



PortaSwitch

Customer Care Staff Interface

75

MAINTENANCE
RELEASE

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V1.75.1**

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Preface

This document provides a general overview of the web interface for the PortaSwitch® Customer Care operators.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only, and does not always contain the latest material on enhancements that occur in-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`.



Exclamation mark draws your attention to important actions that must be taken for proper configuration.

NOTE: Notes contain additional information to supplement or accentuate important points in the text.



Timesaver means that you can save time by taking the action described here.



Tips provide information that might help you solve a problem.



Gear points out that this feature must be enabled on the Configuration server.

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Audience

The target audience of this document is Customer Care operators who will be managing your services via the PortaBilling® web interface.

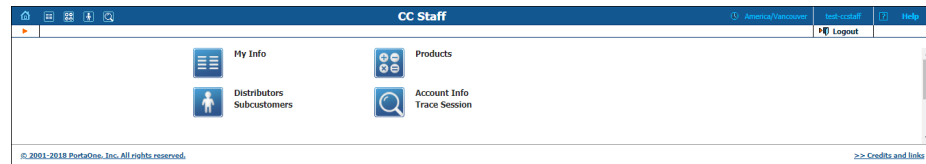
Hardware and software requirements

Client system recommendations

- **OS:** MS Windows XP or above, Linux/BSD, Mac OS X 10.6 or above.
- **Web browser:**
 - Google Chrome 55 or above, Mozilla Firefox 50 or above.
 - JavaScript and cookies must be enabled.
- **Spreadsheet processor:** MS Excel, OpenOffice Calc, LibreOffice Calc, Google Sheets.
- **Display settings:** a minimum screen resolution of 1366 × 768.

1 ■ Introduction

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



The four functional areas are:



Management

Global system maintenance tasks, such as adding administrative users, defining access levels and creating mailing lists, templates and quick forms.



Products

Information related to charging customers for services, such as products and tariffs.



Distributors Subcustomers

Task related to such entities in the system as distributors and subcustomers and accounts.

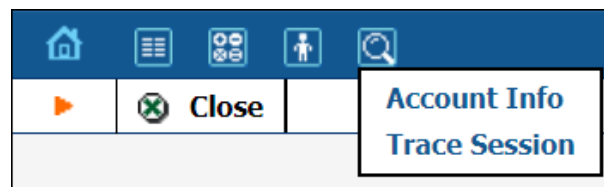


Account Info Trace Session

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

Common features

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

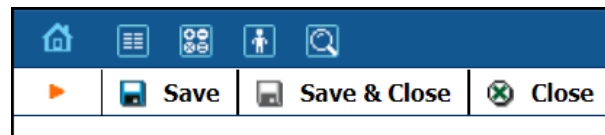


Right top side of the interface provides user with following information:

 America/Vancouver	test-ccstaff	 Help
Limit: 50.00 USD	 Logout	

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

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



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

Sorting tables

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

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

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

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

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.

The screenshot shows the 'Account Info / Retail Customer 'Talos'' form. The 'Account Info' tab is selected in the first row of tabs. The form contains fields for Account Role (Universal), Main Product (Reseller Talos), Account ID (999004010), and a Blocked checkbox. Below these are two rows of tabs: the first row includes Life Cycle, Subscriptions, Notepad, and Service Configuration; the second row includes Account Info (selected), Web Self-Care, Subscriber, and Additional Info. The form also includes Login, Password, Access Level, Time Zone, and Web Interface Language fields. At the bottom, there are sections for Output Format and Input Format, each with Date, Time, and Date & Time options.

When you click 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.

The screenshot shows the same 'Account Info / Retail Customer 'Talos'' form, but with the 'Incoming Calls' tab selected in the second row. The 'Services' section on the left is expanded, showing 'Incoming Calls' selected. The main content area displays settings for 'Incoming Calls', including 'Unified Messaging' (Reset/override), 'Unified Messaging' (Enabled), 'Mailbox Limit, MB' (10), 'Fax-only mode' (No), 'Endpoint Redirection' (Reset/override), 'External voicemail' (Reset/override), 'External voicemail' (Disabled), and 'Access number'.

Date & time format

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

Output Format		
Date	YYYY-MM-DD	2003-12-31 ▼
Time	HH24:MI:SS	User Defined ▼
Date & Time	YYYY-MM-DD HH24:MI:SS	User Defined ▼
Input Format		
Date	YYYY-MM-DD	2003-12-31 ▼
Time	HH24:MI:SS	User Defined ▼

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 PortaBilling® 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
<i>Date</i>		
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-December	Full name of the month
YYYY	2003 +	Year
YY	00-99	Last two digits of the year
<i>Time</i>		
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	
<i>Separators</i>		
A separator can be any symbol 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

2. Web interface

My info

My Info screen allows you to edit personal information and view some details of your account.

Address info

Here you can set most of the commonly required contact information.

Mandatory field for user contact information:

Field	Description
Email	An email contact for this user.



Enter your mobile number in the **Alt. Phone** field to receive SMS notifications.

Web self-care

Field	Description
Login	The user ID that is used at login and elsewhere throughout the system.
Password	The password for this login to access the interface. A secure and easy-to-remember password may be automatically generated by pressing the “Auto” button.
Time Zone	The time zone in which this user will be operating.

Web Interface Language	The language to be used on the web interface 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.

Field	Description
Activation Date	Date when the account is activated.
Expiration Date	Date when this account expires. If this field left empty the account never expires.

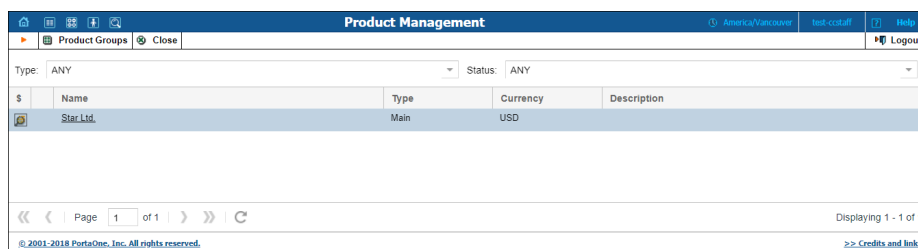
Limits

Field	Description
Daily credit/refund limit	Maximum refund per day.
Transaction credit/refund limit	Maximum refund per one transaction.


Products

A product is a combination of services that is provided to a customer for a price. It defines additional billing properties such as maintenance fees

and the amount of credit required for a given account to be usable. The most common use of Products is for defining prepaid calling card plans.



From the Product Management screen, the user may view the list of all registered products. The list provides the following information:

Column	Description
Rate Lookup	Click the  icon to enter the Rate Lookup interface using which you can easily view rate information for a tariff(s) of a particular product.
Name	The logical designation of the product.
Type	<p>The product type can be the following:</p> <ul style="list-style-type: none"> • Main Product – A basic product that assigns all the basic services that are available to your customers. • Add-on Product with precedence level – An additional product by which you can increase or limit the services provided to your customers. <p>Add-on products have precedence over the main product, so no matter what is defined within the main product, it will be overridden by settings defined within add-on products (this applies only to the options that are supplied with add-on products).</p> <p>In order to differentiate the add-on products there is also a “precedence level” parameter for each add-on product. If there are more than one add-on products assigned to an account they will be sorted according to the specified precedence level.</p>
Currency	The currency in which the product is maintained.
Description	Product description.

Rate lookup

Having entered the Product Rate Lookup page use search filters to display (a) specific rate(s):

Product Management

Type: ANY Status: ANY

Name	Type	Currency	Description
Star Ltd.	Main	USD	

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Displaying 1 - 1 of 1

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>> Credits and links

Product 'Star Ltd.' Rate Lookup

Tariff: A11 Destination: Country: Description: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Product 'Star Ltd.' Rate Lookup

Tariff	Destination	Country	Description	Interval, sec	Price, USD/min	Features	Tariff
A11	1212	United States of America	New York New York	1 1	0.3 USD 0.3 USD	Reseller	
VOICEONNET	Not Applicable	Not Applicable	Calls between IP phones	1 1	0 USD 0 USD	Reseller	

In addition to the mandatory rate information (e.g. Destination, Country, Interval and Price) there may also be icons that indicate features which have been applied to the rate, such as Maintenance Fee, Surcharges, Payback Rate and Call Rate Formula (this indicates if the rate uses a call rating formula). To get more information click the  icon.

Subcustomers



On the Customer Management screen, you can view a list of all registered customers.










Subcustomer Management


Limit: 50.00 USD

Customer Class: ANY Search: Advanced Search


xDRs	ID	Accounts	Currency	Balance Control	Available Funds	Balance	Credit Limit	Email	Status	Delete
	David Welsh		USD	Postpaid	-	0.00000	100.00000	david.welsh@example.com		
	John Dust		USD	Prepaid	100.00000	-		john.dust@example.com		

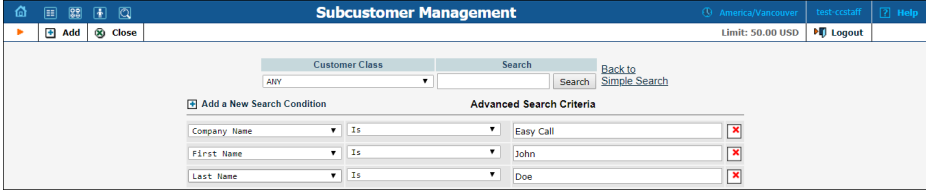
Column	Description
xDRs	Click the View  icon to go to the xDR view page.
ID	The customer's identification name.
Accounts	Click the Accounts  icon to go to the Account

	Management screen (for retail customers). If there are no accounts under the customer, the icon changes accordingly to  , so that you can easily see this.
Currency	The currency in which the customer's account is maintained and billed.
Balance Control	The subcustomer category: either prepaid or postpaid, depending on the way their balance is controlled.
Available Funds	The amount of available funds to spend on services – is only shown for prepaid subcustomers.
Balance	The customer's current balance.
Credit Limit	The credit limit applicable to the customer's account (if any).
Email	Email contact for this customer.
Status	<p>A customer may have the following statuses:</p> <ul style="list-style-type: none"> •  Permanently terminated – The customer has been closed and is only in the database for informational / regulatory purposes. No further operations are possible with this entity. •  Blocked – The customer has been blocked by the administrator; no call services are provided until the administrator removes the block. •  Suspended – Services for this customer have been suspended because of an overdue invoice. •  Provisionally Terminated – Once a customer is provisionally terminated, all services are terminated. There still exists the option to reactivate the services that were disconnected if the customer changes their mind. •  Credit Exceeded – This indicates that the postpaid customer's balance is above his credit limit, so he will not be allowed to make outgoing calls unless they are free calls (e.g. toll-free numbers). •  No Available Funds – This status is only for prepaid customers. When a customer's funds reach zero value, services are no longer available. •  Suspension Lifted – This indicates that the customer's suspension has been lifted (the 'as of' date is specified on the Change status button). •  Payment Frozen – This indicates that the

	<p>customer's payment has been suspended due to repeated errors (e.g. credit card cancellation).</p> <ul style="list-style-type: none"> 🚫 Spending Limit Reached – This indicates that the customer's daily spending limit has been reached.
Delete	<p>Click the  Delete icon to remove the customer. The delete icon appears only if there are no xDRs, accounts owned by the customer, other entities (products, tariffs, etc.) managed by the customer or the customer does not participate in bilateral traffic exchange with a vendor.</p>

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.



