintum", "PortaOne" or another |
| | from the drop-down list, depending on the |
| | manufacturer of the equipment. |
| Туре | Select what role the node plays in the network from |
| | the drop-down list. The options are as follows |
| | (according to Cisco naming conventions): |
| | • VOIP-GW: the node functions as a gateway |
| | • H323-GW: the node is an H.323 proxy |
| | • H323-GK: the node is an H.323 gatekeeper |
| | • PortaSIP: PortaSIP server |
| | • PortaUM: PortaUM server |
| | • MVTS: Mera Networks VoIP Softswitch |
| | Note that only types applicable to the chosen |
| | manufacturer will be shown. |
| RTP | Describes the NAT traversal capabilities of this node: |
| Proxying | • Direct - RTP stream should be send directly to |
| | this node; RTP proxy should not be used. |
| | Optimal - this node is capable of NAT |
| | traversal; no RTP proxying is required unless |
| | specifically requested. |
| | |
| | • OnNat - this node is not capable of NAT |
| | traversal; engage RTP proxy if the other party is behind the NAT. |
| | |
| | • Always – when sending a call to this node, |
| | always engage RTP proxy, so that no direct |
| VoIP User- | media stream goes to it. |
| Name | Defines which parameters (e.g. ANI, IP, DNIS, etc.) should be used to identify which account the call |
| 1 NA111C | should be billed to. This applies to calls that arrived to |
| | this node from the IP network (values taken from the |
| | answer/VoIP call leg). |
| | Note that this parameter is only applicable to Quintum |
| | gateways. |
| Telephony | Defines which parameters (e.g. ANI, port ID, DNIS, |
| User-Name | etc.) should be used to identify which account the call |
| | colly should be used to ruchary which account the call |

| | should be billed to. This applies to calls that arrived to this node from PSTN (values taken from the answer/Telephony call leg). |
|---------------------|--|
| | Note that this parameter is only applicable to Quintum gateways. |
| Radius Client | Check this box if the node will provide accounting records to the Radius server. |
| Radius Key | This input will be available only if the node has been designated as a Radius client. This is the authentication key for all Radius interactions. An easy-to-remember password may be generated automatically by selecting the Auto button. |
| Radius Source IP | More than one interface can be present on the node; specify the IP address of the one that communicates with the Radius server. |

Route Categories

This screen allows you to define new categories into which you can divide your available routes. To create a new category, select **3** Add from the toolbar.

| ຝ | ~ | 0. 0 | \$ | i | | Route | Cate | gories | I | ④ America/ | demo | | ? | |
|---|----------|----------|------|-------|------|------------|-------|------------|---------|-------------|--------|-------|---|-----|
| | ÷ | Add | | Save | 📄 Sa | ve & Close | 🛞 C | ose | | | Mỹ Lo | gout | | Log |
| | •. | | _ | | | | | | | | | | | |
| | Ť | • | Edit | | Name | * | | | Descrip | tion | Delete | | | |
| | | | + | Econo | my | | Cheap | routes, av | erage q | uality | × | | | |
| | | | | | | | | | | | | | | |
| | | | V | | | | | | | | | | | |
| 6 | ~ | 0.0 0 | \$ | i | | Route | Cate | gories | | ③ America/I | | | ? | |
| • | • | Add | | Save | 🔲 Sa | ve & Close | 🛞 C | ose | | | Mỹ Lo | ogout | | Log |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | Edit | | Name | * | | | Descrip | tion | Delete | | | |
| | | | Edit | | Name | * | | | Descrip | tion | Delete | | | |

| Column | Description | | | | |
|--|---------------------------------------|--|--|--|--|
| Name Name of the route category. This is the name you see in the select menu when assigning a route | | | | | |
| | category for the rate. | | | | |
| Description | A description of this route category. | | | | |

If you do not wish to define any custom route categories, the **Default** route category is always available.

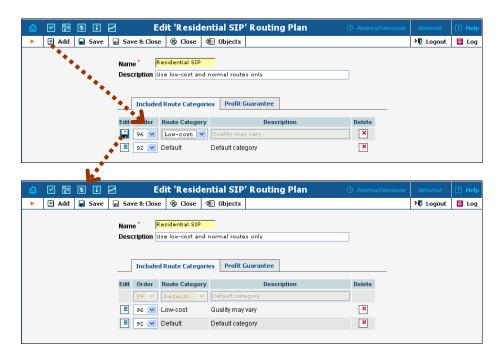
Routing Plans

A routing plan is a combination of route categories in a specific order. It defines which categories of vendors will be available for termination and in what sequence.

| ۵ | | 30 | \$ | i | | | | | Routi | ing P | Plans | (1) America | /Vancouver | demo-root | ? H | elp |
|---|---|-----|------|------|--------|---------|--------|--------|------------|---------|---|-------------|------------|-----------|-----|-----|
| • | • | Add | 8 C | lose | | | | | | | | | | M Logout | 🔳 L | og |
| | | | | | | | ļ | Name D | escription | | ame Search Categories Included Delete | | | | | |
| | | / | | | | | | | | | | | | | | |
| ₫ | | \$ | : | | | | | Ad | d Rout | ting | Plan | | | demoroot | 21 | |
| • | 🔁 Add | | Save | | Save (| & Close | 8 C | lose | 街 Obje | ects | | | | 🕅 Logout | | Log |
| | Name* Residential SIP Description Use low-cost and normal routes only Included Route Categories Profit Guarantee Edit Order Route Category Description Delete | | | | | | | | | | | | | | | |
| | | | | | _ | | | _ | | | | Delete | | | | |
| | | | | | 9 | 9 🗡 | Defaul | lt 🔽 | Default | t cate; | gory | | | | | |

After a routing plan has been created, you can specify which route categories will be included in it. To add a new route category, select

Add from the toolbar, then click the Save New.



You can change the route category order by choosing an **Order** number. Remember that if a route category is not included in the routing plan, a customer with this routing plan will not have access to such routes. Click the **Save** icon to make your changes take effect.

Please note that a larger value in the **Order** column pushes the given route category towards the top of the route list (i.e. 99 is the first route category which will be tried).

Profit Guarantee

On this tab you can specify how the system chooses routes for call termination, in order to maximize your profits.

| ₫ | V P | \$ i | | | Add | Routing Plan | America/Vancouver | demo-root | ? Help |
|---|---------------|-------|---|---------------------------------------|---|--|-------------------|-----------|--------|
| • | 🖬 Save | 📄 Sav | e & Close | 🛞 Close | 街 Objects | | | 🕅 Logout | 目 Log |
| | B Save | | Name [*] Descripti Inc Sen Cho | Resider ion Outgoin cluded Rout | tial SIP g/inbound SIP e Categories alerts about cal utes which gua | |] | νη Logout | Log |
| | | | | m Relative F robbin betwe | Profit 10 | ♥ % cost difference under 0.01 USD | | | |

If you switch off the "profit guarantee" in PortaBilling, it is possible that your carrier will charge you more than you have charged your customer. (Sometimes these situations can arise even with "profit guarantee" switched on, e.g. when a random surcharge was not triggered, or if you charged your customer for just a few seconds, but were charged by a vendor for a full minute, due to different time rounding increments). Such events can occur from time to time in any system, but it is important to constantly monitor them and take immediate action if they start to appear frequently.

| Field | Description |
|---------------------|--|
| Send Real-time | Turn this option on in order to receive real-time |
| Alerts about | email alerts whenever a customer (with this routing |
| Calls with | plan assigned) makes a call on which you lose money. |
| Losses | |
| Choose Only | When calculating a routing list for a customer with |
| Routes Which | this routing plan, compare the price used to charge |
| Guarantee | the customer with the termination cost of each |
| Profit | vendor. If the vendor's costs are higher than the |
| | customer's rate, exclude the vendor from the list (see |
| | note below). |
| Minimum | Allows you to create a more aggressive profit |
| Absolute Profit | guarantee route selection: the vendor's cost per |
| | minute must be lower than the customer's rate by at |
| | least the amount specified. (Amounts are specified in |

| | your base currency). |
|-----------------|---|
| Minimum | In some cases, specifying the amount of profit per |
| Relative Profit | minute does not yield the desired results, e.g. for risky |
| | destinations such as Somalia you would like to get at |
| | least \$0.10 per minute, yet \$0.10 on calls to the US is |
| | simply not feasible, since you charge your customers |
| | only \$0.05/minute. In this case, you can use a relative |
| | threshold, so that for expensive destinations the |
| | profit must be high, while for low-cost destinations a |
| | small profit is acceptable. |
| Combination | You can specify that a route must satisfy both |
| of Absolute | conditions, i.e. both absolute and relative profit, or at |
| and Relative | least one. |
| Profit | |
| Parameters | |
| Round-robin | If you would like to share the load among several |
| between | carriers where the difference in cost is insignificant |
| Routes with | (e.g. carrier A charges you \$0.023 and carrier B |
| Cost | \$0.025), specify the maximum allowed threshold for |
| Difference | two carriers to be granted the same priority in LCR. |
| under | |



PortaBilling allows at least two different price per minute values for rating (potentially, you can have an unlimited set of different prices applied within the same call when you use a rating formula). For comparison purposes, however, only one specific value should be used. PortaBilling uses the value of the **Price_Next** parameter for profit guarantee calculations. In order for the profit guarantee to work properly when you use rate formulas to charge your customers, make sure that you populate **Price_Next** in the customer's rates with a meaningful value.

Test Dialplan

This screen allows users to test a dialplan for a specific telephone number or certain destinations at any moment in time.

| 6 | I | s : [| 2 | Т | est Dial | plan | | | | | |
|---|-------------|---------|-------------------|--------------|-------------------|---------|----------------------|------------------------|------------|--------------------------|------------------------|
| • | S Close | | | | | | | | | M Logout | |
| | | | | Phone Number | Routing | Plan | ① Date YYYY-MM-DD | and Time HH24:MI:SS | | | |
| | | | 1 | 6045432345 | Default | ~ | | | Search | | |
| # | Destination | Country | Descript | ion Price | Route Category | Prefere | ence Huntsto | p Route to | Vendor | Connection | Tariff |
| 1 | 1604 | CANADA | British Columb | | Cheap | 8 | N | <u>192.168.0.25</u> | MCI Vendor | MCI VoIP- >Vendor | <u>CT Tariff</u> |
| 2 | 1604 | CANADA | British Columb | | Economy | 7 | Ν | <u>192.168.0.30</u> | X-Telecom | X-Telecom | Mera Systems |
| 3 | 1604 | CANADA | British Columb | | Premium | 5 | Ν | <u>192.168.0.66</u> | Best VolP | Premium VolP- >Vendor | <u>Best</u> Quality |

To test a dialplan, type a number in the Phone Number field. The search can be performed in real time: select the \bigcirc stopwatch icon or click the date input format link to set a date using the pop-up calendar.

| Column | Description |
|-------------|---|
| Ctrl# | Sequential number of this route. |
| Destination | Matching destination from the corresponding tariff. |
| Country | Country where the tested destination is located. |
| Description | Destination description. |
| Price | Next interval price for the given destination (per |
| | minute). |
| Route | Route category for this route. See the Route Categories |
| Category | section for more info. |
| Preference | Routing preference for this destination. See the Call |
| | Routing section of the PortaBilling User Guide for |
| | more info. |
| Huntstop | If one of the routes has huntstop enabled, then all |
| | routes with a lower preference will be ignored. |
| Route to | The node (or remote gateway IP) where the call will be |
| | routed. Click the link to open the connection screen. |
| Vendor | Call terminating vendor. |
| Connection | Description of the vendor connection. |
| Tariff | The tariff used to bill this call. Click the link to open the |
| | tariff screen. |

IP Phone Profiles

IP phone profiles and the IP phone inventory allow service providers to reconfigure a large number of end-user devices before sending them to customers, as well as those already on a customer's premises. Instead of entering the same values for codec, server address and the like into each of a thousand user agents, you can simply create a profile which will describe all of these parameters. After that, PortaBilling automatically creates a configuration file for each user agent using account-specific parameters such as ID or password, which it will then fetch (for instance, from a TFTP server) and update.

If you decide later to change the address of the SIP server, you need only update it once in the profile in order for new configuration files to be built for each user agent. The user agents will then fetch them next time they go online. The config file is specific to each user agent since it contains information such as username and password, and so the user agent must fetch his own designated config file.

PORTA **Silling** 100°

| 6 🛛 💀 🕯 i | IP Phone Profiles | I America/Vancouver demo-root | 2 Help |
|-------------------|--|--|--------|
| ► 🕒 Add 🛞 Close | | ►Ø Logout | 📒 Log |
| | | d By V Search Intinued Description Delete X | |
| ` | | | |
| 🙆 🗹 🗈 🖲 🖬 🗹 | Add IP Phone Profile | | |
| Save Save & Close | & Close | ►Ø Logout | |
| | Name SPA-941 Managed Dy Administrator only Type Linksys SPA-941 As Copy Of Hone Effective From Date (*) Time H=024:MLSS | | |
| V | | | |
| 🙆 🗹 📴 💲 🖡 🗹 | IP Phone Profiles | ③ America/Vancouver demo-root ▶♥ Logout | ? Help |
| | Name SPA-941 C Effection Type Linksys SPA-941 Date Immediately Description Time Discontinued Discontinued Managed By Administrator only Discontinued Discontinued Discontinued System Provisioning Regional Line 1 Line 2 Provision Enable Yes w Resync Periodic 5600 Profile Rule [-1.e.y. \$B]http://PB_SLAVE_SERVEF/\$A/\$MA.dg | LErom VYYYAMM-DD HH24:ML:SS | |
| | GPP A \$1.env GPP B \$asciLkey GPP C | | |

Profile list mode:

| Column | Description |
|--------------|--|
| Name | Logical name of the profile. |
| Туре | Telephone adaptor or SIP phone. |
| Effective | Date and time when the profile becomes effective. |
| From | |
| Managed By | Administrator only (default) means that this profile |
| | will be used for your direct customers and is accessible |
| | only to your administrators. Select a PortaBilling |
| | reseller to assign this profile for use by a particular |
| | reseller. |
| Discontinued | Indicates that the current profile is no longer in use. |
| Description | Short text description of the profile. |
| Delete | The delete icon is only visible when the current profile's |
| | effective date has not arrived yet. |

Add Profile mode:

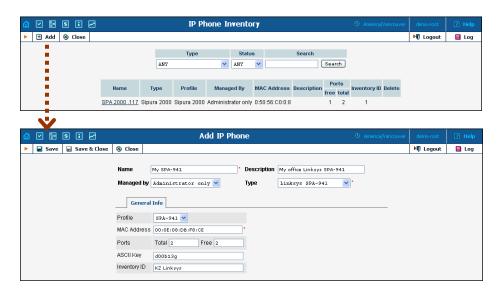
| Column | Description |
|------------|---|
| As copy of | Similar to templates; a user can create new profiles |
| | using previously created ones, so there is no need to re- |
| | enter a large amount of information. |

| Effective | Set the time when the profile is to become effective. |
|-----------|---|
| From | Click the stopwatch icon for the profile to become |
| | effective immediately. |

In Edit mode, the Profile Management screen will differ depending on the UA.

IP Phone Inventory

The IP phone inventory allows you to keep track of IP devices (SIP phones, SIP ATAs, etc.) which are distributed to your customers. You will assign a profile that defines general configuration settings for each device (preferred codecs, address of the SIP server, etc). You can then assign a specific account (basically representing a phone number) to a specific port (phone line) on the IP phone. PortaBilling will create a config file for auto-provisioning all of these devices, thus allowing you to easily manage thousands of user IP phones remotely.



| Field | Description |
|-------------|---|
| Name | IP phone name. |
| Description | Short description. |
| Managed by | Administrator only (default) means that this IP |
| | device will be used for your direct customers and is |
| | accessible only to your administrators. Select a |
| | PortaBilling reseller to assign this IP device for use by |
| | a particular reseller. |
| Туре | One of the available device types (e.g. Cisco ATA, |
| | Sipura, etc.). |
| Profile | Select one of the defined IP phone profiles. |
| MAC Address | MAC Address of the IP phone. |

| Ports | Number of the IP phone ports (phone lines). |
|--------------|---|
| ASCII Key | The key which is used to encrypt the configuration |
| | information. |
| Inventory ID | An ID which allows you to identify this device in the |
| | external system (e.g. your warehouse management |
| | application). |

DID Inventory

DID inventory allows you to keep track of phone numbers (DIDs) that you purchase from various telco partners for distribution to your customers or resellers. In order to see the DID numbers currently available in the database, choose **DID Inventory** in the Management section of the admin interface, specify the search filters, and click **Search**. You can search for DIDs which:

- match a specific phone number pattern, e.g. enter 1800% to find all 1-800 numbers;
- belong to a particular owner batch (to search for unallocated DIDs, choose **NONE**);
- belong to a specific vendor batch;
- are in use (there is an account using this DID) or are free (not used by any account).



Hint: Often a business will request a phone number that can be "spelled out" so customers can remember it easily (for instance 1-866-SIP-VOIP). You can search for such easy-to-remember phone numbers by entering the letter string in the **DID Number** field. For example, in order to search for all 1-800 numbers containing VOIP in them, enter 1800%VOIP.



| | V 🗄 | § i 🖂 | | | | | DID | Inver | nto | ry | | | | ٩ | Europe | /Prague | demoroot | ? Help |
|---|---------|----------|-----------|---------------|--------|--------------|---------|--------|-------|-----------|--------------|---------|--------|--------|--------|-----------|-----------|--------|
| • | 🛞 Close | 🔺 Upload | 🍝 Ve | ndor Batches | ؋ Own | er B | atches | 街 Ob | ject | s | | | | | | | M) Logout | 目 Log |
| | | DID Num | atch | | Vendor | Vendor Batch | | C | Statu | s | Sear | ch | Advanc | | | | | |
| | | | | ANY | * | AN | Y | | ۷ | ANY | * | ANY | * | Sear | ch | searc | <u>h</u> | |
| | | 0.400 | ian Von | dor DID Batch | Edit | х | DID Nur | nber | 0wr | ner Batch | Vendor Batch | Account | Free | since | Desc | ription D | el | |
| | | | XBONE-U | | = | | 4420855 | 553434 | | | VOXBONE-U | < | | | Premi | um [| × | |
| | | | | er DID Batch | = | | 4420855 | 553435 | | | VOXBONE-U | < | | | | [| × | |
| | | × _ | NE | | Ξ | | 4420855 | 53450 | | | VOXBONE-U | < | | | | E | × | |
| | | O Del | lete from | inventory | = | | 4420855 | 553451 | | | VOXBONE-U | < 0 | | | | | × | |
| | | 0.001 | ete nom | inventory | Ξ | | 4420855 | 553452 | | | VOXBONE-U | < | 2007 | -11-25 | | [| × | |
| | | Apply to | 💿 All | | Ξ | | 4420855 | 553453 | | | VOXBONE-U | < | | | | [| × | |
| | | | ⊖ Sele | cted | = | | 4420855 | 53454 | | | VOXBONE-U | < | | | | E | × | |
| | | | ○ First | N | | | 4420855 | 553455 | | | VOXBONE-U | < | | | | | × | |
| | | | | | = | | 4420855 | 53456 | | | VOXBONE-U | < | | | | E | × | |
| | | | Appl | | Ξ | | 4420855 | 553457 | | | VOXBONE-U | < | | | | | × | |
| | | | | | ≡ | | 4420855 | 53458 | | | VOXBONE-U | < | | | | E | × | |
| | | | | | | | 4420855 | 553459 | | | VOXBONE-U | < | | | | | × | |
| | | | | | | | 4420855 | 53460 | | | VOXBONE-U | < | | | | [| × | |

| Column | Description | | | | | | |
|--------------|--|--|--|--|--|--|--|
| DID Number | Phone number. | | | | | | |
| Owner Batch | Name of owner batch this DID is assigned to (if | | | | | | |
| | empty, the DID is unallocated). | | | | | | |
| Vendor Batch | Name of vendor batch this DID belongs to. | | | | | | |
| Account | If the \textcircled{III} icon is shown in this column, this DID is | | | | | | |
| | currently being used by an account. Click on the icon | | | | | | |
| | to access the account information. | | | | | | |
| Free since | For DIDs used in the past but now available, the date | | | | | | |
| | when they became available is displayed. | | | | | | |
| Description | Comments about a particular DID number. | | | | | | |

Vendor Batches

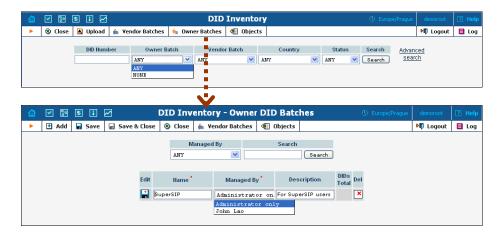
When you receive a set of phone numbers from a vendor, they will be registered in PortaBilling as a vendor DID batch. Vendor batches allow you to keep track of which phone numbers were purchased from which vendors. (Every number entered into the DID inventory must reside in a certain vendor batch). The vendor batch also contains various administration parameters, e.g. a description of which country and city these numbers are from.

| 6 | V | \$ | 3 | | | DID | Invent | ory | | | | | demoroot | 🕐 Help |
|---|----------|---------|-------------------|-----------------------------|---------------|------------|---------|-----------|---------|------------------------|-----------|-------------------------------|-------------|--------|
| • | 🛞 Close | 萬 Uploa | d 👍 Vend | or Batches | 💺 Owne | er Batches | 🐔 Obj | ects | | | | | 🔰 Logout | 📒 Log |
| | | DID Nu | | Owner B: NY NY ONE | ntch | Vendo | r Batch | | Country | Status ANY | Search | <u>Advan</u>) <u>sear</u> | | |
| ۵ | V 📲 | \$ 1 | - ` | D | ID Inv | entory · | - Vend | or DID I | Batches | | 🕓 Euro | ope/Prague | demoroot | ? Help |
| • | 🔁 Add | 🖬 Save | 📕 Save & | Close 🛞 C | lose ؋ | Owner Bat | ches 🖣 |) Objects | | | | | M Logout | 目 Log |
| | | | | ANY | Vendor | ANY | Country | ~ | Sear | ch Search | | | | |
| | E | dit I | lame [*] | Vendor | r * | Country | y | Area Coo | | rea Code escription | Descripti | | Ds Del | |
| | | VOXBO | NE-NL | Voxbone | > N | ETHERLAND | s 💌 [| | | | | | × | |
| | [| | NE-UK | Voxbone | U | NITED KING | DOM | | Londo | n area | | đ |) <u>13</u> | |

To add a new vendor batch, first select **b** Vendor Batches in the toolbar, then click **D** Add in the toolbar. The Country, Area Code, Area Code Description, and Description columns are optional, and serve only to simplify management of multiple batches. When you are done entering data, click the Save New i icon to save this row.

Owner Batches

After the DIDs have been entered into the system, you can create owner batches and allocate some of the numbers to them. An owner batch contains numbers to be provided to an end-user by a particular reseller or your administrators, The purpose of owner batches is to keep track of how numbers are used internally.



To add a new owner batch, first select **• Owner Batches** in the toolbar, then click **• Add** in the toolbar.

| Column | Description |
|-------------|--|
| Name | Unique name of the batch. |
| Managed By | Designates who will be using the DID numbers in |
| | this batch. If you plan for the numbers to be used by |
| | your administrators for direct customers, choose |
| | Administrator only. If you plan to make these |
| | numbers available to a reseller, select the reseller's |
| | name here. |
| Description | Comments about this batch. |

When you are done entering the data, click the **Save New** icon to save this row.

Importing numbers into the DID inventory

You can upload DID numbers from a CSV file. The structure of the CSV file should be as shown in the picture below: the first column contains the phone number, the second contains the vendor batch name, and the third contains an optional description.

| N | Microsoft Excel - dids.csv | | | | | | | | | | |
|----------|----------------------------|----------|----------------|-----------------|---------------|--------------|--------------------|-------|--------------|--|--|
| | <u>E</u> ile <u>E</u> dit | ⊻iew | Insert | F <u>o</u> rmat | <u>T</u> ools | <u>D</u> ata | <u>W</u> indow | Help | _ | | |
| 1 | 💕 🖬 🖪 | 1 🖪 🗳 | 🕰 🛙 | à 🛍 • | 5-1 | 🧕 Σ | - 21 🛍 | 0 | 1 | | |
| : 🐚 | 1112 | Po 🖄 | BB | | 1 | Reply | with <u>C</u> hang | jes E | E <u>n</u> d | | |
| | C5 | • | <i>f</i> ∡ Ea: | sy-to-rem | ember | | | | | | |
| | A | | | В | | | С | | | | |
| 1 | Phone # | | Batch | | | Description | | | | | |
| 2 | 4420 | 85553450 | VOXBO | DNE-UK | | | | | | | |
| 3 | 4420 | 85553451 | VOXBO | DNE-UK | | | | | | | |
| 4 | 4420 | 85553452 | VOXBO | DNE-UK | | | | | | | |
| 5 | 4420 | 85553453 | VOXBO | DNE-UK | | Easy-t | o-remembe | er j | | | |
| 6 | 4420 | 85553454 | VOXBO | DNE-UK | | | | | | | |
| 7 | 4420 | 85553455 | VOXBO | DNE-UK | | | | | | | |
| 8 | 4420 | 85553456 | VOXBO | DNE-UK | | | | | | | |
| 9 | 4420 | 85553457 | VOXBO | DNE-UK | | Recent | tly used | | | | |
| 10 | 4420 | 85553458 | VOXB | DNE-UK | | | | | | | |
| 11 | 4420 | 85553459 | VOXBO | DNE-UK | | | | | | | |
| 10 | 4400 | 05550360 | VOVP | NI⊏ LIIZ | | | | | | | |

NOTE: The first row in the file is skipped, since it usually contains column titles and not actual data.

To upload a DID file, first select **Upload** in the toolbar, then specify the file location (you can use the Browse button to select a file in the explorer window), and then click **Save & Close** in the toolbar.



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A popup window will inform you of the import results.

Managing DID Number Allocation

On the main screen of the DID inventory you can view DID numbers that match certain criteria (e.g. all numbers in a specific vendor batch). You can then perform number allocation for some of these numbers. This includes:

- re-assigning a vendor batch for some numbers (this may be required if you decide to change the way you organize your vendor batches, or if some DID numbers are now provided by a different vendor);
- allocating numbers to an owner batch, or returning them to the unallocated pool;
- deleting DIDs from the DID inventory.

These operations may be applied to all numbers matching the original search, only to the first N DIDs among them, or only to those you manually select.

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Hint: If you would like to assign the first N unused numbers from some vendor batch to an owner batch, specify the vendor batch and the **Free** status in the search condition, then apply an assign operation to the **First N** numbers. If you just select DIDs from a vendor batch and then assign the first N to an owner batch, you might also re-assign to it some numbers which are already in another owner batch.

Press **Apply** to submit the changes. After the update is completed, a popup window will inform you of the results.

4 Adjusting Billing Parameters

Currencies

The Currencies page allows you to define a method for determining exchange rates between currencies. Supported methods include explicitly defined exchange rates or the use of external services such as yahoo.com or xe.com.



NOTE: Before relying on an external exchange rate service, read its terms of use thoroughly, as the rates it provides are usually given at a delay of at least fifteen minutes from the actual values.

To define an exchange rate source for a currency, first click 🖬 Add in the toolbar.





From the Exchange Rate Source drop-down list, choose "Manual", "yahoo.com", or "xe.com". (The specific exchange rate is defined on the Exchange Rates page, available from the PortaBilling home page.)

The next drop-down list shows all payment systems registered by the system's administrator. Choose one which will be responsible for all payments in this currency using the payment methods chosen for it. If this is not required, select an empty value. It is possible to add multiple combinations of the same currency with different payment systems; in this case, all of them will use the same exchange rate source.

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| | | USD | 840 | US Dollar | 2 | dollar | cent | Manual | MyAuthorizeNet | UISA | 1.00 | 0000 | |
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Please note that it is not allowed to have several (more than one) systems assigned to the same currency using the same payment method. Because of charges for the use of online payment systems, it is recommended that a non-zero value be entered in the Maximum Allowed Payment field.

| Column | Description |
|-------------|--|
| ISO 4217 | |
| Alpha | Official three-letter currency code (e.g. USD). |
| num | Numeric currency code according to ISO standard. |
| Name | Commonly used name of the currency. |
| Dec. digits | Maximum number of decimal places allowed by the |
| | currency, e.g. for US dollars or euros it will be 2, |
| | since the smallest unit is one cent (0.01) , while for |
| | yen it will be 0, because an amount in yens can only |
| | be a whole integer. |
| Major | The main currency unit, e.g. dollar. |
| Minor | The lesser currency unit (if applicable), e.g. cent. |
| Exchange | Defines the method of entering the exchange rate for |
| Rate Source | this currency: updated either manually by an |
| | administrator, or by PortaBilling from exchange rate |
| | sites such as xe.com or yahoo.com. |
| | For an existing row in the table, click on the |
| | underlined xe.com or yahoo.com line in a column to |
| | immediately fetch the current exchange rate. |
| Payment | Selects an online payment processor to process |
| System | payments in this currency. |
| Payment | Read-only column; lists all available payment |
| Method | methods (e.g. VISA) for the selected payment system. |
| Minimum | The smallest allowed amount for an online payment |
| Payment | (in the corresponding currency), in order to prevent |
| | service abuse. |

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Select **Save** or click the **Save** icon in the Edit field to make your changes take effect.

The ISO 4217 currency code is normally composed of a country's twocharacter ISO 3166 country code plus an extra character denoting the currency unit. For example, the code for Canadian Dollars is simply Canada's two-character ISO 3166 code ("CA") plus a one-character currency designator ("D"). Currency unit names (major and minor) are not defined in ISO 4217, and are listed in the table only for user convenience. Visit **BSI Currency Code Service (ISO 4217 Maintenance Agency) website http://www.bsi-global.com/** for more information.

Exchange Rates

All exchange rates used within the system are listed. The **Effective** dropdown list allows you to define whether only current exchange rates ("Now") or all exchange rates ever used ("->Now") will be shown. The following information is provided in the exchange rate listing:

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| | | | Effect Now | tive V | | | | |
| | | Edit Name | Exchange Rate, USD * | Source | Timestamp | x | | |
| | | 🔳 Australian Dollar | 1 AUD = 0.75000 | Manual Entry | 2006-10-05 05:01:44 | | | |
| | | euro | 1 EUR = 1.27081 | XE.com | 2006-10-05 04:59:12 | | | |
| | | Pound Sterling | 1 GBP = 1.88169 | XE.com | 2006-10-05 04:59:15 | | | |
| | | 🔳 Kuwaiti Dinar | 1 KWD = 3.45790 | Yahoo.com | 2006-10-05 04:59:17 | | | |
| | | Hryvnia | 1 UAH = 0.19840 | Yahoo.com | 2006-10-05 04:59:19 | | | |
| | | US Dollar | 1 USD = 1.00000 | Yahoo.com | 2006-10-05 04:59:19 | | | |

| Field | Description |
|-----------|--|
| Edit | Click the Edit () icon to modify the given exchange |
| | rate. Select 🖬 Save or click the 🖬 Save icon in the Edit |
| | field to make your changes take effect. |
| Name | The currency unit name (for example, "Canadian |
| | Dollar"). |
| Exchange | Currency exchange rate. Defines the number of units of |
| Rate | the base currency equal to one unit of the foreign |
| | currency. (For example, with British Pounds as the |
| | foreign currency and U.S. Dollars as the base currency, |
| | the base currency units would be "1.5326" and the value |
| | of this column would be "1 GBP = 1.5326 ") |
| Source | Shows the exchange rate source for the given currency |
| | as defined on the Currency page. |
| Timestamp | The effective date for the given currency. Newer |
| | exchange rates supersede older ones. |

To add a new exchange rate, click the **Add** button; this will start a new row in the table header. Select the currency from the list, and enter the exchange rate. Click the **Edit** icon to modify an existing exchange rate.

This will copy the content of the current row into the table header. The source will be changed to Manual. Enter the new exchange rate, then select either **Save Edit**, **Save** or **Save&Close** to save changes.

Tariffs

A tariff is a collection of individual rates, a rate being a per-destination price. Each tariff has its own set of rates. Call billing is based on billing units. You can define two billing units for each destination: the first billing unit (interval) and the next billing unit (interval). Billing unit precision is one second, and the minimum length of each unit is likewise one second.

Typical billing unit configurations include 60/6 (the first unit, i.e. the minimum charged call duration, is one minute, and subsequent intervals are one-tenth of a minute, i.e. six seconds) and 1/1 (per-second billing).

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| | SI | P Phone | e Subscr | bers | USD | Customer | Voice Cal | Is Administrator only | | SIP Phone | Subscriber's Tariff | | | |
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| | Te | rminati | on servic | es | USD | Customer | Voice Cal | Is Administrator only | | Terminatio | n services | := | × | |
| | W | Fi | | | USD | Customer | Wi-Fi | Administrator only | | | | | | |

The main Tariff Management screen shows a list of all existing tariffs. Tariffs can be located using the Search form, by selecting a reseller from the drop-down list, or choosing the tariff's name. To edit a tariff, click on its name in the list. Click the Edit Rate \blacksquare icon to edit individual rates for the given tariff. The Delete \blacksquare icon will be visible only when the tariff is not in use (not assigned to any customer or vendor and not being used in any product's accessibility), and enables permanent deletion of the given tariff.

Add/Edit Tariff

To add a new tariff to the system, select 🖿 Add to go to the Add Tariff screen. Existing tariffs can be edited by clicking on the tariff's name in the list.

