



# Interoperability Guide

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## Preface

This document provides information about interoperability between PortaSwitch® and the third-party equipment. It aims to help PortaSwitch® owners enhance their networks and facilitate service provisioning.

### 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/](http://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.



**Archivist** explains how the feature worked in previous releases.



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

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## What is new in Maintenance Release 90?

### Added:

- The [Integration with the Pharos CIG](#) chapter.
- The [Charging for USSD](#) sessions chapter.

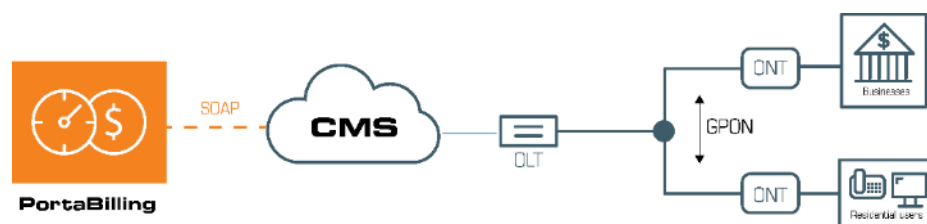
# 1. Internet provisioning

## Fiber to the home service provisioning via Calix ONT

Gigabit passive optical network (GPON) and Active Ethernet (AE) are fiber access technologies that provide gigabit Internet services for subscribers. You can use them with PortaBilling® and the Calix network access equipment to deploy fiber to the home (FTTH) networks and deliver high-speed broadband Internet to your subscribers.

GPON/AE networks consist of:

- OLT – Optical Line Terminal – the service provider endpoint, and
- ONT – Optical Network Terminal – the endpoint that is located on the customer premises.



PortaBilling® provisions Calix ONTs such as:

- Calix 803G GigaPoint;
- Calix 844E GigaCenter;
- Calix 844G/854G GigaCenters;
- Calix 716GE-I.

and Calix E7-20 EXA Service Access Platform for GPON/AE services.

To make this happen, PortaBilling® has integrated with the Calix Management System (CMS). PortaBilling® provisions the following information to the CMS via the External Systems Provisioning Framework (ESPF):

- ONT data such as the FSAN serial number – e.g. the unique serial number of the equipment, and
- account and service configuration data, e.g. the account status, Calix bandwidth profile ID within the Internet access policy, etc.

Thus, Calix performs network access and configuration management while PortaBilling® operates as a B/OSS by providing a single place to perform customer and service management.



When the administrator assigns the ONT to a user's account from the CPE inventory in PortaBilling®, PortaBilling® sends the provisioning request to the CMS. The CMS activates the service for the user on the ONT and allocates the bandwidth as defined in the bandwidth profile. The user can now access the service.

When a user does not pay for their service (e.g. has insufficient funds to cover the monthly subscription fees), PortaBilling® instructs the CMS to suspend their services on the ONT until a payment is received. If the user upgrades to a new package (e.g. from 5Mbps to 20Mbps), PortaBilling® provisions the service configuration change to the CMS. The CMS allocates the new bandwidth limits on the ONT and the user receives the benefit of faster speed.

To configure the Calix ONT provisioning, do the following:

1. Configure the Calix Management System by creating network uplinks for GPON services, ONT and Ethernet bandwidth profiles, etc. (Please find configuration details on the [Calix](#) website.)
2. Upload ONT devices to the CPE inventory.
3. Configure the Internet Access policy and specify the Ethernet bandwidth profile ID within.
4. Configure the Internet access service in PortaBilling®.
5. Configure the ESPF in PortaBilling® to enable data provisioning to CMS.

This solution enables you to build cost-effective last mile networks that work with gigabit speeds and thus meet users' increasing demands for more bandwidth. You automate the service configuration and the delivery to your users as well as its availability, based on their demands (e.g. the decision to upgrade), and their billing status (e.g. suspended upon non-payment).

### **Provisioning of Calix ONTs in residential gateway mode**

You can provision a Calix ONT (Optical Network Terminal) in residential gateway mode (RG). Residential gateway mode enables you to limit bandwidth on the entire ONT, rather than on a specific Ethernet port. As a result, you set speed limits per household.

You can create different packages such as 500Mbps, 1Gbps, etc., to meet your customers' needs. For example, you can offer higher speeds to premium customers and enterprises.

PortaBilling® is integrated with the Calix Management System (CMS) for ONT provisioning. When an administrator creates a new user, PortaBilling® provisions the bandwidth profile ID, the account status, etc. In addition to account and service configuration data, the ONT WAN port type is provisioned to the CMS. This port type is defined as RG.

To provision a port type to Calix CMS, an administrator configures the following in PortaBilling®:

- creates the Internet access policy that selects RG for the ONT slot type;
- assigns the policy to the product;
- assigns the product to a user's account.

The screenshot shows the 'Service policy' configuration page in PortaBilling. The breadcrumb trail is 'GPON > Attributes > Calix'. The page is divided into three main sections: 'GPON', 'Attributes', and 'Calix'.

- GPON Section:** Contains fields for 'Service type' (set to 'Internet access'), 'Managed by' (set to 'Administrator only'), and 'Description'. Below these are links for 'Access policy', 'Attributes' (highlighted), 'Hotlining', and 'Audit log'.
- Attributes Section:** A list of device manufacturers with expandable options: Alcatel-Lucent, Calix 2 enabled attributes (highlighted), Cisco ASR, Cisco NAS, Cisco PDSN, ECI, Gy, Huawei, Huawei BRAS, and Juniper.
- Calix Section:** Contains configuration for the selected Calix attributes. It includes a 'Bandwidth profile id' dropdown set to '15' and a 'Data ont slot type' dropdown set to 'RG' (highlighted with a red box).

Note that only GPON ONTs such as Calix 844E GigaCenter, 803G GigaPoint, etc. can be defined as residential gateways.

The WAN ports are provisioned as Gigabit Ethernet port types, by default. You can change the RG port type in the service policy or CPE profile. The configuration in the CPE profile takes precedence over the service policy configuration.

Provisioning the ONTs in residential gateway mode helps you deliver Internet services to residential users and effectively manage bandwidth limits for your customers. As a result, you remain competitive in the market and prevent revenue leakage.

### ***Possibility to provision the service to all Calix ONT ports***

You can provision all ONT ports with Internet service rather than only one specific ONT port.

When the administrator chooses to provision all the ports, a customer can plug their devices into any port for Internet access and the bandwidth limit is shared among the ports (for RG port type). This eliminates situations where the customer accidentally plugs their device into a port without Internet service available. Thus, it reduces the load on the customer support staff helping customers with instructions for a correct setup.

Let's say John Doe signs up for the Internet service package with a 100 Mbps bandwidth limit. The service provider's engineer installs a Calix ONT at John's home. John plugs his PC into a random port (any of four) of the Calix device. The 100 Mbps Internet service is now available on John's PC. John plugs his laptop into another available port. Now the bandwidth limit is shared between the PC and the laptop (e.g., downloading on the PC takes 60 Mbps and a video conference on the laptop takes 40 Mbps).

To enable this scenario, the administrator needs to configure the following in PortaBilling®:

1. Create an Internet access policy:
  - choose **RG** (residential gateway) for the **ONT slot type**;
  - define the bandwidth limit.
2. Assign the service policy to the product.
3. Assign the product to the account.
4. Create a CPE profile for the specific type of Calix ONT (e.g., Calix 844E) and add the Calix device to the CPE list.
5. Assign a Calix ONT with all ports provisioned to the account:
  - open **Account > Account info > enable Auto-provisioning**;
  - select the Calix device (ID); and
  - select **All** for **Data device port**.

The screenshot displays the 'Account' page for 'johndoe@domain.com'. The left sidebar shows the account details, including the role 'User@domain', type 'Credit', customer 'John Doe', and main product 'Start'. The 'General info' tab is selected in the top navigation bar. The 'Auto-provisioning' section is active, showing a toggle switch turned on. The 'Option' is set to 'CPE', the 'Device model' is 'Calix 844E', and the 'Device ID' is '458632'. The 'Data device port' dropdown menu is open, showing 'All' as the selected option. Other options in the dropdown include 'Not set', '1', '2', and '3'.