The screenshot shows the 'Subcustomer Management' web interface. At the top, there's a navigation bar with icons and a search bar. Below it, there's a section for 'Advanced Search Criteria'. This section includes a table with three rows of search conditions:

Field	Operator	Value
Company Name	Is	Easy Call
First Name	Is	John
Last Name	Is	Doe

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).
Ends with	The value of this customer information field must end with the specified value (e.g. if you enter the filter value "smith", customers with the last names "Smith" and "Hammersmith" 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 criterion 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.

Edit Customer

This page allows you to change details for a particular customer.

The screenshot shows the 'Edit Subcustomer' page for 'David Welsh'. At the top, there's a navigation bar with 'Save', 'Save & Close', 'Close', 'xDRs', and 'Accounts' buttons. The 'Accounts' tab is active, showing 'Customer ID: David Welsh', 'Customer Class: Easy Call reseller', 'Balance Control: Postpaid', 'Balance: 0.00000 USD', and 'Current Credit Limit: 100.00 USD'. Below this, there are tabs for 'Life Cycle', 'Invoices & Taxation', 'Abbreviated Dialing', 'Subscriptions', 'Notepad', 'Service Configuration', and 'Measured Services'. The 'Address Info' tab is selected, displaying fields for 'Company Name' (Welsh Telecom), 'Contact', 'Phone', 'Fax', 'Alt. Phone', 'Alt. Contact', 'Email' (welsh.telecom@example.com), 'BCC', and 'Description'. The 'Address Info' section also includes 'Country' (United States of America), 'Address Line 1' (Suite 408, 2963 Glen Drive), 'Address Line 2', 'City' (Coquitlam), 'Province/State' (Not set), and 'Postal Code' (V3B 2P7).


Field	Description
Customer ID	Defines the customer name as it will appear in the PortaBilling® system. This is distinct from the Company Name field in the Address Info tab.
Customer Class	The Customer Class assigned to this customer. In order to change any parameters of the particular Customer Class, click on the link “Customer Class”. When editing the Customer, the field Customer Class will only contain classes with the <i>same</i> currency, or classes with no defined currency.
Balance Control	The customer category: either prepaid (a customer who pays for services in advance) or postpaid.
Available Funds (only for prepaid customers)	The balance for prepaid customers. While consuming the service, the amount of available funds decreases. When it reaches zero value, no more services can be used.

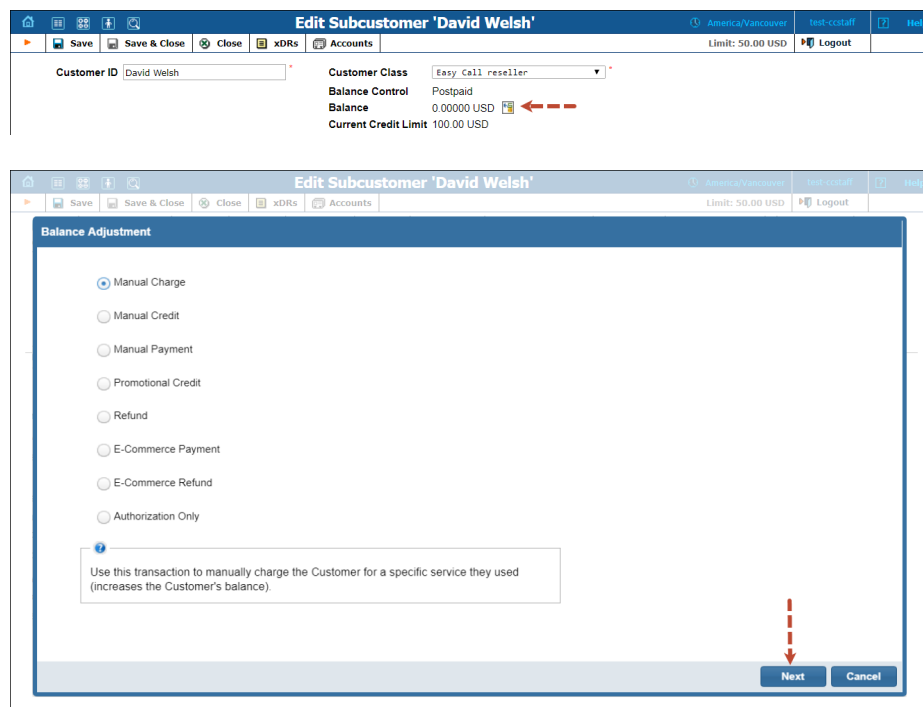
Balance (only for postpaid customers)	The customer's current balance
Current Credit Limit (only for postpaid customers)	The credit limit value defined for a customer during creation.

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 email sent to the customer by entering his email address in the **BCC** field.

Balance adjustments

The **Balance Adjustments**  wizard allows you to correct a customer's balance:



The screenshot displays the 'Edit Subcustomer' interface for 'David Welsh'. The top navigation bar includes 'Save', 'Save & Close', 'Close', 'xDRs', and 'Accounts'. The 'Accounts' tab is active, showing a 'Limit: 50.00 USD' and a 'Logout' button. The main content area shows customer details: 'Customer ID: David Welsh', 'Customer Class: Easy Call reseller', 'Balance Control: Postpaid', 'Balance: 0.00000 USD', and 'Current Credit Limit: 100.00 USD'. A red dashed arrow points to the 'Balance' field.

The 'Balance Adjustment' wizard is open, showing a list of options with radio buttons: 'Manual Charge' (selected), 'Manual Credit', 'Manual Payment', 'Promotional Credit', 'Refund', 'E-Commerce Payment', 'E-Commerce Refund', and 'Authorization Only'. A blue information icon is next to the 'Manual Charge' option. Below the list, a text box explains: 'Use this transaction to manually charge the Customer for a specific service they used (increases the Customer's balance)'. At the bottom right, there are 'Next' and 'Cancel' buttons, with a red dashed arrow pointing to the 'Next' button.

Balance Adjustment

Action: Manual charge

Amount: 10 USD

Service: Credits / Adjustments

Date: 2018-12-13

Visible Comment: Manual charge

Internal Comment: IP phone

Back Done Cancel

Field	Description
Action	<p>Manual Charge: Use this transaction to manually charge a customer for a specific service they used; 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.</p> <p>Manual Credit: Use this transaction to manually give compensation related to a specific service; 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.</p> <p>Manual Payment: Use this transaction when you receive a payment (e.g. cash or check) directly from the customer. This means the balance will be changed so that the customer is able to make more calls.</p> <p>Promotional Credit: Use this transaction to give the customer credit, for example, as a sales promotion. The difference between this and the “Manual Credit” transaction is that this transaction applies to a special “Credits / Promotions” service, and not to any actual service. Basically, it provides some “virtual” funds to the customer for future use.</p> <p>Refund: Use this transaction to refund an earlier payment received from the customer (e.g. a check returned by the bank). This means the balance will be changed so that the customer is able to make fewer calls.</p> <p>E-Commerce Payment: Use this transaction to</p>

	<p>charge the customer's credit card and apply the amount to the customer's balance as payment.</p> <p>E-Commerce Refund: Use this transaction to reverse a previous E-commerce payment. It withdraws funds from your company's merchant account and applies them as credit to the user's credit card. The amount is added to the user's account balance.</p> <p>Authorization Only: Verifies that the customer's credit card is valid and reserves a given amount. Returns a transaction ID to be used in a Capture Payment transaction. This does not affect the user's account balance in PortaBilling® or his credit card balance. Note: the transaction ID will be written to the customer's Notepad entry.</p> <p>Capture Payment: Charges the customer's credit card and applies the amount to his balance as a payment (decreases the customer's balance). Requires a transaction ID from the Authorization Only transaction. The amount must be less than or equal to the amount of the corresponding Authorization Only transaction.</p>
Amount	Amount to charge / refund.
Service <i>(only for Manual charge and Manual credit)</i>	A service for which the manual charge / credit is made. The charged / credited amount will be included in the selected service section on the next invoice.
Tax Transaction Code <i>(only for Manual charge and Manual credit)</i>	<p>An internal code by which taxes are calculated for this transaction. This code is mapped to the taxation codes of EZTax®, Avalara, GST or SureTax taxation plug-ins as defined in PortaBilling®.</p> <p>The Tax Transaction Code field is only available for Manual charge and Manual credit transactions.</p>
Date <i>(only for Manual charge and Manual credit)</i>	<p>A date associated with the manual charge / credit. For example, you can specify a date for manual credit action for when an item is credited.</p> <p>Note that if the selected date falls within a previous (closed) billing period the transaction will be included in the next invoice.</p>
Include into	This allows you to include transactions on an out-

Out-Of-Turn Invoice <i>(only for Manual charge and Manual credit transactions)</i>	<p>of-turn invoice to be issued on demand. You should then generate the invoice with the requisite transactions on the Out-Of-Turn Invoice page. For example, if the end user visits your office to buy a new IP phone, your clerk will locate the account, issue an invoice covering the cost of the phone, take the money for the phone and give the phone and the invoice to the end user.</p> <p>Transactions included in an out-of-turn invoice that was <i>generated</i> on the Out-Of-Turn Invoice page won't be reflected on the regular invoice issued at the end of the billing period.</p>
Transaction ID <i>(only for E-Commerce Refund and Capture Payment)</i>	The transaction ID obtained via the <i>Authorization Only</i> transaction. This is required to use the reserved earlier amount for a current transaction.
Visible Comment	A comment on this transaction visible to the administrator as well as the customer, in the xDR browser or on the invoice.
Internal Comment	An internal comment on this transaction; not visible in the xDR browser, and accessible only from the database directly.