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| | | | | Descriptio | | What we charge cu <u>EasyCall</u> product | | | | | | | | |

| Field | Description |
|-------------|--|
| Name | The logical name for the tariff object. |
| Currency | Indicates the currency in which pricing information is |
| | defined. All pricing information for a single tariff must |
| | be defined in the same currency. |
| Applied To | Designates whether this tariff will be used to charge |
| | your customers or resellers or to calculate costs |
| | associated with your vendors. You must select a value |
| | here to get access to certain fields that are available only |
| | for a specific type of tariff. |
| Service | Select the service for which this tariff will be used (by |
| | default the Voice Calls service type will be selected). |
| Managed By | (Only available for tariffs of the Customer type). |
| | Allows you to designate this tariff as managed by the |
| | administrator only (so this tariff will be applied to your |
| | direct customers), or by a specific reseller (so this tariff |
| | will be used to charge the reseller's sub-customers). |
| Routing | (Only available for tariffs of the Vendor type). The |
| | tariff contains information about the carrier's routing |
| | preferences, in addition to the usual cost data. |
| Off-Peak | Off-peak period definition; click the wizard icon 🖄 to |
| Period | launch the period format definition wizard; click the test |
| | icon 🐺 to run the off-peak period test. |
| Off-Peak | Human-readable description of the off-peak period (e.g. |
| Description | "From 21:00 until 09:00, Working Days"). This field is |
| _ | automatically filled in by the wizard. |
| Destination | A set of destination groups (UK-Mobile, CZ-Mobile, |
| Group Set | etc.) you would like to use for more convenient rate |
| | entry. |
| Free | Number of free seconds granted for each call. In order |
| Seconds | to claim free seconds, the length of the call must be at |

| least one billing unit (i.e. the first interval; see the 'Enter Rates' section above).Post Call SurchargeIncreases the total call cost by the given value.Login FeeAmount to be charged immediately after the first user authentication.Connect FeeAmount to be charged for each successful call, in addition to other charges.Round ChargedPattern that defines the rounding of a charged amount in an individual xDR. This pattern takes the form XXX000. An X (to the left) means that the digit in this position will be left unchanged, while a zero (to the right) means that this position will be rounded. For example, XXXXX.XX000 means that the amount will be rounded up to two decimal places, so that 1.2345 becomes 1.24. Note that rounding is always done upwards.Default FormulaDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.Short DescriptionWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- 1800, the short description will be Smart call using a | | |
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| addition to other charges.Round ChargedPattern that defines the rounding of a charged amount in an individual xDR. This pattern takes the form XXX000. An X (to the left) means that the digit in this position will be left unchanged, while a zero (to the right) means that this position will be rounded. For example, XXXXX.XX000 means that the amount will be rounded up to two decimal places, so that 1.2345 becomes 1.24. Note that rounding is always done upwards.Default FormulaDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.Short DescriptionWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | authentication. |
| Round ChargedPattern that defines the rounding of a charged amount in an individual xDR. This pattern takes the form XXX000. An X (to the left) means that the digit in this position will be left unchanged, while a zero (to the right) means that this position will be rounded. For example, XXXXX.XX000 means that the amount will be rounded up to two decimal places, so that 1.2345 becomes 1.24. Note that rounding is always done upwards.Default FormulaDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.Short DescriptionWhile the name of a tariff is for your internal use, and is usually created according to your reseller. For example, for the tariff name aABC-SmartCall-USD- | Connect Fee | Amount to be charged for each successful call, in |
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| example, XXXXX.XX000 means that the amount will be rounded up to two decimal places, so that 1.2345 becomes 1.24. Note that rounding is always done upwards.Default FormulaDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.Short DescriptionWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | position will be left unchanged, while a zero (to the |
| be rounded up to two decimal places, so that 1.2345becomes 1.24. Note that rounding is always doneupwards.DefaultFormulaDefault call rating formula applied to new rates. Notethat the value of this parameter is only used when a newrate is inserted. Modification of this parameter has noeffect on existing rates.ShortDescriptionUsually created according to your internal use, and isusually created according to your reseller. Forexample, for the tariff name aABC-SmartCall-USD- | | right) means that this position will be rounded. For |
| becomes 1.24. Note that rounding is always done upwards.DefaultDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.ShortWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | example, XXXXX.XX000 means that the amount will |
| becomes 1.24. Note that rounding is always done upwards.DefaultDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.ShortWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | be rounded up to two decimal places, so that 1.2345 |
| Default FormulaDefault call rating formula applied to new rates. Note that the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.Short DescriptionWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | becomes 1.24. Note that rounding is always done |
| FormulaThat the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.ShortWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | upwards. |
| Formulathat the value of this parameter is only used when a new rate is inserted. Modification of this parameter has no effect on existing rates.ShortWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | Default | Default call rating formula applied to new rates. Note |
| rate is inserted. Modification of this parameter has no effect on existing rates.ShortWhile the name of a tariff is for your internal use, and is usually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | Formula | |
| ShortWhile the name of a tariff is for your internal use, and isDescriptionusually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | - |
| ShortWhile the name of a tariff is for your internal use, and isDescriptionusually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | | effect on existing rates. |
| Descriptionusually created according to your internal rules, you can also add a name meaningful to your reseller. For example, for the tariff name aABC-SmartCall-USD- | Short | |
| example, for the tariff name aABC-SmartCall-USD- | Description | |
| 1 | | also add a name meaningful to your reseller. For |
| 1800, the short description will be Smart call using a | | example, for the tariff name aABC-SmartCall-USD- |
| | | 1800, the short description will be Smart call using a |
| toll-free number. | | |
| Description Tariff description. | Description | Tariff description. |

Free Seconds, Connect Fee and Post-Call Surcharge are only applied when the default rating method is used. For more about different call rating methods, see the **PortaBilling Administrator Guide**.

Off-Peak Period Definition Wizard

| | | Off-F | Peak Period Definition | ? Hel |
|---|--------------------|--|--|-------|
| • | 🛞 Close | | | 1 |
| | ◯ Call: ◯ Call1 | rate is used if starts during the off-peak period inishes during the off-peak period starts and finishes during the off-peak d | PERIOD: From 01:00 until 04:00, Workdays | |
| | | | <pre>startstop:hr(1-3) wd(mo-fr) Gancel Skip Next></pre> | |

The Off-Peak Period wizard provides users with a flexible tool for defining the off-peak period of any tariff. On a sequence of screens, the

user may select a time interval, day of the week, day of the month, and month; multiple select is allowed. The following example illustrates the process of creating an off-peak period that starts at 6pm every day and lasts until 6am the next morning. Another off-peak interval is on weekends. We will also include some holidays, i.e. January 1st and December 24-26.

In the first screen, select 6pm in the **From** column, and 6am in the **Until** column. Now click the **Next** button. The two text areas on the right of the screen give the user a display of the current period definition. The top text area displays a verbal definition of the period -- From 6:00pm until 6:00am, and the bottom one contains this same information in a format that can be parsed by PortaBilling -- hr{6pm-5am}. This sets up the first period; in order to continue, skip the following screens by pressing the **Skip** or **Next** button until the "Period definition completed" message is displayed, then press the **Add** button to add another definition to this period. The wizard now returns to the first screen.

NOTE: Time::Period treats all formula elements as "inclusive". Thus, in the example above, 6pm to 6am will be represented as hr{6pm-5am}. This is perfectly correct, since 5am actually means "all of the 5th hour – 05:00:00 ... 05:59:59".

Now for the weekends: pressing the **Skip** or **Next** button, go to the second screen and select *Weekend*, or, holding down the <Ctrl> key, select *Saturday* and *Sunday* from the list. Select the **Next** button and skip until the "Period definition completed" message is displayed. Press the **Add** button to add another definition to this period.

To include January 1st in the off-peak period definition, skip to the Day of Month screen, and select 1. Click the **Next** button. Now select *January*, click **Next**, skipping forward to the next screen. Follow the same steps to select the December 24-26 interval. Hold the <Ctrl> key down to select multiple entries.

On the next screen, you can choose how the system will charge calls which overlap with your off-peak period, i.e. cover both peak and offpeak time. There are three options you can choose from:

- If the call starts in the off-peak period, it will be charged using offpeak rates (even if part of the call was made during peak time). This method is the easiest and most transparent for end-user authorization of outgoing calls.
- If the call finishes during the off-peak period, it will be charged using off-peak rates; it does not matter whether it starts within the off-peak period or not.
- Or, the off-peak rate will only be used if the call both started and finished during the off-peak period. In this case, any call which partly extends into the peak period will be charged at the peak rate.

To evaluate your work, look at the top text area. The following text should be displayed:

```
From 6:00pm until 6:00am
    any day of any month
OR Sunday and Saturday
    of any month
OR 1
    of January
OR 24-26
    of December
```

If the definition is correct, click the **Finish** button.

Test the Off-peak Period

If you are unsure whether you have created a correct off-peak period definition, you may use the test utility to check if a specific moment in time fits into the period or not. In order to run the off-peak period test, either click the ^[C] icon in the tariff information window, or use the **Test Period** button on the last page of the off-peak period wizard.

| | | | Test | Period | | | | | ? | |
|---|----------|-------------|-----------|-----------|-----|-----|---------|---|---|--|
| • | Save | 📄 Save | & Close | 🛞 Clos | se | | | | | |
| | | | | | | | | | | |
| | Date and | d Time e | Φy | YYY-MM | -DD | | HH24:MI | | | |
| | Date and | u rime | 2007-12 | 2-10 | | | 02:00 | | | |
| | Period | | startstop | o:hr{1-3) | wd{ | mo· | -fr } | 2 | | |
| | Period D |)escription | From | | | | 04:00, | | | |
| | | | | Test | ! | | | | | |

Now simply enter any time/date and click the Test button to check whether this moment fits into the off-peak period definition.

Web Upload/Download

Choose appropriate templates for web upload/download of tariffs. Read more about this in the **Templates** section.

E-mail Upload

| | 80 | | | | | | | lit 'P | it 'Prepaid Cards' Tariff | | | | | | ④ America/Vancouver | | | | demo-toor | | |
|---|-------------------------------|-------|---------------------------|--------|---------------------|---------|--------|--------|---------------------------|--------|--------|---------|---|---------|---------------------|------|-------|----------|-----------|----|----|
| ٠ | Add | | Save | | Save & | Close | 8 (| Close | 👿 Dow | nload | | Upload | | Rates | | Test | | | 🕅 Logou | ut | Lo |
| | | | | | | | | | | | | | | | | | | | | | |
| , | Name | • | Pre | paid | Cards | | | * | Currency | USD | 1 | | | | | | | | | | |
| 1 | Applie | ed To | Cus | tome | r | | | | Service | Voice | e Call | s | | | | | | | | | |
| | Managed By Administrator only | | | | | | | | | | | | | | | | | | | | |
| | Mana | ged E | by Adn | ninist | rator on | ly | | | | | | | | | | | | | | | |
| ' | Mana | ged E | By Adn | ninist | rator on | ly | | | | | | | | | | | | | | | |
| ' | Mana | | by Adn eral Inf | | rator oni Web Uj | | Dowr | nload | | Upload | N | lotepad | I | | | | | | | | |
| _ | Mana Edit Ty | Gene | | 0 | | | Dowr | nload | | | N | iotepad | 1 | Ter | nplate | * | | Disabled | Delete | | |
| _ | | Gene | | 0 | Web U | | : Dowr | nload | Email | | N | | | | | | ad ((| Disabled | Delete | | |
| E | Edit Ty | Gene | eral Inf | 0 | Web U | bload & | | nload | Email | y* | | | | er A ts | | uplo | ad ((| Disabled | Delete | | |

Tariffs can be uploaded to the system from an e-mail received with an attached document in either CSV or XLS format.

| Field | Description |
|----------|---|
| Edit | Click the Edit icon to copy the current row in the form |
| | above for editing. |
| Туре | Uploaded document type, either CSV or XLS file. |
| From | Sender's e-mail; to prevent unauthorized access, only |
| | trusted e-mail will be allowed. |
| Key | Security key; tariff will be accepted only if the correct |
| | key is specified in the message's subject line or body. |
| Template | Select a template to map information in the uploaded |
| | file using PortaBilling. Read more in the Templates |
| | section. |
| Disabled | Disable receipt of tariffs from this source. |
| Delete | Click the delete icon to remove this source. |

NOTE: Due to the security risk, the processing of incoming e-mails is disabled by default. To reactivate, enable e-mail forwarding to the mail processing script in the /etc/aliases file on your slave server.

Rates

Peak and Off-peak Prices

It is possible to have two different sets of prices, one for peak and one for off-peak time. A call is always billed using one rate or another; this also applies to calls which start in the off-peak period and end in the peak period, or vice versa, i.e. there is no proration. See above regarding how you to define whether the peak or off-peak rate should be used in this situation. By default, everything is considered peak time.

Off-peak periods are defined using a powerful and flexible Time::Period module. The Off-Peak Period Wizard is also available to help you construct a period definition in an easy manner.



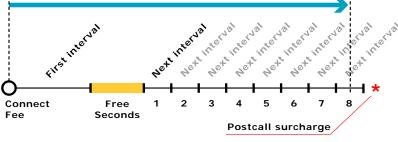


Figure 4-1

Figure 4-1 demonstrates how calls are charged. A **Connect Fee** is charged immediately upon connection, and all calls shorter than *First Interval_1* will be rounded to **First interval** seconds. Free seconds are granted after the *First interval*, so this part of the call is not charged. Calls longer than (*First interval+Free Seconds*) will be rounded up to multiple **Next interval** seconds. After that, a **Post Call Surcharge** is applied. The call illustrated in the figure above will be charged using the following formula:

```
Amount_Charged = ( Connect_Fee +
   First_Interval * Price_First/60 +
   8 * Next_Interval * Price_N/60) * (1+Post_Call_Surcharge/100)
```

Parameters such as **First interval**, **Next interval**, **Price First** and **Price Next** can be specified per destination. **Connect Fee**, **Free Seconds** and **Post Call Surcharge** are defined on a per-tariff basis, and so are the same for all destinations in the tariff.

Managing Rates Online

Managing rates online is very convenient for maintaining existing rate tables and for reference purposes. In the case of new price lists or major updates, the offline method is better.

| ₫ | v 🖭 | 5 🖬 🖂 | 'SIP Ph | one Subs | cribers' ta | riff rates | e | 9 America/Vancouver | r demo-toor | ? Help |
|------|---------------|--------------------------------|--------------------|----------|-------------|-------------------------|--------------------|---------------------------|-------------|--------|
| • | 🗄 Add 🚺 | 🖥 Save 🛞 Clo | ose 🔳 Tariff | | | | | | M Logout | 目 Log |
| | | | Effective Fr | | | tination refix Group | Country |) | | |
| _ | | Country | r | Interval | , second | Price, USI |)/ minute | O Effective From | ~ ¬ ~ ~ | |
| Edit | Destination * | Descriptio | on | First * | Next * | First * | Next * | YYYY-MM-DD HH24:MI:55* | 1/6 🖉 🕷 🧲 | Delete |
| | | | Peak Off-Peak | | | | | | | |
| | 1604 | CANAD/ British Colu | | 30 30 | 6 6 | 0.02000 0.01500 | 0.02000 0.01500 | 2007-06-25 07:05:32 | | |
| | VOICEONNE. | Not Applica SIP to SIP dest | | 30 30 | 6 6 | 0.00000 0.00000 | 0.00000 0.00000 | 2007-12-10 06:35:59 | | |
| | 38067 | UKRAIN Mobile | E Peak Off-Peak | 1 1 | 1 1 | 0.12000 0.11000 | 0.12000 0.11000 | 2007-06-22 07:06:41 | | |

On the Tariff Management page, click the 🔳 Rates icon for a tariff.

The filter at the top of the screen allows you to view rates depending on their Effective From date or Destination. The **Effective From** dropdown list allows you define whether only current rates ("Now") or all rates ever used ("->Now") will be shown.

To edit an existing rate, click the \square (**Edit**) icon next to it to copy rate details into the form. Note that if a tariff contains peak and off-peak rates there will be two rows of fields: the top one is for peak rates, and the bottom one is for off-peak rates.

Usually you will enter rate data for each destination separately. However, if the tariff has a **Destination Group Set** defined, by clicking on **G** in the Destination column header you can switch into Destination Group mode. Now you can enter a destination group name (e.g. UK-Mobile) instead of a prefix, and the system will automatically create rates for all of the destinations in that group.

| Field | Description |
|----------------|--|
| Destination | Destination prefix. May be entered directly, e.g. "47" for |
| | Norway; or you can access the destinations directory by |
| | clicking the Destination link. In the destinations |
| | directory pop-up window, you can search for the |
| | desired prefix by country name. |
| Country | Country corresponding to the current destination. |
| First interval | First billing unit in seconds. |
| Next interval | Next billing unit in seconds. |
| Price first | Per minute price for first interval. |
| Price next | Per minute price for next interval. |
| Off-peak | First billing unit in seconds for off-peak time. |
| First interval | |
| Off-peak | Next billing unit in seconds for off-peak time. |
| Next interval | |
| Off-peak | Per minute price for first interval in off-peak time. |
| Price first | |
| Off-peak | Per minute price for next interval in off-peak time. |
| Price next | |
| Effective | Exact time when the rate becomes effective. Click the \mathbb{Q} |
| Time | icon to make the rate effective immediately. Click the |
| | DD-MM-YYYY link to set up the desired date using the |
| | pop-up calendar. |
| 15 | Indicates if this rate uses a call rating formula. The 🌆 |
| | icon indicates that there is no formula, thus old-style |
| | rating is used. The 🎾 icon indicates that the rate already |
| | has a formula defined. Click on the icon to invoke the |

| | call rating formula wizard. |
|------------|---|
| Rate | Hidden . This means that the rate is excessive (e.g. |
| Properties | there are usually more than 500 rates for Argentina |
| | mobile because of different prefixes). This flag does not |
| | affect usage of the rate by the billing engine. It simply |
| | indicates that this rate may be omitted when making a |
| | list of rates for the end user. |
| | Discontinued . Note that marking a rate as |
| | discontinued takes effect immediately; you cannot |
| | discontinue a rate sometime in the future |
| | Forbidden . This means that no calls are authorized |
| | for this particular destination. |
| Delete | Click the delete icon to delete this rate. Only rates which |
| | are not yet active can be deleted. |

| | Image: Section 1. | s i 🖂 | | 'Teri | ninatio | 1 to X-T | 'elecom' | tariff rate | s | | | | | |
|------|---|------------------|------------------|------------------------|------------|----------|-------------------------------------|-------------|--------------------|--------------------|---------------------------|----|--------|--------|
| • | 🔁 Add 🕻 | a Save 🛞 | Close | 🗄 Tariff | | | | | | | | M | Logout | 目 Log |
| | Effective From Destination Now Y Prefix Group Country | | | | | | | | | | | | | |
| Edit | Destination * | Country | | R | outing | | Interval, second Price, USD/ minute | | |)/ minute | C Effective From | ý. | 1 📾 🕻 | Delete |
| | | Description | | Route Category | Preference | Huntstop | First * | Next* | First * | Next * | YYYY-MM-DD HH24:MI:55* | | | |
| | | | Peak Off-Peak | Default 👻 Default 👻 | 5 V 5 V | | | | | | | | | |
| | 55 | BRAZIL Proper | Peak Off-Peak | Default Economy | 5 5 | | 1 1 | 1 1 | 0.30000 0.10700 | 0.40000 0.20000 | 2007-12-10 06:46:02 | | | |

The following columns are available only for tariffs of the **Routing** type:

| Field | Description |
|------------|---|
| Route | Route category, selected from among those already |
| Category | defined. If you do not wish to use different route |
| | categories, use the Default one. |
| Preference | Routing priority for this destination. 10 is the highest |
| | priority, 0 is the lowest (i.e. do not use this destination |
| | for routing at all). |
| Huntstop | If turned on, the billing engine will not try any routes |
| | for other vendors with a lower preference. |

Click the **Save** icon to save your changes.



NOTE: Off-peak fields appear only if an off-peak period has been defined for the tariff.

Call Rating Formula Wizard

Because of the extreme flexibility of the call rating formula, it has a quite complex syntax. To avoid possible errors, the call rating formula wizard allows you to design a call rating formula easily.

The top table allows you to edit rate parameters (such as interval or price per minute) directly; below it, the current formula is displayed (read-only); and, finally, there are three tabs for managing different formula parameters:

Global:

• **Do not bill calls shorter than** - For a detailed description of this feature, see the **PortaBilling Administrator Guide**.

| • | 🖬 Save | 📓 Save & Clos | se 🛞 Close | | | | | |
|--|---------------------|---------------|--------------|---------|--------|----------|---------|---------|
| Interval, sec. Price, USD/min Off-Peak | | | | | | | | |
| | Interv | al, sec. | Price, | USD/min | Interv | al, sec. | Price, | USD/min |
| First* Next* | | | First* | Next* | First* | Next* | First* | Next* |
| 1 | | 1 | 0.30000 | 0.40000 | 1 | 1 | 0.10000 | 0.20000 |
| ormu | lla: MIN=5 SEQ=i | nt1xNxprice1 | &intNxNxpri | zeN | | | | ~ |
| | Global Ra | ting Sequence | Add Duration | | | | | |

Rating Sequence:

Here you can construct the actual call charge plan by defining a sequence of time intervals and surcharges.

| | Rate Formula | a Wizard for | '446 UNITE | d Kingdo | М' | | ? Help | |
|---|--|--|------------|----------|---------|--|--------|--|
| 🕨 🖬 Save 📓 Save & Close 🛞 Clo | ose | | | | | | | |
| Interval, sec. Price, USD/min Interval, sec. Price, USD/min | | | | | | | | |
| First Next First | * Next * | First * | Next* | First* | Next* | | | |
| 1 0.30000 | 0.40000 | 1 | 1 | 0.10000 | 0.20000 | | | |
| Formula: HIN=5 SEQ=int1xNxprice1&intNxNz | | | | | < × | | | |
| Global Rating Sequence Add Dura | tion | | | | | | | |
| Available Tized Surcharge Belacive Surcharge Call Disconnect | Count* Custom Unlimited Until until t Duration* Custom First Interval Next Interval Price* Custom First Price Next Price Instude Include | times he end of the call sec. USD | | | | First price USD/min ext price USD/min | | |

- 1. Choose the element type from the list on the left (Available).
- 2. Fill in the element parameters (such as interval duration, price, etc.).
- 3. Click the **Include** button to add this element to the formula.

Add Duration:

NOTE: This option must be enabled in the config; by doing so, you accept the responsibility for any legal issues related to use of this billing feature.

| | | | | | Rate | Formula | a Wizard f | or '420 CZE | CH REPUBL | IC' | | |
|------|-----------------------|---|---|--------------------------------------|--------|---------|------------|-------------|-----------|---------|---|--|
| • | 🗈 Ado | l 🔒 Save | 🗟 5ave & (| :lose 🛞 | Close | 街 Objec | ts | | | | | |
| | | | | | | | | 06 | Peak | | | |
| | Interval, sec. Price, | | | | | | Inter | val, sec. | | USD/min | | |
| | First * | Next | * | First * | N | ext * | First * | Next * | First * | Next * | | |
| 30 | | 6 | 0.20 | 000 | 0.2000 | | | | | 10 | | |
| Form | nula: _{Al} | D=#300:20& | | | 0.2000 | 00 | 30 | 6 | 0.20000 | 0.20000 | | |
| Form | Globa | | 600:10&12 | | | 00 | 30 | 6 | 0.20000 | 0.20000 | | |
| | | l Rating Seq | 600:10&12 | 200:5&0 | 1 | 00 | 30 | 6 | 0.20000 | 0.20000 | | |
| | Globa t Up/Dn | l Rating Seq | 600:10&12 uence Ad sec. Ex | 200:5&0 | 1 | 00 | 30 | 6 | 0.20000 | 0.20000 | | |
| Edi | Globa t Up/Dn | l Rating Seq | 600:10«12 uence Ad sec. Ex nds | 00: 5x0 Id Duration dend By, % | Delete | | 30 | 6 | 0.20000 | 0.20000 |] | |
| Edi | Globa t Up/Dn v | I Rating Seq Interval, First 300 seco | uence Ad sec. Ex nds seconds | d Duration tend By, % | Delete | | 30 | 6 | 0.20000 | 0.20000 |] | |

- Interval, sec. The duration of a specific call interval to which "add duration" should be applied. Initially there will be only one row in the Add Duration table, defining the rule to be applied to the whole call. Click the Add button to add a rule for another interval. Intervals are interpreted according to the order in which they appear in the table, e.g. the first row covers the *first* 300 seconds, the second row covers the following 300 seconds, and so on.
- Extend By, % Defines how the call duration for this interval should be changed (increase in percentage; a 0 value means that the call duration should not change).

Managing Rates Offline

The rates table may be prepared using a spreadsheet processor (e.g. MS Excel) and easily imported into PortaBilling. This is very convenient if you are going to make many changes. For example, you might increase all prices by 10%. To upload your rates file, proceed as follows:

- 1. On the Tariff Management page, click on the tariff name.
- 2. In the Edit Tariff window, click the **Upload** .CSV icon.
- 3. In the Upload Rates window, click Browse...
- 4. Locate the Tariff-sample.csv, then click Open.
- 5. In the Upload Rates window, click Upload.
- 6. In the Edit Tariff window, click Close.

You can verify your work using the Rates feature.

Test Call Rating

This screen allows testing of the call rating formula and shows the resulting cost and duration of the call. The formula can be used both

ways: either to calculate the call's cost given its duration, or to see how long a call ought to last given its cost.

| ₫ | y 🗄 💲 i | 🖂 E0 | lit 'Mera Sy | stems' Ta | ariff | 0 | America/Vancouver | demo-root | ? Help |
|---|--|--|-------------------|---------------|--|---|---|--------------------------------------|--------|
| • | 🖬 Save 📓 Save | & Close 🛞 Close | Download | 萬 Upload | 🗄 Rates | 🗵 Test | | N Logout | 目 Log |
| | Name Mera Sys Type Routing General In Off-Peak Period Off-Peak Descrip | fo Web Upload & I | | l Upload 🛛 No | otepad | • | | | |
| | | | Test Call | Rating | | 🚯 Am | erica/Vancouver | demo-root | ? Help |
| • | 🛞 Close | | | | | | | Dogout | |
| | | O YYYY-MM-D 2006-05-19 44625524678 charges based on t norization based on 10:00 Test | 23:37:26 | ds | Formula Expande Charged Real ch | ed Formula d amount: 1 | ng : MIN = 1 SEQ = 1 1.99834 USD r: +1x1x0.1+599x1 | | «0.2 |
| | | | | | | | | | |
| | y 🖫 💲 ፤ | | Test Cal | Rating | | | nerica/Vancouver | | ? Help |
| • | 🛞 Close | | | | Ý | | | M Logout | |
| | | © YYYY-MM-D 2006-05-19 44625524678 charges based on t norization based on 10 | 23:37:26 | | Formul Expand Real cr Annour Real ch | ed Formula edit time: 4 nced credit narge histor | a: MIN = 1 SEQ = 50 min. 0 sec. (3) time: 50 min. 0 y: +1x1x0.1+2999 | 000 sec.) sec. (3000 se x1x0.2 | ec.) |
| | Simulate auth | norization based on | the available fun | ds | Real cr Annour Real ch | redit time: 4 nced credit narge histor | 50 min. 0 sec. (3 time : 50 min. 0 | 000 sec.) sec. (3000 se x1x0.2 | ec.) |

| Field | Description | | | | | |
|----------------------|--|--|--|--|--|--|
| Date and Time | The date and time when the call is initiated. | | | | | |
| | Click on C icon to set the current time. The | | | | | |
| | "YYYY-MM-DD" opens a calendar that can | | | | | |
| | be used to select a date. | | | | | |
| Phone number | The phone number to call. | | | | | |
| Call duration | Estimated call duration. | | | | | |
| Available funds | Estimated available funds. | | | | | |
| | Results of the testing | | | | | |
| Formula | The rate formula used for the given | | | | | |
| | destination. | | | | | |
| Expanded Formula | The rate formula with the real interval and | | | | | |
| | price values. | | | | | |
| If the formula d | valculates the call cost based on its duration | | | | | |
| Charged amount | Charged amount for test call | | | | | |
| Real charge history | A short description of how the Charged | | | | | |
| | amount was calculated | | | | | |
| If the formula calcu | lates the call duration based on available funds | | | | | |
| Real credit time | The true maximum call duration. | | | | | |

| Announced credit | The announced maximum call duration. |
|---------------------|---|
| time | |
| Real charge history | A short description of how the Real credit |
| | time was calculated. |
| Announced charge | A short description of how the Announced |
| history | credit time was calculated. |

Volume Discount Plans

Volume discount plans allows you to dynamically modify your rates depending on how much traffic a customer has already sent you. For instance, after he makes calls for 200 minutes (charged at the normal rate) he will get a 10% discount for every minute he calls over this limit.

A discount plan includes one or more discount schemes applicable to a certain destination group. "First 200 minutes for free, then normal rate with 10% discount over 500 minutes" is one such discount scheme, and it may be applied to the destination group "Asia", which includes China, Hong Kong, Singapore, Thailand and other countries.

| â | | 0.0 | \$ | i | 5 | Dis | scount | Plan Ma | nage | ment | | | | -root | ? I | |
|---|---|-----|----|----------|-----------|--------------|----------|-------------|---------|--------------|----------------|---------|--------|-------|------------|-----|
| • | • | Add | 8 | Close | | | | | | | | | M Lo | ogout | | Log |
| | | | | | | ANY | Manageo | i By | | Search | Search | | | | | |
| | | | | N | lame | | Currency | Manageo | d By | D | escription | | Delete | | | |
| | | | | Europe | free 50 | <u>0 min</u> | USD | Administrat | or only | Europe first | 500 minutes f | or free | × | | | |
| | | | | Russia | <u>3%</u> | | USD | Administrat | or only | Russia 3% | for Spring 200 | 6 | × | | | |
| | | | | United S | States 5 | <u>5%</u> | USD | Administrat | or only | United State | es 5% | | × | | | |

Use the main Discount Plan Management screen to list all existing plans. Plans can be located using the search form, by selecting a reseller from the drop-down list, or entering the plan's name. To edit a discount plan, click on its name in the list. The Delete icon will be visible only when a discount plan is not in use (not assigned to any customer, account or product), and enables permanent deletion of the discount plan.

Add/Edit a Discount Plan

To add a new discount plan to the system, select Add to go to the discount plan creation screen. An existing discount plan can be edited by clicking on its name in the list.

| | N | \$ | | | | Add Discount Plan | () Europe/Prague | demoroot | 🛛 Help |
|---|----------|-----------|-------------|--------------|--------------|---|------------------|----------|--------|
| • | 🖬 Save | 📄 Sa | ve & Close | 🛞 Close | 📲 Objects | | | 🕅 Logout | |
| | | | | | strator only | Currency USD - US Dollar | V | | |
| | | | Destination | n Group Set | [| EasyCall 💌 * | | | |
| | | | Counter Re | eset | | Once in billing period 💌 * | | | |
| | | | Destination | n Group Lool | | Same Destination As Rate By Prefix Of Rate Destination | | | |
| | | | Description | n | | Colume discounts, bundled with the EasyCall product | | | |
| | | | | | | | | | |

| Field | Description |
|-------------|---|
| Name | The logical name of the discount plan object. |
| Currency | Indicates which currency is used for billing calculations. All discounts in a plan are to be defined in this currency. A discount plan can only be assigned to customers, accounts and products using the same currency. |
| Managed By | By default – administrator only. The plan can be assigned to a reseller (Managed by NNN) so that it is manageable from the Customer Self-Provisioning web interface. |
| Destination | Discounts can be defined for individual groups (e.g. |
| Group Set | US&Canada, Asia, Western Europe) within this set. Once chosen during discount plan creation, they cannot be changed later on. |
| Counter | Each discount has internal counters associated with a |
| Reset | corresponding account or customer. These counters store the current value in minutes (or charged amount) of calls made to a specific destination group. The counters go up according to the customer's or account's billing. Never means the plan counters will never be reset (zeroed). This is convenient if you wish to provide a special promotion such as "500 free minutes of calls to Western Europe". In this case, the counter will always go up, and the normal rate will be applied after it reaches 500 minutes. Once in billing period means the counters of the plan will be reset when the customer's next billing period begins. If you have defined a "first 500 minutes for free" discount, then the customer will have 500 free minutes in every billing period (month, week, etc.). |
| T 1 | Once chosen, this setting cannot be changed later on. |
| Lookup | • Same Destination As Rate – This requires |

| Туре | exactly the same prefix as the one in the tariff to |
|-------------|--|
| | be used in the destination group for the volume |
| | discount definition. |
| | • By Prefix Of Rate Destination – This provides |
| | more flexible matching, but puts more load on |
| | the billing engine. |
| | See the details below regarding the different matching |
| | models. |
| Description | Short description of discount plan. |

Phone Number Matching in Discount Plans

When volume discounts are involved alongside "normal" rating as per the tariff plan, the billing engine must obviously match the ID of the service used (e.g. the phone number dialed) with one of the destination groups used in the volume discount definition.

The fastest and the most efficient way is to check whether the destination in the customer's tariff applicable to this call is included in any destination groups in the volume discount plan, and then keep using this volume discount. For instance, if a customer makes a phone call to 4206025551234 and a matching rate is defined in his tariff for 420602 (Czech Republic, Mobile), the billing engine will search whether any discounts in the volume discount plan are assigned to a destination group containing 420602.

But what if you would like to include the whole Czech Republic in your volume discount? One option would be to simply list all applicable prefixes (420, 4202, 420602, etc.) in a destination group, then use this group in the volume discount definition. Alternatively, you could use the other discount plan lookup option – "by prefix". In this case, the billing engine will look not for the exact same prefix, but rather for a destination group which contains a **matching** prefix. So if a call is made to 4206025551234 and there is a 420602 rate applied in the tariff, the billing engine will search for a destination group in the volume discount plan that includes a prefix matching 420602; such matching prefixes could be 420602, 420, or even 4. In this case you could just enter 420 in your volume discount definition, and it will then be used for calls rated by different tariff rates (e.g. 4202 and 420602).

Such extensive lookups put a higher load on the billing engine, so they should be used with caution, and only in volume discount plans where they are truly needed.

Defining Discounts for Individual Destination Groups

After a volume discount plan has been saved, the Discounts tab will become available. To add a new discount to the plan, click the **Add** button. An existing discount can be edited by clicking the **Edit** icon on the row containing its details.

| | ☑ 📰 | \$ | | | E | dit 'EasyC | all' Discount P | an | Europe/Prague | demoroot | |
|--|--------|-----------|---------|--------------------|---------|------------|-----------------|----------------------|---------------|-------------|--------|
| • | 🔁 Add | 🖬 Save | 🖻 Sa | we & Close | 🛞 Close | 街 Objects | | | | N Logout | : 🔳 |
| Plan Name EasyCall Currency USD Managed By Administrator only General Info Discounts | | | | | | | | | | | |
| | | | | 1 | | | | | | | |
| | Genera | | | Service | | | Type * | Discount Sche | eme 🏏 | Exclusive I | Delete |
| Edit | Genera | l Info Di | scounts | Service e Calls | • | Volume, m | Type * | <u>Discount Sche</u> | eme 🌠 | Exclusive I | Delete |

| Field | Description |
|-------------|--|
| Destination | Enter the name of a destination group manually, or click |
| Group | the column header link (Destination Group) to choose |
| | a group from a searchable list inside the pop-up window. |
| Service | Choose a specific service (voice calls, messaging, data transfer, etc.) that this volume discount will apply to. You can bundle discounts for multiple services into the same volume discount plan. |
| Туре | Select the threshold type: will you use thresholds based on the charged amount, or on the total call time? |
| | Amount means the threshold is measured in currency units (e.g. USD), and the counters will go up by the amount which the customer should have been charged for the call before the volume discount was applied. Volume means the unit is minutes, and the counters will go up by the same value as the charged call duration. Note the difference between <i>call duration</i> and <i>charged call duration</i>. For instance, if a rate specifies 5 minutes rounding and a customer has spoken for 3 minutes 42 seconds, he will be charged for 5 minutes and the counter will go up by 5 minutes as well. |
| Exclusive | Defines whether an account should be granted exclusive free calls, i.e. calls to which a 100% discount is applied (these calls do not affect the customer's counters). See |
| | the PortaBilling Administrator Guide for more |
| | details. |
| Discount | Since the discount formula is complex, you cannot edit |

| Scheme | it directly. Click on the column header or the \swarrow icon in order to launch the discount definition wizard (see the |
|--------|---|
| | section below). |

Discount Definition Wizard

The discount wizard provides users with a flexible tool for defining threshold values and corresponding discount values. A threshold defines the maximum counter value (call duration or charged amount) within which the current discount may still be applied. If the last available discount is to be applied regardless of the counter value (e.g. first 200 minutes – normal rate, up to 500 minutes – 10% discount, and 20% discount after that) then this last discount will be created with a special unlimited threshold.

| Discount Wizard | | | | | | | | | | | |
|-----------------|-------|--------|--------|----------|------------|-------------|---------------|--------|--|--|--|
| • | 🔁 Add | 🖬 Save | 📄 Save | & Close | 🛞 Close | | | | | | |
| | | | | | | | | | | | |
| | | | Edit | | Threshold, | min* | Discount, % * | Delete | | | |
| | | | - | Unlimite | Ы | 🗹 Unlimited | 20 | × | | | |
| | | | ≡ | | 200 | | 0 | × | | | |
| | | | | | 500 | | 10 | × | | | |
| | | | | | Unlimite | d | 20 | × | | | |

| Field | Description |
|-----------|--|
| Threshold | The threshold value is measured either in currency units |
| | or time units (minutes), according to the type of |
| | discount. The value entered must be numeric (with a |
| | period allowed) and greater than zero. To provide a |
| | special unlimited value for the threshold, check the |
| | Unlimited box. You cannot have two discount rows |
| | with the same threshold values. |
| Discount | The percentage discount value must be numeric (with a |
| | period allowed) in the 0 - 100 range. A 0% discount |
| | means "standard rate applied", while a 100% discount |
| | means "free call". |

The billing engine decides which discount is to be applied, depending on whether the counter for the given destination has reached one of the defined thresholds. Note that the "charged amount" counters record charges as they are defined in the tariff, i.e. before a volume discount is applied. If there is no "Unlimited" threshold discount, and the counter exceeds the last (i.e. biggest) threshold, any further calls will be billed according to the standard tariff rate.