It's also possible to provision all the ports with Internet service by using the **Gigabit Ethernet** rather than **RG** as the **ONT port type**. In this case, the bandwidth limit defined in the service policy applies to each Ethernet port independently.

Provisioning Internet service to all ports helps to avoid customer complaints caused by selecting a wrong port, and as a result saves the customer support staff time. This also allows customers to plug in several devices at once.

## Integration with Alcatel-Lucent Service Router

PortaBilling® is integrated with the Alcatel-Lucent Service Router (SR), used by service providers worldwide for providing broadband Internet services.

In this configuration, the Alcatel-Lucent SR is deployed as a DSL access point within a service provider's network. It communicates with PortaBilling® via the RADIUS protocol to authorize end users when they connect to the Internet. When an Internet session is established, the Alcatel-Lucent SR periodically sends interim (also called keep-alive) accounting requests with information about the current transferred data volume. When an end user's balance is not sufficient for using the service or their Internet quota is reached, PortaBilling® sends the Alcatel-Lucent SR a CoA (change of authorization) request. The Alcatel-Lucent SR then switches the session to a hotlined state – i.e. redirects the end user to a defined website.

PortaBilling® acts as an OCS (Online Charging System). It communicates with the Alcatel-Lucent SR via the RADIUS protocol for real-time session authorization and rating. PortaBilling® also provisions Alcatel-Lucent SR information about the bandwidth speed (for example, 1 Mbps or 10 Mbps) and Internet quota allocated to a particular customer. The bandwidth options and quota amounts are defined by the product configuration in PortaBilling®.

This integration extends the variety of equipment that PortaOne's clients can use for broadband Internet service provisioning. Service providers who have already chosen the Alcatel-Lucent SR and are looking for a flexible and reliable billing system, can explore the advantages of choosing PortaBilling®.

# Integration with Bridgewater Service Controller

PortaBilling® is integrated with Bridgewater, a service controller for WiMAX networks.

## WiMAX services with Amdocs

PortaBilling® supports the following billing models for WiMAX via Bridgewater:

- Preset bandwidth with unlimited data transfer amount, fixed recurrent fee.
- Preset data transfer quota, fixed recurrent fee.

In both cases, the user connects to the ASN gateway, which sends requests to and receives authorization from Amdocs Service Controller. Amdocs uses account information from its DB, which in turn, is pre-populated and kept current by PortaBilling®.

## Account provisioning

PortaBilling® can automatically provision WiMAX accounts into Amdocs. It means that:

- An account created in PortaBilling® will be automatically created in Amdocs with a Profile<sup>1</sup> assigned that corresponds to the PortaBilling® product.
- When an account is suspended due to non-payment or reaches a credit limit in PortaBilling®, the account is automatically blocked in Amdocs.
- When an account is unsuspended or balance returns below a credit limit, the account is automatically unblocked.
- When an account is terminated in PortaBilling®, it gets removed from Amdocs.

## Integration with Cisco PDSN

CDMA operators can use PortaBilling® to provision, bill and monitor mobile broadband services controlled by Cisco PDSN (Packet Data Serving Node for CDMA networks). To do this, Cisco PDSN connects to PortaBilling® via RADIUS.

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<sup>1</sup> Profiles are to be predefined on Bridgewater side as part of the setup process.

## Integration and operation flow

The integration of PortaBilling® with Cisco PDSN is similar to its integration with NAS – the principles of integration are almost the same. Though PDSN is used only for CDMA networks, the main difference between services provided via PDSN and a “traditional” NAS is the user’s mobility. Users may not be stationary and thus switching from one base station to another while the original Internet session is connected. PortaBilling® ensures that even if there are various individual sub-sessions, a single xDR is produced at the end.

## Provisioning

To set Cisco PDSN for PortaBilling® you need to carry out settings on the Configuration server and on the administrative web interface (tariffs, nodes, etc.)

# Integration with Cisco SCE (Service Control Engine)

PortaBilling® is integrated with Cisco SCE, a network element specifically designed for carrier-grade deployments that require high-capacity stateful application and session-based classification and control of application-level IP traffic, per subscriber.

This solution facilitates content-based charging and allows the ISP to granularly track Internet usage, permitting varied pricing schemes for truly differentiated IP service offerings, while at the same time keeping costs low.

Consider a few examples of services that you could offer using this solution:

- Offer *high speed Internet* service to your business customers but disallow bandwidth-consuming peer-to-peer (P2P) applications.
- Provide residential customers with standard Internet speed, but offer enhanced latency-sensitive services such as online gaming, by assigning a high priority for identified users of this service.

PortaBilling® currently works with the Cisco SCE integrated with PDSN nodes that already allow CDMA operators to raise their mobile broadband services to new heights. In the future, this solution can be enhanced to support various equipment bundled with Cisco SCEs, thereby benefitting ISPs that provide other Internet services.

## Integration with Huawei BRAS CX600 Router

PortaBilling® is integrated with the Huawei BRAS CX600 Router used by service providers to provide broadband Internet access.

The Huawei BRAS CX600 Router is deployed at the edge of the service provider network and acts as an aggregation point through which end users connect to the broadband Internet. It communicates with PortaBilling® via the RADIUS protocol to authorize end users and manage their Internet sessions.

Once an end user starts an Internet session, the Huawei BRAS CX600 Router performs the session authorization in PortaBilling® to verify that the end user has sufficient balance and is allowed to use the service. PortaBilling® also provides information to the Huawei BRAS CX600 Router about bandwidth speed (for example, 1 Mbps or 10 Mbps) allocated to a particular end user.

When the Internet session is established, the Huawei BRAS CX600 Router periodically provides session usage information to PortaBilling®, i.e. sends interim (also called keep-alive) accounting requests with information about the current volume of transferred data. When an end user's balance is not sufficient to use the service, PortaBilling® sends the Huawei BRAS CX600 Router a POD (Packet of Disconnect) request. The Huawei BRAS CX600 Router then switches the session to a hotlined state – i.e. redirects the end user to the service provider's portal.

PortaBilling® acts as an OCS (Online Charging System) performing such functions as authentication, authorization and accounting of end users' sessions.

This integration extends the variety of equipment that service providers can use for broadband Internet service provisioning.

## Integration with the Juniper MX960 Router

PortaBilling® is integrated with the Juniper MX960 Router. ISPs use this router as a broadband remote access server (BRAS). It operates as a broadband network gateway (BNG).

With the Juniper MX960 Router you can provide high-speed (e.g. 50/100 Mbps and higher) Internet services via Ethernet cable. An administrator must first configure the router and create service policies in PortaBilling®. Then, when a user connects to the Internet, PortaBilling® authorizes

them and sends their service configuration (defined in the service policy) to the Juniper MX960 via the RADIUS protocol.

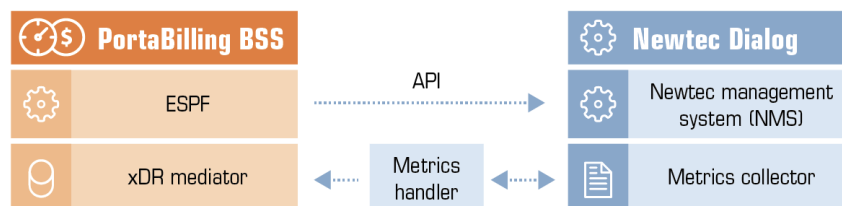
PortaBilling® operates as an OCS (online charging system) for user authorization and charging. It is also used as an administrative interface for product management and bandwidth throttling (i.e. slowing and speeding). When an Internet quota is used up or expires, PortaBilling® sends a change of authorization (CoA) request that instructs the router to change the configuration.

Upon request, the Juniper MX960 either reduces Internet speed and/or hotlines the user to the captive portal for replenishment. Upon payment, PortaBilling® instructs the router to resume speed.