Additional info

The screenshot shows the 'Edit Subcustomer' page for 'David Welsh'. The 'Additional Info' tab is selected, showing configuration options for alias authentication and registration. Fields include 'Use system configuration (Enabled)', 'Distributor' (Not Defined), 'Representative' (Not Defined), and 'Use Hierarchy of Offices' (unchecked). Other tabs visible include Life Cycle, Invoices & Taxation, Abbreviated Dialing, Subscriptions, Notepad, Service Configuration, and Measured Services.

Field	Description
Alias authentication/registration defaults	<p>This defines whether an alias can be used independently for making and receiving calls.</p> <ul style="list-style-type: none"> • Use system configuration (Enabled) – This is the default value. It allows to use an alias for making and receiving calls. The alias inherits the configuration of the main account and uses its balance, products and other parameters for all further operations. • Enabled alias authentication/registration - This means a user can register an alias ID and use that number for making and receiving calls. The

	<p>alias inherits the configuration of the main account. When a user makes a call via an alias, funds are drawn from the main account.</p> <ul style="list-style-type: none"> • Disabled alias authentication/registration - This means that incoming calls to the alias will be forwarded to the main account. Once disabled, a user cannot register an alias to make outgoing calls.
Bundle Promotion	Bundle promotion to be applied to this customer.
Discount Plan	Volume discount plan to be applied to this customer.
Subscription Discount Rate	Amount of discount applied by default to all subscriptions of this customer (assigned either directly to a customer or to one of his accounts).
Suspend on insufficient funds for subscriptions	<p>This option allows you to suspend a customer when their balance or available funds are insufficient to cover subscription charges of subscriptions assigned to them directly.</p> <ul style="list-style-type: none"> • As defined by the Customer Class – Option configured for the customer class is used. • Yes – Customers who have insufficient available funds are automatically suspended. When they are suspended, they no longer receive the service and therefore no subscription charges are generated. As soon as funds become available, the service is resumed and new charges are generated. • No – The full amount of subscription will be charged and the balance of the customer will exceed the credit limit or the amount of available funds (in this case the negative value will appear).
Distributor	Assigns a distributor to this customer if any.
Representative	Assigns a representative to this customer if any.
Use Hierarchy of Offices	<p>This defines two types of customers:</p> <ul style="list-style-type: none"> • Main Office (HQ) customers. • Branch Office (site) customers. <p>Main Office (HQ) and Branch Office (site) customers are linked together into a group.</p>

Balance & credits

Edit Subcustomer 'David Welsh' America/Vancouver test-cs@t Help

Save Save & Close Close xDRs Accounts Limit: 50.00 USD Logout

Customer ID: David Welsh Customer Class: Easy Call reseller

Balance Control: Postpaid
Balance: 10.00000 USD
Current Credit Limit: 100.00 USD

Life Cycle Invoices & Taxation Abbreviated Dialing Subscriptions Notepad Service Configuration Measured Services

Address Info Web Self-Care Additional Info Balance & Credits

Permanent Credit Limit: 100.00000 USD
Temporary Credit Limit Increase: 10 USD
Valid Until: 2018-12-27 YYYY-MM-DD 00:00:00 HH24:MI:SS

Unallocated Payments: 0.00000 USD
Credit Limit Warning Threshold(s): 5 USD
Credit Limit History: show
Subscriber-to-Subscriber transfers allowed: No (As defined by the Customer)

Field	Description
Permanent Credit Limit	The credit limit value defined for a customer during creation.
Temporary Credit Limit Increase (only for postpaid customers)	Here you can temporarily increase a customer's credit limit (the value should be defined either as an amount or as a percentage of a positive Permanent Credit Limit value). This shows a temporary increase of the customer's credit limit.
Valid Until (only for postpaid customers)	Specify the date and time for when an increased credit limit value will automatically be reverted to a permanent state. NOTE: The values for the Temporary Credit Limit and Valid Until cannot be higher than the values provided in the Maximum possible increase prompt.
Low Funds/ Credit Limit Warning Threshold(s)	<p>If a warning threshold is defined for a customer balance and the customer balance reaches this value, a notification is sent to the customer.</p> <p>Depending on the customer balance model, warning thresholds are known as:</p> <ul style="list-style-type: none"> Credit Limit Warning Threshold for postpaid customers. Low Funds Warning Threshold for prepaid customers. <p>For <i>postpaid</i> customers the balance warning threshold is defined either as an amount or a percentage of a positive Permanent Credit Limit value. For <i>prepaid</i> customers, balance warning thresholds are defined only as an amount of an Available Funds value.</p> <p>To send customers multiple notifications, define several balance warning thresholds as comma-separated values.</p>

Unallocated Payments	<p>Unallocated payments show that the customer “overpaid” you sometime in the past, and are used to correct the paid/unpaid status of future invoices.</p> <p>NOTE: Unallocated payments do not represent a “cash reserve.” When a payment is made, the amount is immediately applied to the customer’s balance.</p>
Credit Limit History	This shows changes made to the customer’s credit limit (e.g. increases, decreases, temporary increases, etc.). Available only for postpaid customers.
Subscriber-to-Subscriber transfers allowed	<p>This allows end users to transfer funds among accounts (only debit accounts can transfer and receive funds).</p> <ul style="list-style-type: none"> • As defined by the customer class – The option configured for the customer class is used. • Yes – Debit accounts that have sufficient available funds are able to transfer funds. • No – Debit accounts are not allowed to transfer available funds.

Web self-care

Edit Subcustomer 'David Welsh'

Customer ID: David Welsh Customer Class: Easy Call reseller

Balance Control: Postpaid Balance: 10.00000 USD Current Credit Limit: 110.00 USD

Limit: 50.00 USD Logout

Life Cycle Invoices & Taxation Abbreviated Dialing Subscriptions Notepad Service Configuration Measured Services

Address Info Web Self-Care Additional Info Balance & Credits

Login: david_welsh Time Zone: The same as billing time zone

Password: Password field with Auto button Web Interface Language: en - English

Access Level: Retail

Output Format

Date: YYYY-MM-DD 2003-12-31

Time: HH24:MI:SS User Defined

Date & Time: YYYY-MM-DD HH24:MI:SS User Defined

Input Format

Date: YYYY-MM-DD 2003-12-31

Time: HH24:MI:SS User Defined

Login	Customer login for his web Self-care interface.
Password	Web Self-care interface password for the customer. An easy-to-remember yet secure password may be generated automatically by clicking the Auto button.
Access Level	Access level assigned to the customer.
Time Zone	Time zone for the customer web Self-care interface.

Web Interface Language	Displays the customer Self-care interface in a particular language.
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Date & Time Format

PortaBilling® allows defining 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 customer self-care interface, on invoices, and so on (see the screenshot below).

See the [Date & Time format](#) section for examples of date and time format usage.

Service configuration

Using this tab, you can activate / deactivate various features of the services provided. Note that features are defined per *service type* (the physical service provided to the user) rather than per *service* (the name used in the billing configuration and “visible” to the end 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.

The screenshot shows the 'Edit Subcustomer' page for 'David Welsh'. The 'Service Configuration' tab is selected. On the left, a 'Services' tree shows 'Voice Calls' as the active service. The main area displays configuration for 'Voice Calls':



- RTP Proxy:** Set to 'Use Default'.
- Music on Hold:** Set to 'Enabled'.
- File:** Set to 'No Frills Cumbia (c) 2001 Kevin MacLeod. Latin'.
- Legal Intercept:** Unchecked.
- CLI Trust:**
 - Accept Caller Identity: None
 - Supply Caller Identity: No
- First Login Greeting:** Unchecked.

The **Services** links on the left allow you to specify for which service type you would like to define parameters.

Parameters for the Voice Calls service type

Field	Description
	The <i>Voice Calls</i> service type
Legal Intercept	Intercepts all incoming and outgoing calls of this customer for law enforcement purposes.
First Login Greeting	When a new account (phone number) in this IP 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.
Music On Hold	Defines the music on hold to be used with the IP Centrex environment. Choose None to disable this 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.
Call Parking	<p>Enables call parking for this customer's IP Centrex.</p> <ul style="list-style-type: none"> • Park Prefix – The end user can dial this access code to park a call. The default value is *70. • Release Prefix – The end user can dial this access code to retrieve a call from the parked status. The default value is *71. <p>These access codes are available only if call parking is enabled for the customer.</p>
RTP Proxy	<p>This specifies the RTP proxy policy for this customer.</p> <ul style="list-style-type: none"> • Use Default – This uses Optimal RTP proxy.
CLI Trust	
Accept Caller Identity	<ul style="list-style-type: none"> • Favor forwarder – Use the redirector-provided ID for caller identification. • Caller only – Use the caller-provided ID for caller identification. • None – Do not accept caller-provided ID for caller identification.
Supply Caller Identity	<ul style="list-style-type: none"> • Yes – accept the remote network and maintain caller ID on outgoing headers (even for private calls). • No – do not accept the remote network and strip any private caller's ID.