For example:

Discount type - Volume, minutes

PORTA Billing 100°

The discount is defined as 0..100 - 50%; 100..200 - 20%; 200..unlimited - 10%

The first 100 minutes are billed at a 50% discount (half the price specified in the tariff), the next 100 minutes are billed at a 20% discount, and thereafter all calls receive a 10% discount.

The discount is defined as 0..100 - 100% The first 100 minutes are free; all minutes above that are billed at the tariff rate.

Discount type - Amount, USD. The tariff rate for the given destination is a flat 0.5 USD per minute.

The discount is defined as 0..10.00 - 0%; 10.00..20.00 - 10%; 20.00..unlimited - 20%

When the customer begins making calls, each call is charged according at the normal rate until the total charged amount exceeds \$10.00. After that, the customer is given a 10% discount on calls.

NOTE: Let's look at a situation in which a customer's balance is \$10.00 (and the volume discount counter is also \$10.00). The customer makes a 30-minute call, and the tariff rate is \$0.20/min. The call is charged as $30 \times 0.20 - 10\% = 5.40 , and this value is stored in the CDR for the call. Thus the customer's balance will be modified by \$5.40, to become 15.40. At the same time, the volume discount counter will go up by the amount without the discount. Thus the counter will go up by \$6, to become \$16.00.

Subscription Plans

Subscription plans enable automation of recurring non-call related charges applied to your customers: for instance, basic monthly fees or fees for additional services such as voicemail or hardware rental.

| 奋 | _ | 0.0 | \$ | : | ⊿ s | Subscri | ption P | lan Ma | anagen | nent | ④ America/Van | couver | den | no-root | ? | Help |
|---|----------|-----|----|----------|------------|-----------|-----------|----------|------------|----------|-----------------|--------|-------|---------|---|------|
| • | ٠ | Add | ۲ | Close | | | | | | | | | Þ | Logout | | Log |
| | | | | | | M | anaged By | | | Searc | h Search | | | | | |
| | | | | | Name | | Currency | | aed By | | Description | D | elete | | | |
| | | | | Call Dis | | | USD | | | | onth FREE | 0 | × | | | |
| | | | | Follow-r | <u>me</u> | | USD | Administ | rator only | Follow- | me service | | | | | |
| | | | | Friends | & Fa | mily Plan | USD | Administ | rator only | Friends | s & Family Plan | 1 | | | | |
| | | | | Neighbo | orhoo | d Plan | USD | Administ | rator only | Neighb | orhood Plan | | | | | |
| | | | | Travelle | r's Pl | us | USD | Administ | rator only | Travelle | er's Plus | | × | | | |
| | | | | Voice M | <u>ail</u> | | USD | Administ | rator only | Voice N | Iail - 1 FREE m | onth | × | | | |

Use the main Subscription Plan Management screen to list all existing plans.

Add/Edit a Subscription Plan

To add a new subscription plan to the system, select Add to go to the subscription plan creation screen. An existing subscription plan can be edited by clicking on its name in the list.

| ₫ | y 📰 💲 🖬 📈 | Add Subscription Plan | demo-root | ? Help |
|---|---|------------------------------------|-----------|--------|
| • | 🖬 Save 📓 Save & Close | S Close | 💵 Logout | |
| | Name Traveller's Plus Managed By Administrator | | | |
| | General Info Periodic Fe | Traveller's Plus | | |
| | Subscription Is Activated | Upon the account's first usage 👻 | | |
| | Activation Fee | 0 USD | | |
| | Minimum Subscription Period | 12 Months | | |
| | Early Cancellation Penalty | 100 USD* | | |
| | Subscription Charges Applied | At the end of the billing period 👻 | | |
| | Round Charged Amount | XXXXX.XX000 🗨 🍝 | | |
| | Description | Traveller's Plus | | |

| Field | Description |
|------------|--|
| Name | The logical name of the subscription plan object. |
| Managed By | By default – administrator only. The plan can be |
| | assigned to a reseller (Managed by NNN) so that it is |
| | manageable from the Customer Self-Provisioning web |
| | interface. |
| Currency | Indicates which currency is used for billing calculations. |
| | All fee amounts in the plan are to be defined in this |
| | currency. A subscription plan can only be assigned to |
| | customers, accounts and products using the same |
| | currency. |

General Info tab

| Field | Description | | | | | | | | | | |
|--------------|--|--|--|--|--|--|--|--|--|--|--|
| Invoice Line | The subscription plan name as the end-user will see it | | | | | | | | | | |
| Description | on the invoice. | | | | | | | | | | |
| Subscription | becifies from which date subscription charges will | | | | | | | | | | |
| Is Activated | apply: | | | | | | | | | | |
| | • At the given start date – the first billed day is the | | | | | | | | | | |
| | subscription start date. | | | | | | | | | | |
| | • At the account's first usage – charges are applied only from the later of the subscription start date or the account first usage date. | | | | | | | | | | |
| Activation | A one-time fee applied when the subscription is | | | | | | | | | | |
| Fee | activated. | | | | | | | | | | |
| Minimum | Time interval (in months) during which the subscription | | | | | | | | | | |

| Subscription | must remain uninterrupted so as to avoid penalties. |
|--------------|---|
| Period | 1 1 |
| Early | A one-time fee applied if the subscription is cancelled |
| Cancellation | earlier than the minimum subscription period. |
| Penalty | 1 1 |
| Subscription | Defines whether the customer is charged the full |
| Charges | subscription fee at the end of the billing period, or if a |
| Applied | prorated service charge is applied on a day-by-day basis |
| | depending on the time the service was used during this |
| | period. For example, if the monthly subscription fee is |
| | \$9.99, a progressively charged customer will be charged |
| | 0.33 daily, and on the 10^{th} day the subscription charges |
| | will total \$3.33. |
| Round | A pattern that defines the rounding of the amount |
| Charged | charged for a billing period (e.g. when the monthly |
| Amount | subscription amount is \$10.00, but the service was only |
| | used for 10 days, it is desirable to round the applicable |
| | charge of \$3.33333). This pattern takes the form |
| | XXX000. An X (to the left) means that the digit(s) in |
| | this position will be left unchanged, while a zero (to the |
| | right) means that this position will be rounded. For |
| | example, XXXXX.XX000 means that the amount will |
| | be rounded up to two decimal places, so that 1.2345 |
| | becomes 1.24. Note that rounding is always done |
| | upwards. |
| Description | An extended description of this subscription plan. |

Periodic Fees tab

In this tab you may define recurring fees which are applied to your customers while a subscription is active, as well as special promotion periods. The rate structure is organized as a table, where columns define the rates for different billing periods, and table rows specify the rates for different phases of the customer's lifetime. The table of periodic fees must include at least one row (marked **Default Rate**) which specifies the normal rates applied by default. If you wish to define a special promotion (e.g. a reduced rate for the first three months), you may insert an extra row into the table to cover this period.

| ຝ | | \$: | 🗹 🛛 Edit 'Tra | aveller's | ; Plus' S | ubscript | tion Plar | Ar | merica/Vancou | ver demo | -root [| ? Help |
|-----|---|-------------|----------------------|---------------|-----------|------------|--------------|-----------|---------------|-----------|------------|--------|
| • | 🛨 Add | 🖬 Save | Save & Close | 🛞 Close | | | | | | NŰ)L | ogout | 🔳 Log |
| | Name Traveller's Plus Currency USD Managed By Administrator only General Info Periodic Fees | | | | | | | | | | | |
| | | | | Monthl | y Billing | Bi-week | dy Billing | Weekl | y Billing | Daily | Billing | |
| Edi | it Up/Down | n Default | promotional rate | N * | Fee, USD* | N * | Fee, USD* | N * | Fee, USD* | N * | Fee, USD * | Delete |
| | | First N b | oilling periods | 1 | 0 | 2 | 0 | 4 | 0 | 30 | 0 | × |
| | | Followin | ng N billing periods | 6 | 4.99 | 12 | 2.89 | 26 | 1.36 | 180 | 0.25 | × |
| Ξ | | Default | Rate | unlimited | 9.99 | unlimited | 5.49 | unlimited | 2.99 | unlimited | 0.49 | |
| | Month | ly Billing | Bi-we | eekly Billing | | Week | dy Billing | | Daily Bil | ling | | |
| | 1 month(s): | 0 US | D 12 bi-wee | ek(s): 0 | USD | 14 week(s | s): 0 US | D 1 | .30 day(s): | 0 USD | | |
| : | 27 month(| s): 4.99 US | SD 314 bi-we | eek(s): 2.89 | USD | 530 week | (s): 1.36 US | D 31 | 210 day(s): | 0.25 USD | | |
| 8 | Bunlimited | : 9.99 US | SD 15unlimit | ted: 5.49 | USD | 31unlimite | ed: 2.99 US | D 21 | 1unlimited: | 0.49 USD | | |

| Field | Description |
|---------------------|--|
| Default/Promotional | Specifies whether this is a rate which applies for a |
| rate | certain initial period, which rate which follows it |
| | (additional promotion), or if it is a default rate. |
| Ν | Promotion span - the number of billing periods |
| | covered by this fee. |
| Fee | Amount of the fee. |

After you have edited a specific row, click **Save** to confirm that you have finished editing this row. (You still need to save the whole form – use **Save** in the toolbar for this.)



For your convenience, the periodic fee table in Edit mode provides autopopulation of the fields:

- If you type a value in one of the span (N) columns, a re-calculated value will be entered automatically in all other empty columns. For instance, say you plan to define a special promotion for the first month. If you type 1 in the N column under the Monthly billing period, the N columns for Bi-Weekly, Weekly and Daily billing periods will be automatically filled with 2, 4 and 30 respectively.
- If you type a value in one of the **Fee** columns, a re-calculated value will be entered automatically in all other empty columns. For instance, when defining a special promotion for the first month as mentioned above, if you type 9.99 in the **Fee** column under the **Monthly** billing period, the **Fee** columns for Bi-Weekly, Weekly and Daily billing periods will be automatically filled with 4.995, 2.331 and 0.333 respectively.

Also, below the table in which you enter periodic fees you may see another table providing an extended explanation of the fee structure.

Products

A product is a combination of services that you provide to a customer for a price. For example, you decide to sell calling cards with 10 cents/minute calls to the Czech Republic for calls to a local access number in New York, and 15 cents/minute + 50-cent connection fee for calls to a tollfree line. In this case, your product will include two types of service:

- access via the local New York number, and
- access via the toll-free line,

with price parameters associated with each service.

Accessibility is the main component of a product definition. It specifies where your customers are allowed to use a service and how they should be charged for it. Accessibility allows you to specify the following parameters which define an access point:

- 1. The type of service provided.
- 2. The node on which the service is used. What exactly does "node" mean in this context? If, for example, a customer calls to gateway A, enters his PIN, and makes an outgoing call which is terminated on gateway B, is he using a service on node A, node B, or both? The correct answer is that the service is regarded as having been provided at the point where authorization was performed. In this example, since PIN authorization is performed on node A, it is node A which must be listed in the accessibility.
- 3. Identification of the access code (method) on that node. This parameter allows you to use different rate plans for the same service. For example, you may choose a rate plan according to the PSTN access number (local or toll-free) that the customer has dialed. Or you may use different rate plans for outgoing, incoming and forwarded calls in your IP calls service. (While for services such as prepaid cards the access code is a number, for other services any string may be used, so long as it is one provided by the application handling the call).
- 4. Originating line information (this is applicable only to the voice call service, where the call originates on the PSTN network). You can separate accessibility entries based on originating line information (e.g. whether the call was made from a home phone or a pay phone). Make sure your telecom provider supplies you with this information in the call setup.

PORTA **Silling** 100°

| 🙆 🗹 📰 💲 🚺 | | Add Product | America/Vancouver | demo-root | |
|------------------|---|---------------------------|-------------------|-----------|--|
| 🕨 🗟 Save 🛞 Close | 2 | | | M Logout | |
| | Product Name SmartCall P Managed By Administr General Info Mainte Breakage 0.05 Account Default ACL Acco Default Discount Plan Nom Info URL http:// | ator only V manace Fee | | | |

The basic information for defining a product is as follows:

| Field | Description |
|-------------|---|
| Product | The logical designation of the product. |
| Name | |
| Currency | The currency in which the product will be maintained. |
| | To edit a currency, delete all accessibility entries for this |
| | product. |
| Managed By | Administrator only (default) means that this product |
| | will be used for your direct customers and is accessible |
| | only to your administrators. Select a PortaBilling reseller |
| | to assign this product for use by a particular reseller. |
| Breakage | This value should be set by the administrator based on |
| | the currency and minimum price per minute. It is used |
| | in Account Management to obtain a summary of |
| | "depleted" (practically unusable) accounts. |
| | How it works: An account user could have a very small |
| | balance, e.g. 0.015. This is not enough to make calls to |
| | most destinations, except perhaps calls to technical |
| | support and certain local calls. Thus, even though the |
| | account's balance is not yet zero, the account is basically |
| | unusable (and the customer will probably never use it). |
| | The administrator is interested in how many accounts |
| | are in this state, i.e. how many accounts are depleted. |
| Account | Which ACL should be assigned to new accounts created |
| Default ACL | with this product. |
| Default | Which Discount Plan will be used with all the product's |
| Discount | accounts by default. |
| Plan | |
| Info URL | URL to an external website describing product features. |
| | Customers can access it by clicking on the Product |
| | Info link in the main menu of their self-care interface. |
| Description | Product description. |

Maintenance Fee

In most cases, you will use subscription plans rather than maintenance fees to apply periodic charges to your customers.

| Add Product | demo-root | Ρ Help |
|---|-----------|--------|
| ▶ 🖬 Save ⊗ Close | 💵 Logout | |
| Product Name SmartCall Prepaid * Currency USD - US Dollar * Managed By Administrator only * General Info Maintenance Fee Period Weekly * Fee 0.05 * C Effective From immediately * | | |

| Field | Description |
|-----------|---|
| Period | Defines how often to apply the maintenance fee. The |
| | maintenance fee will be charged on the first day after an |
| | account is used for the first time, or on the date |
| | specified in the Maintenance Charging option, and |
| | thereafter according to a specified period, e.g. every |
| | week. |
| Fee | Only defined when a maintenance period is set; the |
| | amount to charge any account using this product |
| | according to the schedule defined by the maintenance |
| | period. |
| Effective | Defines when the maintenance fee starts to be applied. |
| From | |

Accessibility

| | | :• | s i | | | | E | dit ' | EasyCal | l' Prod | uct | | | | | | | 🕐 Help |
|---|-----|-----|-----------|-----------|-----------|---------|---------|---------|-----------|---------------|----------|---------|----|-------|-----------------|------|----------|--------|
| • | 🔁 A | dd | 🖬 Save | 📄 Sar | ve & Clo | se 🛞 | Close | 🔯 Ra | te Lookup | Clor | e 🖑 | Objects | ; | | | | M Logout | 目 Log |
| | | | | | | | | | | | | | | | | | | |
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| | | P | Toduct Na | me Easy | Call | | | | curren | cy 080 | | | | | | | | |
| | | M | lanaged B | v Adm | inistrato | r only | | | | | | | | | | | | |
| | | | | , | | , | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | | | | | |
| | | E | Edit | Service | * | N | ode | | Access C | ode | Info | Digits | | | Tariff * | Dele | ete | |
| | | - 1 | 🛔 Void | e Calls | ~ | PortaSI | ΓP | ~ | | | NY. | | ۷ | Easy | Call | × | ٢ | |
| | | 1 | Confe | rencing | | Ports | aBridae | | | | ۵ | NY | | EasyC | all | | | |
| | | | | reneing | | 1 010 | abridge | | | | | | | Super | SIP | | | |
| | | | Mess | aging Sei | rvice | SM | IS-GW | | | | A | NY | | EasyC | all - messaging | × | C | |
| | | | _ | | | | | | | | | | | | | | _ | |

NOTE: The Accessibility tab is invisible in Add New mode, and will appear only when editing an existing product.

To add a new Accessibility entry:

- 1. Click the **Add** button
- 2. Choose a Service
- 3. Choose a **Node** where the service will be provided
- 4. Type in the **Access Code** value (if required) and select the appropriate value from the **Info Digits** menu
- 5. Choose a tariff from the drop-down list

6. Click the **Save** button

To edit the Accessibility list:

- 1. Click the 🔳 (**Edit**) button
- 2. Choose the service, node, info-digits and tariff from the dropdown lists
- 3. Type in the Access Code value, if any
- 4. Click the **Save** button

Subscriptions

This tab allows you to define a list of subscription plans which are mandatory for this product, so that these subscriptions will be automatically applied to every account to which this product will be assigned.

| 🙆 🗹 📰 💲 i | Edit 'SmartCall Prepaid' Pr | roduct © America/Vancouver | demo-root | |
|-----------------|--|----------------------------|-----------|-------|
| 🕨 🗄 Add 🖬 Save | 🖬 Save & Close 🛞 Close 🔯 Rate Lookup | | 🕅 Logout | 📒 Log |
| Ma | tuct Name SmartCall Prepaid * Currency USD aged By Administrator only * Currency USD General Info Maintenance Fee Online Signup Accessibility it Subscription Delete SmartCall subscription X Traveller's Plus X | Subscriptions Notepad | | |

NOTE: The Subscriptions tab is invisible in Add New mode, and will appear only when editing an existing product.

To add a new Subscription entry:

- 1. click the 🖬 Add button
- 2. choose a subscription plan from the drop-down lists
- 3. click the **Save** button

Online Signup

Online signup allows automated creation of accounts (and customers, if necessary) when an end-user fills in a subscription form and payment card information and then, having successfully completed the subscription process, receives the credentials necessary to make phone calls.

| ŵ | Y P | s i 🗹 | | Edit | 'SmartCall | Prepaid' P | roduct | | demo-root | ? Help |
|---|------------|---------------------------|------------|---------------|------------------|---------------|---------------|---------|-----------|--------|
| • | 🖬 Save | 📄 Save & Close | 🛞 Close | 🧧 Rate Look | up | | | | 🕅 Logout | 📕 Log |
| | | Product Nam Managed By | | | | Currency USD | | | | |
| | | Genera | l Info Mai | ntenance Fee | Online Signup | Accessibility | Subscriptions | Notepad | | |
| | | HTTP_REFE | RER https: | //demo.portao | ne.com/subscrib | e.html | |] | | |
| | | Validation Mo | dule | | | | | | | |
| | | Continue UR | L https: | //demo.portao | ne.com/finalize_ | _signup.html | |] | | |

Numerous online signup frontends can be developed using a combination of the "HTTP_REFERER" and "Validation Module" fields.

Read about "How to configure online web signup" in the **PortaBilling** Administrator Guide.

Vendor Management

Vendors are your service providers, for example, termination partners or incoming toll-free line providers. Every time a call travels from your network to a vendor (via telephony or VoIP) there is a cost associated with it, and at this point PortaBilling will charge the account and customer for the call, as well as calculate your termination costs.

On the Vendor Management screen, you can view a list of all registered vendors. This list provides the following information and activities:

| _ 🙆 _ | ✓ 🔤 | s : | | Vendo | or Manag | ement | | | | demoroot | ? Help |
|-------|-------|---------|-----------|------------------|-------------|----------|---------|--------|--------|----------|--------|
| • | 🔁 Add | 🛞 Close | 街 Objects | | | | | | | 🕅 Logout | 目 Log |
| | | | | | | | | | | | |
| | | | | | Sear | | | | | | |
| | | | | | | Sea | rch | | | | |
| | | | | | | | | | | | |
| | | | xDRs | Name | Connections | Currency | Balance | E-mail | Delete | | |
| | | | Q | Arbinet | 🔀 2 | USD | 0.00000 | | | | |
| | | | \square | <u>iBasis</u> | 🔀 1 | USD | 0.00000 | | | | |
| | | | \square | SIP-to-SIP calls | <u>× 1</u> | USD | 0.00000 | | | | |
| | | | \square | Voxbone | 🔀 1 | USD | 0.00000 | | | | |

| Column | Description |
|-------------|---|
| xDRs | Click the View () icon to go to the xDR view page for |
| | this vendor. |
| Name | The vendor's name. |
| Connections | Click the connections (\textcircled{S}) icon to be taken to the |
| | connections management page for this vendor. The |
| | number next to the icon shows the number of |
| | connections defined for this vendor. |
| | Read more in the Connections section below. |
| Currency | The currency in which the vendor's account is |
| | maintained and paid. |
| Balance | The vendor's current balance. |
| E-mail | E-mail contact for the given vendor. |
| Delete | Click the delete (💌) icon to remove the vendor. The |
| | delete button will only appear if there are no xDRs or |
| | connections defined for the vendor. |

Add/Edit Vendor

| ₫ | 🗸 🔛 💲 🖬 📈 | | Add | Vendor | ① Europe/Prague | demoroot | ? Help |
|---|--|--------------------------------|---------------|--|------------------|----------|--------|
| • | 🗟 Save 📓 Save & | Close 🛞 Close | 街 Objects | | | 🕅 Logout | |
| | Vendor Name 🗵 | Telecom | * | Currency U Opening Balance 0 | SD - US Dollar 💌 | | |
| | Address In | o Additional Inf | o User Interf | ace | | | |
| | Company Name Mr/Ms/ First Name Last Name Address | X-Telecom | | Contact Phone 917-555-1 Fax Att. Phone Att. Contact E-mail billing@x-tt BCC Description | 234 | | |
| | Province/State Postal Code City Country/Region | NY 01202 New York USA | | | | | |

The Add Vendor page allows definition of a new client entity within PortaBilling. The information required is split into two tabbed sections: Address Info and Additional Info. The Edit Vendor page also contains the Notepad tab for making notes. The following information is required at the top of the form:

| Field | Description |
|-------------|---|
| Vendor Name | Defines the vendor name as it will appear within the |
| | PortaBilling system. This is distinct from the |
| | Company Name field in the Address Info tab. |
| Currency | A currency must be specified by selecting it from the |
| | drop-down list of available currencies. |
| Opening | The starting balance for the vendor. |
| Balance | |

The information in all the other tabs is optional, and need not be specified when creating a vendor.

Maintenance

The Maintenance tab allows the administrator to correct a vendor's balance.

| Field | Description | | | |
|--|--|--|--|--|
| Action Manual charge: Use this transaction to adju | | | | |
| | the vendor's balance in case of non-call related | | | |
| | charges from the vendor. For instance, if the | | | |
| | vendor is charging you for an equipment | | | |

| | purchase. |
|------------------|---|
| | Manual refund: Use this transaction if you |
| | have received credit to your account. For |
| | instance, if you complained about the vendor's |
| | service quality and have agreed for certain |
| | funds to be credited toward future services. |
| Amount | Amount to charge/refund. |
| Visible comment | A comment on this transaction visible to the |
| | vendor in the xDR browser. |
| Internal comment | An internal comment on this transaction; not |
| | visible in the xDR browser, and only accessible |
| | directly from the database. |

Additional Info

| Field | Description |
|----------------|--|
| Billing Period | Defines the frequency of invoicing for this vendor. |
| Offset Balance | Defines the customer for automatically offsetting the |
| with Customer | vendor's balance (if this vendor also sends you traffic, |
| | i.e. he is also your customer). You may only choose a |
| | reseller or retail customer defined with the same |
| | currency. |
| Minimum | When the balance reaches the threshold value, the |
| Amount to | current vendor's balance will be applied as credit to |
| Offset | the chosen customer and reduced to zero. xDR |
| | records for both the vendor and the customer will be |
| | created for this transaction. |

User Interface

The User Interface tab content is identical to that described in the User Interface subsection of the User Management section of this guide.

Accounts

When you send traffic to the vendor's network, both parties are interested in securing the connection so that no one else can send traffic to the vendor, as this would then be billed to your account. When using SIP, it is possible to do this in a very convenient and secure way: by using digest authentication. In this case, the vendor will provide you with a username/password, which will be used to authorize every outgoing call from your network to this vendor. Here you can enter information about such accounts, so that they can be provided automatically by billing to the SIP server.

| ຝ | | \$ i | | | Edit V | endor | | | () America/Vancouver | demo-toor | ? Help |
|------|-----------|--------------------|------------|-----------------|---------------|------------------------------|---------------------|--------|----------------------|-----------|--------|
| • | 🔁 Add | 🖬 Save | : 📄 Save | & Close 🛞 Close | 🔳 xDRs | 💥 Connections | | | | 🕅 Logout | 📒 Log |
| Vend | ior Name | MCI Ven | dor | × | Open Balan | ing Balance 0.00 Ice 18.5 | 000 USD 3369 USD | | | | |
| | Address 1 | nfo M | aintenance | Additional Info | User Interfa | Accounts | Notepad | | | | |
| Edit | | Name * | | Login * | | Passwor | d | Delete | | | |
| | | | | | | | | | | | |
| = | | Jim Turner jimvoip | | | | ******** | * | × | | | |
| | | Paul Allo | t | pallot | | ******** | ********* | | | | |

Connections

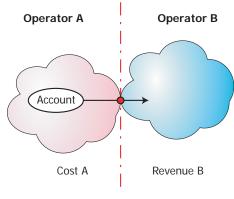
Definitions

Network

VoIP network - one or more VoIP entities that belong to a single operator.

Connection

Point of change of network ownership. Defined as a set of physical and logical parameters i.e. IP, Port, Timeslot, Call Type, Call Direction, etc.



Cost A = Revenue B

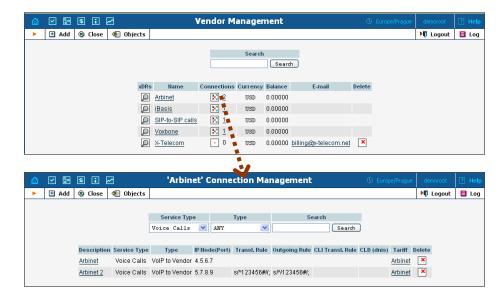
Operator

Network owner. Responsible for internetworking and wholesale in its network.

A connection defines the point where a call travels between the networks of two operators, one of whom is a PortaBilling owner. At this point, we will create an xDR for the vendor (the other operator) describing our costs. Also, if this was an outgoing call, we will create xDRs for both the account and the customer. You can access connection information directly from the main menu. In this case, all connections defined in the system will be displayed.

| 3 🗹 🗄 | 5 🖬 🗹 | | | Con | nection | Managem | ent | | | | ? He |
|-------------|------------------|--------------|---------|--------|------------|------------------|---------------|------------------|------------|-------------------|--------|
| Clos | e 📲 Objects | ; | | | | | | | | 📲 Logout | 目 Lo |
| | | | | | | | | | | | |
| | | Vendo | or | Ser | /ice Type | Туре | | Search | | | |
| | | ANY | * | Voice | Calls 🔽 | ANY | ~ | | Search | | |
| | | | | | | | | | | | |
| Description | Vendor | Service Type | Ту | pe | IP/Node(Po | rt) Transl. Rule | Outgoing Rule | CLI Transl. Rule | CLD (dnis) | Tariff | Delete |
| Arbinet | Arbinet | Voice Calls | VoIP to | Vendor | 4.5.6.7 | | | | 1 | Arbinet | × |
| Arbinet 2 | Arbinet | Voice Calls | VoIP to | Vendor | 5.7.8.9 | s/^123456#/ | s/9123456#/; | | 1 | Arbinet | × |
| ibasis | iBasis | Voice Calls | VoIP to | Vendor | 114.5.6.90 | | | | 1 | Basis termination | × |
| | | | | | 0.0.1.14 | | | | | SIP-to-SIP calls | × |
| sip2sip | SIP-to-SIP calls | Voice Calls | VoIP to | Vendor | SIP-UA | | | | 1 | SIP-to-SIP calls | |

Alternatively, you can access a list of connections for a particular vendor. To do so, click the \mathbb{R} icon next to the vendor name in the vendor list, or click \mathbb{R} **Connections** in the toolbar on the vendor info screen.



To edit a connection, simply click on the connection description in the table. To add a new connection, first go to the list of connections for a specific vendor, then select **Add**.

| ຝ | > | \$ 🖬 🗠 | Add | Connectio | on for 'X-Telecom' | ③ Europe/Prague | demoroot | ? Help |
|---|-------------|----------------|---------|----------------|-----------------------|-----------------|----------|--------|
| • | 🗟 Save | 🗟 Save & Close | 🛞 Close | 街 Objects | | | 🕅 Logout | 目 Log |
| | | | | | | | | |
| | | | | Description | X-Telecom termination | × | | |
| | | | | Service Type | Voice Calls 🛛 💟 | × | | |
| | | | | Туре | PSTN to Vendor 🛛 💌 | × | | |
| | | | | | | | | |
| | | | | Node | Cisco-GW 🔽 | × | | |
| | | | | Port | ISDN 0% | | | |
| | | | | Tariff | X-Telecom 💌 | × | | |
| | | | | Capacity | 30 | * | | |
| | | | | Hide CLI Mode | Clear caller info 🛛 💌 | | | |
| | | | T | anslation Rule | s/^011//; | 2 | | |
| | | | | Outgoing Rule | | 0 | | |
| | | | CLIT | anslation Rule | | 2 | | |

| Field | Description | | | | | | |
|--------------|--|--|--|--|--|--|--|
| Description | logical description of the connection. | | | | | | |
| Service Type | The type of service this connection is used to transport (voice calls, Internet connectivity, etc.). | | | | | | |
| | NOTE: While services are used to represent and bill your customers' activities to them, you use service types to define a connection, since in this case it is important to know what actual (physical) service was provided. | | | | | | |
| Туре | The type of this connection. The available types depend on the service type chosen above. For the Voice Calls service, the applicable types are: PSTN from Vendor - Vendor-related expenses for delivering calls from your customers to your network (e.g. toll-free lines) via a PSTN trunk to your gateway. VoIP from Vendor - Vendor-related expenses for delivering calls from your customers to your network (e.g. foreign DIDs) via VoIP to your SIP server. PSTN from Vendor - Your expenses for terminating calls on a vendor's network via a PSTN trunk on your gateway. VoIP from Vendor - Your expenses for terminating calls on a vendor's network via a pSTN trunk on your gateway. | | | | | | |

Other available fields on the **Add Connection** form vary depending on the service type and type of connection chosen.

| ຝ | > | \$ 🖬 🖂 | Add | Connectio | on for 'X-Telecon | י' | | demoroot | ? | |
|---|-------------|----------------|---------|-----------------|-----------------------|----|-----|----------|---|-----|
| • | 🖬 Save | 📓 Save & Close | 🛞 Close | 街 Objects | | | | 🕅 Logout | | Log |
| | | | | | | | | | | |
| | | | | Description | X-Telecom termination | | × | | | |
| | | | | Service Type | Voice Calls | * | × | | | |
| | | | | Туре | PSTN to Vendor | * | × | | | |
| | | | | | | | | | | |
| | | | | Node | Cisco-GW | ۷ | * | | | |
| | | | | Port | ISDN 0% | | | | | |
| | | | | Tariff | X-Telecom | ¥ | * | | | |
| | | | | Capacity | 30 | | * | | | |
| | | | | Hide CLI Mode | Clear caller info | * | | | | |
| | | | TI | ranslation Rule | s/^011//; | | 🏏 😨 | | | |
| | | | | Outgoing Rule | | | 0 | | | |
| | | | CLI TI | ranslation Rule | | | 🏏 📀 | | | |
| | | | | | | | | | | |

Connections with Voice Calls Service Type and PSTN Type

| Field | Description | | | | | | | | |
|-------------|--|--|--|--|--|--|--|--|--|
| Node | Name of the node used for this connection. Not | | | | | | | | |
| | available for "VoIP to Vendor" connections. | | | | | | | | |
| Port | Only on PSTN-related connections. The specified port | | | | | | | | |
| | for PSTN origination or termination. The port can be | | | | | | | | |
| | set using wildcards: | | | | | | | | |
| | "_' - match any symbol | | | | | | | | |
| | "%" - match any sequence of symbols | | | | | | | | |
| | The wildcard symbols ** and *? should not be used. | | | | | | | | |
| Tariff | The tariff used to calculate the cost of terminating calls | | | | | | | | |
| | via this connection. | | | | | | | | |
| Capacity | The number of simultaneous sessions this connection | | | | | | | | |
| | can support. This parameter is only used to correctly | | | | | | | | |
| | scale the load graph for the connection, and not for | | | | | | | | |
| | actual call handling – this is done by the gateway itself. | | | | | | | | |
| | column is only available for "PSTN from Vendor" connections: | | | | | | | | |
| CLD | Specifies the access number the customer dialed in | | | | | | | | |
| | order to reach your network. | | | | | | | | |
| Info Digits | Info Digits is ISDN Originating Line Information sent | | | | | | | | |
| | by the gateway, which allows accounts to be billed | | | | | | | | |
| | depending on where the call is originated from. Simply | | | | | | | | |
| | associate the corresponding tariff with any OLI in | | | | | | | | |
| | Accessibility. | | | | | | | | |
| | Please note that the gateway should be configured to | | | | | | | | |
| | support OLI. | | | | | | | | |
| | g column is only available for "PSTN to Vendor" connections: | | | | | | | | |
| Hide CLI | Describes how outgoing calls for which privacy has | | | | | | | | |
| Mode | been requested by the caller should be displayed to the | | | | | | | | |
| | vendor. | | | | | | | | |
| | • Clear caller info – PortaSwitch will remove all | | | | | | | | |
| | information about the caller from the call | | | | | | | | |
| | initiation info sent to the vendor. | | | | | | | | |

| | • II |
|-------------|--|
| | Use private headers – The outgoing call |
| | initiation request will contain special flags |
| | requesting the vendor to hide the caller |
| | information from the call recipient. |
| Translation | Rule applied to convert a number from a vendor- |
| Rule | specific format into the unified format used in billing. |
| | Click the wizard icon \bigotimes to launch the Dialing Rules |
| | wizard; click the test icon 😰 to pop up the Test Rule |
| | window. |
| Outgoing | If necessary, a received number can be modified before |
| Rule | sending it to the vendor (for example, if a tech prefix is |
| | required). This is only applicable if the node which |
| | routes the call retrieves routing information from |
| | PortaBilling (e.g. PortaSIP or MVTS). This will be filled |
| | in automatically if you use the Dialing Rules wizard. |
| CLI | Translates the CLI (ANI) to a vendor-specific format |
| Translation | when routing a call to the vendor's network. |
| Rule | |