This integration extends the variety of equipment that PortaOne's clients can use for broadband Internet service provisioning.

## Satellite data provisioning over Newtec Dialog platform

PortaBilling® is integrated with Newtec Dialog, a multiservice satellite communications platform. This integration allows service providers to offer prepaid data services over the satellite using PortaBilling® as the BSS system.



PortaBilling® interacts with these two components of the Newtec Dialog platform:

- The network management system (NMS) – is used to provision satellite modems and control user access to the network. The user can have either default or restricted access to the network. NMS manages network access using corresponding service profiles. A restricted service profile is used to block internet access (e.g. the account quota/service wallet is used up) and a default service profile is used to resume it (e.g. upon service wallet top-up).

PortaBilling® provisions Newtec NMS via the ESPF with this data to automate subscriber provisioning and service management: the



service profile ID, a device model and MAC address and the CPE profile details.

- The metrics collector – is used to measure and report a subscriber's service usage. A subscriber is identified by their modem ID and their service usage is measured every 5 minutes. The collected data is retrieved by PortaBilling® for further import, charging and quota control.

This is how it works:

An administrator defines the speed limits for default and restricted service profiles in NMS. Let's say John Doe subscribes for satellite Internet. An administrator creates an account for John Doe in PortaBilling® and assigns a satellite modem to it. PortaBilling® provisions John Doe's satellite modem details to Newtec NMS. Upon provisioning, NMS returns the modem ID which is assigned as an alias to John Doe's account in PortaBilling®. And that's what is used to charge him for Internet usage.

John Doe begins to use the Internet. The metrics collector measures the total amount of data transferred for the previous 5 minutes. PortaBilling® retrieves this collected data every 5 minutes, processes it and charges John for the traffic he uses.

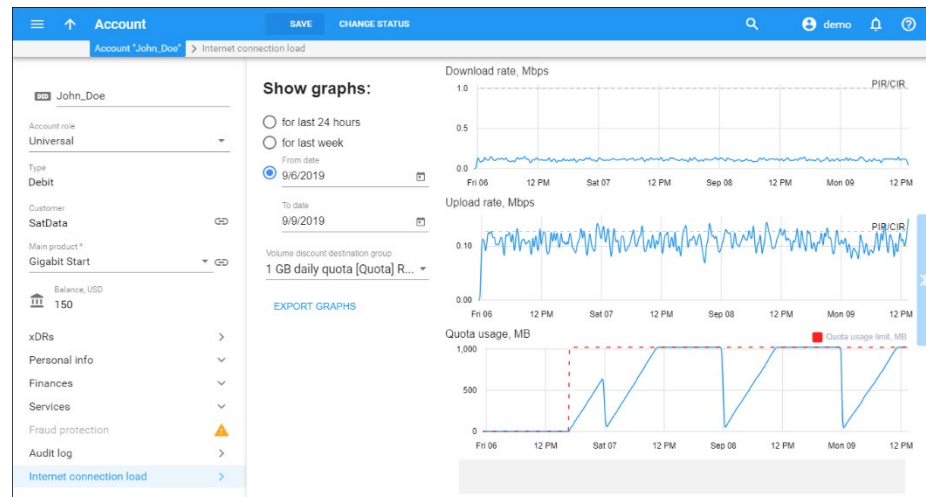
When John Doe uses up his service wallet, PortaBilling® provisions the restricted service profile ID to NMS which then restricts John's service usage. Once he tops up his service wallet again, NMS applies the default service profile and service resumes for his account.

### **Data usage statistics**

An administrator can view the data usage statistics on the Internet connection load panel for John's account in PortaBilling®.

Let's say John Doe uses a daily quota of 1GB and complains that the Internet did not work for one day. The administrator checks John Doe's upload/download rate graphs and quota usage statistics for the last week and sees that John Doe did not have a functioning connection to the Internet for one day. Further investigation shows that the Internet was unavailable due to the provider's connectivity issues.

As compensation, the administrator provides John Doe with free internet for one day.



Service usage graphs are available as a separate plug-in. Please contact the PortaOne® support team for assistance with plug-in installation.

### Configuration:

To provide satellite data services, configure the following in NMS:

- Create two service profiles: one for default access, another one for restricted access.
- Define the speed limits for default and restricted service profiles.

Then in PortaBilling® configure the following:

- Install the NMS provisioning plug-in. Contact PortaOne Support for assistance;
- Create Internet access policies and specify Newtec attributes (default service profile ID and restricted service profile ID);
- Configure quotas and/or service wallets to define the amount of provided data;
- Create Internet access products. Assign quotas/service wallets, subscriptions and service policies to them;
- Create a CPE profile with satellite modem details and upload modems to the CPE inventory (device model, number of ports, server IP, etc.);
- Configure an xDR mediation utility for service usage import and processing;
- Configure ESPF to enable data provisioning.

This integration enables you to provide satellite data services and manage these services from a single place. This reduces your administrators' manual work and helps prevent revenue leakage (e.g. an account is out of funds but the administrator has forgotten to block the service).

## Traffic management via Sandvine SPB

PortaBilling® is integrated with Sandvine SPB (Subscriber Policy Broker). Sandvine SPB is a component of the Sandvine DPI (Deep Packet Inspection) solution. It enables CSPs to shape traffic on a per-subscriber basis by applying different access policies to them (e.g. prioritize VoIP traffic to ensure sound quality for calls). CSPs can analyze and measure network traffic, study user behavior on the network (e.g. which sites customers visit most often) and collect various statistics data (e.g. the percentage of content types consumed). MVNOs and CSPs that rent the network infrastructure can use Sandvine SPB to authenticate users and control their activity on the network.

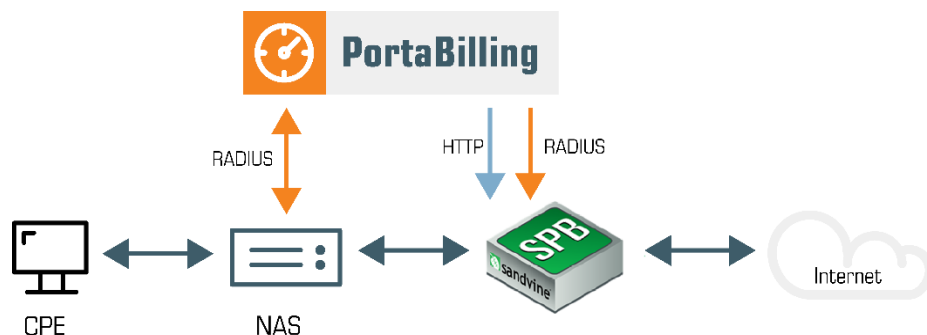
PortaBilling® provisions Sandvine SPB with this subscriber data:

- Account details: username, IP address/netmask, service provider identifier;
- Service configuration details: Internet access policy name, upload/download speed limits, captive portal URL.

This automates subscriber management and service activation.

To authenticate subscribers and apply service policies to them, Sandvine SPB must identify their username and the IP address associated with it. In network deployments with *static* IP allocation (e.g. fiber-based networks for point-to-point connections), PortaBilling® stores this data and provisions it to Sandvine SPB via the ESPF (External System Provisioning Framework). In networks with *dynamic* IP allocation, the subscriber's IP address is initially unknown. PortaBilling® receives a subscriber's IP in a RADIUS request from NAS and then provisions it to Sandvine SPB via RADIUS. This enables you to manage subscribers and their service availability on virtually any network.

This is how it works:



When an administrator creates a new customer in PortaBilling®, PortaBilling® sends the provisioning request to Sandvine SPB to create the new subscriber and assign a corresponding Internet access policy to it. If there's already a subscriber in Sandvine SPB with the same name, their

Internet access policy configuration is overridden by the PortaBilling® data received.