Limit simultaneous calls	
Limit Simultaneous Calls	<p>Engage real-time checks of the number of concurrent calls made by this customer's accounts. When the specified number of concurrent calls has already been established (calls are in a "connected" state) and the account tries to place another call, that call will be rejected.</p> <p>NOTE: To enable the Limit Simultaneous Calls feature, activate the send_start_acct option for the corresponding PortaSIP instances on the Configuration Server. To increase the features accuracy, activate the allow_reauth option too. Note that these features may slightly increase the load on the billing engine.</p>
Count	<ul style="list-style-type: none"> • All calls – Choose this option to allow a specific number of concurrent calls (both internal and external). • Off-centrex calls only – Choose this option to allow only a specific number of external concurrent calls. Once this specified number of simultaneous calls is established and an end user attempts to place another call, that call is rejected. This limitation applies to external calls only. IP Centrex users can call each other as much as they need.
Codec connectivity profile	Select a suitable codec connectivity profile that will be used for bandwidth allocation calculation. Every new call's allocated bandwidth is calculated by considering a negotiated codec and its parameters to enable full use of the available bandwidth and block new calls if no more bandwidth is available.
Max bandwidth	<p>This allows you to configure the bandwidth utilization limitation to ensure that only an acceptable number of calls are allowed, in order to avoid severe degradation of the sound quality on calls in progress.</p> <p>The system plays a 'limit reached' warning when allocated bandwidth is used up.</p> <p>NOTE: Playing warning prompts requires an additional 8 Kbps of bandwidth. Therefore, set aside a certain amount of bandwidth (about 8 Kbps) when you define the bandwidth limit.</p> <p>Note that only external calls are scrutinized during</p>

	<p>bandwidth consumption calculation.</p> <ul style="list-style-type: none"> • Max incoming bandwidth – This allows you to configure the bandwidth utilization limitation for incoming calls. • Max outgoing bandwidth – This allows you to configure the bandwidth utilization limitation for outgoing calls.
The <i>Dialing Rules</i> section	
Dialing Rules	This permits you to enable / disable the dialing rules.
Dialing Format	<ul style="list-style-type: none"> • Select one of the existent dialing rule formats. Click the  Wizard icon to review the selected dialing rule. • Select Custom Dialing Rule if you want to create personalized dialing settings for a customer. Then click the  Wizard icon to open the Dialing Rule Wizard.
Translate CLI on outgoing calls	This permits you to translate the CLI number in outgoing calls based on the selected dialing format.
Translate CLI on incoming calls	This permits you to translate the CLI number in incoming calls based on the selected dialing format.
The <i>Fraud Detection</i> section	
Location Information	<p>In this section you can set the country that the end user is currently in or usually resides in (and thus this country will be treated as ‘safe’ when the system checks for fraudulent activity) and whether the end user is allowed to make calls from abroad.</p> <ul style="list-style-type: none"> • Enabled – Select this option to provide information about the end user’s current ‘default’ country and whether they are permitted to make calls from abroad. • Disabled – Select this option if such information must not be provided. In this case, fraud detection, if enabled, is based solely on the geo / risk profile settings.

Allowed Mobility	<p>This option is available only when Location Information is set to Enabled. Specify whether the end user is permitted to make calls from abroad.</p> <ul style="list-style-type: none"> • Stationary User (Permanent Location) – Select this option for residential users who may only make calls from a single country. These end users are not authorized to make calls from countries other than their default one, and outgoing calls made from other countries will be screened. • Roaming User (Changeable Location) – Select this option for users who frequently travel to different countries. In this case, the call will be screened if it <i>does not meet</i> one of the following conditions: <ul style="list-style-type: none"> • The call is made from the end user's default country. • The call is made from countries in the No Restrictions section in the geo / risk profile specified in the end user's product. • The call is made from countries in the Suspicious section of the geo / risk profile, but the number of calls does not exceed the value permitted (also specified in the geo / risk profile).
Current Location	<p>This option is available only when Location Information is set to Enabled. Select the country from the list.</p>
The <i>Outgoing Calls</i> section	
Override Identity	<p>Here you can set options that an end user may use for an identity. If an end user applies an identity that does not belong among the options permitted, it will be replaced with an identity provided by an administrator. PortaBilling® provides several options for overriding identity information:</p> <ul style="list-style-type: none"> • Never – The caller's identity information supplied by the remote party will neither be screened nor overridden. This implies that the remote party is trusted and takes full responsibility for the supplied display number and display name • If Different From Account ID And Aliases – The identity will be overridden if it differs from the ID of the account that is authorized for the call and any of the aliases assigned to this account

	<ul style="list-style-type: none"> • If Different From All Customer Accounts – The identity will be overridden if it doesn't match an account ID (or account alias) of any account belonging to this customer • If Different From All Accounts In The Specified Batch – An end user may only specify an identity (account ID or account alias) that belongs to his account's batch. If a specified identity does not belong to that batch, it will be replaced with an identity provided by an administrator. • If Different From All Accounts in the Specified Huntgroup – An end user may only specify an identity (account ID or account alias) that belongs to his account's huntgroup. If a specified identity does not belong to the huntgroup, it will be replaced with an identity provided by an administrator. • If Different From All Accounts in the Specified Site – An end user may only specify an identity (account ID or account alias) that belongs to his account's site. If a specified identity does not belong to that site, it will be replaced with an identity provided by an administrator. • Always – The identity value supplied by the remote party will always be overridden. This allows you to manually specify the display number and / or the display name for an account.
Batch	This allows you to specify the batch (this field is only available when If Different From All Accounts In The Specified Batch has been selected).
Huntgroup	This allows you to specify a huntgroup (this field is only available when If Different From All Accounts In The Specified Huntgroup is selected).
Site	This allows you to specify a site (this field is only available when If Different From All Accounts In The Specified Site is selected).
Identity	Here you can specify a default value that will replace the account identity (or display number) when the identity used for the call in the RPID / PAI headers (or From header) is invalid. If not specified, the account ID will be used instead.

Override Display Number	<p>This allows you to control the “Caller number” value that will be placed in the <code>From:</code> header and typically displayed on the called party’s phone display. The possible values are:</p> <ul style="list-style-type: none"> • Never – The display number supplied by the remote party is not restricted and therefore will not be modified. This allows the remote IP phone or IP PBX to supply any CLI / ANI number. • If Ruled Out By The Identity Constraint – The validity of a display number supplied by a remote party is verified according to a rule set for identity. For example, when the <i>If Different From Account ID And Aliases</i> option is selected in the Override Identity list, and the display number supplied by the remote party doesn’t match the ID of the account that is authorized for the call or any of the aliases assigned to this account, the display number will be overridden. • If Different From The Used Identity – The display number supplied by the remote party (in the <code>From:</code> header) will be overridden if it is different from the used (already checked and / or overridden according to the Override Identity constraint) caller identity. • Always – The display number supplied by the remote party will always be overridden. This allows you to manually specify the display number for an account.
Override Display Name	<p>This allows you to override the caller name used by the calling account. The possible values are:</p> <ul style="list-style-type: none"> • Never – The display name supplied by the remote party is not restricted therefore it will not be modified. This allows the remote IP phone or IP PBX to supply any display name • Always – The display name supplied by the remote party will always be overridden
Paging / Intercom	

Paging / Intercom	<p>This allows you to enable the intercom feature for accounts under this customer.</p> <p>An end user can dial a special service code before a phone number to establish an intercom connection (two-way communication using phone's loudspeakers) with a colleague (within the same IP Centrex).</p>
<i>The Incoming Calls section</i>	
Endpoint Redirection	This allows the end user to configure call redirection on their SIP phones (if this feature is supported by the SIP phone).
Ext-to-Ext Call Distinctive Ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
Sip Contact	
Sip Contact	Enable this feature to define the way a SIP device will perform SIP registration to PortaSwitch®.
Deliver Incoming Calls To	Define whether the IP PBX address for delivering incoming calls is taken from the IP PBX registration account or specified directly in the Static Address field.
Account	<p>This shows the customer's IP PBX registration account.</p> <p>This option is usually selected if a customer's IP PBX is located at a dynamic IP address and can register only the main phone line (provisioned as the registration account in PortaBilling®) on the PortaSIP® server.</p>

Static Address	<p>Enable this feature if the customer's IP PBX can't perform SIP registration to PortaSwitch®.</p> <ul style="list-style-type: none"> • Use Original CLD – Specify the destination number that calls will be routed to. If left blank, the number originally dialed will be used as the destination number. • Host – This contains the destination host the calls will be routed to. A customer's IP PBX can be identified with one of the following options: <ul style="list-style-type: none"> ○ A valid IP address (four numbers separated by points, e.g. 12.34.56.78). ○ A valid domain name (e.g. pbx.example.com). ○ A valid domain name with configured DNS SVR records. In this case, PortaSIP® will round-robin through them.
Transport	Select the transport protocol (either TCP or UDP) that is used to deliver incoming calls.
User-managed SIP addresses	
User-managed SIP addresses	<p>Define to which external SIP proxies the customer can forward calls using the SIP URI forward feature.</p> <p>Addresses – Type IP addresses or hostnames of external SIP proxies here. Use one of the following formats:</p> <ul style="list-style-type: none"> • IP address • IP address:port • hostname • hostname:port <p>A user-managed SIP address must be unique. Its value length should not be greater than the allowed maximum (255).</p>
Group Pickup	

Group Pickup	<p>The Group Pickup feature enables members of the same huntgroup to answer each other's calls by dialing a Group Pickup Prefix.</p> <p>To fine-tune a group pickup functionality, a customer can organize IP Centrex extensions into pickup groups. Pickup groups are based on huntgroups, i.e. huntgroup A with number 2000 can serve as primary pickup group for its extensions 123 and 456. At the same time extension 123 can also belong to huntgroup B with number 9999.</p> <p>In this example, extension 123 has the following pickup options:</p> <ul style="list-style-type: none"> • To pick up an incoming call to huntgroup A (its primary pickup group) by dialing only *40; • To pick up an incoming call to extension 456 by dialing *40456 (both extensions belong to the same huntgroup and have it as their primary pickup group); • To pick up an incoming call to huntgroup B by dialing *409999 (since extension 123 also belongs to this huntgroup). <p>Note that group pickup must be enabled for the particular huntgroup as well.</p> <p>In case no primary pickup groups are defined within the IP Centrex (e.g. a small company with only several staff members) any extension can pick up incoming calls of others by dialing only the pickup prefix.</p>
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Abbreviated dialing


Here you can define a list of phone extensions for customer's 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 PortaSIP® 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 abbreviated numbers, first type the maximum number of digits that a short number must consist of into the **Maximum Abbreviated Number Length** field and click **Save** on the toolbar.

For example, if you save '3' in the **Maximum Abbreviated Number Length** field, you will be able to use abbreviated numbers like 1, 2, 34, 145, 999, etc.