Connections with Voice Calls Service Type and VoIP Type

| | v 🗄 💲 🖬 🖌 | A | dd Connec | tion for 'iBasis' | | | | ? Help |
|---|-----------------------|---------|----------------|-----------------------|---|-----|----------|--------|
| • | 🗟 Save 📓 Save & Close | 🛞 Close | 📲 Objects | | | | 💵 Logout | 目 Log |
| | | | | | | | | |
| | | | Description | Termination to iBasis | | * | | |
| | | | Service Type | Voice Calls | ~ | * | | |
| | | | Туре | VoIP to Vendor | ~ | × | | |
| | | | | | | _ | | |
| | | | Remote IP | 192.168.0.100 | | * | | |
| | | | RTP Proxying | Optimal | * |] | | |
| | | | Tariff | iBasis termination | v | * | | |
| | | | Capacity | 100 | | * | | |
| | | | Hide CLI Mode | Clear caller info | ~ | | | |
| | | V | /endor Account | None | * | * | | |
| | | Tr | anslation Rule | s/^123456#//; | | 2 | | |
| | | | Outgoing Rule | s/^/123456#/; | | (?) | | |
| | | CLI Tr | anslation Rule | | | 2 | | |

| Field | Description | | | | | |
|--------------|---|--|--|--|--|--|
| The followin | ng column is only available for "VoIP to Vendor" connections: | | | | | |
| Remote IP | IP of the remote gateway. The value in this field should | | | | | |
| | take one of the following forms: | | | | | |
| | • An IP address, e.g. 23.45.67.89 | | | | | |
| | • An IP address and port, e.g. 34.56.78.90:5062. | | | | | |
| | This is required if the remote gateway uses a | | | | | |
| | port different from the standard one. | | | | | |
| | Special keywords any or SIP-UA | | | | | |
| | • For prefix-based connection matching, specify a | | | | | |
| | value in the form PREFIX:NNN, where NNN | | | | | |

| | is the actual prefix; for example PREFIX: 34567# | | | | | | |
|-------------|---|--|--|--|--|--|--|
| RTP | Describes the NAT traversal capabilities of the remote | | | | | | |
| Proxying | gateway: | | | | | | |
| . 0 | • Direct - RTP stream should be sent directly to | | | | | | |
| | this node; RTP proxy should not be used. | | | | | | |
| | Optimal - This node is capable of NAT | | | | | | |
| | traversal; no RTP proxying is required unless | | | | | | |
| | specifically requested. | | | | | | |
| | | | | | | | |
| | OnNat - This node is not capable of NAT | | | | | | |
| | traversal; engage RTP proxy if the other party is behind NAT. | | | | | | |
| | | | | | | | |
| | • Always - When sending a call to this node, | | | | | | |
| | always engage RTP proxy, so that no media | | | | | | |
| | stream goes to it directly. | | | | | | |
| Tariff | The tariff used to calculate the cost of terminating calls | | | | | | |
| | via this connection. | | | | | | |
| Capacity | The number of simultaneous sessions the connection | | | | | | |
| | can support. This parameter is used only to correctly | | | | | | |
| | scale the load graph for the connection, and not for | | | | | | |
| | actual call handling – this is done by the gateway itself. | | | | | | |
| Hide CLI | Describes how outgoing calls for which the caller has | | | | | | |
| Mode | requested privacy are to be displayed to the vendor. | | | | | | |
| | • Clear caller info – PortaSwitch will remove all | | | | | | |
| | information about the caller from the call | | | | | | |
| | initiation info sent to the vendor. | | | | | | |
| | • Use private headers – The outgoing call | | | | | | |
| | initiation request will contain special flags | | | | | | |
| | requesting the vendor to hide the caller | | | | | | |
| | information from the call recipient. | | | | | | |
| Vendor | Defines which username/password should be used for | | | | | | |
| Account | authorization of calls via this connection. | | | | | | |
| Translation | Rule applied to convert a number from a vendor- | | | | | | |
| Rule | specific format into the unified format used in billing. | | | | | | |
| | Click the wizard icon 🖄 to launch the Dialing Rules | | | | | | |
| | wizard; click the test icon 😰 to pop up the Test Rule | | | | | | |
| | window. | | | | | | |
| Outgoing | If necessary, a received number can be modified before | | | | | | |
| Rule | sending it to the vendor (e.g. if a tech prefix is required). | | | | | | |
| | This only applies if the node which routes the call | | | | | | |
| | retrieves routing information from PortaBilling (e.g. | | | | | | |
| | PortaSIP or MVTS). This will be filled in automatically | | | | | | |
| | if you use the Dialing Rules wizard. | | | | | | |
| CLI | Translates the CLI (ANI) to a vendor-specific format | | | | | | |
| Translation | when routing a call to the vendor's network. | | | | | | |
| Rule | when routing a can to the vehicle's network. | | | | | | |
| Nult | | | | | | | |

The following two columns are visible only if you are using multiple protocols in your system and have the ShowConnectionProtocol feature enabled. By default this option is turned off, and every connection is assumed to be SIP-capable only.

| Field | Description |
|-------|---|
| H323 | Check if this connection is capable of handling H323 calls. |
| SIP | Check if this connection is capable of handling SIP calls. |

Connection Load

PortaBilling automatically updates load graphs based on the number of calls going through a connection. To access the load graph for a specific connection, open the connection details page and click the **I Load** icon in the toolbar.

Customer Classes

A customer class is a definition of various properties (e.g. invoice terms) which can be easily applied to a large number of customers.

On the Customer Class Management screen, you can view a list of all currently defined classes. This list provides the following information:

| | ! | : • (| \$ i | 🖂 (| Custon | ner Class Ma | anagement 🕓 🗚 | | | | ? Help |
|---|----------|--------------|--------|---------------|----------|--------------------|---------------------|-------------|--------|--------|--------|
| • | 🕂 A | dd | 🛞 Clos | ie . | | | | | Þ | Logout | 🔳 Log |
| | | | | | ANY | Managed by | Search | Search | | | |
| | | | | Na | me | Managed by | Descriptio | n | Delete | | |
| | | | | Enterpri | ise | Administrator only | Enterprise Customer | Class | | | |
| | | | | Europea | an Union | Administrator only | European Union Cus | tomer Class | × | | |
| | | | | North Ar | merican | Administrator only | North American Cust | omer Class | | | |
| | | | | <u>Retail</u> | | Administrator only | Retail Customer Cla | SS | × | | |
| | | | | | | | | | | | |

| Column | Description | | | | |
|-------------|---|--|--|--|--|
| Name | The name of a specific customer class | | | | |
| Managed by | Administrator only (default) means that this class will | | | | |
| | be used for your direct customers, and is accessible only | | | | |
| | to your administrators. Select a PortaBilling reseller to | | | | |
| | assign this class for use by a particular reseller. | | | | |
| Description | A logical description of this customer class. | | | | |

Add/Edit Customer Class

The Add Customer Class page allows you to define a new customer class within PortaBilling.

| | Add Customer Class | ④ Europe/Prague | demoroot | ? Help |
|---|---|-----------------|----------|--------|
| 🕨 🖬 Save 📓 Save & Close 🛛 🛞 Close 🐗 | Objects | | 🕅 Logout | |
| Name Retail SIP | * Managed by Administrato | r only 💌 | | |
| Send Statistics | Summary Only | | | |
| Invoice Template | Basic invoice (with call details | | | |
| Terms | Due on receipt | | | |
| Send Invoices | | | | |
| Invoice Grace Period | 21 Days | | | |
| Invoice Notification Intervals | 10,5,3 Days | | | |
| Invoice Re-send Intervals | 2,7 Days | | | |
| Re-collect Intervals | 1,6 Days | | | |
| Suspension Time | 14 Days | | | |
| Suspension Warning Time | 4 Days | | | |
| Closing Time | 28 Days | | | |
| Charge Credit Card When The Billing Period Is Closed | V | | | |
| Description | For our retail customers, using SIP services | | | |

The following parameters are available:

| Field | Description | | | | | | | |
|-------------------------|--|--|--|--|--|--|--|--|
| Name | Name of the specific customer class. | | | | | | | |
| Managed by | Administrator only (default) means that this class | | | | | | | |
| | will be used for your direct customers, and is | | | | | | | |
| | accessible only to your administrators. Select a | | | | | | | |
| | PortaBilling reseller to assign this class for use by a | | | | | | | |
| | particular reseller. | | | | | | | |
| The following specifie. | s various parameters to be assigned by default to customers within | | | | | | | |
| | this customer class: | | | | | | | |
| Send Statistics | Defines what kind of xDR statistics should be | | | | | | | |
| | delivered to the customer by email: | | | | | | | |
| | • Full Statistics – Send a CSV file with a | | | | | | | |
| | complete list of xDRs. | | | | | | | |
| | • Summary Only – Do not send a full list of | | | | | | | |
| | xDRs, only a brief summary. | | | | | | | |
| | • Do Not Send – Do not send any statistics by | | | | | | | |
| | email. | | | | | | | |
| | For more details see Additional Info in the Add/Edit | | | | | | | |
| | Customer section. | | | | | | | |
| Invoice | Choose either "Do not create invoice" (in this case | | | | | | | |
| Template | no invoices will be created, only CSV xDR statistics) | | | | | | | |

| | or a particular invoice templete |
|----------------|--|
| T | or a particular invoice template. |
| Terms | Description of the invoice terms for a customer to be |
| | printed on the invoice. |
| Send Invoices | Defines whether a PDF copy of the invoice should |
| | automatically be sent to the customer when a new |
| | invoice is created. |
| Invoice Grace | Invoice terms, i.e. how many days after invoice |
| Period | generation payment is expected. |
| Invoice | Comma-separated list of numbers; each number |
| Notification | represents a number of days prior to the invoice due |
| Intervals | date when a notification regarding an unpaid invoice |
| | should be sent. For instance, 14,7,3 means that the |
| | customer should receive a notification 14, 7 and 3 |
| | days before the due date. (Obviously, if the customer |
| | pays after the first notification, no further |
| | 1 2 |
| | notifications will be sent). |
| | Leave this field empty to disable notifications |
| | completely. |
| Invoice Re- | Comma-separated list of numbers; each number |
| Send Intervals | represents a number of days after the invoice due |
| | date when a notification regarding the overdue |
| | invoice should be sent. For instance, 0,7,14 means |
| | that the customer will receive a notification on the |
| | due date and then 1 and 2 weeks later. (Obviously, if |
| | the customer pays after the first notification, no |
| | further notifications will be sent). |
| | Leave this field empty to disable notifications |
| | completely. |
| Re-collect | Comma-separated list of numbers; each number |
| Intervals | represents a number of days after the invoice due |
| inter valo | date when an attempt should be made to charge a |
| | customer's credit card for the invoice amount due. |
| | For instance, 0,3,10 means that PortaBilling will |
| | |
| | attempt to charge the customer's credit card on file |
| | on the due date and then 3 and 10 days later. |
| | (Obviously, if one of the charge attempts succeeds, |
| | no further attempts will be made). |
| | Leave this field empty to disable re-collect attempts |
| | completely. |
| Suspension | How many days after the due date will the |
| Time | customer's services be suspended if the invoice is still |
| | unpaid. Leave this field empty to disable service |
| | suspension. |
| Suspension | How many days after the due date should notification |
| Warning Time | of possible suspension of services be sent to the |
| 8 | customer. Leave this field empty to disable such |
| | notification. |
| | |

| Closing Time | How many days after the due date will the customer's account be closed if the invoice is still unpaid. Leave this field empty to disable automatic account closing. Note that, if defined, the Suspension Warning Time must be less than the Suspension Time , and the Suspension Time must be less than the Closing |
|-----------------------|--|
| | Time. |
| Charge Credit | Automatically charge the customer's credit card on |
| Card When | file for the full amount due when his billing period is |
| Billing Period | closed – as a result, an invoice will be created with a |
| Is Closed | zero amount due. |
| Description | A logical description of this customer class. |

Customer Management

On the Customer Management screen, you can view a list of all registered customers, or use search filters to display a specific set of customers only.

| Filter value | Description |
|------------------|---|
| ANY | All customers registered in the system |
| Direct Customers | Customers directly owned by your company |
| | (who have a business relationship with you, |
| | receive bills from you, and pay to your |
| | accounts). This may include both resellers and |
| | retail customers. |
| All Resellers | Only customers of the reseller type. |
| All Retail | All retail customers; this includes your own |
| | retail customers and those of your resellers. |
| Direct Retail | Only retail customers who are owned by your |
| | company. |
| Sub-customers of | All sub-customers of a specific reseller. |
| Reseller NNN | |
| Representative | Only customers related to a specific |
| | representative. |
| Search | Filter by name. When you enter a value in the |
| | search field, all customers who have the search |
| | string in their customer name, company name, |
| | or first/last name will be displayed. |
| Advanced Search | Allows you to specify complex search |
| | conditions (see more info below) |

The screen provides the following information and activities:

| ຝ | - 1 | \$ 1 | 3 | | Cus | tomer | Manag | jement | | ③ Europe/Prague | e dem | oroot | ? Help |
|---|---------------|-------------|------------|---------|-------|----------|-----------|--------------|---------|------------------------|---------|--------|--------|
| • | • Add | Customer | 🛨 Add Rese | eller 🛞 | Close | 🖑 Ob | jects | | | | Mỹ L | ogout | 目 Log |
| | | | Туре | | | Repre | sentative | | | Search | Advance | d | |
| | | Direct Cust | omers | * | ANY | | | × | | Search | search | | |
| | | | | | | | | | | | | | |
| | xDRs | Name | Accounts | Subcust | omers | Currency | Туре | Credit limit | Balance | E-mail | Status | Delete | |
| | \mathcal{Q} | Callshop#1 | 5 | 鸣 | | USD | Reseller | | 0.00000 | | | | |
| | Q | John Doe | | đ | | USD | Retail | | 0.00000 | | | | |
| | Q | John Lao | | 5 | | USD | Reseller | | 0.00000 | | | | |
| | \square | Mary Smith | | | | USD | Retail | 50.00000 | 3.73000 | mary.smith@hotmail.com | | | |
| | | | | | | | | | | | | | |

| Column | Description |
|---------------|--|
| xDRs | Click the View () icon to go to the xDR view |
| | page. |
| Name | The customer's name. |
| Owned By | The name of the reseller owning the customer (none |
| | are displayed if the Direct Customers filter is |
| | applied). |
| Accounts/ | Click the Accounts 🗊 icon to go to the Account |
| Sub-customers | Management screen (for retail customers) or the |
| | sub-customers icon 🐁 for the Sub-customers |
| | Management screen (for resellers). |
| | If there are no accounts under the customer, the |
| | icon is changed accordingly to \Box , so that you can |
| | easily see this. The same applies to resellers; in this |
| | case the "no sub-customers" icon ⁴⁶ is shown. |
| Currency | The currency in which the customer's account is |
| | maintained and billed. |
| Туре | The customer may be either a reseller or a retail |
| | customer. |
| Credit Limit | The credit limit applicable to the customer's account |
| | (if any). |
| Balance | The customer's current balance. |
| E-mail | E-mail contact for this customer. |
| Status | The status of the customer's account. |
| | The 🚨 icon will appear if the customer's credit has |
| | been exceeded. The customer blocked 🗢 icon |
| | means that all accounts of this customer have been |
| | administratively blocked. The 👬 icon means all |
| | services to this customer have been suspended |
| | because of an overdue invoice, and the 🔒 icon |
| | means that this customer was closed. |
| | The frozen 攀 icon means that periodic payments |
| | for this customer have been suspended due to |
| | repeated errors (for instance, the customer canceled |
| | his credit card and did not enter the information for |
| | his new card in PortaBilling). |

| Delete | Click the delete $(\textcircled{\times})$ icon to remove the customer. |
|--------|--|
| | The delete icon will only appear if there are no |
| | xDRs, accounts or sub-customers owned by the |
| | customer, or other entities (products, tariffs, etc.) |
| | managed by the customer. |

Advanced Search

In advanced search mode you can specify an unlimited number of search conditions. Every condition applies to a particular field (e.g. customer's ZIP code). Click on Add a new search condition to add another condition.

| ₫ | I | • \$: 2 | 3 | | Custom | er | Manag | ement | | () Europe/Prague | dem | oroot | ? Help |
|---|---------------|-----------------|-----------------|---------|---------------------|------|------------|--------------|----------|------------------------|----------|--------|--------|
| • | 🗈 Ad | l Customer [| 🗄 Add Resellei | · 🛞 | Close 🖣 |) Ot | bjects | | | | ►Ø L | .ogout | 目 Log |
| | | | _ | | | | | | | | | | |
| | | | Туре | | Re | epre | esentative | | | Search | Back to | 2 | |
| | | Direct Cust | omers | ~ | ANY | | | ~ | | Search Sir | nple se: | arch | |
| | | • Add a new s | earch condition | | | | Advanc | ed Search (| Criteria | | | | |
| | | Name | | В | egins wi 💙 | | John | | | × | | | |
| | City | | | | Is New York | | | | | × | | | |
| | | | | I: B | s egins with | | | | | | | | |
| | ×DR | s Name | Accounts / Su | bcu C | ontains | icy | Туре | Credit limit | Balance | E-mail | Status | Delete | |
| | \mathcal{A} | Callshop#16 | i 🛱 | | nds with s empty | | Reseller | | 0.00000 | | | | |
| | \square | John Doe | |) _ | US | D | Retail | | 0.00000 | | | | |
| | Q | <u>John Lao</u> | <u>.</u> | 5 | US | D | Reseller | | 0.00000 | | | | |
| | P | Mary Smith | Ģ |) | USI | D | Retail | 50.00000 | 3.73000 | mary.smith@hotmail.com | | | |

| Operation | Description | | | | | | | |
|-------------|--|--|--|--|--|--|--|--|
| Is | The value of the field in the customer information | | | | | | | |
| | must match the search criteria exactly. | | | | | | | |
| Begins with | The value of the field in the customer information | | | | | | | |
| | must start with the specified value (e.g. if you enter | | | | | | | |
| | the filter value "John", customers with the names | | | | | | | |
| | "John" and "Johnny" will be selected). | | | | | | | |
| Contains | The value of the field in the customer information | | | | | | | |
| | must contain the specified value somewhere (e.g. if | | | | | | | |
| | you enter the filter value "Eric", customers with the | | | | | | | |
| | names "Eric", "Erica", "Maverick" and "American" | | | | | | | |
| | will be selected). | | | | | | | |
| Is empty | The corresponding field in the customer information | | | | | | | |
| | must be empty. | | | | | | | |

All search operations are case-insensitive, so you can enter "Eric" as a search criteria and, even if the customer's name was originally entered as "eric" or "ERIC", you will still see him in the list.

All conditions work in conjunction, so in the case of multiple search criteria the customer's record must satisfy all of them in order to appear in the result list.



During a search operation using auxiliary fields (e.g. fax) or the "contains" comparison, the database cannot use indexes. This will result in a full table scan, meaning an increased load on the server and a longer time to produce the final result. Please avoid using such search operations if not necessary.

By clicking on **Back to simple search** you can switch the form to its original mode.

Add/Edit Customer

The Add Customer page allows you to define a new client entity within PortaBilling. The information required is divided into four tabbed sections: Address Info, Additional Info, Payment Info, and Self-Care Info. The information on the top of the form is required . Information on all the other tabs is optional, and need not be provided when creating the customer. Once created, the customer cannot be changed from a retailer to a reseller, or moved under another reseller.

| | × | \$ | | | | Edit (| Custon | ner | | | 🚯 Am | erica/Vancouver | demo-toor | ? Help |
|---|-------------|--------|-------------|-----------|--------|-----------|----------|------------------------|-------|---------|--------|-----------------|-----------|--------|
| • | 🖬 Save | 📄 Sav | e & Close | 🛞 Close | 🔳 xD | Rs 🗊 | Accounts | nts 🛛 🙀 E-Payments Log | | 🔲 In | voices | | ▶Ø Logout | 目 Log |
| Customer Name EasyCall Ltd. Opening Balance 0.00000 USD | | | | | | | | | | | | | | |
| Blocked Database 0.00000 USD | | | | | | | | | | | | | | |
| Тур | e | Retail | | | | Custome | r Class | Enterprise | | | ~ | | | |
| | Taxation | _ | breviated I | | | riptions | 1 | ne Discounts | Note | | | ice Features |] | |
| | Address In | fo Ma | intenance | User Inte | erface | Dialing R | ules A | dditional Info | Payme | nt Info | Perio | dic Payments | | |
| Cor | npany Name | | | | | Conta | ct | | | | | | | |
| Mr./I | √ls./ | | | | | Phone | | | | | | | | |
| Firs | t Name | | | M.I. | | Fax | | | | | | | | |
| Las | t Name | | | | | Alt. Ph | ione | | | | | | | |
| Add | ress | | | | | Alt. Co | ontact | | | | | | | |
| | | | | | | E-mai | l ad | lmin@easycall.c | om | | | | | |
| | | | | | | BCC | | | | | | | | |
| | | | | | | | | | | | | | | |
| Prov | /ince/State | | | | | Descr | iption | | | | | | | |
| Pos | tal Code | | | | | | | | | | | | | |
| City | | | | | | | | | | | | | | |
| Cou | ntry/Region | | | | | | | | | | | | | |

| Field | Description |
|----------|---|
| Customer | Defines the customer name as it will appear in the |
| Name | PortaBilling system. This is distinct from the |
| | Company Name field in the Address Info tab. |
| Blocked | Blocks all accounts of this Customer. |
| Currency | The currency must be specified by selecting it from the |
| | drop-down list of available currencies. Once saved, the |
| | currency cannot be changed. |
| Opening | The starting balance for this customer. |
| Balance | _ |

| Туре | This can be either "Reseller" or "Retail". |
|-------------------|---|
| Customer Class | The customer class assigned to this customer. |

Address Info

The Address Info tab provides most of the commonly required contact information. Also note that you may enable your account manager to receive a copy of every e-mail sent to the customer by entering his e-mail address in the **BCC** field.

Maintenance

The Maintenance tab allows the administrator to correct a customer's balance (this tab is only available in **Edit Customer** mode).

| ₫ | V 🗜 | i 🖬 🖂 | | E | dit Cust | omer | | | | demo-toor | 🕐 Help |
|------|---|---|-----------------------------|--------|---|--|----------------------|----------|-------------------------------|--------------|--------|
| • | 🖬 Save | 📄 Save & Close | 🛞 Close | 🔳 xDRs | 🗊 Accou | nts 🙀 E-Payme | nts Log 🛛 | Invoices | | 💵 Logout | 目 Log |
| Bloc | Customer Name EasyCall Ltd. Blocked Type Retail | | | Bal | Opening Balance 0.00000 USD Balance 0.00000 USD Customer Class Enterprise | | | | | | |
| | Taxation Abbreviated Dialing Address Info Maintenance User Into | | | | | | Notepac Payment I | | ice Features odic Payments | - | |
| | | Manual paymen No action Manual charge Manual refund E-Commerce Pa Authorization Capture Payme Manual paymen Promotional c | yment fund Only nt | Cr | | ion tomer's balance. U nt allows the custo | | | payment from t | he Customer. | A |

| Field | Description |
|--------|---|
| Action | Manual Charge: Debit (increase) the customer's |
| | balance in PortaBilling100; for instance, if you are |
| | selling SIP phones to a customer. This means the |
| | balance will be changed so that the customer is able |
| | to make fewer calls. |
| | Manual Refund: Credit (decrease) the customer's |
| | credit balance in PortaBilling100; for instance, if the |
| | customer files a complaint and you agree to give |
| | him credit toward future service use. This means |
| | the balance will be changed so that the customer is |
| | able to make more calls. |
| | E-Commerce Charge: Transfers a given amount |
| | from a customer's e-commerce account to a |
| | company merchant account and issues credit |
| | toward the customer's balance in PortaBilling100. |
| | E-Commerce Refund: Transfers a given amount |
| | from a company merchant account to a customer's |
| | e-commerce account; for instance, if a customer |

| | files a complaint and you agree to a refund. |
|----------|--|
| | Authorization Only: Verifies whether the |
| | customer's e-commerce account is valid and |
| | reserves a given amount. This will return a |
| | transaction ID, which may be used later in a |
| | capture payment transaction. This transaction will |
| | not affect the customer's balance in |
| | PortaBilling100, nor the customer's e-commerce |
| | account. Note: the transaction ID will be written to |
| | the customer's Notepad entry. |
| | Capture Payment: Transfers a given amount from |
| | a customer's e-commerce account to a company |
| | merchant account and issues credit toward the |
| | customer's balance in PortaBilling100. This requires |
| | the transaction ID obtained via an Authorization |
| | Only transaction. The amount must be equal to or |
| | less than that in the corresponding Authorization |
| | Only transaction. |
| | Manual Payment: Credits the customer's balance. |
| | Use this when receiving payment from the |
| | customer. Manual payment allows the customer to |
| | make more calls. |
| | Promotional Credit: Credits the customer's |
| | balance. Use this when giving the customer credit |
| | toward future service due to a sales promotion. A |
| | promotional credit allows the customer to make |
| | more calls. |
| Amount | Amount to charge/refund. |
| Visible | A comment on this transaction visible to the |
| Comment | administrator as well as the customer, in the xDR |
| | browser or on the invoice. |
| Internal | An internal comment on this transaction; not |
| Comment | visible in the xDR browser, and accessible only |
| | from the database directly. |

Additional Info

| 👌 🗹 [| \$ | | | | Edit Cı | istomer | | | () E | urope/Prague | demoroot | 🛛 Help |
|---|---|---------------------------|-----------|-----|---|--|---|---|---|--------------|----------|--------|
| Sa | iave 🔒 Sav | e & Close 🛞 | Close 🔳 🛪 | dRs | 🗊 Accounts | 🙀 E-Payr | nents Log | Invoices | 🖑 Objects | | M Logout | 目 Log |
| Block | Customer Name John Doe Blocked 🔲 Type Retail | | | * | Opening Bala Balance Customer Cla | 0.0000 |) USD | omer class | • | | | |
| | Taxation Address Info | Abbreviate | | | bscriptions Dialing Rules | Notepad Addition | | ice Features Payment Info | | | | |
| Routii Disco Subsi Repre Tax ID | ing Plan ount Plan scription Disco resentative | Defau None Int Rate | ult |] | | Billing Per Next Billin Shift Billin Send Stat Invoice Te Send Invo | iod g Date g Date To stics mplate | monthly 2007-12-01 Customer Customer | YYYY-MM-DD class' defa class' defa class' defa | alt 💌 | | |

| Field | Description |
|-----------------|--|
| Routing Plan | Routing plan to be applied to this customer. |
| Discount Plan | Volume discount plan to be applied to this customer. |
| Subscription | Amount of discount applied by default to all |
| Discount Rate | subscriptions of this customer (assigned either directly |
| | to a customer or to one of his accounts). |
| Representative | Assigns a representative to this customer. See the |
| | Representatives section for more information. |
| Tax ID | Customer's tax ID. |
| Callshop | Defines whether callshop features (timer, receipt, etc.) |
| Enabled | are available. Not available for direct retail customers. |
| | To use the callshop functionality with accounts of a |
| | particular sub-customer, you should first enable this |
| | option for the reseller, then enable it for the sub- |
| | customer as well. |
| Creation Date | The date and time the customer was created (read- |
| | only). |
| Billing Period | Defines the frequency of invoicing for this customer. |
| Next Billing | Read-only field; displays the date when the customer's |
| Date | current billing will be closed (and invoice and statistics |
| | generated). |
| Shift Billing | Applicable only for "monthly anniversary" and 30-day |
| Date | billing periods; allows you to set the billing date to a |
| | different day of the month in the future (see below for |
| | more details). |
| Send Statistics | Defines what kind of xDR statistics should be |
| | delivered to the customer by email: |
| | • Customer class default – Use the settings for |
| | the customer class. |
| | • Full Statistics – Send a CSV file with a |
| | complete list of xDRs. |
| | • Summary Only – Do not send a full list of |
| | xDRs, only a brief summary |
| | • Do Not Send – Do not send any statistics by |
| | email. |
| Invoice | Defines the invoice template for this customer. |
| Template | Choose Customer class default in order to apply the |
| _ | invoice template defined for this class, and so avoid |
| | defining an invoice template for each customer |
| | specifically. See the Templates section for more |
| | information. |
| Send Invoices | Defines whether new invoices should be delivered to |
| | the customer by email. Customer class default – Use |
| | the settings for the customer class. |

Regarding statistics, the default choice is **Full Statistics**, whereby the customer receives an e-mail after the billing period has closed, including an attached CSV file containing all the calls made by his accounts. If invoices are generated for this customer and invoice delivery is enabled, an invoice will also be attached to the e-mail. The CSV file containing all the calls may be rather large, so it is possible to use the **Summary Only** option. In this case, the customer receives only a brief summary of calls by e-mail. Finally, it is possible to disable e-mail statistics by choosing the **Do Not Send** option. Note that these options only affect the delivery of xDR files by email. The actual statistics files will always be generated and accessible for download from the administrator interface or customer self-care.

Shifting the billing date may be required if, for instance, your customer has a monthly anniversary billing cycle in which his billing period closes on the 3rd day of each month. Since this may be inconvenient either for customers or your administrators (who are busy with corporate reports during the first week of the month), it may be desirable to change the billing date to some other day of the month. In this case, you can specify a new date between today's date and the date when the current billing period will close. Upon reaching this date, an "intermediate" invoice will be created (covering the period from the end of the previous billing period to that date), and subsequent billing will start from that date in the normal way.

Payment Info

The Payment Info screen defines customer payment characteristics. In addition to customary payment information (e.g. preferred payment method, credit card number), there is also a **Credit Limit** field. If left empty, no credit limit is enforced. Otherwise, if Radius authentication is enabled, calls exceeding the limit can be denied. Also, if a **Balance Warning Threshold** is defined and the customer balance reaches this value (defined either as an amount or as a percentage of a positive **Credit Limit** value), an alarm e-mail will be sent to the customer owners (i.e. the system administrators if the customer is direct, or else the reseller).

| 🖬 Save 🗔 Customer Name | Save & Close | 🛞 Close | 🔳 xDRs | . Accounts | EDau | | | | | | | |
|---|-------------------------|-------------|-----------|---|---------------------------|-----------|------------|------|---------------|------|----------|------|
| Customer Name | | | | E Hecounts | 🗩 C-Payl | ments Log | 🔲 Invoi | ces | 街 Objects | | M Logout | 📒 Lo |
| Blocked Type | Mary Smith | | * | Opening Balan Balance Customer Clas | IUSD IUSD market cu | ~ | | | | | | |
| Taxatio | n Abl | breviated I | Dialing | Subscrip | tions | Notep | ad | Serv | ice Features | | | |
| Address In | fo Maintenan | ice User | Interface | Dialing Rules | Additiona | l Info P | ayment Inf |) Pe | eriodic Payme | ents | | |
| Preferred Payme Credit Card No. CVV | 4444××××××××4 **** | Maste | Exp. Date | 01 💙 / 2008 / | ~ | | | | | | | |
| Name On Card | | | | | | | | | | | | |
| Address | 140 34th Str Seattle | | | | | | | | | | | |
| City Country | Seattle UNITED STATE | | | ~ | | | | | | | | |
| State | WA - Washing | | | × | | | | | | | | |
| Postal Code 99104 | | | | | | | | | | | | |
| | Same As Addr | ess Info | | | | | | | | | | |

The **Preferred Payment Method** drop-down contains a list of available payment methods. Some of these, e.g. Cash and Cheque, are "virtual" methods that do not allow manual e-commerce transactions from the administrator interface, payments from customer self-care, or running periodic payments. Any other online methods will be available only if a payment system with such methods has been defined, and is assigned to the same currency as the customer's currency. Other Payment Info fields depend on the currently selected **Preferred Payment Method**, and may vary accordingly.

NOTE: There are a few payment systems which use External Authorization. If such a system has been chosen as a preferred method, no other payment information details may be entered. This is because the payment processor does not allow the system to store and reuse customer payment credentials. For example, if you add a payment system with the Moneybookers payment processor and VISA payment method, and then assign it to the currency USD, customers defined in the USD currency and using VISA as their preferred payment method will not be able to enter their payment credentials. Therefore, it will not be possible to run periodic payments for them or make manual e-commerce transactions with them.

NOTE: Only resellers, direct retail customers, and their accounts are allowed to use a company's payment systems and payment methods for e-commerce payments, both manual and periodic. A reseller should define his own payment systems and assign these to the appropriate currencies in his self-care, so that those payment systems will be used by his sub-customers and their accounts.

Retention Restrictions



IMPORTANT! A merchant may not use account and transaction information for any purpose other than assisting completion of a payment card transaction, or as specifically required by law. Merchants may collect a payment card number and expiration date independently of a payment card transaction only with the express consent of the cardholder. A merchant may only retain this information for the sole purpose of facilitating future payment transactions. A merchant must not provide this information to any other person, except for the sole purpose of assisting completion of a payment card transaction.

You may click the **Invoices** button in the toolbar to quickly access the list of all customer's invoices.

User Interface

The login and password information for Customer Self-Care refer to the credentials required on the self-care web page. An easy-to-remember yet secure password may be generated automatically by clicking the **Auto** button.

Check the "Periodic payment management enabled" option to enable the customer himself to manage periodic payments on the Customer Self-Care interface (this does not prevent the administrator from editing this information!). The **Periodic Payment** tab will appear only if the customer's currency can be processed by at least one of the existing payment systems, and if the customer's preferred payment method has been set to any available online method which allows storage of his payment credentials.

Check the "Dialing rules management enabled" option to enable the customer himself to manage dialing rules on the Customer Self-Care interface. This option is not available for resellers.

Date & Time Format

PortaBilling allows the administrator to define both input and output date and time formats for each customer registered in the system.

By making changes to the date and/or time format on this page, customers will be able to enter dates and times in the desired format throughout the entire PortaBilling100 Customer Self-Provisioning Interface, on invoices, and so on (see the screenshot below).

See the **User Management** section for examples of date and time format usage.