When a user connects to the Internet, their device is allocated a dynamic IP address. The NAS sends the Start accounting RADIUS request to PortaBilling®. PortaBilling® extracts the user's IP address from the Framed-IP-Address attribute and provisions it to the Sandvine SPB via RADIUS.

Sandvine SPB now controls a user's traffic usage according to their access policy (e.g. denies access to websites with pirate videos). When a user's session is over, NAS sends the Stop accounting request to PortaBilling® which then passes the RADIUS provisioning request to Sandvine SPB to clear the user's IP address.

When the user's status changes (e.g. they're blocked or their services are suspended due to non-payment), PortaBilling® updates their status in Sandvine SPB. The user is redirected to the captive portal URL. Similarly, when a user's access policy parameters change (e.g. new speed limits are applied), their data is updated in Sandvine SPB.

### Configuration:

To provision Sandvine SPB, configure the access policies in Sandvine and set up a hotline portal and the IP assignment rules.

In PortaBilling® configure the following:

1. Enable the Sandvine adaptor on the Configuration server.
2. Create all NASs that PortaBilling® communicates with as nodes.
3. Create a special node for Sandvine SPB. Specify the IP address of the Sandvine server to provision the user IP addresses via RADIUS in the PoD server configuration.
4. Configure Internet access policies with the same names as those defined in Sandvine SPB.
5. Create Internet access products. Include the Mobile network provisioning service with the products to trigger subscriber data provisioning.
6. Configure the ESPF to provision subscriber data to Sandvine SPB.

This integration enables CSPs to manage traffic effectively. They can:

- Monitor network performance and ensure quality service to subscribers.
- Introduce policy enforcement per subscriber based on subscription plans (e.g. premium customers receive more bandwidth and higher Internet speed while residential users enjoy regular speed limits).

- Facilitate security on the network by detecting and blocking unwanted traffic/protocols (e.g. BitTorrent) and cyber threats.
- Collect various statistics data.

## 2. LTE services

## Integration with Adax EPC

PortaBilling® is integrated with Adax EPC, which enables CSPs to provide Internet Access services to their customers within LTE networks.

The integration covers two aspects:

- Integration with Adax P-GW;
- Integration with Adax HSS.

### Integration with Adax P-GW

PortaBilling® operates as the online charging system (OCS) that communicates with the Packet Data Network Gateway (P-GW) using the Diameter (Gy) protocol for real-time user authorization and rating.

When a user establishes an Internet session, P-GW sends an authorization request to PortaBilling®. During the session, P-GW sends recurring interim credit control requests that report on the volume of traffic already consumed. Based on that information, PortaBilling® verifies that the user can continue to use the service. If the user runs out of funds, they cannot access paid Internet content (e.g. YouTube.)

Adax EPC supports rating groups and AVPs such as Validity-Time and Volume-Quota-Threshold. This enables ISPs to introduce different business models and ensure correct charging for all of them.

### Integration with Adax HSS

Adax HSS is the centralized database of user subscription information. It includes user identification data (SIM card IMSI, MSISDN), user registration states, user profiles with QoS parameters and other attributes (e.g. static IP address). PortaBilling® provisions SIM card data to Adax HSS and thus enables wireless operators to authenticate their subscribers across the LTE network and allocate the corresponding service policy to them.

To trigger provisioning to Adax HSS, an administrator configures the External Systems Provisioning Framework (ESPF) and enables the Mobile network provisioning service within a product for LTE service.

## Integration with Aricent HSS

PortaBilling® is integrated with the Aricent HSS – LTE core network element that contains all subscriber data, such as:

- the account identification (the phone number (MSISDN) and SIM card, identified by IMSI), and

- profile information (e.g. static IP address, quality of service information).

This integration enables wireless operators to provision subscriber information defined within PortaBilling® to Aricent HSS, where a SIM card is activated by Aricent HSS and the LTE service becomes available for the subscriber.

To make this happen, an administrator enables the **Mobile Network Provisioning** service for a product and assigns it to an account with an associated SIM card. PortaBilling® then provisions the new subscriber information to Aricent HSS via the External System Provisioning Framework (ESPF). When an administrator makes changes for an account (e.g. blocking, changing a product), PortaBilling® automatically synchronizes this data with Aricent HSS.

This feature extends the list of LTE equipment that wireless operators can use for organizing their network infrastructure. For those operators that want to switch from legacy billing systems to PortaBilling®, the integration with Aricent HSS ensures the seamless migration of subscriber information.

## Integration with Huawei EPC

To enable ISPs to provide Internet Access services to their users within the LTE network, PortaBilling® is integrated with Huawei EPC.

PortaBilling® provides a single place for customer information and balance and service configuration management by provisioning user data to the HSS and PCRF.

In network terms, PortaBilling® operates as the OCS that performs real-time user authorization and rating. Communication with the SAE-GW is managed via the Diameter (Gy) interface. The same interface is used to disconnect an Internet session when a user is out of funds or exceeds their credit limit or when redirecting the user to a hotlining portal.

The Huawei UGW9811 supports the following features:

- Traffic categorization into rating groups
- Credit Control for Multiple Services per session
- Hotlining
- Server-Initiated Credit Re-Authorization (RAR)
- Online Centralized Session charging with units reservation SCUR, DCCA
- Real-time billing for period-switch



This integration extends the variety of existing LTE equipment for service providers who are interested in becoming active players in the wireless telecommunications industry.

## Integration with NetNumber Titan HSS

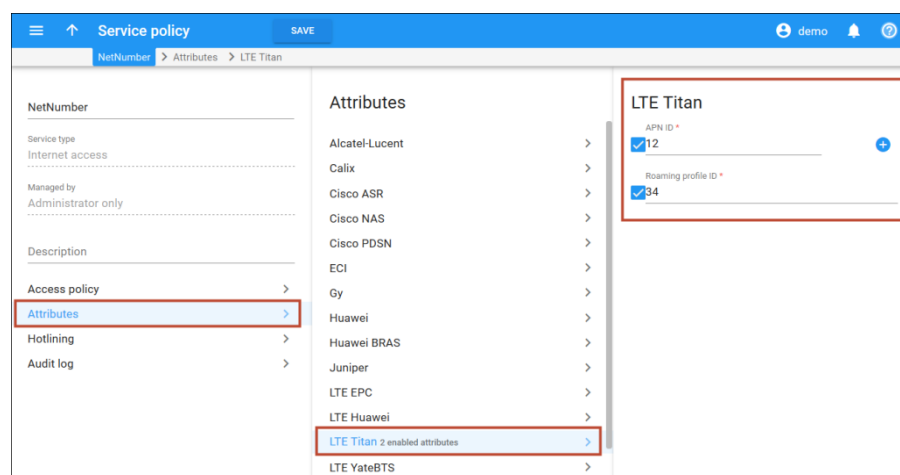
PortaBilling® is integrated with NetNumber Titan HSS. This is the centralized subscriber database for LTE service provisioning that stores:

- subscriber information (phone number (MSISDN), SIM card IMSI), and
- profile information (Regular upload/download limits for Internet access, APN (Access Point Name) ID, Roaming profile ID).

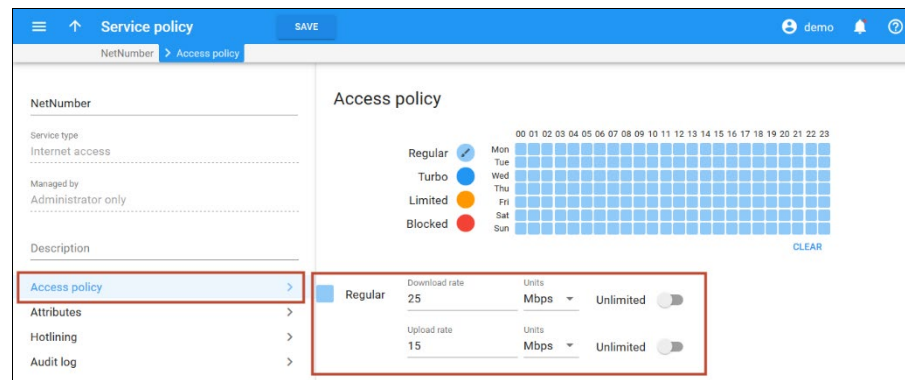
Wireless operators can now provision subscriber data in NetNumber Titan HSS. This enables them to provide their subscribers with the LTE service.