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.

Subscriptions

This tab displays the subscription plans currently applied to this customer.

Edit Subcustomer 'David Welsh'

Customer ID: David Welsh

Customer Class: Easy Call reseller

Balance Control: Postpaid

Balance: 10.00000 USD

Current Credit Limit: 110.00 USD

Limit: 50.00 USD

Logout

Life Cycle | Invoices & Taxation | Abbreviated Dialing | **Subscriptions** | Notepad | Service Configuration | Measured Services

Address Info | Web Self-Care | Additional Info | Balance & Credits

Edit	Products/Subscriptions	Monthly Fee, USD	Discount Rate, %	Activation Date YYYY-MM-DD	Finish Date YYYY-MM-DD	Billed To YYYY-MM-DD	Subscription Plan Name visible to End User	Close	Delete
	Equipment rental	10 USD					Equipment rental		

Pending Subscriptions

Active Subscriptions

Closed Subscriptions

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). While a subscription is in pending status, it can be deleted.
- **Active Subscriptions** displays currently activated (and billed) subscription plans.
- **Closed Subscriptions** displays subscriptions which have already been closed.

Field	Description
Product/Subscriptions	The subscription plan name. Click this link to open the corresponding subscription plan.
Monthly Fee (for subscriptions charged progressively)	<ul style="list-style-type: none"> For subscriptions with prepaid plans: Shows the fee for the current prepay period and the period duration. For subscriptions without prepaid plans: Shows the subscription fee for the current billing period.
Discount Rate, %	Enter a discount rate for this subscription. If you leave this field empty, it means that the discount rate defined in the customer information should be applied. If you 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).
Discount Rate, %	Enter a discount rate for this subscription. If you leave this field empty, it means that the discount rate defined in the customer information should be applied. If you 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 Date	(Read-only) Displays the date when the subscription was 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.
Subscription Plan Name Visible to End User	The subscription plan name as the end user will see it on the invoice.
Close	Allows you to close one of the optional subscriptions.

Life cycle

Edit Subcustomer 'David Welsh'

Customer ID: David Welsh

Customer Class: Easy Call reseller

Balance Control: Postpaid

Balance: 10 00000 USD

Current Credit Limit: 110 00 USD

Life Cycle | Invoices & Taxation | Abbreviated Dialling | Subscriptions | Notepad | Service Configuration | Measured Services

Address Info | Web Self-Care | Additional Info | Balance & Credits

Current Billing Time Zone: Europe/Prague (Change)

Current Billing Period: monthly (Change)

Next Billing Date: 2018-12-31

Status History

Created: 2018-11-27 00:43:19

Field	Description
Current Billing Time Zone	Time zone in which customer's billing period will be closed and invoices will be generated.
Current Billing Period	Defines the frequency of invoicing for this customer.
Next Billing Date	Read-only field; displays the date when the customer's current billing will be closed (and invoice and statistics generated).
Status History	Read-only field; allows you to track important events in a customer's lifecycle, such as when the customer was created, blocked / unblocked or provisionally terminated / opened.

Invoices & taxation

On this tab you can define the following:

- How to tax the customer for provided services.
- Whether to send statistics and invoices by email.
- What invoice template to use and how to enumerate the invoices.

Field	Description
Tax ID	Customer's tax ID.
Taxation Plugin	<ul style="list-style-type: none"> • No Taxation – Select this option if the customer is exempt from taxation. • Avalara – Select this method to use the Avalara plug-in. Avalara – one of the largest tax calculation companies in the USA. Tax calculation via Avalara is done using the XML API. Your taxation configuration is stored within Avalara and all taxes are calculated by the Avalara middleware. • EZtax (US, Canada) – The former version of the Avalara plug-in. Select this method to use the EZtax plug-in. Available for backward compatibility. due to the simplified management of the Avalara updates, it is recommended that you switch to Avalara taxation. • SureTax (US, Canada) – Select this method to tax voice call services and subscriptions in the US and Canada. SureTax is another taxation system that allows you to accurately and easily calculate taxes for your US and Canadian customers. • Fixed VAT Rate – Select this method when you need to specify a certain percentage of value-added tax. • Custom taxation – This taxation plug-in is similar to VAT, but allows you to specify more than one tax and rate. <p>NOTE: This option is only visible if at least one custom tax is defined on the Custom Taxes page.</p> <ul style="list-style-type: none"> • GST (Malaysia) – This plug-in handles the goods and services tax (GST) that was

	implemented in Malaysia in April 2015.
Send Statistics via email	<p>Defines what kind of xDR statistics should be delivered to the customer by email after the billing period is closed:</p> <ul style="list-style-type: none"> • As defined by the Customer Class – 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 – This option prevents the delivery of event statistics to the customer via email. <p>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 interface.</p>
Generate Invoice PDF	<ul style="list-style-type: none"> • As defined by the Customer Class – With this option enabled, PortaBilling® uses the settings defined for the customer class. • At the end of the billing period – With this option enabled, PortaBilling® processes the customer's xDRs, applies charges (e.g. subscriptions, fees, etc.), creates a regular invoice and generates a .pdf file at the end of the billing period. • Postponed, based on resource availability – With this option enabled, PortaBilling® creates a regular invoice and charges a customer's credit card immediately. PortaBilling® begins to generate the .pdf files only once the calculations related to the previous billing period (e.g. xDR processing, statistics) for all customers have been completed. • On demand – With this option enabled, PortaBilling® makes all calculations for the customer, creates their regular invoices and saves them to a database. These invoices are then accessible via API. However, the .pdf file will not be generated unless explicitly requested.
Regular Invoice Template	Defines the regular invoice template for this customer.

	<ul style="list-style-type: none"> • Select As defined by the Customer Class in order to apply the regular invoice template defined for this class, and so avoid defining an invoice template for each customer specifically. • Select Do Not Create Invoice to disable regular invoice generation for this customer. <p>Choose the required invoice template from the list.</p>
Out-of-Turn Invoice Template	<p>Defines the out-of-turn invoice template for this customer.</p> <ul style="list-style-type: none"> • Choose As defined by the Customer Class in order to apply the out-of-turn invoice template defined for this class, and so avoid defining an invoice template for each customer specifically. • Choose Do Not Create Invoice to disable out-of-turn invoice generation for this customer. <p>Select the required invoice template from the list.</p>
Send Regular Invoices	<p>Defines whether new regular invoices should be delivered to the customer by email.</p> <ul style="list-style-type: none"> • As defined by the Customer Class – Use the settings defined for the customer class. • Yes – Send regular invoices by email. • No – Do not send regular invoices by email.
Send Out-of-Turn Invoices	<p>Defines whether out-of-turn invoices should be delivered to the customer by email.</p> <ul style="list-style-type: none"> • As defined by the Customer Class – Use the settings defined for the customer class. • Yes – Send out-of-turn invoices by email. • No – Do not send out-of-turn invoices by email.
Invoice Number Sequence	<p>Select an invoice number sequence that will be used for this customer:</p> <ul style="list-style-type: none"> • Default – The default numbering sequence will be selected for this customer's invoices. • Individual for Environment – This customer's invoices will have globally sequenced invoice numbering (throughout the environment). • Individual for Customer – This customer's invoices will have their own sequential numbering.

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

Measured services

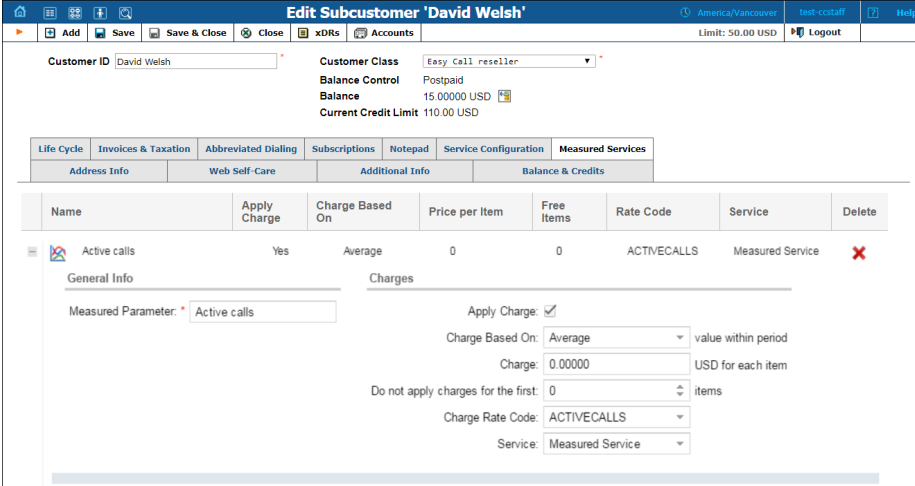
On this tab you can configure which allocated resources will be measured and what charges will be applied for their consumption.
All resources consumed have their own metrics.


NOTE: Each metric can only be added once per customer.