PORTA Billing 100°

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|---|------------|-----------------|---------------|----------|--------|-----------------|------|-----------|----------|---------------|-------|------------|---------|----------|--------|
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| | Customer | Name John I | Doe | |]* | Opening Bal | lanc | e 0.00000 | USD | | | | | 1 | 1 |
| | Blocked | | | | | Balance | | 0.00000 | USD | | | | | | |
| | Туре | Retail | | | | Customer C | lass | Defaul | t cust | omer class | * | | | | |
| | | | | | | | | | | | | | | | |
| | Тах | ation / | Abbreviated I | Dialing | Sub | scriptions | N | otepad | Serv | vice Features | | | | | |
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| | Password | htthe6re | | Auto | |) Interface Lan | auao | | | | ~ | | | | |
| | Access Lev | el Retail | | * | | | | | | - | | | | | |
| | | | | | | | | | | | | | | | |
| | 📃 Periodi | c Payments N | /lanagement B | Enabled | | | | | | | | | | | |
| | 🔲 Abbrev | iated Dialing I | Management | Enabled | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | Output For | nat | | | | | | | | | | | | | |
| | Date | YYYY-М | IM-DD | | 20 | 03-12-31 | | | * | | | | | | |
| | Time | HH24:M | 1I:SS | | Us | er Defined | | | ~ | | | | | | |
| | Date & Tim | е үүүү-м | M-DD HH24: | MI:SS | Us | er Defined | | | ~ | | | | | | |
| | Input Form | at | | | | | | | | | | | | | |
| | Date | үүүү-М | IM-DD | | 20 | 03-12-31 | | | ~ | | | | | | |
| | Time | HH24:M | 11:55 | | Us | er Defined | | | * | | | | | | |
| | | | | | _ | | | | | | | | | | |

Periodic Payments

NOTE: The Periodic Payment tab will appear only if a suitable payment system has been set up, and the appropriate online payment method has been selected as the customer's preferred payment method.

Periodic payment management allows the administrator and customers to set up the following parameters for automated periodic payments. All registered payments for a customer are listed. The **Effective** drop-down list allows you to define whether only current payments ("Now") or all payments ever processed ("->Now") will be shown.

Choose ("Now->") to see "future" payments, or "All" to list all payments. ("Now") is the default value for this filter. The information in the chart below is provided in the payments listing. To add a new payment, click the **Add** button.

| | | 9 💲 🖬 🖉 | <u>-</u> | | Edit | Custom | er | | ٩ | America | /Vancouver | demoroot | 💽 He | |
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| | Bloc | Customer Name Many Smith Opening Balance 0.00000 USD Blocked Image: Description of the state of the sta | | | | | | | | | | | | |
| | | Taxation Address Info | Abbrevi | ated Dialing User Interface | Dialing | Subscriptions | No ditional Info | tepad Payment I | Service Fea | | its | | | |
| | | ge Credit Card V fective Now | When The Billing F | eriod Is Closed | Cust | omer class' | default ' | • | | | | | | |
| | Edit | Accepted A | mount*, USD | requency | | 'hreshold*, JSD | © From* YYYY-MM-DD | To * YYYY-MM-DD | Number Of Transfers | Frozen | Discontinued | Delete | | |
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| | | | | | | | | | | | | | | |
| | F | lield | | | | | Des | crint | ion | | | | | |

| Amount | Specify a fixed amount to be paid, or click the Pay |
|-----------|--|
| | Balance icon (not available when the frequency is |
| | balance-driven) to pay the current balance with a |
| | certain periodicity. |
| Frequency | Balance-driven, weekly, or monthly. |
| Balance | Only available when the frequency is balance-driven. |
| Threshold | Payment will be triggered when the balance is higher |
| | than the specified threshold. |
| From, To | Dates when the payment will remain active. Click the |
| Date | stopwatch \blacksquare icon to make the payment active |
| | immediately. |

Service Features

Using this tab, the administrator can activate/deactivate various features of the services provided to customers.. Note that features are defined per service type (the physical service provided to the user). Thus if you decide tomorrow to bundle your VoIP services under a different name, and create a new service called "Internet Telephony" rather than the old name, "Voice Call", you do not actually have to change the configuration settings for any of your customers.

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|---------------|--|--------------------|-----------|---------------------------------------|--|---|-----------|--------------|----------|------|
| | 🖬 Save 🖬 Save & C | ose 🛞 Close [| 🔳 xDRs 🧯 | Accounts | 🙀 E-Payments L | g 🔲 Invoices | 📲 Objects | | M Logout | 📒 Lo |
| | Customer Name John (|)oe | | Opening Balan | ice 0.00000 USD | | | | | |
| | Blocked | | | Balance | 0.00000 USD | | | | | |
| | Type Retail | | | Customer Clas | SS Default cus | tomer class | * | | | |
| | | | | | | | 7 | | | |
| | Taxation # | bbreviated Dialing | Subs | criptions | Notepad Se | rvice Features | | | | |
| | Address Info M | aintenance User | Interface | Dialing Rules | Additional Info | Payment Info | | | | |
| | Set CLI To | Original CL | | | gal Intercept | Г | No | ~ | | |
| | Centrex Number | | | | | | | • | | |
| Hide CLI No 💌 | | | | Lin | nit simultaneous ca | | No | ~ | | |
| | Hide CLI | No | | Lin | nit simultaneous ca x number of simult | ills | | ~ | | |
| | Hide CLI Hide CLI prefix | No | | Lin Ma: | | ills aneous calls* | | | | |
| | | No | | Ma: | x number of simult | ills aneous calls* [ved per call | | ~ | | |
| | Hide CLI prefix | No | | Ma: Mir Ca | x number of simult himum funds reser | ills aneous calls* [ved per call | No | USD | | |
| | Hide CLI prefix Show CLI prefix | No | ~ | Ma: Mir Ca Pai | x number of simult nimum funds reser II Parking | ills aneous calls* [ved per call | No | USD | | |
| | Hide CLI prefix Show CLI prefix Voice VPN Voice VPN Distinctive R | No | × | Lin Ma: Ca Pai Re Firs | x number of simult nimum funds reser II Parking rk prefix | ills (aneous calls* (ved per call (| No | USD | | |

The Service Type select menu allows you to specify for which service type you would like to define parameters.

Parameters for the Voice Calls Service Type

| Field | Description |
|------------|---|
| Set CLI to | For outgoing calls, always override the CLI (ANI) value |
| | supplied by the IP phone. This is done to prevent |
| | service abuse via CLI (ANI) number spoofing. The |
| | available options are: |

| | • Original CLI – Do not alter the CLI. |
|--------------|---|
| | • Account ID – Replace the CLI with the |
| | username (phone number) value used for |
| | authorization. |
| | Centrex Number – For outgoing calls to off-net |
| | destinations (PSTN network), assign the CLI as |
| | one of the other phone numbers in the same IP |
| | Centrex environment. This is typically done so |
| | that calls between extensions within the IP |
| | Centrex environment (IP phones of this |
| | customer) will carry the caller's original CLI, |
| | while calls to PSTN numbers will display a |
| | reception/switchboard number as the CLI. |
| Hide CLI | Remove CLI (ANI) information for outgoing calls. |
| Hide CLI | Prefix to be dialed before an outgoing number in order |
| Prefix | to prevent the called party from seeing your phone |
| Show CLI | number. |
| Prefix | Prefix to be dialed before an outgoing number in order to allow the called party to see your phone number. |
| Voice VPN | Charge calls between IP phones in this IP Centrex |
| VOICE VITIN | according to a special pre-defined rate, rather than |
| | using the destination phone number to look up the |
| | rate. |
| Voice VPN | For incoming calls from phones within the IP Centrex |
| Distinctive | environment, use a ring pattern different from the |
| Ring | default one. |
| Music On | Defines the music on hold to be used with the IP |
| Hold | Centrex environment. Choose None to disable this |
| 11010 | feature, or select the default setting for the customer. |
| | To upload your own music, select a file on your local |
| | file system using the Browse button. To rename the |
| | music, enter the desired name in the Music Name field; |
| | otherwise the local file name will be used. The |
| | uploaded music will replace the previous entry in the |
| | list, and is usually enabled within 10 minutes. |
| Legal | Intercept all incoming and outgoing calls of this |
| Intercept | customer for law enforcement purposes. |
| Limit | Engage real-time checks for the number of concurrent |
| Simultaneous | calls made by accounts under this customer |
| Calls | |
| Max number | Only allow a specific number of concurrent calls for |
| of | accounts of this customer. |
| simultaneous | |
| calls | |
| Minimum | Whenever a new call starts, ensure that at least this |
| Funds | amount of funds is available (reduces the risk of |

| Reserved Per | account overdrafts). |
|--------------|---|
| | account overdrans). |
| Call | |
| Call Parking | Enable call parking for this customer's IP Centrex. |
| Park Prefix | Only appears if Call Parking is activated; allows you to |
| | specify a key combination to park a call. |
| Release | Only appears if Call Parking is activated; allows you to |
| Prefix | specify a key combination to dial from the original |
| | phone which parked a call in order to remove the call |
| | from parked status and continue the conversation. |
| First Login | When a new account (phone number) in this IP |
| Greeting | Centrex environment is provisioned and registers for |
| | the first time, call this phone back and play a pre- |
| | recorded voice message confirming service activation, |
| | giving information about various available options, and |
| | so on. |
| Favorite | Defines whether the "Favorite Numbers" rating feature |
| Numbers | should be enabled by default for accounts of this |
| Enabled | customer. |
| | |

Dialing Rules

Using this tab, the administrator can define how phone numbers are dialed by users in this customer's IP Centrex environment.

| | v 🗄 💲 i 🖌 | Add Customer | | | | | 🛛 Help |
|---|--|--|---------------------------------|------------------|-------|--------|--------|
| • | 🖬 Save 🛛 Close 🛞 Close 🝕 |) Objects | | | ı (۲۹ | Logout | |
| | Customer Name New customer Blocked Type Retail | ⁷ Currency Opening Balance Customer Class | USD - US Dol 0 Call Shops | lar v | | | |
| | Address Info User Interface Dialing | Rules Additional Info | Payment Info | Service Features | | | |
| | Imable Dialing Rules Load Sample Your country code Your area code(s) Always dial the area code as a part of the numi Prefix for accessing the outside phone network Prefix for domestic calls, but outside of your are International dialing prefix (e.g. 011, 00, 0011) Exceptions (e.g. *98) Local dialing number length Convert ANI (CLI) for incoming calls into this di | ber K Gacode <i>(e.g. 1, 0)</i> | Aules Wizerd | | | | |

By default, a new customer will have dialing rules disabled. This means that the system regards calls arriving from him as being in the E.164 format. If you wish to define the way in which your customer dials phone numbers, you can use the **Enable Dialing Rules** option. This will allow you to enter various dial plan parameters such as an international dialing

prefix or area code. You may type your own number translation rules instead (as Perl regular expressions) if you select the **Use Custom Translation Rules** option.

In order to define the phone number format which is used by this customer's accounts, click **Dialing rules wizard** to activate the wizard.

| D | ialing rules wizard | ? Help |
|---|--|--------|
| 🕨 🖬 Save 📓 Save & Close 🛞 Close | | |
| Your country code Your area code(s) Always dial the area code as a part of the number Prefix for accessing the outside phone network Prefix for domestic calls, but outside of your area code (e.g. 1, 0) International dialing prefix (e.g. 011, 00, 0011) Emergency numbers (e.g. 941, 112) Exceptions (e.g. 98) Local dialing number length | Image: Stand Strength | |
| Convert ANI (CLI) for incoming calls into this dialing format Check yourself To call 1234567 outside of your office, but within the | same area 1234567 | |
| you dial To call long distance 5 1234567 (within your country) | you dial 1 5 1234567 | |
| To call 1 405 1234567 internationally you dial | 011 1 405 1234567 | |

The upper part of the wizard screen allows you to enter important dialing parameters, such as your international dialing prefix. Several sample settings are provided for your convenience. For instance, in order to load sample settings for "traditional" North American dialing, select "North America, WA, 7 digit number dialing" and click **Load Sample**. Click **Clear** to reset all parameters. Click **Reset** to revert to the last saved settings.

In the bottom part of the wizard screen you can check whether you have described the numbering format correctly. Make sure for all three examples provided (local, domestic and international call) that this is the way you want to dial the numbers.

Abbreviated Dialing

Here the customer may define a list of phone extensions for his IP Centrex environment, plus create abbreviated dialing for external phone numbers. The **Abbreviated Dialing** feature works with both SIP and H.323, with adequate support from either the SIP Server or Cisco TCL IVR.

A PortaBilling customer can set up dialing rules as an international prefix, outside prefix, direct number (e.g. 911), or abbreviated dialing for his accounts.

NOTE: To be able to add extensions / abbreviated numbers, you should enter the maximum length of anticipated digits (e.g. 3 in the case of 123-like numbers) in the **Abbreviated Number Length** field.

| 合 | Image: Section 1. | \$ | i | | | | Edit Cu | oto | mor | | | Ā | America/Vancouv | | demo-toor | | Help |
|-------------------------------------|---|--------|----------|-------------|--------------|-----------|--|--------------------------|----------------|-----|---------------|-------------------|-----------------|-------|-----------|---|------|
| | | | | | <u>.</u> | | | | | | | | | | | | |
| • | 🔁 Add | 🖬 s | ave | | Save & Close | 🛞 Close | 🔳 xDRs | i (| Accounts | F | E-Payments Lo | og | Invoices | | 🚺 Logout | E | Log |
| | | | | | | | | | | | | | | | | | |
| Cus | Customer Name EasyCall Ltd. Opening Balance 0.00000 USD | | | | | | | | | | | | | | | | |
| Blocked Default Balance 0.00000 USD | | | | | | | | | | | | | | | | | |
| Тур | | Ret | inil | | | | Customer C | lace | Enterpris | | | ~ | 1 | | | | |
| Typ | 8 | Rei | an | | | , i | Justomer C | 1055 | Encerpris | e | | • |] | | | | |
| | | | | | | | | | | | | | | | | | |
| | Taxation | ו י | Abbr | eviat | ted Dialing | Subscrip | Subscriptions Volume Discounts Notepad Service Feature | | | | | | 5 | | | | |
| | Address I | info | Main | tenar | nce User In | terface [| Dialing Rule | s | Additional Inf | 0 | Payment Info | Periodic Payments | | | | | |
| | | | | | | | | | | | | | | | | | |
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| | 189 | | | | 777700089 | | Amanda's Office Linksys | | | | | | | × | | | |
| = | 708 | | | 16045673918 | | | Torvald Ericsson 💌 | | | | | | | | | | |
| | 709 | | | | 12065346783 | 2 | Amanda Lee Johns | | | | | | | × | | | |

To add a new abbreviated dialing number, click the Add button and enter the following information:

| Field | Description |
|---------------|--|
| Abbreviated # | The number the end-user will dial on his phone |
| | (extension number). |
| # to Dial | The number that the call will be forwarded to. You |
| | may enter the ID of one of the customer's accounts |
| | (use the 🗊 icon for a pop-up window where you can |
| | see all of them) or any phone number. |
| | If you leave this field blank, then the abbreviated |
| | number is considered to be a direct number, or "dial as |
| | is". This is useful for making sure that special numbers |
| | (e.g. 112) are never converted by other translation |
| | rules. |
| | Note: Phone numbers must be entered in the E.164 |
| | format. |
| Description | Description of this abbreviated number, e.g. |
| | "Andrew's IP phone". |
| SIP | If # to Dial represents the ID of one of the customer's |
| | accounts, you will see the SIP "lamp" icon here. It will |
| | light up if the account is currently being used by a SIP |
| | UA to register with the SIP server; otherwise it will be |
| | gray. |

Taxation

On this tab you can choose which plugin module will be used to make tax calculations and set up parameters that affect taxation.

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| | | | | | | | | | | | | | |
| C | Customer Name Paul Weekes Opening Balance 0.00000 USD | | | | | | | | | | | | |
| в | Biocked Balance 0.06633 USD | | | | | | | | | | | | |
| Ту | /pe | Retail | | | Customer Cla | SS Post-p | aid | ~ | | | | | |
| | | | | | | | | | | | | | |
| | Taxation | Abbrevia | ted Dialing | Subs | scriptions | Notepad | Service F | eatures | | | | | |
| | Address Inf | fo Maintenan | ce User I | nterface | Dialing Rules | Additional | Info Pay | ment Info | | | | | |
| | | | | | | | | | | | | | |
| T | axation Plug-In | BillSoft, | United Sta | tes 💙 | | | | | | | | | |
| T | ype | 💿 Defa | ault 🔿 Bus | iness 🔿 | Residential | | | | | | | | |
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| E | xempt From | 🗌 Stati | eral Taxes e Taxes nty Taxes al Taxes | | | | | | | | | | |

Since these parameters depend on the specific taxation module and your local tax laws, please consult your tax attorney for details regarding their use.

Add/Edit Reseller

The Add Reseller page allows you to create a new reseller. The form is very similar to that for Add Customer, as described above. See below for a description of additional fields not available in the Add Customer form.

Additional Info

| Field | Description | | | | | | | | |
|-----------------|---|--|--|--|--|--|--|--|--|
| Default Tariff | When you are subsequently creating products | | | | | | | | |
| for Voice Calls | managed by this reseller, this tariff will be assigned by | | | | | | | | |
| | default for calculating charges to him for calls made | | | | | | | | |
| | by his sub-customers using this product. This | | | | | | | | |
| | provides backward compatibility with the reseller | | | | | | | | |
| | functionality in PortaBilling prior to Maintenance | | | | | | | | |
| | Release 16, since you will now use different tariffs to | | | | | | | | |
| | charge resellers based on the product or the | | | | | | | | |
| | accessibility entry within a product. | | | | | | | | |
| | | | | | | | | | |

Add/Edit Customer under a Reseller

This is essentially the same as management of customers as described above, the sole difference being that you can only create sub-customers of the Retail type.

| ຝ | | - | \$ | | "John Rese | lle | r" - | Subcus | tome | er Manag | jemen | t 🕓 e | | | | | | |
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| • | 🔁 Ad | bb | 🛞 Clos | e | | | | | | | | | | | Þ٣ | Logout | | Log |
| | | | | Туре | e | | | Repre | esentat | ive | | S | earch | | | Advanc | ed | |
| | John | Res | seller | | | ~ | ANY | | | ~ | | | | Sear | :h | searc | h | |
| | | | | | | | | | | | | | | | | | | |
| | | | | CDRs | Name | Acc | ounts | Currency | Туре | Credit limit | Balance | E-mail | Status | Delete | | | | |
| | | | | Q | Mary Distributor | | | USD | Retail | | 0.00000 | | | × | | | | |

Account Management

An account is a user of a product such as prepaid cards, voucher-based cards, or credit calling plans. Each account in PortaBilling is associated with a customer. The Account Management screen, accessible from the Customer interface by clicking the **Accounts** button, shows you a query screen for listing existing accounts.

Account Listing

Search Filter

There may be a very large number of accounts in the system, so it is advisable to limit your search using the filter functionality.

| Field | Description | | | | | | | |
|------------|---|--|--|--|--|--|--|--|
| Account ID | The primary identification for this account; an | | | | | | | |
| | alphanumeric string. | | | | | | | |
| | Note: the % wildcard symbol may be used. | | | | | | | |
| Batch | Logical name for a group of accounts. Select from a list | | | | | | | |
| | of all the customer's batches to enable the batch update | | | | | | | |
| | pane. | | | | | | | |
| Ctrl# | Enter control numbers and/or number ranges separated | | | | | | | |
| | by commas (for example: 1,3,8-12). | | | | | | | |
| SIP Status | Default – ANY; this function allows you to display either | | | | | | | |
| | logged-in or logged-out accounts only. | | | | | | | |

Batch Update Pane

| ☆ ⊻ ⊵ | s : 🖂 | Accounts o | of Reta | il Cı | ustomer ' | Calls | hop 1' | 🚯 An | nerica/Van | couver | demo-toor | 21 | telp |
|---------------------------|---------------------------------|---------------------|-----------|-----------|------------------|----------------------------|--------------------------------|--------------------------|-------------------------|---------------|---------------------------------|--------|------|
| ► 🗄 Add 🖸 | Account Generation | rator 🛞 Close | | | | | | | | | M Logou | : | |
| | Account ID Batch callshop1 | | | | Ctrl # | SII ANY | P Status ❤ | Show Acco | unts | Advan sear | | | |
| E Selected: 10 | Batch 'callshop1' Started: O | Depleted: O | Ctrl# | xDRs | Account ID | ldle, days | Balance, USD | Open. Balance, USD | Credit Limit, USD | Туре | Product | Status | SIP |
| Activation | | 1 YYYY-MM-DD | <u>1</u> | P | <u>019870001</u> | | 14.00000 | 0.00000 | | Credit | <u>Callshop</u> <u>booth</u> | ۰ | |
| Lifetime (days | | | 2 | Q | <u>019870002</u> | | 17.14594 | 0.00000 | | Credit | <u>Callshop</u> <u>booth</u> | ۰ | |
| Opening Bala | ance 0.00000 | USD | <u>3</u> | P | <u>019870003</u> | | 0.00000 | 0.00000 | | Credit | <u>Callshop</u> <u>booth</u> | • | |
| Unblock | O | | 4 | P | 019870004 | | 116.07684 | 0.00000 | | Credit | <u>Callshop</u> <u>booth</u> | • | |
| UM Enabled | | | <u>5</u> | \square | <u>019870005</u> | -1 | 0.00000 | 0.00000 | | | Callshop | • | |
| Preferred IVR Language | en - Eng | ylish 🎽 | <u>6</u> | P | <u>019870006</u> | ? | ige at https:, Following ch | | caone.co | m says: | | • | |
| Time Zone Ctrl# | America, | America/Vancouver 💌 | | P | <u>019870007</u> | Expiration Date 2008-03-01 | | | | | | • | |
| | Update 🔳 | <u>8</u> | ٥ | 019870-98 | | will be appli | ed TO THE W | HOLE BAT | сн | | • | | |
| | | | 9 | Q | 019870009 | | | OU SURE? | Cancel | | | • | |
| | | | <u>10</u> | P | 019870010 | | | | Carlee | | buutin | • | |

| Field | Descri | ption | | | | | | | | | |
|------------|------------------------------------|--|--|--|--|--|--|--|--|--|--|
| Account ID | The primary identification | n of this account; an | | | | | | | | | |
| | alphanumeric string. | | | | | | | | | | |
| Ctrl# | Enter control numbers and/ | or number ranges separated | | | | | | | | | |
| | by commas (for example: 1,3,8-12). | | | | | | | | | | |
| ACCOUNTS | | | | | | | | | | | |
| Status | ▲ Zero balance ▲ Expired | | | | | | | | | | |
| | Not active | 🗢 Blocked | | | | | | | | | |
| | 🛕 Credit exceeded | Customer blocked (see | | | | | | | | | |
| | | Edit Customer) | | | | | | | | | |
| Ctrl# | Click using Ctrl#, or enter | Click using Ctrl#, or enter control numbers and/or | | | | | | | | | |
| | number ranges separated by c | commas (for example: 1,3,8- | | | | | | | | | |
| | 12). | | | | | | | | | | |

The batch update pane can be activated by selecting a batch in the filter at the top of the interface, or by selecting the batch name from the list of customers' accounts. The basic functionality of this update pane allows users to specify which attributes of all accounts in the results set should be modified. For example, in order to increase the balance of all accounts by 10 USD, users should:

- Check the box next to **Refund/Charge** to indicate that this is one of the updates that should occur,
- o Enter "10" next to **Refund**,
- o Click the **Update Batch** button at the bottom, and
- o Approve the changes when the confirmation dialog appears.

When the page refreshes, the changes will be reflected in the result listing.

NOTE: If you perform a balance adjustment *before* an account is used, it will be regarded as a change to the opening balance, and will not be reflected in the CDRs. For example, if you create a prepaid account worth \$10, then realize you have actually sold it to the customer for \$20, and so add the extra \$10 to the card, it will look to the customer as if the card originally had \$20 on it.

Advanced Search

In advanced search mode you can specify an unlimited number of search conditions and the system will fetch the relevant accounts. Click on Add a new search condition to add another condition.

| ຝ | > | 💲 🖬 🖂 Acc | ounts of Retail (| Customer 'A | BC Shuttle Ltd | . O America/Vancouver | demo-root | ? Help |
|---|-------------|--------------------|-------------------|---------------|--------------------|-----------------------|-------------------------------|--------|
| • | 🔁 Add | Account Generation | itor 🛞 Close | | | | M Logout | |
| | | Account ID | Batch | Ctrl # | SIP Status | | | |
| | | ACCOUNT ID | ANY V | | ANY Y | Show Accounts Si | <u>Back to</u> mple search | |
| | | • Add a new search | condition | Advance | ed Search Criteria | | | |
| | | Phone | Begins with | v 1604 | | × | | |
| | | Contact | 💙 Is empty | ~ | | × | | |
| | | Company Name | Y Is | ABC Shutt | le Ltd | × | | |
| | | Login | ♥ Contains | v 123 | | × | | |

| Operation | Description |
|-------------|--|
| Is | The value of the field in the customer information |
| | must match the search criteria exactly. |
| Begins with | The value of the field in the customer information |
| | must start with the specified value (e.g. if you enter |
| | the filter value "John", customers with the names |
| | "John" and "Johnny" will be selected). |
| Contains | The value of the field in the customer information |
| | must contain the specified value somewhere (e.g. if |
| | you enter the filter value "Eric", customers with the |
| | names "Eric", "Erica", "Maverick" and "American" |
| | will be selected). |
| Is empty | The corresponding field in the customer |
| | information must be empty. |

All search operations are case-insensitive, so you can enter "Eric" as a search criteria and, even if the customer's name was originally entered as "eric" or "ERIC", you will still see him in the list.

All conditions work in conjunction, so in the case of multiple search criteria the customer's record must satisfy all of them in order to appear in the result list.



During a search operation using auxiliary fields (e.g. fax) or the "contains" comparison, the database cannot use indexes. This will result in a full table scan, meaning an increased load on the server and a longer time to

produce the final result. Please avoid using such search operations if not necessary.

By clicking on **Back to simple search** you can switch the form to its original mode.

Account Info / Add Account

To add a new account, select **Add**. For bulk account generation, select **Account Generator**.

The Account Info page provided for the administrator is similar to the Add Account interface; however, some account details are read-only. The administrator is unable to modify Type, Batch, Control Number and Opening Balance. When making changes, the administrator can use the Notepad tab to provide a comment detailing the reason for these changes (for example, "product changed, credited \$50").

Changes can be confirmed by selecting **Save** or **Save&Close**.

| | Image: Second | B 🖬 🖂 🥖 | ccount Inf | o / Retail C | ustome | 'EasyCall Lt | d." (9) America/Vancouver | | ? Hel |
|------|---|---------------------------|---------------|--|---------------------|-----------------|---------------------------|----------|-------|
| • | 🖬 Save | 📕 Save & Close | 🛞 Close 🔳 | xDRs 🙀 E-P | ayments Lo <u>c</u> | 🛛 🔀 Terminate | | 💵 Logout | 🔳 Log |
| Bloc | ked | 00088 sys/SPA941-5.1.8 | | uct USD - SII Ince 0.00000 US Inct sip:7777000 | | | | | |
| [| Life Cycle | e Subs | criptions | Notepad | Servio | e Features | | | |
| | Account Info | Maintenance | User Interfac | e Subscriber | Aliases | Additional Info | | | |
| Cust | omer <u>B</u> | asyCall Ltd. | | Credit Limit | | | USD | | |
| Туре | (| redit | | Opening Ba | lance | 0 | 00000 USD | | |
| VolP | Password | est123 | Auto | Refunds | | | 0 USD | | |
| E-m | ail [| | | Non Call Re | elated Charge | s | 0 USD | | |
| Batc | h e | asycall | | | | | | | |
| A | rol Number 1 | 2 | | | | | | | |

| Field | Description |
|------------|--|
| Account ID | The primary identification of this account. The ID is |
| | read-only by default; you can modify it by clicking the |
| | Edit ID 🛃 icon. The maximum allowed ID length is 32 |
| | characters. |
| Blocked | Specifies whether the account is blocked or unblocked. |
| | If this is checked, the account will be unusable; it is |
| | usually unblocked automatically when the account is |
| | used for the first time. |
| Product | The product providing pricing plans for this account. |
| Balance | The balance for this account. |
| User Agent | If this account is currently used by a SIP UA to register |
| | with the SIP server, the user agent identification info is |
| | displayed. |

| Contact | The URI of the user agent used by the SIP Proxy to |
|---------|--|
| | contact the IP phone. |

Account Info

| Type Credit Limit | The account type may be "Debit", "Credit", or "Voucher". Debit is usually associated with prepaid cards. Credit is an account that will be invoiced for incurred costs. Voucher accounts are "refill coupons" for other types of accounts. Only available when the account type is set to "Credit". |
|----------------------|--|
| Cicuit Linit | Defines the credit allowance in the account's currency. |
| VoIP | The password used to authenticate any calls made using |
| Password | this account. |
| E-mail | If an account has e-mail info associated with it, the owner of the account can reset the password for self- care access, and the new password will be sent to this e- mail address. |
| Batch | Accounts are grouped into batches. If a new batch name is provided 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 | Read-only. The sequential number of the account in the current batch. Batch name and control number uniquely identify an account, and are often used for prepaid calling cards. |
| Zero | Applicable only for debit accounts; specifies when the |
| Balance Date | account has used up all of its available funds. |
| Opening Balance | The opening balance for this account. |
| Refunds | The amount refunded to the account owner. |
| Non-Call | Charges not directly associated with calls the account has |
| Related | made; for instance, a maintenance fee or login fee. |
| Charges | |

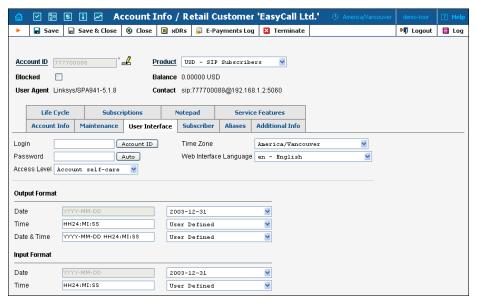
Maintenance

| | \$ | i 🖂 Ac | count Info | / Retail C | ustome | r 'EasyCall Ltd. | America/Vancouver | demo-toor | |
|------|---------------------|--|--------------------|---|------------|------------------|-------------------|-----------|-------|
| Þ. | 🖬 Save 🔓 | Save & Close | 🛞 Close 🔳 | xDRs 🗐 E-Pa | ayments Lo | g 🔀 Terminate | | 💵 Logout | 目 Log |
| Bloc | cked Crass | s/SPA941-5.1.8 | | <u>ct</u> USD - SIP ce 0.00000 USI ct sip:7777000 | c | | | | |
| [| Life Cycle | Subscr | iptions | Notepad | Servio | e Features | | | |
| | Account Info | Maintenance | User Interface | Subscriber | Aliases | Additional Info | | | |
| Visi | ount ble Comment | No action Manual charge Manual charge Manual refund E-Commerce Pay E-Commerce Ref Authorization Capture Payment Hanual payment Promotional cr | fund Only at | Action Desc | ription | | | | |

| Field | Description |
|--------|---|
| Action | Manual Charge: The debit account balance in |
| | PortaBilling100; for instance, if you are selling SIP |
| | phones to a customer. This means the balance will be |
| | changed so that the account is able to make fewer calls. |
| | Manual Refund: The credit account balance in |
| | PortaBilling100; for instance, if the account files a |
| | complaint and you agree to give credit toward future |
| | service use. This means the balance will be changed so |
| | that the account is able to make more calls. |
| | E-Commerce Charge: Transfers a given amount from |
| | an account's e-commerce account to a company |
| | merchant account and issues credit toward the account's |
| | balance in PortaBilling100. |
| | E-Commerce Refund: Transfers a given amount from |
| | a company merchant account to an account's e- |
| | commerce account; for instance, if a customer/account |
| | files a complaint and you agree to a refund. This |
| | transaction will not affect the account's balance in |
| | PortaBilling100. |
| | Authorization Only: Verifies whether the account's e- |
| | commerce account is valid and reserves a given amount. |
| | This will return a transaction ID, which may be used |
| | later in a capture payment transaction. This transaction |
| | will not affect the account's balance in PortaBilling100, |
| | nor the account's e-commerce account. |
| | Capture Payment: Transfers a given amount from an |
| | account's e-commerce account to a company merchant |
| | account and issues credit toward the account's balance in |
| | PortaBilling100. This requires the transaction ID |
| | obtained via an authorization only transaction. The |
| | amount must be equal to or less than that in the |
| | corresponding authorization only transaction. |

| | Manual Payment: Credits the account balance. Use this |
|----------|---|
| | when receiving payment from the account owner. |
| | Manual payment will allow the account to make more |
| | calls. |
| | Promotional Credit: Credits the account balance. Use |
| | this when you are giving the account owner a credit |
| | toward future service due to a sales promotion. A |
| | promotional credit will allow the account to make more |
| | calls. |
| Amount | Amount to charge/refund. |
| Visible | A comment on this transaction visible to the customer |
| Comment | in the xDR browser. |
| Internal | An internal comment on this transaction; not visible in |
| Comment | the xDR browser, and accessible only from the database |
| | directly. |

User Interface



| Login | Account login for the account user interface. Click the |
|-----------|---|
| | Account ID button to make the login identical to the |
| | Account ID. |
| Password | User interface password for the account. |
| | |
| Access | Access level assigned to the account. |
| Level | |
| Time Zone | Time zone for the account. |
| Web | Displays the account user interface in a particular |
| Interface | language. |
| Language | |

Subscriber

The Subscriber tab provides most of the commonly required contact information for the account's owner.

Aliases

| | | • \$ | : | 🖂 🗛 | count I | info / R | letail Cı | istome | r 'EasyCa | ill Ltd.' | | demo-toor | |
|------|---------|---------|--------|----------|-----------|------------|------------|----------|--------------|-----------|-------|-----------|-------|
| 4 | 🗈 Ad | d 🖬 | Save | 📄 Save | e & Close | 🛞 Close | 🔳 xDRs | 🙀 E-Pa | yments Log | 🔀 Term | inate | M Logout | 目 Log |
| | | | | | | | | | | | | | |
| Acco | ount ID | 77770 | 0088 | | P | roduct (| JSD - SIP | Subscrib | ers 💌 | | | | |
| Bloc | ked | | | | В | alance 0. | 00000 USD | | | | | | |
| User | Agent | Linksy | s/SPA9 | 41-5.1.8 | С | iontact si | p:77770008 | 8@192.16 | 8.1.2:5060 | | | | |
| _ | | | | | | | | | | | | | |
| | Life | Cycle | | Subscr | iptions | Note | epad | Servi | ce Features | | | | |
| | Accour | nt Info | Main | tenance | User Inte | rface S | ubscriber | Aliases | Additional I | info | | | |
| | | | | | | | | | | | | | |
| Edit | | Ali | as ID | | Delete | | | | | | | | |
| | | | | | | | | | | | | | |
| | 160412 | 31007 | | | × | | | | | | | | |
| | | | | | | | | | | | | | |

 Alias ID
 Contains alternative IDs for this account.