To make this happen, an administrator configures the following:

- in NetNumber Titan HSS – defines the APN(s) and Roaming profile(s);
- in PortaBilling® – specifies the preconfigured APN ID(s) and Roaming profile ID(s) for the Internet access policy;



- defines upload/download limits for Internet access;



- enables the **Mobile Network Provisioning** service for the LTE product and adds the Internet access policy and assigns it to an account with an associated SIM card.

PortaBilling® provisions the NetNumber Titan HSS via the External System Provisioning Framework (ESPF). When an administrator makes changes for an account in PortaBilling® (e.g. blocks or changes a product/Internet access policy, etc.), PortaBilling® immediately synchronizes the updated data to the NetNumber Titan HSS.

This feature extends the list of LTE equipment that wireless operators can use for organizing their network infrastructure.

## Real-time content-based charging with Protei P-GW

PortaBilling® is integrated with Protei Packet Data Network Gateway (P-GW) for real-time content-based charging on mobile networks: GPRS, 3G and LTE.

PortaBilling® provides a single place for subscriber management and service configuration and functions as the OCS (Online Charging System). It communicates with Protei P-GW via the Diameter Gy interface for user authorization and rating.

Protei P-GW performs policy control and reports traffic usage to the OCS. It supports content-based charging via rating groups with configurable speed limits. This enables you to differentiate among the types of Internet traffic, control the bandwidth and charge differently for each traffic type. For example, access to email and the self-care portal are free of charge – while online gaming, YouTube, etc. are available for a price. This gives you flexibility in service configuration and thereby increases your competitiveness in the market.

To control user access to the Internet and perform content-based charging, Protei P-GW communicates with the PCRF (Policy and Charging Rules Function). When a user connects to the Internet, Protei P-GW obtains the user's service policy in the PCRF and then sends the Credit Control Request (CCR-Initial) message to authorize the user in PortaBilling®. Upon authorization, PortaBilling® allocates a service unit quota for the requested rating group and responds with the Credit Control Answer (CCA-Initial) message. The user can now use the Internet according to their service policy. Periodically, the P-GW reports about the volume of consumed traffic to PortaBilling® so that when a user's quota is depleted or runs out of funds, their session is either hotlined or disconnected.

Thus, to configure content-based charging for Internet access services, do the following:

- Configure the service policies, rating groups and hotline portal URL in the PCRF.
- In PortaBilling®, define quotas and create Internet access policies where you configure Protei-related attributes and define hotlining URL. Bundle them in the Internet access products for accounts.
- Configure the ESPF to provision user data to the PCRF.

This integration with Protei P-GW expands the variety of available equipment for CSPs to build their network infrastructure. PortaBilling® is already integrated with Protei core components such as **PCRF**, **HLR/HSS** and **SCP (Diameter-CAMEL gateway)**. Together, these integrations provide a ready-to-use ecosystem that minimizes the time necessary to launch mobile services on the market.

## Integration with YateHSS/HLR and YateUCN

Wireless operators can use PortaBilling® to provision their subscriber information to HSS and/or bill their subscribers for the LTE service. The integration of PortaBilling® with EPC components produced by Yate, i.e. YateHSS/HLR for subscriber data provisioning and YateUCN for real-time charging, allows wireless operators to use Yate products exclusively to organize and build their network infrastructure.

### Integration with YateHSS/HLR

YateHSS/HLR functions as a centralized subscriber database that stores and manages subscriber information for LTE service provisioning.

Using PortaBilling®, you can provision subscriber details such as subscriber's phone number (MSISDN), SIM card IMSI and profile details

(e.g. LTE service, quality of service information) to activate SIM cards in YateHSS/HLR. This registers subscribers on the mobile network and gives them access to the LTE service.

To provision subscriber details to YateHSS/HLR, an administrator creates a product for the LTE service and enables the **Mobile Network Provisioning** service for it. When a new mobile account is created, PortaBilling® sends the subscriber information to YateHSS/HLR via the External System Provisioning Framework (ESPF).

With PortaBilling® you can also update YateHSS/HLR with any subscriber changes (e.g. account is blocked or is assigned a new product).

## Integration with YateUCN EPC

The PortaBilling® integration with YateUCN – an LTE EPC component – enables you to provide LTE service and charge your mobile subscribers for it in real time.

With this integration, PortaBilling® operates as an OCS (online-charging system) and communicates with the YateUCN EPC using the Diameter (Gy) protocol for real-time user authorization and rating. It also instructs the YateUCN EPC to redirect users to a hotlining portal if and when they run out of funds/lack available quota.

YateUCN EPC supports rating groups. This enables you to introduce content-based charging. For example, you can charge users for watching YouTube videos or visiting social networks although traffic for using your self-care portal always comes free of charge.

## Integration with ZTE EPC

PortaBilling® supports the provisioning of LTE/3G services to ZTE EPC (Evolved Packet Core) and provides quota control for these services. You can combine PortaBilling® as both the online charging system and the SIM card provisioning system with ZTE equipment.

### Integration with ZTE P-GW

The ZTE Packet Data Network Gateway (P-GW) is the point of entry to the LTE network. PortaBilling® is integrated with ZTE P-GW as the OCS (Online Charging System) to perform real-time user authorization and charging. This enables wireless operators to provide full-scale LTE services to subscribers.

PortaBilling® communicates with the ZTE P-GW via Diameter (Gy) to authorize user sessions and either disconnect a session or redirect a user

to a hotline portal when they run out of funds or exceed their allocated quota.

ZTE P-GW supports rating groups. This enables you to introduce content-based billing wherein you charge users differently depending on the type of Internet traffic they consume. For example, you charge users for online games and to watch YouTube, while regular browsing, using email and having access to their self-care portal are free of charge.

### Integration with ZTE HSS and SPR

When an administrator makes changes for an account in PortaBilling® (to create, block or change a product/their Internet access policy, etc.), PortaBilling® immediately provisions the updated data to the ZTE HSS (Home Subscriber Server) or the ZTE SPR (Subscription Profile Repository). HSS then provides centralized user authentication across the network and SPR manages users' service policies. This way, user data is always up-to-date in ZTE.

PortaBilling® can also independently serve as the B/OSS system for LTE services. It manages customer data (including unified balance), service configuration details, product/rate tables, etc. for LTE just as for other services. Therefore, by using PortaBilling® as a unified platform, you reduce your administration costs and improve the user experience.

## Multiple add-on products provisioning for LTE

In LTE networks deployed with ZTE equipment, services for subscribers are activated based on the PAKID value. The PAKID value defines which Internet quota is available for a subscriber and is taken from the accounts' product configuration provisioned by PortaBilling®.

By provisioning several PAKID values via add-on products, you can allocate multiple Internet quotas within ZTE EPC for subscribers and then allow them to modify their product configuration a la carte. PortaBilling® provisions a PAKID value to ZTE SPR as soon as a subscriber assigns an add-on product and ZTE SPR allocates the corresponding quota for the subscriber. As a result, the subscriber receives the service based on the combination of the PAKID values and according to add-on precedence.

Consider the following example:

Smart Net is an LTE service provider. They offer a 1 GB Internet quota for their basic service and the following additional service packages:

- 2 GB “Turbo” quota available within 24 hours and
- 5 GB of “Regular Internet access” quota available within 30 days.

These service packages are configured as the following add-on products in PortaBilling®:

- “Turbo” add-on product with high precedence level and
- “Regular Internet access” add-on product with medium precedence level.

John Doe has basic LTE service. In a week, he uses all the allocated 1 GB Internet quota so he is then redirected to his self-care portal. There he signs up for both service packages. His product configuration now includes the “Turbo” add-on product with an expiration date of 24 hours and the “Regular Internet access” add-on product with an expiration date of 30 days. Thus, John Doe uses the “Turbo” quota first and once it expires, he uses the “Regular Internet access” quota.