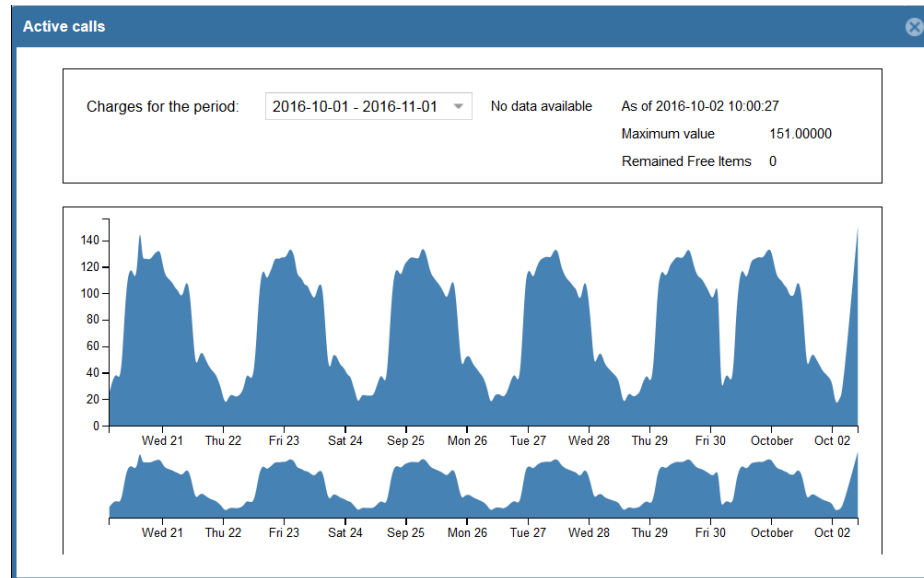
Name	Apply Charge	Charge Based On	Price per Item	Free Items	Rate Code	Service	Delete
Active calls	Yes	Average	0	0	ACTIVECALLS	Measured Service	

Field	Description
Measured Parameter	<p>Specify which consumed resource will be measured and aggregated.</p> <p>The available options are:</p> <ul style="list-style-type: none"> Active calls – The actual number of connected calls at a specific moment in time. Concurrent calls – The number of simultaneous outgoing calls allowed for a particular customer. This amount is defined for the customer or customer site by the administrator (in the Limit Simultaneous Calls service feature). PBX Extensions – The number of extensions a customer defines within their IP Centrex environment.
Apply Charge	<p>Select this check box to apply charges to customers for consumed resources.</p> <p>If left clear, measured resources data will be used for statistics purposes only.</p>
Charge Based On Value Within Period	<p>Select which criteria will form the basis for charges to be calculated and applied to customers.</p> <p>The available options are:</p> <ul style="list-style-type: none"> Average – At the end of a billing period the

	<p>system collects aggregated measurements and calculates their average. It is then used for calculating a customer's charges.</p> <ul style="list-style-type: none"> • Maximum – At the end of a billing period the system collects aggregated measurements, extracts their maximum value and uses that for assessing a customer's charges. • Minimum – At the end of a billing period the system collects aggregated measurements, extracts their minimum value and uses that for calculating a customer's charges.
Charge for Each Item	Specify the price for each consumed unit of resources.
Do Not Apply Charges for the First Items	Specify the amount of consumed resources that the customer will not be charged for (as a rule this is included in the customer's service bundle).
Charge Rate Code	Select which rate code is to be used to calculate charges for resources consumed. This rate code is shown in the customer's xDRs and invoices.
Service	The service type used to calculate charges for resources consumed. This service type is shown in the customer's xDRs and invoices.



To browse resource usage statistics, click the  **Click here to view graphs** icon next to the necessary resource metric.



The statistics window consists of two graphs. The bottom graph displays resource usage data for the last three months; the upper graph displays a detailed view of the resource usage for a particular time interval selected from the three-month period below.

To select a time period, click on the start date in the bottom graph and drag the mouse cursor to the finish date.

The topmost part of the window provides additional information about the selected metric. The following options are available:

Field	Description
Charges for the period	This represents the customer's billing period. You can select any of this customer's billing periods within the xDR storage time and see their charges.
Value	This is the measured resource value defined for the selected metric for the current billing period. It can be minimum, maximum or average.
Amount	If any resource consumption charges have been applied to the customer, they are displayed for the selected billing period. Charges for the current billing period will not be displayed since it is not yet closed. If no charges were applied to the customer, a zero amount is displayed.
Remained Free Items	The number of available allocated resources that are included in the service bundle for the current billing period.

Distributors


On the **Distributor Management** page you can view all distributors you cooperate with.

To add a new distributor, click **Add** on the toolbar.

The **Add Distributor** page allows you to define a new client entity within PortaBilling®. The information on the top of the form and for the **Default Sale Commission** and **Default Payment Commission** fields on the **Additional Info** tab is mandatory. Information on all the other tabs is optional, and need not be provided when creating the distributor.

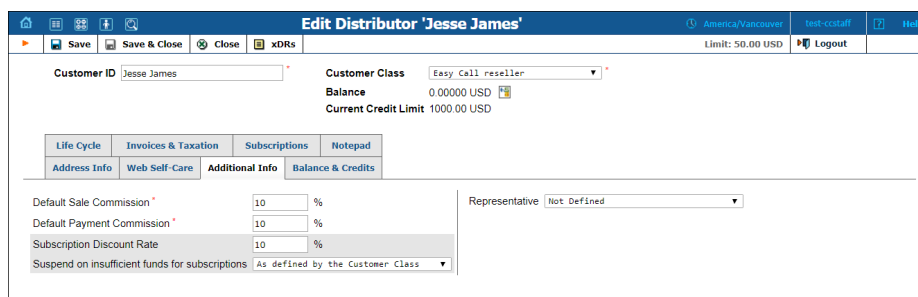
Field	Description
Customer ID	Defines the distributor name as it will appear in the PortaBilling® system. This is distinct from the Company Name field in the Address Info tab.
Blocked	Blocks <i>all</i> accounts of this distributor.
Customer Class	The customer class assigned to this distributor. In order to change any parameters of the particular customer class, click on the link Customer Class . When adding a distributor, be aware that if you select a class with a defined currency, the field Currency will show the corresponding value and this cannot be modified; if the class without a predefined currency is selected, then a list of currencies will be available. When editing the distributor, the field Customer Class will only contain

	classes with the <i>same</i> currency, or classes with no defined currency.
Currency	The currency must be specified by selecting it from the drop-down list of available currencies. Once saved, the currency cannot be changed.
Permanent Credit Limit	If this field is left empty, there is no credit limit defined for this distributor; we strongly recommend entering a value here. This helps to avoid a situation where the distributor would activate too many accounts without first submitting payment for accounts already activated, and thus limits the ITSP's risk of loss in case the distributor goes out of business.

To save the new distributor, click  **Save**.

Edit distributor

The **Edit Distributor** page allows you to change distributors details. Some fields are read-only.



The screenshot shows the 'Edit Distributor' page for 'Jesse James'. The page has a blue header with navigation icons and the title 'Edit Distributor 'Jesse James''. Below the header, there are tabs for 'Life Cycle', 'Invoices & Taxation', 'Subscriptions', and 'Notepad'. The 'Life Cycle' tab is active, showing fields for 'Customer ID' (Jesse James), 'Customer Class' (Easy Call reseller), 'Balance' (0.00000 USD), and 'Current Credit Limit' (1000.00 USD). Below these fields, there are sub-tabs for 'Address Info', 'Web Self-Care', 'Additional Info', and 'Balance & Credits'. The 'Additional Info' sub-tab is active, showing fields for 'Default Sale Commission' (10%), 'Default Payment Commission' (10%), 'Subscription Discount Rate' (10%), and 'Suspend on insufficient funds for subscriptions' (As defined by the Customer Class). A 'Representative' dropdown menu is also visible, set to 'Not Defined'.

The following are associated with a distributor:

- **Default Sale Commission** (this is applied when an account is created or a distributor is assigned).
- **Default Payment Commission** (this is applied when payment is entered).

When a customer or account is created or activated under the distributor, the distributor's balance increases by the account's balance, minus his commission. For example, if the distributor's commission percentage is 15% (default sales commission), and a new account with a \$10 balance has been created, then the distributor is charged \$8.5 and has a \$1.5 profit. When the distributor applies payment of \$10 towards an account, and his payment commission is 10% (default payment commission), then the distributor is charged \$9 and has a \$1 profit.

When the distributor makes a payment in favor of his customer, the batch commission rate is used by default, except in the following cases:

- The batch has not been assigned a commission rate.
- The debit account does not belong to any batch.

In these cases, the distributor's commission rate is used.

The distributor will be charged:

- When he applies payment toward a customer or an account.
- When he is assigned to an active account.
- When an account to which he has been assigned is activated (or when a new account is created in the active state).

To generate a batch of accounts, you can use the account generator and assign the distributor to these accounts. The account generator only permits the creation of an inactive debit when a distributor has been selected.

Account info

The **Account Info** page is provided for Customer Care staffs which are responsible for answering requests from Account holders and carrying out refunds. Some account details are read-only. The interface requires that the Account holder provide the operator the Account ID.


Click the **Show Accounts** button to see the Account Information for that Account.

Account ID	Batch	Ctrl #
12019162374		

xDRs: Account ID ldr, days Currency Balance Credit Limit Type Product Batch Status SIP

When making any changes, the Help Desk staff should also provide a comment in the Notepad, detailing the reason for the changes (for example, “user unable to call due to network outage, credited \$5”). Changes can be confirmed by selecting **Save**, or **Save&Close**.

To deactivate an active debit account, press the **Terminate** button in the toolbar.

Field	Description
Account Role	The account role defines what a specific account is designated for (e.g. whether the account represents a phone line or a top-up voucher) and executes account ID validation. Thus, for a phone line, one can only pick a valid phone number as an account ID.
Main Product	The Product providing the pricing plans for this account. You can select a product that role equals to account role.
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 64 characters.
Blocked	Specifies whether the account is blocked or unblocked. The account will be unusable if this is checked, and is usually unblocked automatically once the account is used for the first time.
Balance	Account's balance . For debit accounts this the amount of their funds for using the service. For credit accounts with the individual credit limit defined this shows the sum of funds owned to the service provider for the service usage.

Account Info

Customer	The Customer this account belongs to.
Type	The Account type may be one of “Debit”, “Credit”, or “Voucher”. Debit is usually associated with pre-paid cards. Credit is a type of account that will be invoiced for incurred costs. Voucher accounts are “refill coupons” for debit accounts.
Service Password	The password used to authenticate any calls made using this account.
Email	The email that is associated with the account.
Opening	The opening balance for this account.

Balance	
User Agent	Displays the user agent identification info when this account is currently used by this SIP UA to register with the SIP server.
Contact	The URI of the user agent used by the SIP Proxy to contact the IP phone.

Web self-care

The screenshot displays the 'Account Info / Retail Customer 'David Welsh'' web interface. At the top, there are navigation links and a 'Logout' button. The main content area shows account details: Account Role (Universal), Main Product (Star Ltd.), and Account ID (12019162374). Below this, there are tabs for Life Cycle, Subscriptions, Notepad, and Service Configuration. The 'Web Self-Care' tab is selected, showing fields for Login, Password, Access Level, Time Zone, and Web Interface Language. There are also sections for Output Format and Input Format with dropdown menus for Date, Time, and Date & Time.

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 Level	Access level assigned to the account.
Time Zone	Time zone for the account.
Web Interface Language	Displays the account user interface in a particular language.
Output Format/Input Format	PortaBilling allows users to define both input and output formats for date and time. See the Date & Time format section.