Additional Info

| ŭ | y 📴 💲 | i |) 🖂 🗛 | count I | nfo , | / Reta | il Custom | er ' | EasyCall L |
|-------|----------------|------|-------------|-------------|---------|-----------|--------------|--------------------|-------------|
| ۰. | 🖬 Save 🖡 |] Sa | ve & Close | 🛞 Close | 🗉 xi | DRs 🗐 | E-Payments | og | 🔀 Terminate |
| | | | | | | | | | |
| Acc | ount ID 77770 | 008 | ÷ | 🖌 <u>Pr</u> | oduct | USD - | SIP Subscr | bers | |
| Bloc | cked 📃 | | | Ba | alance | e 0.00000 |) USD | | |
| Use | r Agent Linksy | s/SP | A941-5.1.8 | Co | ontact | sip:777 | 700088@192. | 68.1 | .2:5060 |
| [| Life Cycle | | Subscr | iptions | Notepad | | Ser | Service Features | |
| | Account Info | м | aintenance | User Inter | face | Subscr | iber Aliases | Aliases Additional | |
| IP PI | hone | | | | | | | | |
| IP PI | hone Port | 1 | Jone | ~ | | | | | |
| E-co | mmerce Enabl | ed [| | | | | | | |
| Disc | ount Plan | 1 | Product dei | fault | | ~ | | | |

| IP Phone, | Indicates the IP phone and associated port assigned to | | | | | | | |
|-----------|--|--|--|--|--|--|--|--|
| IP Phone | the account. Default – not set. | | | | | | | |
| Port | | | | | | | | |
| E- | Allows the account's owner to make online payments or | | | | | | | |
| commerce | set up periodic payments on the account self-care page. | | | | | | | |
| Enabled | Note: Configuring the account to enable online | | | | | | | |
| | payments (both manual and periodic) is done in exactly | | | | | | | |
| | the same way as for customers. First you should set up a | | | | | | | |
| | suitable payment system. | | | | | | | |
| Discount | Assign a discount plan to this account. When a new | | | | | | | |
| Plan | account is created, it will be assigned by default a | | | | | | | |
| | discount plan associated with the account's product. | | | | | | | |

Life Cycle

| | y 🖫 \$ | i 🗹 🗛 | count Inf | o / Retail C | ustome | 'EasyCall Lt | d. @ America/Vancouver | demo-toor | 😢 Help |
|------------|--|----------------|---------------|----------------|-------------|-----------------|------------------------|-----------|--------|
| • | 🖬 Save 📓 | Save & Close | 🛞 Close 🔳 | xDRs 🙀 E-P | ayments Log | 🛛 🔀 Terminate | | 💵 Logout | 目 Log |
| | | | | | | | | | |
| <u>Acc</u> | Account ID 777700088 * Product USD - SIP Subscribers 💌 | | | | | | | | |
| Bloc | :ked 📃 | | Balar | nce 0.00000 US | D | | | | |
| Use | r Agent Linksy | s/SPA941-5.1.8 | Conta | act sip:777700 | 088@192.16 | 3.1.2:5060 | | | |
| | | | | | _ | | | | |
| | Life Cycle | Subsci | iptions | Notepad | Servio | e Features | | | |
| Ī | Account Info | Maintenance | User Interfac | e Subscriber | Aliases | Additional Info | | | |
| 10 A | Activation Date | 2007-12-10 | YYYY-MM-DD | Issue Date | 2007-12-10 | | | | |
| | | | ryyy-MM-DD | First Usage | 2007-12-10 | | | | |
| | Expiration Date | | | Last Usage | 2007-12-10 | 08:34:12 | | | |
| | Time | 90 | davs | Lasi Osaye | | | | | |

| Activation | The date from which the account is usable. |
|--------------|---|
| Date | |
| Expiration | The date from which the account will be unusable. If |
| Date | you do not want the account to expire, leave this field |
| | blank. |
| | Note: This date is assumed to be in the billing server's |
| | time zone, not the account's. |
| Lifetime | Relative to the activation date, the account will expire on |
| | first usage date + lifetime days. If you do not want to |
| | use this feature, leave the field blank. |
| Issue Date | The date when the account was created. |
| First Usage, | The date when the account was in use for the very |
| Last Usage | first/last time. |
| Last | Specifies the last time the account was recharged using a |
| Recharge | voucher (either via the self-care page or IVR). |

Service Features

| ₫ | | <u>•</u> | i | 🖂 Ac | count 1 | info , | / Retail | Custome | er 'Ea | isyCall | Ltd.' | America/V | ancouv | er demo-toor | ? Help |
|------------------------------------|---|----------|--------|-----------|-----------|---------|-----------|---|--------|--------------|-------|----------------|--------|--------------|--------|
| • | 🖬 Sa | ve 🗖 | Save | & Close | 🛞 Close | 🔳 xi | DRs 🗐 E | -Payments Lo | g 🛛 | Terminat | e | | | M Logout | 目 Log |
| | | | | | | | | | | | | | | | |
| Acc | Account ID 777700088 | | | | | | | | | | | | | | |
| | Blocked Balance 0.00000 USD | | | | | | | | | | | | | | |
| | r Agent | Linkow | CDAD | 41 6 1 0 | | | | 10088@192.11 | 0124 | 5060 | | | | | |
| 036 | Agent | LIIKoya | 501 A3 | 41-3.1.0 | | Jontact | 51p.11110 | 0000@132.11 | 0.1.2. | 0000 | | | | | |
| | Life | Cycle | | Subscr | iptions | 1 | Notepad | Servi | ce Fea | tures | | | | | |
| | Accour | nt Info | Main | itenance | User Inte | erface | Subscribe | er Aliases | Add | itional Info | | | | | |
| | | | | | | | | | | | | | | | |
| Ser | /ice Type | 9 Voi | ce Ca | 115 🚩 | | | | | | | | | | | |
| | | | | | | | _ | | | | | | | | |
| | CLI To | | | Custo | mer's det | ault | <u>×</u> | Legal Interc | ept | | Custo | omer's default | | | |
| Ce | ntrex Nu | mber | | | | | * | E911 | | | No | | ~ | | |
| Hid | e CLI | | | Custo | mer's det | ault | ~ | Preferred IVR Language 🛛 en - English 🛛 👻 | | | | | | | |
| Hid | e CLI Pr | efix | | | | | | Associated | Numbe | er | | | | | |
| Sh | W CLI P | refix | | | | | | UM Enabled | ł | I | | | | | |
| Voi | Voice VPN Distinctive Ring Customer's default 💌 | | | | | | | Forward Mo | de | | No Fo | rwarding | ~ | | |
| Default Answering Mode Ring only 🖌 | | | | | | | | Maximum Forwards | | | | | | | |
| Са | Call Processing Enabled Timeout, sec 30 * | | | | | | | | | | | | | | |
| | Favorite Numbers Enabled Customer's default V | | | | | | | | | | | | | | |
| Mu | sic On H | old c | ustom | er's defa | ault | | ~ | | | | | | | | |
| | | | | | | | | | | | | | | | |

You have the option of expressly specifying the value of a given parameter or using the "Customer default" option. In the latter case, this parameter is assumed to be the value defined in the customer's configuration (the global value for this IP Centrex).

| Set CLI To | Account ID: for outgoing calls, always override the CLI (ANI) value supplied by the IP phone with the username value used for authorization. This is done to prevent service abuse via CLI (ANI) number spoofing. Centrex Number: for outgoing calls in the IP Centrex environment (off-net destinations), set the CLI (ANI) number to the specified value. This is typically done so that calls between extensions within the IP Centrex environment (IP phones of this customer) will carry the caller's original CLI, while calls to PSTN numbers will display a reception/switchboard number as the CLI. |
|----------------------|--|
| Hide CLI | Remove CLI (ANI) information for outgoing calls. |
| Voice VPN | For incoming calls from phones within the IP Centrex |
| Distinctive | environment, use a ring pattern different from the default |
| Ring | one. |
| Default | Specifies the method of processing incoming calls to this |
| Answering | account if selective call processing has been disabled, or if |
| Mode | none of the selective call processing rules apply. |
| Call | Enables selective call processing / conditional call |
| Processing | forwarding features. |
| Enabled | |
| Music On | Defines the music on hold to be used with the account. |
| Hold | Choose None to disable this feature, or select the default |
| | setting for the account's customer. To upload your own |
| | music, select a file on your local file system using the |
| | Browse button. To rename the music, enter the desired |
| | name in the Music Name field; otherwise the local file |
| | name will be used. The uploaded music will replace the |
| | previous entry in the list, and is usually enabled within 10 |
| | minutes. |
| Legal | Intercept all incoming and outgoing calls of this customer |
| Intercept | for law enforcement purposes. |
| E911 | Activate emergency services for this account |
| Preferred | The language the user prefers when interacting with an |
| IVR | IVR application. |
| Language | Specifies the number to be east back to the IVD is an |
| Associated Number | Specifies the number to be sent back to the IVR in an authorization confirmation. For example, this might be a |
| Inulliber | authorization confirmation. For example, this might be a |
| | redirect to a technical support number in an IVR |
| | application. Another example might be a quick-dial |
| | number for prepaid accounts. (In this case, the redirect |

| | number may be maintained via web self-provisioning.) |
|----------|--|
| | number may be maintained via web sen-provisioning. |
| | |
| | |
| | |
| UM | Allows the account user to access the unified messaging |
| Enabled | system. See the PortaUM Administrator Guide for more |
| | details. |
| | Please note that if an account has UM Enabled |
| | activated, there will be an additional link next to it on the |
| | administrator interface: Manage UM Account. By clicking |
| | on this you will go automatically to the account's UM |
| | administration pages. This is extremely useful for |
| | helpdesk people, since they can quickly check the |
| | configuration of an account's auto-attendant, call queues, |
| | and the like. |
| | Also note that it may take a few minutes before an |
| | account is fully provisioned in PortaUM. Thus if you |
| | click on the link immediately after activating UM |
| Forward | Enabled, it most likely will not work yet. |
| Mode | Assigns a call forwarding mode to this account: |
| Mode | • No Forwarding: Disables call forwarding entirely. |
| | • Follow-me: Enables standard follow-me |
| | forwarding. |
| | Advanced Forwarding: Activates advanced call |
| | forwarding mode. |
| | • Forward to SIP URI: Replaces the Follow-me |
| | tab with a simplified Forward tab, where you can |
| | enter a forwarding destination as a CLD@IP. |
| | • Forward to CLD: A simplified type of forwarding |
| | where you specify a single phone number to |
| | which calls will be sent. |
| Maximum | When you select follow-me or advanced call forwarding, |
| Forwards | you must also provide a value for the Maximum |
| | Forwards parameter, so as to limit the number of |
| | concurrently active forwarding destinations allowed. |
| | Please note that you do not have to limit the total |
| | number of phone numbers entered, but rather the |
| | number of phone numbers active at any given moment |
| | of time. For instance, a user may have a list of 20 |
| | numbers, each active in its own time period, some |
| | temporarily turned off, and so on. When call forwarding |
| | is done, PortaBilling will compute a list of numbers |
| | which may be used at that moment, and choose only the first N in the list, where N is the number specified in |
| | Maximum Forwards. |
| | Maximum Porwarus. |

| Timeout, sec | How long the IP phone will ring before a call goes to follow-me numbers (if any) or voicemail. |
|--------------------------------|---|
| Favorite Numbers Enabled | Allows you to define a list of phone numbers for this account, so that calls made to these numbers by the owner of the account will be charged according to a special FAV rate. |

Follow-me

| ₫ | \checkmark | 0 | \$ | i | | Acc | count | Info | / R | etail (| Cust | tome | r 'EasyC | all I | L td.' 🕓 | America/Van | couver d | lemo-toor | ? He |
|------|--|--------|-----|---------|--------|--------|-----------|------------------------|-----|------------------------------------|------|---------|------------------|-------|--------------------------------------|-------------|----------|-----------|--------|
| ٠ | ٠ | Add | | Save | | Save 8 | & Close | 🛞 Cla | ose | 🔳 xDR | .s 🧯 | 🔋 E-Pay | yments Log | × | Terminate | | Þ | 🕽 Logou | : 🔳 La |
| Bloc | Account ID 777700088 Product USD - SIP Subscribers ✓ Blocked □ Balance 0.00000 USD User Agent Linksys/SPA941-5.1.8 Contact sip:77700088@192.168.1.2:5060 | | | | | | | | | | | | | | | | | | |
| Γ | Life | Cycl | e | Sub | oscrip | tions | No | Notepad Service Featur | | | | | atures Follow Me | | | | | | |
| | Acco | unt II | nfo | Maint | tenar | nce | User Inte | erface | Sub | Subscriber Aliases Additional Info | | | | | | | | | |
| Orde | Order A listed C Random Simultaneous | | | | | | | | | | | | | | | | | | |
| Edit | Up/Do | wn | | Name | в* | | Destina | tion * | | IP | | Кеер | Original CLD | | Active | • | Timeout, | sec * Of | Delete |
| | | [| | | | | | | @ | | | | | | | | | | |
| | | ł | lom | e phone | • | | 3804451 | 37456 | | | | | | | m 20:00 un Workdays of any mon | | 15 | | × |

This tab is only available when **Forward Mode** on **Service Features** tab is set to **Follow-me** or **Advanced Forwarding**.

| Order | Specifies the order for redirecting a call. |
|-------------|---|
| | As listed: call every active follow-me number from the |
| | first (topmost) number to the last, until the call is |
| | answered. |
| | Simultaneous: call every active follow-me number from |
| | |
| | the list at the same time until the call is answered. |
| | Random: use a random order. |
| Edit | Click the Edit icon to edit the follow-me number |
| | details. To add a new number to the list, click the 🖬 Add |
| | button. |
| Up, Down | Click these buttons to move a row before the previous |
| | one or after the next one in the list. |
| Name | The name of the follow-me number (e.g. "Mobile |
| | Phone"). |
| Destination | Specify a number for redirecting calls, formatted |
| | according to the customer dialing rules. |
| IP | The address part should contain a valid IP address (four |
| | numbers separated by dots, e.g. 12.34.56.78) |
| Active | Defines the period when the number is active, i.e. is |
| | allowed to receive a forwarded call. Click the Active link |
| | |
| | or wizard icon to create the first period definition or |

| | add the next one using the Period Wizard (this is | | | | | | | | |
|---------|---|--|--|--|--|--|--|--|--|
| | virtually the same as the Off-peak Period Wizard in Edit | | | | | | | | |
| | Tariff). Click the Always button in the wizard to make | | | | | | | | |
| | the follow-me number active permanently. Click the | | | | | | | | |
| | Test Period 🌄 icon to run a period test. | | | | | | | | |
| Timeout | Specify the amount of seconds to wait until a call is | | | | | | | | |
| | answered. Following timeout, the call will be redirected | | | | | | | | |
| | to the next follow-me number or disconnected. | | | | | | | | |
| Off | Check this option to temporarily disable forwarding to a | | | | | | | | |
| | follow-me number. | | | | | | | | |

Forward

| ₫ | | 5 i 🖂 A | count Info | / Retail C | ustome | 'EasyCall Lt | d. @ America/Vancouver | demo-toor | ? Help |
|------|----------------|-----------------|----------------|-------------|-------------|-----------------|------------------------|-----------|--------|
| • | 🖬 Save | 🚽 Save & Close | 🛞 Close 🔳 🛪 | DRs 🗐 E-P | ayments Log | j 🔀 Terminate | | 🕅 Logout | 目 Log |
| | | | | · | | | | | |
| Acc | ount ID 7777 | 00088 | Product | USD - SIP | Subscribe | rs 💌 | | | |
| Bloc | ked 📃 | | Balance | 0.00000 USE |) | | | | |
| Use | r Agent Links | ys/SPA941-5.1.8 | Contact | sip:7777000 | 88@192.168 | .1.2:5060 | | | |
| | _ | | | | - | | | | |
| | Life Cycle | Subscription | s Notepad | Service | e Features | Forward | | | |
| | Account Info | Maintenance | User Interface | Subscriber | Aliases | Additional Info | | | |
| 010 | URI | | | × | | | | | |
| | | | @ | | | | | | |
| Tim | eout, sec | | | | | | | | |
| Kee | p Original CLE | | | | | | | | |

This tab is only available when **Forward Mode** on **Service Features** tab is set to **Forward to SIP URI** or **Forward to CLD**.

| CLD/SIP | Here you will enter CLD or two parts of the SIP URI: | | | | | | | |
|----------|--|--|--|--|--|--|--|--|
| URI | • The CLD part may contain only digits, the | | | | | | | |
| | letters A-D, and the signs # and *. | | | | | | | |
| | • The address part should contain a valid IP | | | | | | | |
| | address (four numbers separated by dots, e.g. | | | | | | | |
| | 12.34.56.78) | | | | | | | |
| Timeout | Specify the amount of seconds to wait until a call is | | | | | | | |
| | answered. Following timeout, the call will be redirected | | | | | | | |
| | to the next follow-me number or disconnected. | | | | | | | |
| Кеер | Allows you to preserve the originally dialed number | | | | | | | |
| Original | during forwarding. This is useful when forwarding a call | | | | | | | |
| CLD | to a remote IP PBX. For more details, see the PortaSIP | | | | | | | |
| | Administrator Guide. | | | | | | | |

Call Processing

| | 🔁 ¢ | dd [| a Save | | Save & C | lose 🕱 | Close | 🗉 x | DRs 🗐 | E-Paymen | tslog | 🔀 Termi | nate | | | M Logout | |
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| | <u> </u> | | a Jure | | Juicac | lose o | ciose | | N N | L Tuymen | cs cog | | nace | | | Logout | - |
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| | DIUC | Neu | | | | | Dalali | CE 0.0 | 0000 08 | D | | | | | | | |
| | User | Agent | Linksy | s/SPA9 | 941-5.1.8 | | Conta | nct sip | :7777000 | 88@192.16 | 8.1.2:5 | 060 | | | | | |
| | | | | | | | | | | | | | | | | | |
| | Γ | Life C | ycle | Subscr | iptions | Notepa | i Ser | vice Fe | atures | Forward | Call P | rocessing |] | | | | |
| | - 1 | Accou | nt Info | Mai | ntenance | User | Interfac | e Su | bscriber | Aliases | Addit | ional Info | | | | | |
| - | | HEEOO | ine milo | 1.101 | recircurec | - Osci - | incernae | - 50 | bachber | Filldaca | Huun | | | | | | _ |
| | Edit | Up/Dn | | From | | | To | | Time | Window | | Action | | Off | Delete | | |
| | | | | _ | | | | | | | | | | | | | |
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| | | | Office | | | ANYWHE | RE | | ANYTIME | | Ring | then forwa | rd | | × | | |
| | | | | | | | | | | | | | | | | | |

This tab allows you to define a list of rules for handling incoming calls to this account. It is only available when **Call Processing Enabled** box is checked on **Service Features** tab.

| From | Allows you to select a condition applicable to an incoming phone number (phone number of a person trying to contact you). Click on the column header with the corresponding rule to invoke the wizard, which will enable you to define a new rule or change an existing | | | | | | |
|--------|---|--|--|--|--|--|--|
| | one. | | | | | | |
| То | Allows you to select a condition applicable to a dialed | | | | | | |
| | phone number (one of your phone numbers that a | | | | | | |
| | person trying to contact you has dialed). | | | | | | |
| Time | Allows you to select a condition applicable to the time | | | | | | |
| Window | when a call is made. | | | | | | |
| Action | Specifies which actions should be taken if a particular | | | | | | |
| | phone call satisfies the conditions for this rule. | | | | | | |
| Off | Allows you to temporarily disable a rule without actually | | | | | | |
| | deleting it (so it can be used later on). | | | | | | |

Volume Discounts

| ຝ | 🖌 🔚 😫 | 1 | Acc | ount In | fo / Re | tail C | ustome | r 'EasyCall L | t d.' 🕚 Ameri | ca/Vancouver demo | -toor | ? Hel |
|---|--|------------------|---------|-------------|------------|----------------|---------------|------------------|----------------------|-------------------|-------|-------|
| • | 🖬 Save 🛛 | 🚽 Save & C | lose 🤅 | Close | 🗉 xDRs | 🗐 E-Pa | yments Lo | g 🛛 🔀 Terminate | | Þ¶) L | ogout | 目 Log |
| Bloc | Account ID 777700088 Product USD - SIP Subscribers ▼ Blocked □ Balance 0.00000 USD User Agent Linksys/SPA941-51.8 Contact sip.777700088@192.168.1.2:5060 | | | | | | | | | | | |
| Γ | Life Cycle | Subscrip | otions | Volum | Discounts | N | otepad | Service Features | Forward | Call Processing | | |
| | Account Info | Mainten | ance | User Interf | ace Sub | scriber | Aliases | Additional Info | Payment Info | Periodic Payment | 5 | |
| Destination Group Service Threshold Used Remaining Current Discount Next Discount Level Discount Info | | | | | | | | | | | | |
| | Europe | Voice Calls 5 US | | 0 0050 | 5 USI | 5 USD 100% (fo | | 0% (normal rat | e) 🕐 | | | |
| US | 3&Canada | Voice Calls | 200 min | ute 0 minu | te 200 min | ute 100 |)% (for free) | 0% (normal rat | e) 🕜 | | | |
| - | | | | | | | | | | | | |
| | | | | | | | | | | | | |

| Destination | Information about discounts used and remaining is |
|-------------|---|
| Group | shown, grouped by Destination Group names. Each |

| | name represents one group included in the volume | | | | | | |
|-----------|--|--|--|--|--|--|--|
| | discount plan assigned to the account. | | | | | | |
| Threshold | eshold The threshold value for the currently used disco | | | | | | |
| | level. When an account's internal counter reaches this | | | | | | |
| | value, the next level discount will start to be applied | | | | | | |
| | according to the discount scheme. When the counter | | | | | | |
| | reaches the last numeric threshold value, it will be shown | | | | | | |
| | here. N/A means that there is no numeric threshold | | | | | | |
| | defined in the scheme, or no scheme has been defined at | | | | | | |
| | all. | | | | | | |
| Used | The current value of the account's counter associated | | | | | | |
| | with this destination group. | | | | | | |
| Remaining | The amount remaining before the threshold value. | | | | | | |
| Current | The value of the discount currently applied to the | | | | | | |
| Discount | account. | | | | | | |
| Next | The value of the next level discount. | | | | | | |
| Discount | | | | | | | |
| Level | | | | | | | |
| Discount | Click the information 🕐 icon for a textual | | | | | | |
| Info | representation of the discount scheme. | | | | | | |

Subscriptions

| ₫ | V | \$ 1 | 🖂 🗛 | count Info | / Retai | Custom | er 'EasyCa | all Ltd.' | () Ameri | ica/Vancouver | demo-toor | ? Help |
|--|------------------------------------|-----------|------------|----------------|------------------|-------------|------------------|-----------------|---------------|-----------------|-----------|--------|
| • | 🔁 Add | 🖬 Save | 📄 Save | & Close 🛞 Clo | se 🔳 x | DRs 🙀 E-I | ayments Log | 🔀 Termir | nate | | ▶¶ Logout | 目 Log |
| | | | | | | | | | | | | |
| Account ID 777700088 Product USD - SIP Subscribers | | | | | | | | | | | | |
| Bloc | ked 🗌 | | | Balance | e 0.00000 | USD | | | | | | |
| Use | r Agent Lin | ksys/SPA9 | 941-5.1.8 | Contac | sip:7777 | 00088@192. | 68.1.2:5060 | | | | | |
| r | | | | | | | | | | | | |
| | Life Cycle | Sub | scriptions | Volume Dis | Volume Discounts | | Service Fe | eatures Forward | | Call Processing | | |
| | Account Ir | nfo Maii | ntenance | User Interface | Subscrib | er Aliases | Additional | Info Payr | ment Info | Periodic Pay | ments | |
| Edi | | Subscrip | tion | Discount Ra | te.% Star | t Date* Act | ivation Date Fir | nish Date Bil | lled To Oblig | natory Close | Delete | |
| | | | | Dioodantina | | | | Non Dato Di | iou ro obii | gatory close | boloto | |
| | Pending Subscriptions | | | | | | | | | | | |
| Ac | Active Subscriptions | | | | | | | | | | | |
| | Linksys phone rental 2007-12-10 () | | | | | | | | | | | |
| Closed Subscriptions | | | | | | | | | | | | |
| | | | | | | | | | | | | |

This tab displays the subscription plans currently applied to this account. Subscriptions are divided into three groups

- **Pending Subscriptions** displays subscriptions which are not active yet (i.e. they will be activated sometime in the future).
- Active Subscriptions displays currently activated (and billed) subscription plans.
- **Closed Subscriptions** displays subscriptions which have already been closed.

| Subscription | Choose one of the available subscription plans from the |
|--------------|---|
| | list. |

| Discount | Enter a discount rate for this subscription. If you leave | | | | | | | |
|--|---|--|--|--|--|--|--|--|
| Rate, % | this field empty, it means that the discount rate defined | | | | | | | |
| | in the customer information should be applied. If | | | | | | | |
| | enter any value, it will override the customer discount | | | | | | | |
| | rate. 0 means no discount (i.e. the rate defined in the | | | | | | | |
| | subscription plan is applied). | | | | | | | |
| Start Date | Enter the desired subscription activation date: | | | | | | | |
| | immediately, or sometime in the future. | | | | | | | |
| Activation (Read-only) Displays the date when the subscription | | | | | | | | |
| Date | activated. | | | | | | | |
| Finish Date | Enter the date when this subscription should be | | | | | | | |
| | automatically canceled. | | | | | | | |
| Billed To | (Read-only) The date to which subscription charges have | | | | | | | |
| | already been applied. | | | | | | | |
| Mandatory | A flag indicating that this subscription comes from the | | | | | | | |
| | account's product, and so cannot be closed until the | | | | | | | |
| | account has this product assigned to it. | | | | | | | |
| Close | Allows you to close one of the optional subscriptions. | | | | | | | |

Account Generator

The Account Generator should be used when large numbers of accounts are to be generated (for example, when issuing prepaid cards) so that individual accounts need not be entered manually. The account IDs will be generated either sequentially or randomly, as will the web password, so as to prevent possible defrauding. The generation process will run offline, so that the accounts are not visible from the Account Management page until the process is complete. The customer will then receive an e-mail notification regarding completion of the task, as well as another e-mail listing all the accounts in CSV format, including the values "Batch", "Control Number" (a sequential index), "PIN" (account ID), "Web login" (by default identical to the account ID) and "Password" (web password).

| ຝ | > | • \$ | 🚺 🖂 Ac | count Genera | ator for Reta | il Custo | mer 'EasyCall | Ltd. ® America/Vancouver | demo-toor | 🛛 Help |
|---|-------------|--------|----------------|------------------------------------|-----------------|------------|------------------|--------------------------|-----------|--------|
| • | 🕑 Ger | nerate | 🛞 Close | | | | | | 🕅 Logout | |
| | | | | | | | | | | |
| | | Num | ber of account | s 1000 [*] | Product | USD - E | asyCall pre-paid | C: 🚩 | | |
| | | Block | ked | | Opening Balance | 10 | * | | | |
| | | _ | | | | | | 7 | | |
| | | | Account Info | User Interface | Additional Info | Life Cycle | Service Features | | | |
| | | Туре | | 💿 Debit 🔘 Credit | ○ Voucher | | | | | |
| | | | | | | | | | | |
| | | Gene | ration method | Random | | | | | | |
| | | | | 🔘 Sequential | | | | | | |
| | | | | DID Inventory | | | | | | |
| | | ID Pre | əfix | 1234 | | | | | | |
| | | ID Lei | ngth | 12 * | | | | | | |
| | | VoIP I | Password | Empty | | | | | | |
| | | | | Auto Generated | | | | | | |
| | | | | Auto Generated | Digits Only | | | | | |
| | | Batch | | Easycall-2007-12 | New batch | * | | | | |

The **Account Generator** interface is very similar to **Add Account**, with the following exceptions:

| Field | Description | | | | | | |
|------------------------|--|--|--|--|--|--|--|
| Number of Accounts | The number of accounts to be generated. | | | | | | |
| (replacing Account ID) | _ | | | | | | |
| Account Info tab | | | | | | | |
| Generation method | Random will produce unique unpredictable | | | | | | |
| | account IDs with a specified length and prefix. | | | | | | |
| | Sequential will create accounts with | | | | | | |
| | incremental IDs, e.g. if the starting ID is | | | | | | |
| | specified as 55540000, it will create accounts | | | | | | |
| | 55540000, 55540001, 55540002 and so on; see | | | | | | |
| | below for more details. | | | | | | |
| | DID Inventory will generate accounts by | | | | | | |
| | assigning account IDs from the available | | | | | | |
| | DIDs in a specific DID batch; the user has the | | | | | | |
| | option of choosing the starting DID. | | | | | | |
| ID prefix | Preset leading digits in the account ID; leave | | | | | | |
| | empty to make the account ID totally random. | | | | | | |
| ID length | Total ID length, including ID prefix. | | | | | | |
| Starting ID | Only available in sequential generation, and | | | | | | |
| | always numeric. | | | | | | |
| VoIP Password | Can be generated automatically, or left empty | | | | | | |
| | to allow end-users to login using account ID | | | | | | |
| | only (typically used for prepaid cards). The | | | | | | |
| | "Auto-generated digits only" option allows | | | | | | |
| | you to create sufficiently secure passwords | | | | | | |
| | (with a specified password length) consisting | | | | | | |
| | of digits only, so that they can be entered from | | | | | | |
| | a phone's touchpad. | | | | | | |

| User Interface tab | | | | | | | |
|---|---|--|--|--|--|--|--|
| Login Can be set as identical to the account ID, or | | | | | | | |
| | left empty to disable access to the account | | | | | | |
| | self-provisioning interface. | | | | | | |
| Password | Can be generated automatically, or left empty | | | | | | |
| | to allow end-users to login using account ID | | | | | | |
| | only. | | | | | | |

Assigning an Account ID

Choose Random if you want a relatively small amount of unpredictable IDs within a large enough range of possible numbers. Please note that "random" means not only "generated randomly" but also "difficult to guess"; therefore, the ratio between the number of generated PINs and the number of total possible PINs should be sufficiently low. For instance, PortaBilling will refuse to generate 5,000 PINs with ID prefix 33333 and ID length 9, because in this case there are 10,000 possible PINs; if we generate 5,000 actual pins, there is a 50% chance of using someone else's PIN just by entering one wrong digit. Thus, in the example above, the PIN length should be set at 10 or even 11 digits (with a 5% or 0.5% chance of guessing the PIN, respectively). Note that random account PINs are never generated with leading zeroes, as these zeroes could be truncated when working with PIN data in programs like Microsoft Excel.

Choose Sequential if you want to generate a large number of accounts at once. You can choose the starting ID for the first account to be generated, and the system will generate IDs sequentially by an increment of one. If a given account ID is already used, it will be skipped and the system will continue until it generates the specified number of accounts. For example, if you requested 100 accounts with the starting ID prefix "1000000", and there are already three accounts within the defined range (1000010, 1000011, 1000012), the first generated ID will be 1000000, the second 1000001, and the last 1000103. Account ID length is always the same for all generated accounts. So if there is not enough room to generate the specified number of accounts (e.g. you request 1,000 accounts with starting ID 999900), generation will not begin and a warning e-mail will be sent immediately.

| ₫ | V B | \$ | : | | A | ccou | ints of I | Retail | Cu | stome | r 'Callsi | 10p 1' | (t) An | nerica/Vancou | ver d | emo-toor | ? Help |
|---|------------|--------------|----------|-----------|-------------|--------|------------|-------------|-------------------|-------------|---------------------|----------|-------------------------|---------------------|------------------|-------------------|---------|
| • | 🗈 Add | i 🗈 | Accour | nt Genera | itor | 🛞 Cla | ose | | | | | | | | Þ |) Logout | |
| | | [| Ac | count ID | | ANY | Batch | × | | Ctrl # | SIP ANY | Status | Show Account | | anced arch | | |
| | | xDRs | Timer | Receipt | Acco | unt ID | ldle, days | Currend | y I | Balance | Credit Lim | it Type | Product | Batch | Status | SIP | |
| | | \square | 8 | | 0198 | 70001 | | USD | 1 | 14.36000 | | Credit | Callshop booth | callshop1 | • | | |
| | | \square | 1 | ** | 0198 | 70002 | | USD | 1 | 17.14594 | | Credit | Callshop booth | callshop1 | | | |
| | | \square | 8 | 8 | 019 | b 🕑 h | ttps://dem | o.portao | ne.co | om - Port | aBilling100 | Super | VoIP Call Inc P | ortaOne, In | c Moz | illa Firefo: | . 🗆 🖸 🖾 |
| | | \square | 8 | ≞ | 0198 | 1 | | | | Callsh | iop Red | eipt | | | | | |
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| | | \square | 8 | | 0198 | | | lshop bo | | I | | | | | | | |
| | | Q | 8 | | <u>0198</u> | 1 | | Narayam | | | | | | | | | |
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| | | P | e | | <u>0198</u> | | Fro | | To 3809 | 94733216 | Country 4 UKRAIN | | ime Cl 2-10 08:10:04 | harged time 7:58 | | nt, USD .19500 | |
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| | | | | | | | Reta | in this cop | y for | your record | ds | | | | | | |
| | | | | | | Done | | | | | | | | | demo | .portaone.c | :om 🚘 🛒 |

Callshop Features

The account list screen can be used by a callshop operator to track calls made in callshop cabins, to block an account after a call has been placed, and to print receipts for services provided. When a user wants to place a call, the operator clicks the Start Timer icon, which automatically unblocks the account. After the call, when the user is ready to pay, the operator clicks the Stop Timer icon, and the Print Receipt icon appears. Clicking this icon will initialize the receipt pop-up.

NOTE: Callshop features are not available for accounts of direct retail customers. In order to enable these features for accounts of a reseller's sub-customer, both the reseller and the sub-customer must have "Callshop enabled" on.

E-Payments Log

This form is not directly accessible from the main menu, since it should be accessed in the specific context of:

- the whole environment (accessible from **Company Info**); this allows you to see charge attempts for any direct customer.
- a specific customer (accessible from **Customer Info**); this allows you to monitor charge attempts related to a particular customer.