To configure add-on product provisioning to ZTE EPC, include the LTE service and Internet access policy with the PAKID value defined in the product configuration.

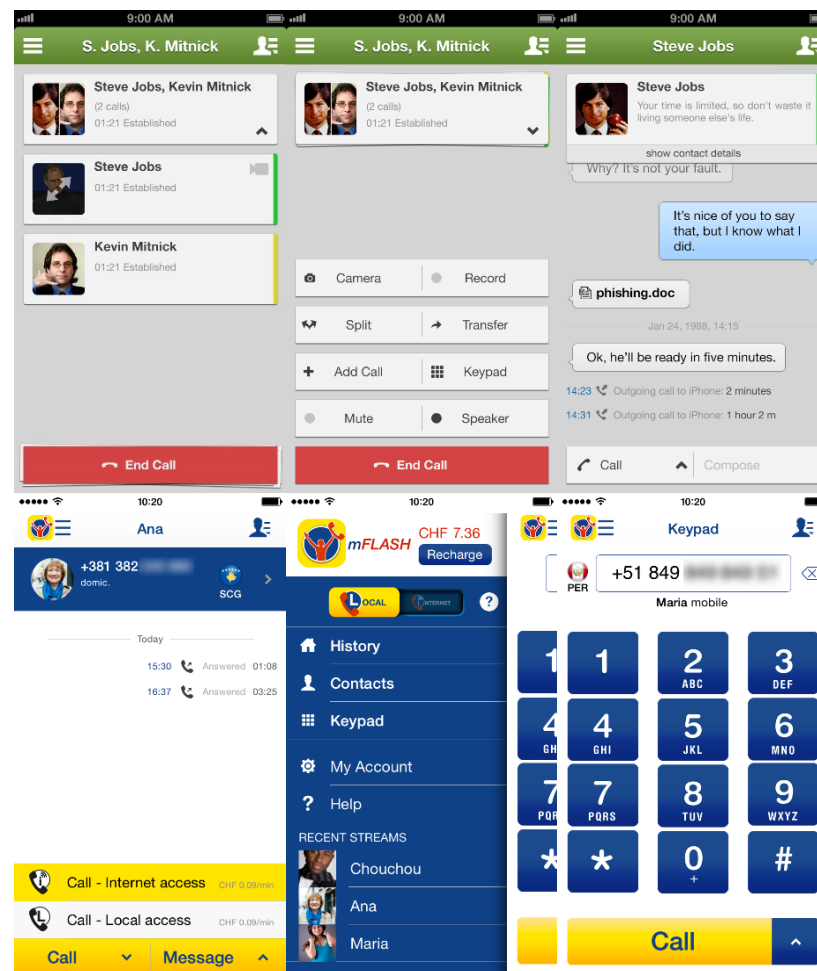
Add-on product provisioning for ZTE EPC enables ISPs to provide various service packages to their customers, making them more competitive in the market while growing their customers’ loyalty.

Alternatively, for quota control organized within ZTE EPC, you can deploy PortaBilling® as the online charging system (OCS) in your LTE network. Thereby you gain advanced control over your service provisioning by receiving information about monthly quotas, service wallets, and current usage bars and rollovers in one single location.

# 3. MNO/MVNO solution

## Acrobits Cloud Softphone

Service providers can use Acrobits Cloud Softphone to deploy a premium quality, customized mobile app for iOS and Android devices. Cloud Softphone is fully integrated with PortaSwitch® to enable seamless calling and advanced features such as on-line balance display. PortaOne and Acrobits engineering teams work in sync to provide a best-of-breed, innovative and reliable platform for mobile services. In less than one day, service providers can launch their own white-label smartphone app via the iOS App Store and Google Play, with settings and features set specifically for their service.



Acrobits Cloud Softphone is a highly configurable SIP client designed specifically for VoIP service providers. The following features are available:

- centralized configuration management
- incoming and outgoing calls
- applying and managing tariffs



- possibility to perform calls via mobile network and Wi-Fi
- option to quickly private-brand app
- push notification feature— users can receive calls even when the app is closed
- Web service-based callback for maximum battery efficiency
- instant messaging
- presence feature provides option to check availability of those on your contact list to chat
- HD sound
- balance checker
- customizable ringtones
- Bluetooth support

To simplify customer management, Acrobits iOS/Android softphone apps offer one-touch provisioning with QR codes generated by PortaSwitch® online signup portal.

For detailed description of how to use the service form the mobile application, please refer to the **Unified PortaSwitch® Handbook Collection**.

## Integration with Acrobits Webs

PortaSwitch® is integrated with Acrobits Webs – a solution that allows end users to communicate with each other directly from their web browsers, e.g. make voice and video calls, send messages, exchange files and share screens. Acrobits Webs is available for use on mobile, tablet and desktop devices.

In its integration with PortaSwitch®, Acrobits Webs acts as a WebRTC gateway, enabling communication between WebRTC and SIP endpoints.

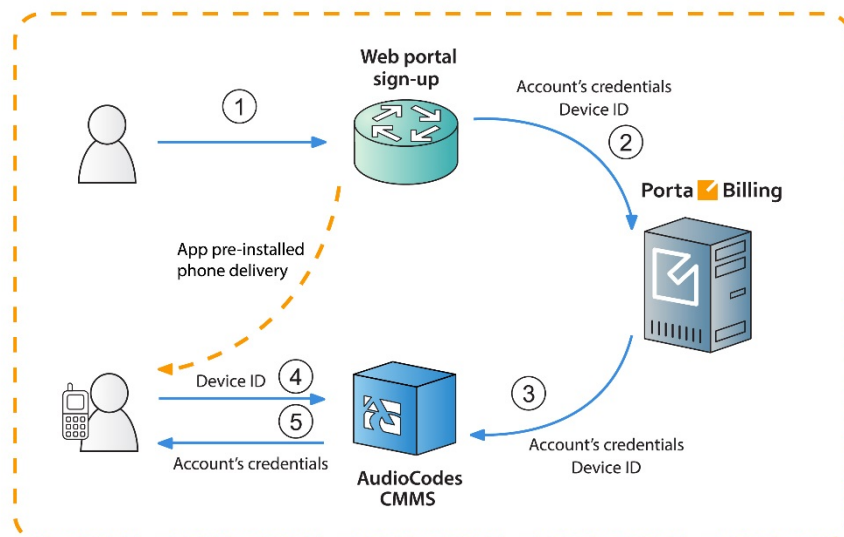
When a WebRTC endpoint initiates a call, it connects to a mediation component – a WEBIS server – that converts session control messages received from the WebRTC client into SIP messages (and vice versa). The WEBIS server then forwards these SIP messages to PortaSwitch® which is responsible for their further processing.

Note that Acrobits Webs is not provided as a part of the PortaSwitch® solution. For more details about integration with Acrobits Webs, please contact [support@acrobits.cz](mailto:support@acrobits.cz).

## Integration with AudioCodes Mobile Application

PortaBilling® can provision the AudioCodes mobile application for service providers and their resellers. Auto-provisioning makes the configuration of services quick and convenient for end users while saving time and expense for service providers.

This multi-featured AudioCodes mobile application provides a wide range of services: voice and video calls, SMS, IM and more. To provision the application, PortaBilling® is in constant interaction with the AudioCodes CMMS (Clients' Management Server) which is responsible for customized profiles, user level control, time-based licensing and other functions. CMMS, in turn, is in constant interaction with users' mobile phones and tablets, so when a user's information is changed on the PortaBilling® side (e.g. user's credentials), it is quickly updated on the user's side, too.