Subscriber

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

Additional Info

The screenshot shows the 'Additional Info' tab for a retail customer account named 'David Welsh'. The account role is 'Universal' with a balance of 10,000,000 USD. The main product is 'Star Ltd.' and the account ID is 12019162374. The account is not blocked. Under the 'Auto-Provisioning' section, 'E-Commerce Enabled' is unchecked. The distributor is set to 'Jesse James' and the discount plan is 'None'. A note states: 'The Individual Discount Plan is an obsolete feature and can be discontinued in future releases. Please use the Add-on functionality instead of the Individual Discount Plan.'

E-commerce Enabled	Allows the account's owner to make online payments or set up periodic payments on the account self-care page. 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.
Distributor	Here you can assign the existing distributor to the account.
Discount Plan	Assign a discount plan to this account. When a new account is created, it will be assigned by default a discount plan associated with the account's product.

Life cycle

The screenshot shows the 'Life Cycle' tab for the same retail customer account. It displays the activation date as 2018-12-14 and the expiration date as 2019-12-14. The expiration date is set to 'Specific Date' with a checkbox checked. Below this, there is a checkbox for '90 days after First Use or Last Top-Up' and another for 'days after Last Use'. On the right, a summary of dates is shown: Issue Date (2018-12-14), First Usage, Last Usage, Last Recharge, and Expiration Date (2019-12-13).

Activation Date	The date from which the account is usable.
Expiration Date	The date from which the account will be unusable. If 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 one.
Specific Date	This identifies the date that the account expires.

...days after First Use	This defines the number of days the account remains active after its first use or recharge.
...days after Last Use	This defines the number of days the account remains active after its last use or recharge.
Issue Date	The date when the account was created.
First Usage, Last Usage	The date when the account was in use for the very first / last time.
Last Recharge	Specifies the last time the account was recharged using a voucher (either via the self-care page or IVR).

Subscriptions

The information about the **Subscriptions** you can find in the **Edit Customers** section.

Service configuration



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).

The screenshot shows the 'Account Info / Retail Customer "David Welsh"' page. The 'Service Configuration' tab is active, displaying settings for 'Voice Calls'. The settings include:

- RTP Proxy:** (Reset/override) Use Default
- Legal Intercept:** (Reset/override) Disabled
- Service Policy:** (Reset/override) Disabled
- Fair Usage Policy:** Disabled
- Music on Hold:** (Reset/override) Enabled

Field	Description
	The <i>Voice Calls</i> service type
RTP Proxy	This specifies the RTP proxy policy for this account. <ul style="list-style-type: none"> Use Default – This uses Optimal RTP proxy policy. As defined by the Customer – This inherits the policy defined in the customer’s settings.
Legal Intercept	Intercept all incoming and outgoing calls of this specific account for law enforcement purposes.
Service Policy	This specifies a predefined set of options for this account.

Fair Usage Policy	This shows the Fair Usage Policy settings as applied to the account via Product . The field works in read-only mode.
Music On Hold	Defines the music on hold to be used with the account. 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.
Call Recording	Enables the recording of calls made or received by this specific account. The user can start and stop recording a specific phone conversation after it has already started by using various phone controls.
CLI Trust	<p>Accept Caller Identity: This option indicates acceptance.</p> <ul style="list-style-type: none"> • Favor forwarder – Use the redirector provided ID for caller identification. • Caller only – Use the caller provided ID for caller identification. • None – Do not accept caller provided ID for caller identification <p>Supply Caller Identity: This option indicates acceptance.</p> <ul style="list-style-type: none"> • Yes – Accept the remote network and maintain caller ID on outgoing headers (even for private calls). • No – Do not accept the remote network and strip any private caller's ID.
Limit Simultaneous Calls	<p>This shows the Limit Simultaneous Calls settings as applied to the account either via Customer or Site. The information is available in read-only mode.</p> <p>NOTE: To enable the Limit Simultaneous Calls feature, activate the send_start_acct option for the corresponding PortaSIP instances on the Configuration Server. To increase the features accuracy, activate the allow_reauth option too. Note that these features may slightly increase the load on the billing engine.</p>

Associated Number	Specifies the number to be sent back to the IVR in an 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.)
The <i>Dialing Rules</i> section	
Dialing Rules	This permits you to enable / disable the dialing rules.
Dialing Format	<ul style="list-style-type: none"> Select one of the existent dialing rule formats. Click the  Wizard icon to review the selected dialing rule. Select Custom Dialing Rule if you want to create personalized dialing settings for a customer. Then click the  Wizard icon to open the Dialing Rule Wizard.
Translate CLI on outgoing calls	This permits you to translate the CLI number in outgoing calls based on the selected dialing format.
Translate CLI on incoming calls	This permits you to translate the CLI number in incoming calls based on the selected dialing format.
The <i>Fraud Detection</i> section	
Location Information	<p>In this section you can set the country that the end user is currently in or usually resides in (and thus this country will be treated as 'safe' when the system checks for fraudulent activity) and whether the end user is allowed to make calls from abroad.</p> <ul style="list-style-type: none"> Enabled – Select this option to provide information about the end user's current 'default' country and whether they are permitted to make calls from abroad. Disabled – Select this option if such information must not be provided. In this case, fraud detection, if enabled, is based solely on the geo / risk profile settings.

Allowed Mobility	<p>This option is available only when Location Information is set to Enabled. Specify whether the end user is permitted to make calls from abroad.</p> <ul style="list-style-type: none"> • Stationary User (Permanent Location) – Select this option for residential users who may only make calls from a single country. These end users are not authorized to make calls from countries other than their default one, and outgoing calls made from other countries will be screened. • Roaming User (Changeable Location) – Select this option for users who frequently travel to different countries. In this case, the call will be screened if it <i>does not meet</i> one of the following conditions: <ul style="list-style-type: none"> • The call is made from the end user's default country. • The call is made from countries in the No Restrictions section in the geo / risk profile specified in the end user's product. • The call is made from countries in the Suspicious section of the geo / risk profile, but the number of calls does not exceed the value permitted (also specified in the geo / risk profile).
Current Location	<p>This option is available only when Location Information is set to Enabled. Select the country from the list.</p>
The <i>Outgoing Calls</i> section	
Individual Routing Plan	<p>This feature permits selection of the routing plan to be used for outgoing calls when the end user dials a number. A specific selection code does not need to be dialed first.</p> <ul style="list-style-type: none"> • Select Enabled to activate the Individual Routing Plan feature for the account. • Select Disabled to prohibit assigning the individual routing plan for this account.
Phone Book	<p>Activates the Phone Book feature. This allows an account user to maintain its own set of frequently dialed numbers, assign speed dial codes to them and define a list of favorite numbers.</p>

Hide CLI	<p>This allows end user to remove / show CLI (ANI) information for outgoing calls by dialing special feature access code before dialing the phone number.</p> <p>Note that when making a call, you can dial the special feature access code before dialing the phone number to override the default setting.</p>
Override Identity	<p>Override Identity – This allows you to set the following options for overriding identity information:</p> <ul style="list-style-type: none"> • Never – The caller’s identity information supplied by the remote party will neither be screened nor overridden. This implies that the remote party is trusted and takes full responsibility for the supplied display number and display name. • If Different from Account ID and Aliases – The identity will be overridden if it differs from the ID of the account that is authorized for the call and any of the aliases assigned to this account. • If Different from All Customer Accounts – The identity will be overridden if it doesn’t match an account ID (or account alias) of any account belonging to this customer. • If Different from All Accounts in the Specified Batch – This is a more restrictive option than the one above; it overrides the identity if the account placing the call and the account matching the supplied identity do not belong under the same batch. This allows you to create “groups” under the same customer (within the same IP Centrex environment). • Always – The identity value supplied by the remote party will always be overridden. This allows you to manually specify the display number and / or the display name for an account. • Batch – This allows you to specify the batch (this field is only available when If Different From All Accounts In The Specified Batch has been selected).

	<p>Identity – Specify a default value that will replace the account identity (or display number) when the identity used for the call in the RPID / PAI headers (or From header) is invalid. If not specified, the account ID will be used instead.</p> <p>Override Display Number – This allows you to control the “Caller number” value that will be placed in the From: header and typically displayed on the called party’s phone display. The possible values are:</p> <ul style="list-style-type: none"> • Never – The display number supplied by the remote party is not restricted and therefore will not be modified. This allows the remote IP phone or IP PBX to supply any CLI / ANI number. • If Ruled Out by the Identity Constraint – The validity of a display number supplied by a remote party is verified according to a rule set for identity. For example, when the <i>If Different From Account ID And Aliases</i> option is selected in the Override Identity list, and the display number supplied by the remote party doesn’t match the ID of the account that is authorized for the call or any of the aliases assigned to this account, the display number will be overridden. • If Different from the Used Identity – The display number supplied by the remote party (in the From: header) will be overridden if it is different from the used (already checked and / or overridden according to the Override Identity constraint) caller identity. • Always – The display number supplied by the remote party will always be overridden. This allows you to manually specify the display number for an account. <p>Display Number – Specify a value that will override and replace the account’s original display number. If no value is specified, it defaults to the account’s Identity.</p> <p>Override Display Name – Replace the original account number with the desired name.</p> <p>Display Name – This allows you to specify the desired name for the account.</p>
E911	Activate emergency services for this account.