Adjust the search parameters to see a list of all transaction attempts (by default, only transactions for the current day will be displayed, so the values in the From/To fields may need to be changed) and then press the **Search** button.

| 🗅 🗹 📴 🖺 🖡 🖻 Object 🗐 Object | | | | E- | Paymen | ts Log | | | | | | B Europe/Kins | ND Logor |
|--------------------------------|--------------|-------------|--------------------------|-------------|----------|-----------------------------|----------|------------|--------|-----------------|------------|---------------|----------|
| | From, MM/DD/ | mr 🗵 | Io, MMIDD/1111 | Test Mode | Paym | ent System | Payme | int Status | | Search | | | 1.4.040 |
| | 03/28/2007 | | 15/28/2007 | YNA. 👗 | ANT | Y | ANT | × | | | Search | | |
| | Pages: 1 2 1 | 'otat: 2 | | | | | | | | | | | |
| | 🗄 ID 🔻 🛛 Da | te / Time | Customer / Accou | nt 🗧 Amount | Currency | Payment | Method | Payment ! | System | Test | Status | | |
| | 82 05/14/20 | 007 18:56:1 | 18 🌲 <u>Call Parking</u> | 1 | USD | 開日 120000 | 0/9 | 😚 2Check | Out DD | 111 | Succeeded | | |
| | 81 05/14/20 | 007 13:52:4 | 16 🌲 EVB SIP Calls | 4 | USD | 4007xx | 10010027 | 😁 TestPro | cessor | (2) 111 | Succeeded | | |
| | 80 05/14/20 | 007 13:52.4 | 12 🌲 EVB SIP Calls | 4 | USD | 4007xx | 0000027 | 🔭 TestPro | cessor | ()151 | Succeeded | | |
| | 79 05/14/20 | 007 13:52:3 | 9 🛔 EVB SIP Calls | 4.07 | USD | TEL 4007xx | 0000027 | 😁 TestPro | cessor | 🚱 1131 | Succeeded | | |
| | 78 05/10/20 | 007 13:56:1 | 19 🔒 Call Parking | 124.17 | USD | 翻記 1x00003 | 07 | 😁 2Check | Out DD | (2) 111 | Succeeded | | |
| | 77 05/10/20 | 007 12:19:3 | 15 🌲 Call Parking | 3.23 | USD | BEE 1x00003 | 07 | 😁 2Check | OutDD | () 151 | Succeeded | | |
| | 76 05/10/20 | 007 12:17:0 | 13 <u>Call Parking</u> | 3.23 | USD | BEER 1x0000/3 | 07 | 😷 2Check | Out DD | 101 | Succeeded | | |
| | 75 05/10/20 | 007 12:06:0 | 13 🌲 <u>Call Parking</u> | 3.23 | USD | BEE 1x00003 | 07 | 😁 2Check | OutDD | (Q 1131 | Succeeded | | |
| | 74 05/10/20 | 07 11:51:1 | 4 🛔 Call Parking | 55.56 | USD | EEE 1xxxxx3 | 07 | 😁 2Check | Out DD | @15T | Succeeded | | |
| | 73 05/10/20 | 07 11:50:3 | 80 🏯 Call Parking | -55.58 | USD | BEE 1x000x3 | 07 | Theck | OutDD | () 11.51 | Succeeded | | |
| | 72 05/10/20 | 007 11:48:4 | 6 🌲 Call Parking | -54.56 | USD | STATE 1x00003 | 07 | 😁 2Check | Out DD | | Failed | | |
| | 71 05/10/20 | 007 11:46:3 | 16 🏯 Call Parking | -21.01 | USD | 1 100000.3 | 07 | TestPro | cessor | () 131 | Succeeded | | |
| | 70 05/10/20 | 07 11:45:3 | 15 🛔 Call Parking | 123.13 | USD | 11000003 | 07 | TestPro | cessor | () 151 | Authorized | | |
| | 69 05/10/20 | 007 11:44:4 | 13 🏯 Call Parking | 123.13 | USD | BERT 1000003 | 07 | Theck | OutDD | | Failed | | |
| | 68 05/10/20 | 007 11:44:3 | 12 🛔 Call Parking | -123 | USD | BERT 1x00003 | | 7 2Check | Out DD | | Failed | | |
| | 67 05/10/20 | 07 11:44:1 | 1 🚔 Call Parking | -12.13 | USD | 5255 1xxxxxx3 | | 2Check | OutDD | | Failed | | |
| | 66 05/10/20 | 007 11:43.5 | 6 👗 Call Parking | -123 | USD | 5000 1xxxxxx | 07 | 7 2Check | Out DD | | Failed | | |
| | | | 54 🌲 Call Parking | -54.55 | USD | BBR 1x00003 | | | | | | | |

| Column | Description |
|------------------|--|
| Date/Time | Specifies when the charge attempt occurred. |
| Customer/Account | Specifies to which customer or account the charge |
| | was applied. |
| Amount | Gives the total amount of the transaction. |
| Currency | Specifies the currency used in the transaction. |
| Payment Method | The icon on the left specifies which type of |
| | payment method was used (e.g. VISA or |
| | MasterCard); the actual card/account number is |
| | displayed in the "safe" form (some of the digits are |
| | masked by an x). |
| Payment System | Specifies the payment system used to carry out this |
| | transaction. |
| Test | Indicates whether this transaction was done in |
| | "test" mode. |
| Status | Indicates the result of the transaction: |
| | • Succeeded – the transaction was successful, |
| | funds were transferred. |
| | • Failed – the transaction has failed (click on |
| | Failed to get further information, such as |
| | the error code or a response from the |
| | remote payment processor). |
| | • Authorized – a "check funds" transaction |
| | was successful (but no actual charges were |
| | applied to the credit card and no balance |
| | modification in the billing was done). |
| | • Incomplete - when using payment systems |
| | with "external authorization" it is possible |
| | that a transaction was interrupted (e.g. user |
| | has pressed the "cancel" button when |
| | entering credit card info on the remote |
| | processor website). |

5. Help Desk

Call Trace

The call tracing utility allows you to determine the characteristics of a specific call when you know the **h323-conf-id** or the **destination**, which may be specified exactly, or using a wildcard. (For example, all calls to England may be specified as "44%" in the destination field). A date range for the search must be specified; however, it is highly recommended to set it to the smallest range necessary, in order to reduce waiting time and server load. Ideally, the search window should contain one day only.

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

| ۵ (| · | s i 🗹 | | | (| Call Trac | e | | | | | | |
|---------------|--|-------------------|--------------------------|-------------------------|------------------|------------------------|------------------------|---|----------------|----------------------|---------------------|-------------------|---|
| • | 8 Close | 🐔 Objects | | | | | | | | | | N) Loga | ut |
| | H323-conf-id H323-conf-id Trace a call Trace a call | | | | | | | | | | | | |
| 'ages View | Error Report | 34567 CLI(ani) | 8 9 10 11 2 CLD(dnis) | ≥ ≥ Total:1 Country | Description | Connect Time | Disconnect Time | Duration, min:sec | ⊖ Amount | [⊖] Account | ÷ Customer | ÷ Vendor | Disconnect Reason |
| Q | E | 44810747061 16 | 6047576761 | | North America | 2006-10-06 10:13:02 | 2006-10-06 10:15:03 | 2:01 | 0.05042 USD | x-telecom | X-Telecom | VoIP Solutions | Normal call clearing |
| \square | E | 19563646551 38 | 80457644772 | UKRAINE | Proper | 2006-10-06 10:08:34 | 2006-10-06 10:08:34 | 0:00 | 0 USD | 56.78.90.1 | Carrier Exchange | SuperNet | User busy |
| Q | E | 38760324998 16 | 6040211301 | | North America | 2006-10-06 10:07:29 | 2006-10-06 10:07:29 | 0:00 | 0 USD | 56.78.90.1 | Carrier Exchange | VoIP Solutions | Temporary fail |
| Q | E | 92227808616 38 | 80497714137 | UKRAINE | Proper | 2006-10-06 10:06:53 | 2006-10-06 10:06:53 | 0:00 | 0 USD | 56.78.90.1 | Carrier Exchange | VoIP Solutions | Normal call clearing |
| Q | E | 82454291708 38 | 80449493612 | UKRAINE | Proper | 2006-10-06 10:04:33 | 2006-10-06 10:15:00 | 10:27 | 0.94050 USD | 56.78.90.1 | Carrier Exchange | VoIP Solutions | Normal call clearing |
| P | E | 88073228656 38 | 80294255778 | UKRAINE | Proper | 2006-10-06 10:04:28 | 2006-10-06 10:04:28 | 0:00 | 0 USD | 100004 | Callshop# 15 | SuperNet | User busy |
| Q | E | 41287423679 38 | 80041355050 | UKRAINE | Proper | 2006-10-06 10:04:16 | 2006-10-06 10:04:16 | 0:00 | 0 USD | 100003 | Callshop# 15 | SuperNet | Temporary fail |
| P | E | 96521391662 16 | 6040789435 | | North America | 2006-10-06 10:03:38 | 2006-10-06 10:05:59 | 2:21 | 0.02350 USD | 56.78.90.1 | Carrier Exchange | SuperNet | Normal call clearing |
| P | E | 73618227004 16 | 6045068948 | | North America | 2006-10-06 10:02:37 | 2006-10-06 10:10:25 | 7:48 | 0.19500 USD | x-telecom | X-Telecom | VoIP Solutions | Normal cal clearing |
| P | E | 55219438665 42 | 20994484518 | CZECH | Proper | 2006-10-06 | 2006-10-06 | 2:28 | 0.17267 USD | 56.78.90.1 | Carrier Exchange | VoIP Solutions | Normal call |

The result listing shows the origination number, the number dialed, the destination location, connect and disconnect times, duration, account and customer (in the case of product usage), vendor (in the case of normal vendor termination), and the call status while disconnecting, which is color-coded according to the table below. Select the View () icon to go to a detailed page describing the call.

Possible Reasons for Disconnect:

| Reason | Color | Reason | Color |
|-------------------------|-------|--------------------|-------|
| Normal completed call | | Calling side error | |
| Normal uncompleted call | | Called side error | |

| Call progress code | Network error |
|--------------------|---------------|
|--------------------|---------------|

Call Trace Detail

The detailed Call Trace Results page shows additional call details, such as the h323-conf-id for the call and the setup time, as well as a detailed breakdown of the charges applied to each entity (accounts, resellers, and vendors). You may view the connection details for a particular vendor by selecting the Connection 💓 icon. On the subsequent Connection detail page, you may view all connections for a particular vendor by clicking the Connections 🛐 icon.

| ▶ O Class Entry Report IV very log I bigsts YI Logost H323.conf.id 00453/C9 00453/C9 00453/C9 000020DB Setup time, sec: 10 Duration, sec: 116 UUC Account Catatemer Setup time, sec: 10 Duration, sec: 116 UUC Account Catatemer Setup time, sec: 10 Duration, sec: 116 UUC Account Catatemer Setup time, sec: 10 Duration, sec: 10 Disconnect Time 2004-106 171412 2005-106 101412 2005-106 0101401 10000 116000000-2000 | ₫ 🗵 | 1 | s i | | | | | Call Trac | e Res | ults | | | | | r pb-root | ? Help |
|--|--------|-----------------|----------|--------|---------------|-----------------|---------------|---------------|-----------|-------------------|------------|---------------|------------|------------|----------------------|--------------------|
| Under Under <t< th=""><th>• 8</th><th>Close</th><th>E Erro</th><th>r Repe</th><th>ort 🗎 Viev</th><th>v log 🛛 🍕</th><th>Objects</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>🛯 🕅 Logout</th><th></th></t<> | • 8 | Close | E Erro | r Repe | ort 🗎 Viev | v log 🛛 🍕 | Objects | | | | | | | | 🛯 🕅 Logout | |
| Under Under <t< th=""><th></th><th></th><th></th><th></th><th>H323 confid</th><th>0046</th><th>32EC9 0046</th><th>2509 004625</th><th>~ a nnnn·</th><th>2008</th><th>Sotun</th><th>timo sor</th><th>10</th><th></th><th></th><th></th></t<> | | | | | H323 confid | 0046 | 32EC9 0046 | 2509 004625 | ~ a nnnn· | 2008 | Sotun | timo sor | 10 | | | |
| UTC Americal Vancouver Calinabority Disconnect Time 2006-10-06 171-1812 2006-10-06 10.1412 2006-10-06 10.14112 2006-10-06 10.1412 <t< td=""><td></td><td></td><td></td><td></td><td>11323-0011-14</td><td>0040</td><td>521 05 0040.</td><td>.1 03 004021</td><td>55 0000.</td><td>2000</td><td></td><td></td><td></td><td></td><td></td><td></td></t<> | | | | | 11323-0011-14 | 0040 | 521 05 0040. | .1 03 004021 | 55 0000. | 2000 | | | | | | |
| Connect Time 200-10-06 171412 200-10-06 101412 200-10-06 101412 200-10-06 101412 200-10-06 101658 200-10-06 100000 VENDO 0000 VENDO 00000 VENDO 0000 VENDO 0000 VENDO 0000 VENDO 0000 VENDO 00 | | | | | | | UTC | 1000 | 104 | Callshop#15 | 5 | SuperNet | pb | -root | | |
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| Save Save & Close Close Load Description superHet * Description superHet * Service Type Voice Calls Type VoiP to Vendor Remote IP 210.55.78.1 * * Capacity 30 * Hide CLI Mode Clear caller info * Vendor Account one * Outgoing Rule * * | H Sur | <u>perNet</u> 4 | 37886635 | 71 16 | 046043539 | N | orth America | 0:10 | | 2:46 | 0.0 | 2767 USD 1 | x1x0.01+1 | 65x1x0.01 | Normal call clearing | 0 |
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| Service Type Voice Calls Type VoiP to Vendor Remote IP [210.56.78.1 • RTP Proxying Always • Tariff c SuperNet • • Capacity 30 • Hide CLI Mode Clear caller info • Vendor Account one • Translation Rule • • • | | | | | | | | | | | | | | | | |
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| Tariff c SuperNet v * Capacity 30 * Hide CLI Mode Clear caller info v Vendor Account one v Translation Rule v ?? | | | | | | | | Remote IF | 210.5 | i6.78.1 | | * | | | | |
| Capacity so Third Clear caller info Vendor Account one Vendor Account | | | | | | | F | TP Proxying | Alwa | ys | ~ | 1 | | | | |
| Hide CLI Mode Clear caller info Y Vendor Account one Y Translation Rule Y Outgoing Rule Ø | | | | | | | | Tarif | f c Su | perNet | ~ | • | | | | |
| Vendor Account one | | | | | | | | Capacit | / 30 | | | * | | | | |
| Vendor Account one | | | | | | | Hie | ie CLI Mode | Clea | r caller info | o 🗸 | ī | | | | |
| Outgoing Rule | | | | | | | | | | | | | | | | |
| Outgoing Rule | | | | | | | Tran | slation Rule | | | | 2 | | | | |
| | | | | | | | 01 | Itgoing Rule | | | | | | | | |
| | | | | | | | | | _ | | | | | | | |

View Billing Engine Logs

The Log Viewer page allows the raw billing log of a selected call to be viewed using the H323-Conf-ID (or, in the call detail screen above, just click the **View log** button in the toolbar).

| 🙆 🗹 📰 😫 🖬 🛩 | BE Log Viewer | ٩ | America/Vancouver | demo-root | ? Help |
|---|--|-------|-------------------|--|--------|
| S Close | | | | M Logout | |
| | Trace a call | | | ow call attempt | ts |
| H323-Conf-ID Search log file forSELE | :CT 💌 | | Use | ELECT 💌 carefully for lai produce huge | |
| 🗌 inclu | ude log file for the previous day in the s | earch | (| Generate | |
| | View log | | | | |

| Field | Description |
|----------------------|--|
| H323-Conf-ID | The H323-Conf-ID of a call. |
| Search log file for | The day when the call was made. |
| Include log file for | This option extends the search by adding the |
| the previous day in | previous day. |
| the search | |

If you do not know the H323-Conf-ID for a call you have just made, you can use the right side of the form to display all call attempts made within a certain interval (this will also include failed call attempts, which makes it extremely useful for troubleshooting problems when you are unable to make outgoing calls, e.g. due to an authorization failure).

You will see a list of call attempts, with the call initiation time, H323-Conf-ID and CLI/CLD for each; click on the underlined H323-Conf-ID to see the billing engine log for it.

Active Calls

The Active Calls page shows calls that are currently in progress or have been completed recently. It indicates the time the call started, the elapsed call duration, and who is making the call, and describes which gateways the call is going through.

Since the total number of simultaneous calls in your system can be quite large, you can display only a certain subset of all calls, by setting a filter for:

- **Customer** name of the customer who is making a call;
- Vendor carrier to whom the call has been terminated;
- Node element of your network (PortaSIP server, gateway, etc.) the call is going through (e.g. you would like to see all calls originating on your Cisco AS5300 gateway in New York);
- **Call duration** only displays calls lasting for more than a certain number of minutes.

| 6 | Image: Second | \$ | : 🗹 | | Active Calls | : | | 1 | 🚯 America/L | os_Angeles | pb-root | ? | H |
|---|---|----------|------------------|-------------------------|----------------------|--------------|---------|-----------|--------------------|------------|-------------|---|---|
| • | 🛞 Close | 4 | Objects | | | | | | | | M Logout | 6 | |
| | | | | Customer | Vendor | | No | de | | | | | |
| | | | | | | • | | | ▼ Search | | | | |
| | | | | | | | | | | | | | |
| | | | | | Call duration greate | | | | | _ | | | |
| | | | Tot | tal 3 calls in progress | 12 Sel | ect calls | Cleanu | p calls p | presentation | | | | |
| | Accou | int | Customer | 🔺 Connect Time | 🗧 Disconnect Time | e 🗦 Duration | i ≑ CLI | ≑ CLD | Vendor | Conr | nection | | |
| | 1866465 | 5093 | <u>X-Telecom</u> | 2005-05-26 14:05:3 | 0 2005-05-26 14:16: | 29 00:10:59 | 988 | 762 | Best VolP | Best PSTN | l to Vendor | | |
| | @ 988 · | .» 🥮 | Test Node | #3 -> 🍘 762 | | | | | | | | | |
| | 1866465 | 5093 | X-Telecom | 2005-05-26 23:07:5 | 5 | 00:13:39 | 988 | 762 | <u>Global VolP</u> | VoIP Co | nnection | • | |
| | @ 988 · | .> 🗐 | VOIPSOLU | TIONS-outbound -> 6 | 🕮 Test Node #5 -> ' | 2 762 | | | | | | | |
| | | | | 2005-05-27 05:22:4 | 1 | 00:18:53 | 988 | 762 | | | | • | |
| | @ 988 | » 🕋 | 762 | | | | | | | | | | |

| Field | Description |
|-----------------|--|
| Account | Account ID of the call originator. |
| Customer | Customer who originated the call. |
| Connect time | The Call-ID used to trace callback calls |
| | when one logical call consists of several |
| | independent SIP calls. |
| Disconnect time | Empty if the call is still in progress. |
| Duration | The total call duration. |
| CLI | Calling station ID (ANI) for the |
| | originator. |
| CLD | Called station ID (DNIS) – the |
| | destination number. |
| Vendor | Carrier used for call termination. |
| Connection | Specific connection for this vendor. |
| Checkbox | By ticking this checkbox for a particular call, you can group several active calls into a single group for further operations (e.g. remove them from the active call registry) |

The line below these fields shows a schematic call flow diagram.

Sometimes a call displayed in the active calls registry may have already been disconnected (the most common reason for this being that one of your gateways was rebooted and calls were cut off, although billing never received accounting records about this). In this case, you are able to clean up such "stalled" calls from the web.

NOTE: A cleanup operation only affects billing's internal registry of active calls, and will not disconnect a call that is still in progress.

If you want to delete such calls, just mark all of them (using the checkbox in the column on the far right) and press the "Cleanup calls presentation" button. The "Call duration greater than, min." option allows you to autoselect calls with a duration greater than the entered value, so that you can quickly select suspiciously long calls.

SIP Log Viewer

The Sip Log Viewer page allows you to view billing logs of PortaSIP calls. You need to know the Call-ID of the specific call in order to trace it. If you do not know the call-id (e.g. you just made a phone call from a SIP phone and it failed), you can display all call attempts for a recent period and locate the call-id of "your" call according to CLD or other parameters.

| 🙆 🗹 語 💲 🖬 🗹 | SIP Log Viewer (| America/Vancouver | demo-root | ? Help |
|--|--|--|--------------------------------------|---------------|
| S Close | | | M Logout | |
| | PortaSIP node 192.168.0.55 - PortaSIP | | | |
| | Trace a call | | | |
| Call-ID but not H323-Conf-ID ! | 7e4f52ad-edfd3c15@192.168.0.55 | si | now call attemp | ots |
| Another Call-ID optional, e.g. for callback calls | | For last | SELECT 💙 | |
| Search log file for | today | Use | e carefully for la y produce huge | |
| | include log file for the previous day in the search | Filter 🔽 | do not show s | elftest calls |
| Output format | only text log log with call diagram | | Generate | |
| | experimental, does not work for all calls | | | |
| | View log | | | |
| Text-only log: | v | | | |
| REGISTER sip:demo.p Via: SIP/2.0/UDP 15 From: ;tag=40338081 To: Call=ID: 2379060364 CSeq: 10 REGISTER Contact: ;expires=3 User-Agent: Cisco 4 | 85 10192.168.0.138 | ne.com",nonce="42 | e6c9cele0b2e | 10ca02cf9312 |
| | <pre>1192.168.0.138/ser: processing REGISTER received 1192.168.0.138/ser: sending AAA request for 1866</pre> | 7478647711, metho 109b1b95fc2' 26' | | |
| 27 Jul 00:00:14/23790603646 h323-billing-model Cisco-AVPair h323-return-code h323-currency h323-currency | = 'h323-ivr-in=Tariff:Apollo SIP' = 'h323-ivr-in=available-funds:99 = 'h323-return-code=0' = 'h323-returnecy=USD' | | | |

Log with call diagram:

| 114:10:17 | rupproxy; pre-milling caller's address with /0.58.128.185:15455 |
|------------------------|---|
| 14:10:17 | <- (B? 200/I) ♪ INVITE@ |
| | - (B? 200/I) / INVITE@ |
| 14:10:17 | 0-> (B? 200/I) 100 trying> |
| | > (B? 200/I) 100 Trying> |
| | > (Ba 200/I) 180 Ringing> |
| 14:10:17 | 6-> (Ba 200/1) 180 Ringing> |
| 14:10:17 | [4- (Åa 102/I) 180 Ringing0 |
| | - (Aa 102/1) 180 Ringing |
| 14:10:20 | (5a 200/1) 7 200 0K> (Ba 200/1) ♪ 200 0K> (|
| 14:10:20 | (=> (Ba 2007) > 200 cm |
| 14:10:20 | rtpproxy: pre-filling callee's address with 70.68.128.186:16458 |
| 14:10:20 | <- (Åa 102/1) ♪ 200 0K® |
| 14:10:20 | - (Aa 102/I) / 200 0K9 |
| 14:10:20 | - (Ba 200/A) ACK0 |
| 14:10:20 8 | > (Aa 102/A) ACK> |
| 14:10:20 | Q→ (An 102/A) ACK> |
| | > (Aa 103/B) EYK> |
| 14:10:22 | Q-> (Aa 103/B) EYE> |
| 14:10:22 | <- (Åa 103/B) 200 0K@ |
| 14:10:22 14:10:22 | - (Aa 103/B) 200 0K |
| 14:10:22 | rtpproxy: RTP stats: 78 in from callee, 79 in from caller |
| 14:10:22 | troprov. RF scale. /s in from carlet. /s in from carlet |
| 14:10:22 | (-(Ba 201/B) BYZ |
| | - (Ba 201/B) BYR |
| 14:10:22 | 8-> Accounting> |
| 14-10-22 | - /Re 201/R) RYR |
| 17 Max 14. | 0:17/GLOBAL/ser: RECEIVED message from 70.68.128.186:34714: |
| | VITE sip:4008216.231.44.34 SIP/2.0 |
| | |
| | a: SIP/2.0/UDP 192.168.0.53:5061;branch=z9hG4bK-4a8856d4 |
| F | om: autoprov 401 <sip:12060000401@216.231.44.34>;tag=13d16d295842930co1</sip:12060000401@216.231.44.34> |
| Т | : <sip:4000216.231.44.34≻< th=""></sip:4000216.231.44.34≻<> |
| | 11-ID: 21e0c92d-42c946d8@192.168.0.53 |
| l c | eg: 101 INVITE |
| R | x-Forwards: 70 |
| | ntact: autoprov 401 <sip:120600004010192.168.0.53:5061></sip:120600004010192.168.0.53:5061> |
| В | pires: 240 |
| U U | er-Agent: Linksys/PAP2-3.1.7(LSd) |
| C | ntent-Length: 428 |
| A | low: ACK, BYE, CANCEL, INFO, INVITE, NOTIFY, OPTIONS, REFER |

| Field | Description |
|--------------------------|--|
| SIP Environment | The PortaSIP node (virtual SIP instance) |
| | whose log files will be processed. |
| Call-ID | The SIP Call-ID (typical format is |
| | XXXXX@some.domain or XXXX@IP). |
| Another Call-ID | The Call-ID used to trace callback calls |
| | when one logical call consists of several |
| | independent SIP calls. |
| Search log file for | The day when the call was made. |
| Include log file for the | This option extends the search by adding |
| previous day in the | the previous day. |
| search | |
| Output format | Raw text log, or with diagram. |
| Show call attempts for | Displays all call attempts on this node, so |
| last | that you can find the call-id for a call and |
| | use it to obtain log information. |

Account Info

The Account Info page is provided for Help Desk staff responsible for answering questions from account holders. The interface requires the account holder to give the Help Desk an account ID or a batch and control number. The Help Desk operator can also browse xDRs for this account by selecting the Browse xDRs icon.

| ~ | | \$ | • | 2 | Accour | nts c | of R | etail Cu | stomer | 'Easy | Ca | ill Ltd.' | | | | | |
|----------|-------|------------|------|----------|------------|-------|------|-----------|------------|----------|------------|-------------------|-----------|-------------------|--------|-------------------|---|
| 8 | Close | | | | | | | | | | | | | | ľ | 🕅 Logout | Ι |
| 5 | Acco | unt II | | 0 | ustomer | | | Batch | | Ctrl | * | SIP Statu | | | | 0 sk - s - s - | - |
| | MULU | | , | BasyCal | | ~ | ANY | Daten | ~ | Cui | " | ANY | ·> | Show Acco | unts | Advance search | |
| | | | | June | | | | | | | | | | 011011 / 1440 | | | |
| | × | DRs | Ace | count ID | ldle, days | Curre | ency | Balance | Credit Lin | nit Type | | Product | | Batch | Status | SIP | |
| | | Q | 1206 | 1234568 | | US | D | 17.84581 | | Credi | t <u>s</u> | IP Subscribers | | <u>easycall</u> | | | |
| | | Q | 1206 | 12345681 | | US | D | 3.31129 | | Credi | t <u>S</u> | martCall - reside | ntial SI | P <u>easycall</u> | • | | |
| | | P | 1206 | 1239876 | | US | D | 0.00000 | | Credi | t <u>s</u> | martCall - reside | ntial SIF | easycall | | | |
| | | Q | 1206 | 1239877 | | US | D | 351.56001 | | Credi | t <u>R</u> | etail SIP | | easycall | | | |
| | | | 1604 | 1231007 | | | | | | Alias | | | | | | | |
| | | Q | 1604 | 1231018 | | US | D | 0.00000 | | Credi | t <u>v</u> | Vholesale XCHG - | Gold | <u>easycall</u> | | | |
| | | \bigcirc | 1604 | 1234567 | | US | D | 10.00000 | | Debit | <u>s</u> | IP Subscribers | | easycall | | | |
| | | P | 1604 | 1234568 | 160 | US | D | 14.68056 | 20.000 | 00 Credi | t <u>s</u> | IP Subscribers | | easycall | Δ | | |
| | | P | 1604 | 1234569 | | US | D | 0.00000 | | Debit | <u>s</u> | IP Subscribers | | easycall | Δ | | |
| | | P | 1604 | 1234570 | | US | D | 0.00000 | 10.000 | 00 Credi | t <u>s</u> | IP Subscribers | | easycall | | | |
| | | P | 1604 | 3102255 | | US | D | 10.34800 | 10.000 | 00 Credi | t <u>s</u> | IP Subscribers | | <u>easycall</u> | Δ | | |
| | | P | 1604 | 6282508 | | US | D | 10.34800 | 10.000 | 00 Credi | t <u>s</u> | IP Subscribers | | easycall | ٨ | | |
| | | P | 1604 | 6831234 | | US | D | 10.34800 | 10.000 | 00 Credi | t <u>s</u> | IP Subscribers | | easycall | Δ | | |
| | | P | 7777 | 00088 | 1 | US | D | 0.00000 | | Credi | t <u>s</u> | IP Subscribers | | easycall | | 0 | |
| | | | 7777 | 00089 | | US | D | 0.00000 | | Credi | t s | IP Subscribers | | easycall | | | |

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

| 6 | > | \$ | i 🖂 , | Account | Info / | Retail Cı | istome | r 'EasyCa | ll Lto | d. () America/Vancouver | demo-toor | ? Help |
|-----------------------------|---|----------------------|--|------------|-------------|--|-----------|--------------|--------|--|-----------|--------|
| • | 🖬 Save | | Save & Close | 🛞 Close | 🔳 xDRs | 🙀 E-Payı | ments Log | 🔀 Termin | ate | | 🕅 Logout | 目 Log |
| Biod | Account ID 120612345691 Image: SwartCall - resident Blocked Image: SwartCall - resident SwartCall - resident User Agent Contact Contact | | | | | | | | | | | |
| | | Life Cy | rcle | 9 | ubscription | าร | | Notepad | | | | |
| | Accoun | t Info | Maintenanc | e User Int | erface 9 | Subscriber | Aliases | Additional I | nfo | | | |
| Type VolF E-m Bate | Passwo ail | Cre rd coe eas | syCall <u>Ltd.</u> 9dit 5digec sycall | Auto | F | Credit Limit Opening Bala Refunds Non Call Rela | | 35 | 0.0 | USD 00000 USD 00000 USD 31129 USD | | |

The majority of account details on the Account Info page are read-only. This interface is similar to the one accessible via the customer's Accounts. Help Desk staff has the ability to modify only Web Password, VoIP Password, Account Balance, Time Zone, Redirect Number, Blocked Status, and Preferred Language. When making such changes, Help Desk staff should also provide a comment detailing the reason for these changes (for example, "user unable to call due to network outage, credited \$5"). Changes may be confirmed by clicking Save or Save&Close.

6. Statistics

Graphs

The default timeframe for all graphs is 30 hours. The dates above the graph are the boundary timeframe for the current graph. If the graph is shown in more than one color, a legend for color use will be displayed below the graph. If there are two graphs, captions will be provided on the left. The use of navigation is explained in the table below.

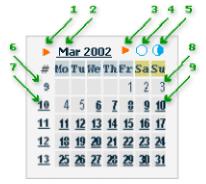
| Icon | Description |
|------|--|
| Q | Zoom Out. Click the icon or the top part of the graph to see a 50% longer time interval. |
| Ð | Zoom In. Click the icon or the bottom part of the graph to see a 50% shorter time interval and a more detailed graph. |
| ¢ | Back in time. Click the icon or the left part of the graph to move back in time by 50% of the current timeframe. |
| \$ | Forward in time. Click the icon or the right part of the graph to move forward in time by 50% of the current timeframe. |

Reports

The middle portion of the report screen is a one-year calendar.

PortaBilling keeps reports for one year, after which they are removed from the system. The current month is displayed in the bottom right-hand corner of the calendar.

Look at the following diagram of a calendar:



- 1. If present, this arrow notifies the user that a report for this month is available for download by clicking the month link.
- 2. Three-letter abbreviation for the month, followed by the year.

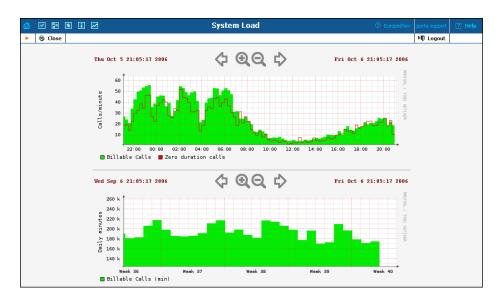
- 3. If present, this arrow notifies the user that two semi-monthly reports are available for download by clicking the links on the right.
- 4. Click this icon to download statistics for the first half of the month.
- 5. Click this icon to download statistics for the second half of the month.
- 6. The number of the week in the current year. No report was generated for this week, so there is no link.
- 7. Same as 6, but here a report has been generated and may be downloaded by clicking the link.
- 8. The day of the month. No report has been generated, so the link is inactive.
- 9. Days with linked reports are bolded and underscored. Click to download the report.

If a report is available, the corresponding link is bolded and underscored.

NOTE: Links are not displayed if reports have not been configured.

System Load

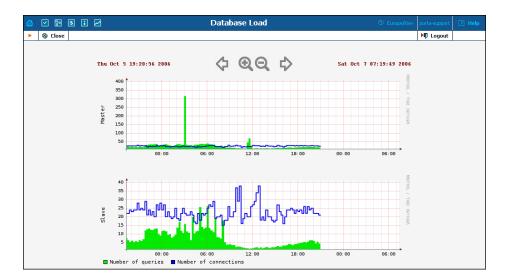
The **System Load** graph provides a general overview of the billing system status in terms of the number of call attempts per minute and the total volume of calls per day.



The **Calls/minute** graph at the top shows the number of calls, and is broken down into "Billable" and "Zero Duration" calls. The **Daily minutes** graph shows the total call volume (in minutes) that passes through your system per day.

Database

The Database Load graph shows the load (in number of queries) and the number of active threads on the master and slave databases. This information may be useful in the event that database interactions seem slow, or for other debugging scenarios.



Connections

The Connection Load screen provides the user with access to load graphs for all connections set up in the system. To view the graph, select the vendor to whom the connection being searched has been assigned from the list on the left side of the screen. Also, the search feature may be used by entering the vendor's name in the search field and clicking the **Search** button. For a search wildcard, the symbol '%' can be used.

After locating the vendor, all connections related to him will be displayed on the right side of the screen, grouped similarly as on the Connection Management screen: PSTN from Vendor, VoIP from Vendor, PSTN to Vendor, and VoIP to Vendor. Click the description under the corresponding connection type to view the Load Graph for a given connection.



Defined in terms of connection threshold, the connection utilization graph shows the saturation of your connections, as well as the setup time and ASR.

ASR

The Vendor ASR reports screen gives the user easy access to downloads of all ASR reports that have been defined for a vendor. Reports for the desired vendor may be found by selecting the vendor from a list on the left side of the screen, or by entering the vendor's name in the search field and clicking the **Search** button. The wildcard symbol "%' may also be used for the search.

Download Options

The default report download format is CSV. Check the box next to the **ZIP** icon to download zipped CSV files.