### MVNOs

The AudioCodes mobile application registration and configuration process for the MVNO business model is detailed in the following example:

John Doe wants to subscribe to EasyCall's services. **(1)** He visits the service provider's website and makes a request for a new mobile phone and a list of services to be provided with that phone (e.g. call forwarding, voicemail, etc.). **(2)** A new account is created for John Doe in PortaBilling® that contains information such as account ID, password, IMEI (device ID), etc. **(3)** At the next stage, PortaBilling creates the account in the AudioCodes CMMS with all of the required parameters –

the account's credentials, IMEI, etc. The phone with the installed AudioCodes mobile application is then sent to the user. John Doe receives his new phone and switches on the AudioCodes application. (4) It automatically connects to the CMMS, provides the IMEI (device ID) and requests the user's credentials. (5) The AudioCodes CMMS parses this information and provides those credentials. Thus, the mobile application is configured, John Doe has avoided having to manually set it up and the requested services can be used immediately.

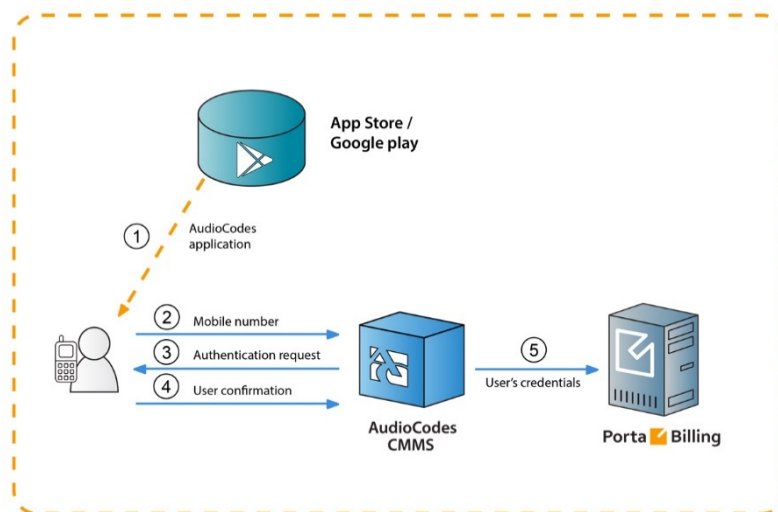
**NOTE:** AudioCodes CMMS is compatible with Android and iOS only.

### *OTT service providers*

The business model for downloading the AudioCodes mobile application from the App Store or from Google play is applicable to a wide circle of service providers. For this model, creation of a new account in PortaBilling® is initiated by registration of a new user in AudioCodes mobile application. The whole process is described in this following example:

The TelePlus service provider will provide voice calls, messaging and other custom services via their own SIP mobile application. TelePlus obtains the mobile application from AudioCodes and brands it as TelePlus.

(1) John Doe downloads the TelePlus application. The first time he runs it, the application requests his mobile number. (2) He inputs his number and the application sends it to the CMMS server. (3) The server generates a special security code and texts it to John Doe via SMS to confirm that the owner of that number indeed made the request. (4) John Doe enters this security code which is then passed to CMMS. (5) The server accepts the code and sends the request to PortaBilling® with the user's credentials. Then a new account is created in PortaBilling® with John Doe's mobile number used as the account ID. Starting from this moment, PortaBilling® charges John Doe for service usage.



The account information configuration and the updates for the AudioCodes mobile application occur immediately and automatically. Auto-provisioning decreases the workload on the service provider and ensures continuous and smooth service provision, leading to user satisfaction with service quality.

## Customized provisioning

Service providers can fine-tune the application's configuration for individual customers who belong to different business models and then automatically provision it to them.

AudioCodes profiles determine which services to deliver to which customers within the applications. Each profile comprises a set of services and application settings defined for a particular customer. Customers who share the same business model or have similar profiles are also identified within the AudioCodes' CMMS by either the service provider's or reseller's company domain name. These can be used for statistics purposes.

By configuring additional parameters in PortaBilling® such as domain and profile name and then passing them to the CMMS in the provisioning request, service providers gain advanced control over services available for a customer within the mobile application.

Consider the following example:

You provide services to your customers under your domain name *mycompany.com*.

John Doe is one of your residential customers whose service bundle includes domestic calls and SMSs. EasyCall Ltd. is one of your IP Centrex

customers whose service bundle includes voice and video calls and conferencing services.

You want to auto-provision the customized AudioCodes mobile application to both of them. To do this, configure two different AudioCodes profiles: “Residential” and “Business.” In PortaBilling®, assign them to John Doe and EasyCall Ltd., respectively, as custom fields. Then, after PortaBilling® provisions the CMMS, the customers’ applications are provisioned with specific settings that improve their usage experience.

To customize the AudioCodes mobile application auto-provisioning, do the following:

- Configure the custom fields *profileName* and *domain*
- Assign them to the requisite customer class
- Specify the custom fields’ values for a particular customer on the **Edit Customer** page.

## Messaging service management in AudioCodes CMMS

With PortaBilling® API you can effectively manage messaging service availability for accounts provisioned in AudioCodes. When an account’s service wallet is empty or expires, a PortaBilling® sends a corresponding request to the AudioCodes CMMS server and the messaging service is suspended. Likewise, it is resumed upon topping up the service wallet.

To configure messaging service management within the AudioCodes CMMS server, do the following:

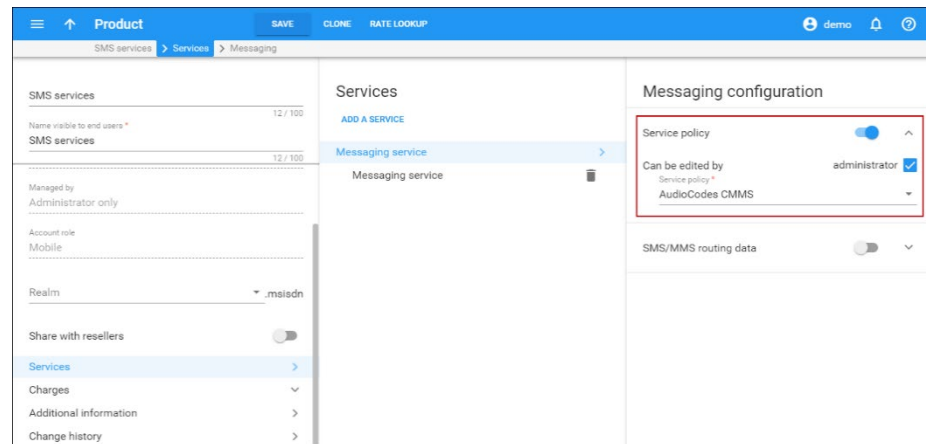
1. Configure a service policy for messaging services and enable the **push\_events** option within.

The screenshot shows the 'Service policy' configuration page in the PortaBilling® interface. The breadcrumb trail is 'AudioCodes CMMS > Attributes > Provisioning into external systems'. The page is divided into three main sections:

- AudioCodes CMMS:** Contains fields for 'Service type' (set to 'Messaging service'), 'Managed by' (set to 'Administrator only'), 'Match priority' (set to '0'), 'Recipient domain pattern', and 'Service control in the AudioCodes CMMS server'.
- Attributes:** Contains expandable sections for 'Diameter Ro interface', 'Processing messages over SIP/SMPP', and 'Provisioning into external systems 1 enabled attribute'.
- Provisioning into external systems:** Contains a checkbox labeled 'Send push event to AudioCodes CMMS', which is currently checked and has a blue toggle switch next to it.

At the bottom of the 'AudioCodes CMMS' section, there are links for 'Attributes' and 'Change history'.

2. Assign a service policy to the product. Note that service policies directly defined for accounts are not considered.



Of course, a user must have a service wallet for the particular messaging service assigned.

## Integration with the BroadForward BFX Interface Gateway

Among the variety of wireless networks in the telecommunications market, networks such as 2.5G, 3G and CDMA are still popular. For 3G networks CAMEL is the main protocol, that enables communication for Intelligent Network (IN) architectures. For North American CDMA networks, this role is fulfilled by the WIN (Wireless Intelligent Network) protocol.