Call via IVR	<p>Allows outgoing calls to be processed in an assigned IVR-capable voice application. For example, the Pass-through IVR application plays a “time left” warning when there are a specific number of seconds left – before the call is disconnected – or it can announce the maximum allowed call duration to the destination and then connect the call. Note that the Pass-through IVR application is launched for all non-free calls to external numbers.</p> <p>The most common option is Product’s default. In rare cases, you may need to define special call processing for an account in order to override the product’s parameters. In such cases, select Enabled to activate the feature, or Disabled if you do not want to activate it for this account</p> <p>Voice Application – If a call via the IVR feature is enabled, select a voice application for processing the calls. Typically this is a special pass-through IVR application for voiceover announcements during the call, but any standard IVR application can be selected to intercept the outgoing call.</p>
Call Barring	Activates the Call Barring feature (a new Call Barring tab will appear, where you can configure destinations which this user is not allowed to call).
CPS Limitation	<p>This allows you to enforce the calls per second (CPS) limitation. The CPS limitation defines how many dialing attempts can be made by this account each second.</p> <p>Allowed rate – Set the limit of dialing attempts per second for this account. If the limit is exceeded, new dialing attempts are rejected. The allowed values are from 1 to 1000.</p>
Preferred IVR Language	This feature enables or disables the selection of languages from the “Language” list.
The <i>Incoming Calls</i> section	

Unified Messaging	<p>Allows the account user to access the unified messaging system. See the PortaSIP® Media Applications Guide for more details.</p> <p>Please note that if an account has Unified Messaging activated, there will be an additional link next to it on the web interface: Voicemail Inbox. By clicking on this you will go automatically to the account's UM administration pages where you can quickly check the configuration of an account's auto-attendant, call queues, and the like.</p> <p>Also note that it may take a few minutes before an account is fully provisioned in PortaSIP®. Thus if you click on the link immediately after activating Unified Messaging, it most likely will not work yet.</p>
Endpoint Redirection	This allows the end user to configure call redirection on their SIP phones (if this feature is supported by the SIP phone)
Caller ID (CNAM) Lookup	This option shows the actual name of the caller retrieved from the database of the CNAM provider for incoming calls.
Call Waiting	Activates the Call Waiting functionality.
Default Answering Mode	Specifies the method of processing incoming calls to this account if selective call screening has been disabled, or if none of the selective call screening rules apply.
Sip Contact	<p>Enable this feature if customer's IP PBX can't perform SIP registration to PortaSwitch®.</p> <p>Deliver Incoming Calls To – Define whether the IP PBX address for delivering incoming calls is taken from the IP PBX registration account or specified directly in the Static Address field:</p> <ul style="list-style-type: none"> • Account - This shows the customer's IP PBX registration account. This option is usually selected if a customer's IP PBX is located at a dynamic IP address and can register only the main phone line (provisioned as the registration account in PortaBilling®) on the PortaSIP® server.

	<ul style="list-style-type: none"> • Static Address – Enable this feature if the customer’s IP PBX can’t perform SIP registration to PortaSwitch® <ul style="list-style-type: none"> ○ Use Original CLD – Specify the destination number that calls will be routed to. If left blank, the number originally dialed will be used as the destination number. ○ Host – This contains a valid IP address of customer’s IP PBX (four numbers separated by points, e.g. 12.34.56.78). ○ Transport – Select the transport protocol (either TCP or UDP) that is used to deliver incoming calls.
Auto Attendant	Enables the auto attendant functionality for this account. Incoming calls will always go <i>only</i> to the auto attendant despite Unified Messaging functionality also being enabled.
Ext-to-Ext Call Distinctive Ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
User Application	Enable this option to allow the usage of custom IVR application.
External Voicemail	To ensure service continuity for mobile subscribers, you can redirect their calls to your host MNO’s voicemail. To do this, enable the External voicemail service feature and define the application’s access number.
Present Caller Info	Display caller info on incoming calls.
Call Forwarding	<p>Assigns a call forwarding mode to this account:</p> <ul style="list-style-type: none"> • No Forwarding – Disables call forwarding entirely. • Follow-Me – Enables standard follow-me forwarding. • Advanced Forwarding – Activates advanced call forwarding mode. • Forward to SIP URI – End users can enter a forwarding destination as a CLD@IP or CLD@domain. PortaSIP® will round-robin through DNS SRV records if they are configured for the specified domain.
	<ul style="list-style-type: none"> • Simple Forwarding – A simplified type of forwarding where you specify a single phone number to which calls will be sent.


Maximum Forwards	When you select follow-me or advanced call forwarding, 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 .
Forward by DTMF	<p>This option is active only when one of the several call forwarding modes is selected. It allows a user to use DTMF tones to transfer calls forwarded to the user's mobile phone from the user's IP Centrex extension, and to stay on the line until the other party picks up.</p> <p>Thus, if a user receives a call to his mobile phone and needs to transfer it to his colleague at Extension 1002, he dials *661002#, and when his colleague confirms that she is free to take the call, he hangs up.</p>
Call Screening	Enables selective call processing / conditional call forwarding features
Ringback Tone	<p>Enable this feature to choose which ringback tone to play to a caller:</p> <ul style="list-style-type: none">• Select an available ringback tone from the list.• Select Upload New Music to upload a new file.
The <i>Internet Access</i> service type	
Session Limit	Allows you to define a specific number of concurrent sessions initiated by the account.

Static IP	<p>Select Enabled if you want to assign a static IP to this account (the default setting is Disabled).</p> <p>Static IP – Type in an IP.</p> <p>Static IP Netmask – Type in a netmask, or leave the default value: 255.255.255.255</p> <p>Routed Networks – Type in the route for your IPv4 network in the CIDR notation format – X.X.X.X/Y Z.Z.Z.Z where:</p> <ul style="list-style-type: none"> • X.X.X.X is the IPv4 address that defines the network prefix; • Y is the decimal length of the network prefix mask; • Z.Z.Z.Z is the gateway IP address; it must belong to the network range. <p>An example of Routed Networks can be this record: 203.0.113.0/24 203.0.113.1</p> <p>NOTE: Any incorrect adjustment of this parameter may affect the entire ISP network so please be sure that your settings are correct.</p>
Access Policy	<p>The most common option is Product default. In rare cases, you may need to set a special policy for an account that will override the product's parameters. In such cases:</p> <ul style="list-style-type: none"> • Select the appropriate internet access policy from the list. • Select None if you do not want to limit the bandwidth for this account.
The <i>Conferencing</i> service type	
Conferencing Enabled	Allows the account user to use voice-conferencing services.
Number of Simultaneous Participants	Specify the maximum number of concurrent connections allowed for the conference.
The <i>Wi-Fi</i> service type	
Limit Bandwidth	The most common option is Product default . In rare cases, you may need to define special bandwidth values for an account that would override the product's parameters. In such cases, select Yes to define these values, or No if you do not want to limit the bandwidth for this account.
Max Download Rate	Specify the maximum download rate for this account.
Max Upload Rate	Specify the maximum upload rate for this account.

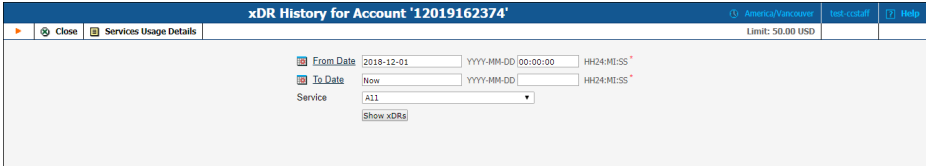
The <i>IPTV</i> service type	
Channel Package	This feature defines a set of broadcast channels that are available to this account.
Activation PIN	Specifies a numeric code to be entered from end user's STB (Set-Top Box) remote controller to activate IPTV services.
The <i>Messaging Service</i> type	
SMS / MMS Routing Data	The following options are available: <ul style="list-style-type: none"> • Disabled – This deactivates updating the centralized routing SMS / MMS database for this account. • Enabled – This activates updating the centralized routing SMS / MMS database for this account.
Update NetNumber database	<ul style="list-style-type: none"> • Yes – Select this option to update the NetNuber database when this account is added, deleted or its ID is changed. • No – Select this option if you don't want to update the NetNumber database for this account.

The Customer Care operator can also browse xDRs for the account by clicking the **xDRs** button on the Account Info screen.

On the xDR view page you can make an extensible search via:

- A date and time range by clicking the  icon.
- A certain service type.
- Required accounts type (for customers only).

To initiate a query, click the **Show xDRs** button. The result page will contain a summary displayed on the top of the screen and a table listing all of the calls and charges from a specified time period.



xDR History for Account '12019162374'

Close Services Usage Details Limit: 50.00 USD

From Date: 2018-12-01 YYYY-MM-DD HH:MM:SS
 To Date: Now YYYY-MM-DD HH:MM:SS
 Service: All
 Show xDRs

Close

Download

xDRs

Services Usage Details

Account12019162374

From Date2018-12-01 00:00:00

To Date2018-12-19 01:18:00

Service(s)All

Total Transactions8

Credits0.00000 USD

Charges0.00000 USD

Recurring Charges0.00000 USD

Recurring Credits0.00000 USD

Usage Charges1.90833 USD

Usage Credits0.00000 USD

Payments0.00000 USD


Refunds0.00000 USD

Taxes0.00000 USD

Total1.90833 USD

Voice Calls

?	View	More Info	From	To	Country	Description	Date/Time	Charged Time, min:sec	Amount, USD	Hidden	Revert	Play
			12019162374	44012555771	United Kingdom		2018-12-06 08:46:46	0:39	0.32500			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 23:45:42	0:03	0.00000			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 23:41:55	0:05	0.00000			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 23:35:09	0:02	0.00000			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 08:05:44	0:01	0.00000			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 08:05:34	0:01	0.00000			
			12019162374	44132235256	United Kingdom	Proper	2018-12-05 08:05:17	0:03	0.00000			
			12019162374	44572235213	United Kingdom		2018-12-04 01:16:36	3:05	1.58333			
Subtotal									3:59	1.90833		

To browse for additional information about a call, with your mouse cursor point at the  **More Info** icon next to the required xDR.

On the xDR history screen the operator can choose to download xDRs by clicking the **Download** button and get more information about service usage using the **Service Usage Details** button.


Trace session

The trace session utility allows you to determine the characteristics of a specific call when you know the **rate pattern (destination)**, which may be specified exactly, or using a wildcard. (For example, all calls to England may be specified as “44%” in the rate pattern 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 **Search Sessions** 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.

Trace Session														
<div> Close </div>														
Destination Number: %														
Service: Any service														
Time Interval: Custom														
From: 2018-12-01					YYYY-MM-DD: 01:45:47					HH:MM:SS				
To: 2018-12-19					YYYY-MM-DD: 01:45:47					HH:MM:SS				
Search Sessions														

The result listing will show 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.

Error Report

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

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

Error Report

Account/Alias 12019162374

To 12019162374

From 44132235256






Date / Time 2018-12-06 07:47:46

Comments *

Submit

Cancel

List of possible Disconnect reasons:

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