Statistics

PORTA Billing 100°

| | 🗹 📰 ≶ 🖬 📈 | | Vendor / | ASR reports | 6 | | | | | | ? Help |
|--|---|---|--|--|---|---|--|--|---|---|--------|
| • | 🛞 Close 🛛 Custom Q | Jery | | | | | | | (1 4 | Logout | |
| | A% | iearch | Download Options |] 🗐 | | | | | | | |
| | Alex Asia Telecom AT&T At&T test | | Nov 2005 # Ko Tu Ke Th Fr Sa Si 44 1 2 3 4 5 6 45 7 8 910111213 46 14 15 16 17 18 19 20 47 21 22 23 24 25 26 27 48 28 29 30 | 5 48 3 49 5 6 7 3 50 12 13 14 | Th Fr Sa Su 1 2 3 4 8 9 10 11 15 16 17 18 22 23 24 25 | # Mo 52 1 2 2 9 3 16 4 23 | n 2006 Tu We Th Fr Sa Su 1 3 4 5 6 7 8 10 11 12 13 14 15 17 18 19 20 21 22 24 25 26 27 28 29 31 | # Mo 5 6 6 7 13 | D 2005 Tu We Th Fr 1 2 3 7 8 910 14151617 21222324 28 | 4 5 11 12 18 19 25 26 | |
| | | | ▶ Mar 2005 # Mo Tu lie Th Fr Sa Sa 9 1 2 3 4 5 10 6 7 8 910111 11 13 14 15 16 17 18 15 12 20 21 22 23 24 25 26 13 27 28 29 30 31 | 5 13 2 14 3 4 5 9 15 10 11 12 5 16 17 18 19 | 6 Th Fr Sa Su 1 2 6 7 8 9 13 14 15 16 20 21 22 23 27 28 29 30 | # Mo <u>18</u> 1 <u>19</u> 8 <u>20</u> 15 | y 2006 Tu We Th Fr Sa Su 2 3 4 5 6 7 9 10 11 12 13 14 16 17 18 19 20 21 23 24 25 26 27 28 30 31 | # Mo 22 23 5 24 12 25 19 | Tu We Th Fr 1 2 6 7 8 9 13 14 15 16 20 21 22 23 5 7 28 29 30 | 3 4 10 11 17 18 | |
| | | | ▶ <u>Jul 2006</u> # Mo Tu We Th Fr Sa 26 1 27 3 4 5 6 7 8 28 10 11 12 13 14 15 | 2 <u>31</u> <u>1</u> 9 <u>32 7 8</u> | e Th Fr <mark>Sa Su</mark> 2 <u>3 4 5 6</u> 910111213 | # Mo 35 36 4 37 11 | 2006 Tu We Th Fr Sa Su 1 2 3 5 6 7 8 910 12 13 14 15 16 17 | # Mo <u>39</u> 40 <u>2</u> 41 9 | t 2006 TuWe ThFr 3 4 5 6 10 11 12 13 | 1 7 8 | |
| | | | 29 17 18 19 20 21 22 30 24 25 26 27 28 29 31 31 | | | | <u>19 20 21 22 23 24</u> 26 27 28 29 30 | 43 23 | 5 17 18 19 20 2 24 25 26 27 2 3 31 | 28 29 | |
| | A | В | <u>30 24 25 26 27 28 29</u> | 30 35 28 29 3 | 031 | | | 43 23 | 3242526272 | 28 29 | |
| 1 | A Destination | B | <u>30242526272829</u> 31 <u>31</u> C | <u>30</u> 3528293 | 031 | 39 25 | <u>26 27 28 29 30</u> | 43 23 44 30 | 3242526272 331 | 2829 | ALOC |
| 1 | | Country | <u>30 24 25 26 27 28 29</u> 31 31 C | 30 35 28 29 3 D | 031 E Billable Calls | 39 25 | 26 27 28 29 30 F | 43 23 44 30 | 3242526272 131 G | 2829 | |
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| 2 3 | Destination 24 Not Matched SUBTOTAL | Country | 38 24 25 26 27 28 29 31 31 C Description Ascension Island | 30 35 28 29 3 D Calls 255 | 031 E Billable Calls | 39 25 39 25 3 0 1 | 26 27 28 29 30 F ASR; % 0.392156862745 | 43 23 44 30 D 0 5098 | 3242526272 131 G | 28 29 nin:sec 0:00 11:37 | |
| 2 3 4 5 | Destination 24 Not Matched SUBTOTAL | Country 7 | 29242526272829 2131 C Description Ascension Island Unable to match in tar | 30 35 28 29 3 D Calls 255 257 | 031 E Billable Calls | 39 25 3 3 0 1 1 | 26 27 28 29 30 F ASR; % 0.392156862745 | 43 23 44 30 D 0 5098 5759 | 3242526272 131 G | nin:sec 0:00 11:37 11:37 | |
| 2 3 4 5 | Destination 24 Not Matched SUBTOTAL 35 SUBTOTAL | Country 7 | 29242526272829 3131 C Description Ascension Island Unable to match in tar Proper | 30 35 28 29 3 D Calls 255 257 1 | 031 E Billable Calle | 39 25 3 3 1 1 0 | 26 27 28 29 30 F ASR; % 0.392156862745 | 43 23 44 30 0 5098 5759 0 | 3242526272 131 G | nin:sec 0:00 11:37 11:37 0:00 | |
| 2 3 4 5 6 | Destination 24 Not Matched SUBTOTAL 35 SUBTOTAL 5 | Country 7 5 ALBANIA | 29242526272829 2131 C Description Ascension Island Unable to match in tar | 30 35 28 29 3 D Calls 255 257 1 1 | 031 E Billable Calls | 39 25 3 3 0 1 1 0 0 0 | 26 27 28 29 30 F ASR; % 0.392156862745 | 43 23 44 30 0 5098 5759 0 0 | 3242526272 131 G | iin:sec 0:00 11:37 11:37 0:00 0:00 | |
| 2 3 4 5 6 7 | Destination 24 Not Matched SUBTOTAL 35 SUBTOTAL 5 54 | Country 7 5 ALBANIA 4 ARGENTINA | 29242526272829 3131 C Description Ascension Island Unable to match in tar Proper | 30 35 28 29 3 D Calls 255 257 1 277 1 277 277 277 277 277 277 277 27 | 031 E Billable Calls | 39 25 3 0 1 1 0 0 0 0 | 26 27 28 29 30 F ASR; % 0.392156862745 | 43 23 44 30 0 0 0 0 0 0 0 0 0 0 0 0 | 3242526272 131 G | in:sec 0:00 11:37 11:37 0:00 0:00 0:00 | |
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Custom Query

The Custom Query utility, which can be accessed by clicking the **Custom Query** Dutton, enables you to view ASR and cost/revenue information for all calls going from selected customer(s) to selected vendor(s). This query can also be filtered by destination and a precise time interval. The Split selector allows the report to be divided into hourly and daily intervals.

Select a customer or vendor, or a destination (which may be specified exactly), or use a wildcard. (For example, all calls to England may be specified as "44%" in the destination field.) A date and time range for the search must be specified. To initiate the query, click the **Show results** button.

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| | | | | | Interval | | | ndor(s) / tomer(s) | Calls | Billable Calls | Duration, min:sec | ASR, % | ALOC, min:sec | Cost/Revenue | e, USD | |
| | | | 2006- | 10-05 00:0 | 0:00 - 2006-10 | 06 00:00: | 00 Airte | el i | 13758 | 5859 | 65573:15 | 42.59 | 11:11 | 4232.61 | | |
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The results table contains two rows, one each for the customer and the vendor.

- o Calls
- o Billable Calls
- o Duration, min:sec
- o ASR (Average Success Rate)
- o ALOC (Average Length of Call), min:sec
- o Cost/Revenue, in the PortaBilling owner's currency

The Custom Query utility is a tool for monitoring various parameters of your current call flow. It should **not** be used to obtain billing statistics for a particular vendor (use the xDR statistics for the corresponding vendor), and should **never** be used to obtain information such as "total minutes for a particular customer". Since this report operates with the vendor's xDR, it will provide figures according to the vendor's time rounding, not the customer's. This can make a significant difference (e.g. your vendor uses 1 second rounding, while customers are billed on a per-minute basis).

Cost/Revenue

The Cost/Revenue reports screen allows users to easily download all Cost/Revenue reports that have been generated in the system. Reports are grouped by the following call types:

- By customer and destination, subtotal per country (default)
- o By customer and destination, subtotal per customer
- o By customer and destination, subtotal per country
- o By vendor and destination, subtotal per vendor
- o By destination

The active selection is highlighted in green.

Statistics

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| | Country | Description | Calls | Gross margin USD | | Rated min. | | Total Revenue U | | [|
| | UNITED STATES | Illinois | 31 | 0.02236 | 66 | 38 | | | .03666 | |
| | UNITED STATES | California | 22 | 1.65841 | 4691 | 43 | | | .75965 | |
| | UNITED STATES | Texas New York | 22 | 0.21031 | 618 621 | 39 | | | .34996 | |
| 4 | | I NEW TOTK | 23 | 0.20631 | | | | | .34663 | |
| 4 5 | UNITED STATES | Illinoic | 27 | 0.0041 | 700 | | | | | |
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Custom Reports

The Custom Reports section allows you to manage and execute custom report queries.

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On the initial Custom Reports screen, you can view already existing reports. To execute one of them and see the result immediately, click the

Run icon for a particular report. Click the **Run Queue** button in the toolbar to see information about scheduled report execution.

| > | \$ | 1 | | Custom Report | Queue | | | | | |
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Click Add to create a new report by choosing the type of report (one of the pre-defined types) and whether this report should be created as a clone of some existing report (inheriting all parameters defined in that report), or just as a blank copy. Press Save to proceed in defining the report.

| Save © Close Vige Not: Popular Destinations Vige Not: Popular Destinations Obscription This report displays ten the most popular destinations in which calls were made for specified customer in the specified time lint. This report displays ten the most popular destinations in which calls were made for specified customer in the specified customer in th | ☆ ✓ ഈ \$; ✓ | Add Query | America/Vancouver | demo-root | |
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| Description CORe and sums COR-charged_amount, COR. charged_time and simultaneously counts the quantity of calls for each separate country. The result is is sorted in accordance with sorting method on Output Parameters: Customer, From date, To date Output Fields: Country, Calls, Minutes, Cost | Send Copy To | This report display destinations in w customer in the sy This report choose CDRs and sums C CDRs and sums C CDRs and sums C charged_time and quantity of calls f result list is order method on Output Input Parameters: | lich calls were made for specified pecified time limit. set the customer's or account's DR.charged_amount, CDR. simultaneously county. The in accordance with sorting Formats Tab. Customer, From date, To date | | |

On the Edit query page, you can alter various parameters of this query. Click the **Run HTML** button in the toolbar to run the query and immediately see the result in your web browser.

Query Info Tab

| Field | Description |
|----------------|--|
| Send Report To | If this check box is ticked, after every query |
| Owner | execution the user who executes the report |
| | will receive a copy of the report result by |
| | email. (Make sure you have defined your email |
| | address in the user settings.) |
| Send Copy To | Send a copy of the report result to another |
| | email address. |
| Description | General description of this report. |

Input Parameters Tab

The contents of this tab are based on a particular report, and allow you to manage report parameters, e.g. for "Most popular destinations" you are able to specify the date range and customers.

For input parameters which contain date/time values, there are two methods of entering values:

- You can type in a specific value, e.g. "01-Jan-2007"; this value will always stay the same for any report execution.
- You can specify a moment in time as an offset from the scheduled report execution date. For instance, you can set up the "Customer's most popular destinations" report to run every night at 5 am, and specify that it should cover an interval from 21 hours to 10 hours **prior** to the report time. As a result, you will always receive a report that includes calls made by the customer during business hours on the previous day. Parameters may also be populated automatically with a date **after** the actual report time: for instance, every Monday you can run a report to obtain a list of invoices that will become overdue during the next seven days.

Output Formats Tab

This tab includes two separate areas: Output Format, where you can define how the values of columns should be presented in the report, and Data Sorting, where you define how the report data should be sorted.

| Column | Description |
|-----------------|---|
| Column | Name of the report column. |
| Visible | Whether this column should be included in |
| | the report. If you uncheck this option, the |
| | given column will simply be skipped in the report result. |
| Format | Formatting of the column data (e.g. whether |
| | the total number of minutes should be |
| | displayed as 380 or 380:00). |
| Post Processing | This field functions like the post-processing |
| Rule | rules in templates (for more details, see the |
| | PortaBilling Templates Guide). It allows you to |
| | modify the actual value extracted from the |
| | database before it is shown in the report. For |
| | instance, if the value in the database gives the |
| | total number of seconds, you can divide it by |
| | 60 to display the value in minutes to the user. |
| Suppress Dup | If activated, duplicate column values in |
| | adjacent rows will not be displayed – see the |
| | example below. |

The Suppress Duplicates option allows you to make your reports more readable by removing excess information. Compare the two datasheets below, in which the same data is shown, but where the right one has Suppress Duplicates enabled for certain columns.

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| : 🖬 | 🚆 🕴 Arial | • 10 • | BIU | | - 🔛 | : 🖬 | 🚆 🗄 Aria | I | v 10 | • B I U | | - 00 |
| | A1 🔻 ; | Country | | | | _ | A2 | - | | PUBLIC | | |
| | A | В | C | D | E | | | A | В | C | D | E |
| | Country | Destination | Description | Minutes | | | Country | | Destination | Description | Minutes | |
| 2 | CZECH REPUBLIC | 420 | Proper | 16703:00 | | 2 | CZECH P | REPUBLIC | 420 | Proper | 16703:00 | |
| 3 | CZECH REPUBLIC | 420601 | Mobile | 6893:30 | | 3 | - | | 420601 | Mobile | 6893:30 | |
| 4 | CZECH REPUBLIC | 420602 | Mobile | 4295:00 | - | 4 | | | 420602 | | 4295:00 | |
| 5 | CZECH REPUBLIC | 420603 | Mobile | 14823:00 | | 5 | | | 420603 | | 14823:00 | |
| 6 | CZECH REPUBLIC | 420604 | Mobile | 8924:00 | | 6 | | | 420604 | | 8924:00 | |
| 7 | CZECH REPUBLIC | 420609 | Premium | 457:00 | | 7 | | | 420609 | Premium | 457:00 | |
| 8 | | | | | | 8 | | | | | | |
| 9 | | | | | | 9 | | | | | | |
| 10 | | | | | | 10 | | | | | | |
| 11 | | | | | * | 11 | | | | | | |
| н | ♦ N Sheet1 / Shee | eet2 / Sheet3 , | / < | | > | н | (F H \ | Sheet1/ | Sheet2 / Sheet3 | / < | | > |
| Read | iy 🗌 | | | | | Read | y | | Sum=420 | | | |

| Column | Description | | | | | | | | | | |
|--------|---|--|--|--|--|--|--|--|--|--|--|
| Column | Name of the report column. | | | | | | | | | | |
| Sort | Specifies the sorting mode for this column: | | | | | | | | | | |
| | • 🐉 - Data is sorted in ascending order | | | | | | | | | | |
| | (i.e. Andrew will be at the top of the | | | | | | | | | | |
| | list, and Zack at the bottom). Data is sorted in descending | | | | | | | | | | |
| | • 🛃 - Data is sorted in descending | | | | | | | | | | |
| | • L - Data is sorted in descending order (i.e. Zack will be at the top of the list, and Andrew at the bottom). | | | | | | | | | | |
| | N 1 | | | | | | | | | | |
| | • — - This column is not used for data | | | | | | | | | | |
| | sorting at all. | | | | | | | | | | |
| Up/Dn | If there are multiple columns used in sorting, | | | | | | | | | | |
| | their order is very important. Here you can | | | | | | | | | | |
| | arrange the sequence of the sort columns. For | | | | | | | | | | |
| | instance, if you want to sort data first by | | | | | | | | | | |
| | country name and then by the number of | | | | | | | | | | |
| | minutes, use the \blacksquare and \blacksquare arrows to move the | | | | | | | | | | |
| | Country column above the Minutes column. | | | | | | | | | | |

Run Queue Tab

This tab allows you to schedule automatic report execution (single time or periodic) in the future, and to see when a report was last generated. Click the **I** Add button in the toolbar to add a new entry.

| | > | \$ | i | | Edit "Firs | t Dial MP co | ountries | " qu | ery | | | | couver | | ? Help |
|---|-------------|------------|-------------------------|--|------------|----------------|--------------------------------------|--------|---------|----------|---|--|--------|----------|--------|
| • | 🔁 Add | | Save | 📓 Save & Close | e 🛞 Close | 📑 Run HTML | | | | | | | | 💵 Logout | 目 Log |
| | | Nan Rep | ne ort Type Query | | ountries | Timezone | America n Queue | /Vanco | | ∾ pad |] | | | | |
| | - | | Query | into input i di | | Ru | that baca Kull Queue Keports Hotepaa | | | | | | | | |
| | | Edit | | tart Time [*] IM-DD HH24:MI:SS | Periodic | Last Run | Sta | atus | Suspend | Delete | | | | | |
| | | | | | - 🖂 | | | | | | | | | | |
| | | | 2007-1 | 2-11 00:00:00 | Monthly | - | Wa | iting | • | × | | | | | |
| | | | 2007-1 | 2-11 06:21:00 | | 2007-12-11 06: | 21:02 Com | pleted | - | × | | | | | |
| | | | 2007-1 | 2-11 06:23:00 | | 2007-12-11 06: | 23:02 Rur | nning | - | × | | | | | |
| | | | 2007-1 | 2-18 00:00:00 | Weekly | 2007-12-11 06: | 19:01 Wa | iting | | × | | | | | |

| Column | Description | | | | | | | | | | |
|------------|--|--|--|--|--|--|--|--|--|--|--|
| Start Time | | | | | | | | | | | |
| Start Time | Date and time when the report should be | | | | | | | | | | |
| | produced. | | | | | | | | | | |
| Periodic | Specifies whether the report should only be | | | | | | | | | | |
| | produced once, or generated every day, week | | | | | | | | | | |
| | or month. | | | | | | | | | | |
| Last Run | The date when the report was last executed (if | | | | | | | | | | |
| | applicable). | | | | | | | | | | |
| Status | Current status of the report: | | | | | | | | | | |
| | • Waiting – Report execution has not | | | | | | | | | | |
| | started yet, and is scheduled for the | | | | | | | | | | |
| | future. | | | | | | | | | | |
| | • Completed – The report was to be | | | | | | | | | | |
| | started yet, and is scheduled for the future. Completed – The report was to be executed only once, and this has | | | | | | | | | | |
| | already been done. | | | | | | | | | | |
| | • Running – The report is being | | | | | | | | | | |
| | currently produced. | | | | | | | | | | |
| Suspend | Allows you to temporarily disable report | | | | | | | | | | |
| | execution (but not delete the entry from the | | | | | | | | | | |
| | report schedule). This may be convenient if | | | | | | | | | | |
| | you are leaving for vacation and would like to | | | | | | | | | | |
| | avoid having reports piling up in your inbox | | | | | | | | | | |
| | during your absence. | | | | | | | | | | |
| | uuring your absence. | | | | | | | | | | |

NOTE: Start Time specifies only the "preferred" start time for the report. Report execution will not start earlier than the specified time, but it may start later if there are some other conflicting tasks at the specified time. For instance, if two reports are scheduled to be executed at 06:00, only one of them will start at that time, while the other will start only after the first one has finished.

Reports Tab

This tab allows you to browse results for the ten previous report executions. Thus, if you did not save the original result, you do not have to run the reports over again. Click the sicon to see the corresponding file.

| ☆ 🔽 🕾 💲 | i 🖂 | Edit "Ei | st Dial M | e count | ies" au | arw | America/Vancouve | r demo-toor | ? Help |
|--|---|--|--|------------------------|--|--|--|--|--------|
| | | | n HTML | count | ies qu | ., | C Allencey ancours | ► Logout | Log |
| Name | First Dia | al MP countries | * Timez | one Amer | ica/Vanco | wer | V | V again | |
| Qu | ery Info 🛛 Inj | put Parameters | Output Data | Run Queu | e Report | s Notepad | | | |
| 2007-11 2007-11 2007-11 2007-11 2007-11 2007-11 | 2-11 06:21:02 2-11 06:19:02 2-11 06:16:20 2-11 06:15:33 2-11 06:15:19 | Completion Time 2007-12-11 06-23:0 2007-12-11 06:23:0 2007-12-11 06:19:0 2007-12-11 06:16:2 2007-12-11 06:16:3 2007-12-11 06:16:2 Report "First | 2 0 2 6 1 6 3 6 0 6 | countrie | s", "200 | 97-12-11 | 06:21:02" | | |
| Report Type: Currency: Timezone: Input Values: | USD America/Vanc From | ouver | | ustomer syCall Ltd. | made for s This report CDR.charg the quantit accordanc Input Parar Output Fiel | displays ten the pecified custom chooses the cu ed_amount, CDR y of calls for eac e with sorting m neters: Custome | most popular countries in w er in the specified time limit. stomer's or account's CDRs c. charged_time and simulane charged_time and simulane stod on Output Formats Tak rod on Output Formats Tak rod den Sufficient of the store of the store store of the store of the store store of the store of the store store of the store of the store of the store of the store of the store store of the store of the store of the store store of the store of the store of the store store of the store of the store of the store store of the store of the store of the store of the store store of the store of the store of the store of the store store of the store of the store of the store of the store store of the store of the store of the store of the store of the store store of the store of the stor | and sums eously counts ult list is sorted in | |
| | | | Country UKRAINE UNITED STATE ZECH REPUB | 13636 ES 6797 | Minutes 79529:36 1 39320:07 38936:36 | 1179.61 | | | |

Vendor xDR Reports

The Vendor reports screen allows users to easily download all reports that have been defined for a vendor. Reports for the desired vendor may be found by selecting the vendor from the list on the left side of the screen, or by entering the vendor's name in the search field and clicking the **Search** button. The wildcard symbol "%" may also be used.

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|---|------------------|--------------------------------------|--------------------------------------|---|----------------------|----------------------------|--------|
| | 🗹 📴 💲 🖬 🖂 | Vendor | reports | | | demo-toor | ? Help |
| • | 🛞 Close | | | | | 🕅 Logout | |
| | Unresolved xDRs | Download Options 🕑 | Ą | | | | |
| | % Search | Jan 2007 | Feb 2007 | Mar 2007 | Apr 200 | 7 | |
| | ABC | #Mo TuWe ThFr <mark>Sa Su</mark> | #MoTuWeThFr <mark>SaSu</mark> | #Mo TuWe ThFr <mark>Sa Su</mark> | #Mo TuWe | ThFr <mark>Sa</mark> Su | |
| | DID supplier | 1 1 2 3 4 5 6 7 | 5 1 2 3 4 | 9 1234 | 13 | 1 | |
| | GlobalNet | 2 8 9 10 11 12 13 14 | 6 5 6 7 8 9 10 11 | 10 5 6 7 8 9 10 11 | 14 2 3 4 | | |
| | MCI Vendor | 3 15 16 17 18 19 20 21 | 7 12 13 14 15 16 17 18 | 11 12 13 14 15 16 17 18 | | 12 13 14 15 | |
| | SmartNetwork | 4 22 23 24 25 26 27 28 5 29 30 31 | 8 19 20 21 22 23 24 25 9 26 27 28 | 12 19 20 21 22 23 24 25 13 26 27 28 29 30 31 | | 19 20 21 22 26 27 28 29 | |
| | SPT Telecom | 9 23 30 31 | 9 20 21 20 | 13 20 27 20 23 30 31 | 17 23 24 2. 18 30 | 20 27 20 23 | |
| | | | | | | | |
| | Teleglobe | May 2007 | Jun 2007 | Jul 2007 | Aug 200 | | |
| | WiFi Vendor | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>SaSu</mark> | | ThFr <mark>Sa</mark> Su | |
| | <u>X-Telecom</u> | 18 1 2 3 4 5 6 | 22 1 2 3 | 26 1 | 31 1 | 2 3 4 5 | |
| | | 19 7 8 9 10 11 12 13 | 23 4 5 6 7 8 9 10 | 27 2 3 4 5 6 7 8 | 32 6 7 8 | | |
| | | 20 14 15 16 17 18 19 20 | 24 11 12 13 14 15 16 17 | 28 9 10 11 12 13 14 15 | | 16 17 18 19 | |
| | | 21 21 22 23 24 25 26 27 | 25 18 19 20 21 22 23 24 | 29 16 17 18 19 20 21 22 | | 23 24 25 26 | |
| | | 22 28 29 30 31 | 26 25 26 27 28 29 30 | 30 23 24 25 26 27 28 29 | 35 27 28 29 | 30 31 | |
| | | | | 31 30 31 | | | |
| | | Sep 2007 | Oct 2007 | Nov 2007 | Dec 200 | 17 | |
| | | # Mo Tu We ThFr Sa Su | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>SaSu</mark> | # Mo Tu We | ThFr Sa Su | |
| | | 35 1 2 | 40 1 2 3 4 5 6 7 | 44 1234 | 48 | 1 2 | |
| | | 36 3 4 5 6 7 8 9 | 41 8 9 10 11 12 13 14 | 45 5 6 7 8 9 10 11 | 49 3 4 3 | | |
| | | 37 10 11 12 13 14 15 16 | 42 15 16 17 18 19 20 21 | 46 12 13 14 15 16 17 18 | 50 10 11 12 | 13 14 15 16 | |
| | | 38 17 18 19 20 21 22 23 | 43 22 23 24 25 26 27 28 | 47 19 20 21 22 23 24 25 | 51 17 18 19 | 20 21 22 23 | |
| | | 39 24 25 26 27 28 29 30 | 44 29 30 31 | 48 26 27 28 29 30 | 52 24 25 28 | 27 28 29 30 | |
| | | | | | 1 31 | | |

Unresolved xDR Reports

The "Unresolved calls" reports screen is accessible from the Vendor xDR. It allows users to easily download all available reports for calls which were not identified as crossing any connection to a vendor. The report periodicity can be set up on the **Company Info** screen -> Report Info Tab -> Reconciliation Period.

| ☆ ♡ № \$: ₽ | "Unresolved call: | s" reports | () America/Vancouver | demo-toor | ? Help |
|---------------------------------------|----------------------------------|--------------------------------|------------------------------------|-----------|--------|
| Close xDRs | | | | M Logout | |
| Download Options | ą | | | | |
| ▶ <u>Jan 2007</u> | Feb 2007 | Mar 2007 | Apr 2007 | | |
| # Mo Tu We ThFr <mark>Sa</mark> Su | #Mo TuWe ThFr <mark>Sa Su</mark> | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>SaSu</mark> | | |
| 1 1 2 3 4 5 6 7 | 5 1 2 3 4 | 9 1234 | 13 1 | | |
| 2 8 9 10 11 12 13 14 | 6 5 6 7 8 9 10 11 | 10 5 6 7 8 9 10 11 | 14 2 3 4 5 6 7 8 | | |
| 3 15 16 17 18 19 20 21 | 7 12 13 14 15 16 17 18 | 11 12 13 14 15 16 17 18 | 15 9 10 11 12 13 14 15 | | |
| 4 22 23 24 25 26 27 28 | 8 19 20 21 22 23 24 25 | 12 19 20 21 22 23 24 25 | 16 16 17 18 19 20 21 22 | | |
| 5 29 30 <u>31</u> | 9 26 27 <u>28</u> | 13 26 27 28 29 30 <u>31</u> | 17 23 24 25 26 27 28 29 | | |
| | | | 18 <u>30</u> | | |
| May 2007 | Jun 2007 | Jul 2007 | Aug 2007 | | |
| # Mo Tu We ThFr <mark>Sa</mark> Su | #Mo TuWe ThFr <mark>Sa Su</mark> | #MoTuWeThFr <mark>SaSu</mark> | # Mo Tu We ThFr <mark>Sa</mark> Su | | |
| 18 1 2 3 4 5 6 | 22 1 2 3 | 26 1 | 31 1 2 3 4 5 | | |
| 19 7 8 9 10 11 12 13 | 23 4 5 6 7 8 9 10 | 27 2 3 4 5 6 7 8 | 32 6 7 8 9 10 11 12 | | |
| 20 14 15 16 17 18 19 20 | 24 11 12 13 14 15 16 17 | 28 9 10 11 12 13 14 15 | 33 13 14 15 16 17 18 19 | | |
| 21 21 22 23 24 25 26 27 | 25 18 19 20 21 22 23 24 | 29 16 17 18 19 20 21 22 | 34 20 21 22 23 24 25 26 | | |
| 22 28 29 30 <u>31</u> | 26 25 26 27 28 29 <u>30</u> | 30 23 24 25 26 27 28 29 | 35 27 28 29 30 <u>31</u> | | |
| | | 31 30 <u>31</u> | | | |
| ► <u>Sep 2007</u> | Oct 2007 | Nov 2007 | Dec 2007 | | |
| # Mo Tu We ThFr <mark>Sa</mark> Su | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>SaSu</mark> | # Mo Tu We ThFr <mark>Sa</mark> Su | | |
| 35 1 2 | 40 1 2 3 4 5 6 7 | 44 1 2 3 4 | 48 1 2 | | |
| 36 3 4 5 6 7 8 9 | 41 8 9 10 11 12 13 14 | 45 5 6 7 8 9 10 11 | 49 3 4 5 6 7 8 9 | | |
| 37 10 11 12 13 14 15 16 | 42 15 16 17 18 19 20 21 | 46 12 13 14 15 16 17 18 | 50 10 11 12 13 14 15 16 | | |
| 38 17 18 19 20 21 22 23 | 43 22 23 24 25 26 27 28 | 47 19 20 21 22 23 24 25 | 51 17 18 19 20 21 22 23 | | |
| 39 24 25 26 27 28 29 <u>30</u> | 44 29 30 <u>31</u> | 48 26 27 28 29 <u>30</u> | 52 24 25 26 27 28 29 30 | | |
| | | | 1 31 | | |

Customer xDR Reports

The Customer reports screen allows users to easily download all reports that have been defined for a customer. Reports for the desired customer may be found by selecting from the list of existing customers on the left side of the screen, or by entering the customer's name in the search field and clicking the **Search** button. The wildcard symbol "%" may also be used.

| ₿ | v 🖫 💲 i 🗹 | Custom | er reports | () Amer | rica/Vancouver | demo-toor | ? Help |
|---|-------------------------------|--|--|--|-----------------------------|------------------------|--------|
| • | 🛞 Close | | | | | 💵 Logout | |
| | % Search ABC Shuttle Ltd. | Download Options ☑ | xDR Types 💿 | nvoice O Debit | ▶ Apr 2007 | | |
| | Callshop 1 | # Mo Tu We Th Fr Sa Su | # Mo Tu We ThFr Sa Su | # Mo Tu We ThFr Sa Su | # No Tu We TI | ıFr <mark>Sa</mark> Su | |
| | Callshop Owner David Welsh | 1 1 2 3 4 5 6 7 2 8 9 10 11 12 13 14 | 5 1 2 3 4 6 5 6 7 8 9 10 11 | 9 1 2 3 4 10 5 6 7 8 9 10 11 | 13 14 2 3 4 5 | 1 | |
| | EasyCall Ltd. | 3 15 16 17 18 19 20 21 | 7 12 13 14 15 16 17 18 | 11 12 13 14 15 16 17 18 | 15 9 10 11 1 | 2 13 14 15 | |
| | Jason Born | 4 22 23 24 25 26 27 28 | 8 19 20 21 22 23 24 25 | 12 19 20 21 22 23 24 25 | 16 16 17 18 1 | 3 20 21 22 | |
| | John - Prepaid | 5 29 30 <u>31</u> | 9 26 27 <u>28</u> | 13 26 27 28 29 30 <u>31</u> | 17 23 24 25 2 | 5 27 28 29 | |
| | Mary Smith | | | | 18 <u>30</u> | | |
| | Paul Weekes | May 2007 | Jun 2007 | Jul 2007 | Aug 2007 | | |
| | <u>Raj Kumar</u> | #MoTuWeThFr <mark>SaSu</mark> | #MoTuWeThFr <mark>Sa</mark> Su | # Mo Tu We ThFr <mark>Sa Su</mark> | #Mo TuWe TI | | |
| | Shuffle | 18 1 2 3 4 5 6 | 22 1 2 3 | 26 1 | 31 1 3 | | |
| | SmartCall SRL | 19 7 8 9 10 11 12 13 20 14 15 16 17 18 19 20 | 23 4 5 6 7 8 9 10 24 11 12 13 14 15 16 17 | 27 2 3 4 5 6 7 8 28 9 10 11 12 13 14 15 | 32 6 7 8 1 33 13 14 15 1 | | |
| | SmartNet | 20 14 13 16 17 16 15 20 21 21 22 23 24 25 26 27 | 25 18 19 20 21 22 23 24 | 29 16 17 18 19 20 21 22 | 34 20 21 22 2 | | |
| | | 22 28 29 30 31 | 26 25 26 27 28 29 30 | 30 23 24 25 26 27 28 29 | 35 27 28 29 3 | | |
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| | | #MoTuWeThFrSaSu | # Mo Tu We ThFr Sa Su | # Mo Tu We ThFr Sa Su | # Mo Tu We TI | ıFr <mark>Sa</mark> Su | |
| | | 35 1 2 | 40 1 2 3 4 5 6 7 | 44 1 2 3 4 | 48 | 1 2 | |
| | | 36 3 4 5 6 7 8 9 | 41 8 9 10 11 12 13 14 | 45 5 6 7 8 9 10 11 | 49 3 4 5 1 | 6789 | |
| | | 37 10 11 12 13 14 15 16 | 42 15 16 17 18 19 20 21 | 46 12 13 14 15 16 17 18 | 50 10 11 12 13 | | |
| | | 38 17 18 19 20 21 22 23 | 43 22 23 24 25 26 27 28 | 47 19 20 21 22 23 24 25 | 51 17 18 19 2 | | |
| | | 39 24 25 26 27 28 29 <u>30</u> | 44 23 30 <u>31</u> | 48 26 27 28 29 <u>30</u> | 52 24 25 26 2 1 31 | / 26 29 30 | |

Invoices

The Invoices screen allows the administrator to view all invoices generated by the system in the current environment. The desired invoice can be found by its number. Groups of invoices can be searched by selecting a customer and a date range.

| 奋 | | 2 🗈 | \$ | l | 3 | | | | | | Invo | ices | | | | | | | demo-root | |
|---|---|--------|----|---|-----------|-----|--------|------------|---------|------------------------------------|---------------|-------------------|------|-------------|-------------|---------------|------------|------------|-----------|--|
| • | 0 |) Clos | e | | | | | | | | | | | | | | | | M Logout | |
| | | | | | | | | S: | lr C | nvoice N Custome <u>irom</u> | 0. | ABC Sh 2006-0: | utt | R selection | IM-DD | and Date rang | ge | | | |
| | | | | | | | | | | | | Search | | | | | | | | |
| | | | | | View | No. | Cust | tomer | [| Date | Payment Sta | tus Stati | ls R | le-create | Period From | Period To | Due Date | Amount Due | | |
| | | | | | \square | 3 | ABC Sh | nuttle Lto | i. 200 | 6-10-01 | Overdue | | | \$ | 2006-08-31 | 2006-09-29 | 2006-10-01 | 31.49 EUR | | |
| | | | | | \square | 2 | ABC Sh | nuttle Lto | i. 200 | 6-09-01 | Partially Pai | id 🖟 | | \$ | 2006-07-31 | 2006-08-30 | 2006-09-01 | 30.99 EUR | | |
| | | | | | \square | 1 | ABC Sh | nuttle Lto | 1. 200 | 6-08-01 | Paid | ¢ | | \$ | 2006-06-30 | 2006-07-30 | 2006-08-01 | 30.47 EUR | | |

Select the **Preview** icon in the result list to view or print the selected

invoice. The **Closed** icon appears when an invoice has been delivered to the customer and cannot be changed. An invoice is considered delivered when the customer receives an e-mail with the invoice attached, or clicks the View icon in the Invoice section of the Customer Self-Provisioning interface. If the invoice is not locked, it will be automatically updated if the balance changes (re-costing of calls, for example); otherwise, a new invoice with a re-costing adjustment will be generated. You can change the status of an invoice manually by clicking the status icon.

The Re-create icon allows you to recreate an invoice. By clicking this icon you can schedule invoice recreation. This will not affect any changes except the invoice date, due date, layout attributes, customer and/or company info, and PDF file renewal. Invoice recreation is useful when you want to renew an invoice date, or have made some changes to a particular invoice template, or if certain customer or company attributes have been changed.