You can penetrate this segment of wireless networks or preserve service provisioning in a CDMA network by using PortaBilling®, and all the while deploying new generation network services (e.g. LTE).

The CDMA network solution includes PortaBilling® operating as an OCS (Online Charging System) for real-time call authorization and rating and the BFX Interface Gateway as the entry point to your network.

In this deployment, the BFX Interface Gateway operates as the mediation component performing the conversion of WIN messages into Diameter (Ro) messages. Thus, the BFX Interface Gateway communicates with the MSC using WIN, while it communicates with PortaBilling® using Diameter (Ro).

When a user places a call, the following occurs:

The MSC (Mobile Switching Center) performs the call authorization in PortaBilling® that verifies that the customer's balance is sufficient to call the desired destination. The MSC uses the WIN protocol, therefore its call authorization request is sent via the BFX Interface Gateway where it is converted to Diameter (Ro) and then delivered to PortaBilling®. PortaBilling® locks in the funds to cover the initial period of the call and sends a confirmation message to the MSC. This message also passes via the BFX Interface Gateway where it is converted to WIN and then delivered to the MSC.

When the user's initial call period finishes and their overdraft protection is configured in PortaBilling®, the BFX Interface Gateway sends a request to lock in the funds for subsequent periods.

Once the user hangs up or runs out of sufficient funds to continue the call, the BFX Interface Gateway sends instructions to the MSC to disconnect the call and sends a Credit Control Request – Terminate (CCR-Terminate) message to PortaBilling® to report the end of the call. PortaBilling® then produces a CDR record for this call.

### Destination number translation and provisioning

In addition to basic call processing, PortaBilling® can translate service numbers dialed by end users into actual numbers and provision them to the MSC.

This is how it works:

For example, a user dials 411 for directory assistance. The BFX Interface Gateway passes this number to PortaBilling® in a Credit Control Request – Initiate (CCR-I) message. PortaBilling® translates the dialed 411 into an actual number (e.g. 12055576061) and returns this number back to the BFX Interface Gateway in a Credit Control Answer – Initiate (CCA-I) message. The BFX Interface Gateway then delivers this number to the MSC to connect the call.

For number translation and provisioning to take place, do the following:

- Configure the dialing rules for the customer.
- Create the service policy and enable the **Provision CLD** and **Rise MSCC result code** options;
- Assign the service policy to the accounts' product.

The integration of PortaBilling® with the BFX Interface Gateway may be of special interest for service providers who aim to penetrate the mobile communications market as MVNOs or MVNEs, since it expands the range of equipment they can use for organizing their network infrastructure.

## Integration with the EConnect EAP for mobile core provisioning

PortaBilling® is integrated with the EConnect EAP platform – the provisioning solution for MVNOs, which operate on the Optus network in Australia.

PortaBilling® provisions the EConnect EAP via the ESPF (External System Provisioning Framework) with the following data:

- SIM card details (ICCID);
- subscriber details (MSISDN, service configuration, billing status);
- EConnect-related information such as “phoneid” and “clientid.” These are the unique IDs of a subscriber’s record and phone number in the EConnect EAP;
- Subscriber location details to control their Internet access in the roaming networks.

EConnect EAP then provisions the Optus mobile core to activate the SIM and grant access to the services for your mobile subscribers.

This is how it works:

Your administrator uploads SIM cards and configures their rate plans and mobile service profiles in the EConnect EAP. The rate plans must match the PortaBilling® products.

In PortaBilling® the administrator does the following:

- configures products that correspond to the rate plans defined in the EConnect EAP (e.g. domestic and roaming ones) and enables the Mobile network provisioning service to trigger provisioning;
- uploads SIM cards;
- configures custom fields for customer and account records to store EConnect-related information such as “clientid” and “phoneid,” and
- configures the ESPF to provision subscriber data.

When John Doe signs up for the mobile service bundle, a new customer is created in PortaBilling® and a SIM card is assigned to this customer’s account. PortaBilling® sends a provisioning request with SIM card details and subscriber data to EConnect EAP. EConnect EAP processes the request and generates the “phoneid” and “clientid” values for the subscriber. Then EConnect EAP triggers the API call to the Optus mobile core to activate the SIM card. John Doe can now enjoy the service.

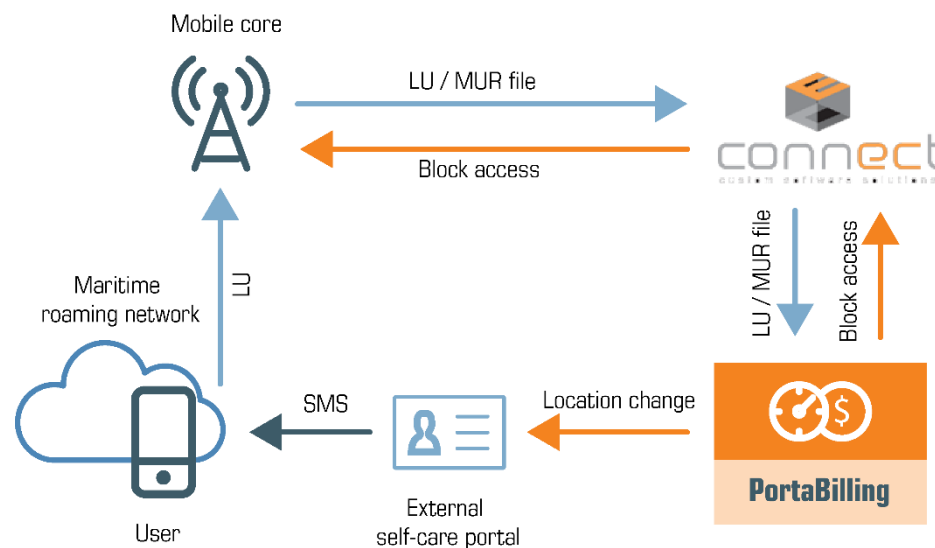


Whenever John's account status changes in PortaBilling®, (e.g. he runs out of funds or his account is suspended), PortaBilling® updates the Optus mobile core via the ECConnect to stop John's services until he tops up the balance. The provisioning request now includes the "phoneid" and "clientid" values to update the service availability status for John in the Optus mobile core.

If John decides to update his phone number with a different one or change his SIM card, his new details update automatically in the Optus mobile core without his service being stopped. This ensures the data integrity in the entire network infrastructure.

## Location-based control of Internet access

Roaming users can connect to networks where mobile data usage is extremely expensive, e.g. on board a cruise ship or in an airplane. To prevent users from high overdraft and bill shock, MVNOs can block Internet access to roaming users when their location changes to Aerospace or Maritime.



This is how it works:

User location information can be obtained from the LU (Location Update) and MUR (Mediated Usage Records) files. LU files are created when a user's phone registers on a roaming network. The mobile core receives the LU file and sends it to PortaBilling® via the ECConnect EAP. However, LU files can become delayed or even get lost. Therefore, MUR files are also used to identify a user's location. The mobile core generates MUR files when a user starts the Internet session and it sends them to PortaBilling® via the ECConnect EAP. MUR files are sent every 15 minutes, which speeds up user location identification.

PortaBilling® reads the LU/MUR files and updates a user's location using the xDR mediation utility. A user's location and the date and time of its change are stored in custom fields for the user's account in PortaBilling®. If a user is located in the expensive zone identified as AEROSPACE or MARITIME, PortaBilling® sends the provisioning request to the mobile core via the EConnect EAP to block Internet access to them. However, SMS and voice call services remain available.

To notify a user about their location change and applicable rates for service usage, PortaBilling® communicates with the external self-care portal. PortaBilling® provisions the user's location to the external self-care portal, which sends an SMS notification to the user.

A user can manually unblock Internet service via the external self-care portal. In this case, the self-care portal updates the user's location in PortaBilling® via the API. PortaBilling® then provisions the mobile core via the EConnect EAP to unblock Internet access for the user.

To control Internet access based on user location, do the following:

- Create the custom fields for the account record (e.g. "location" and "timestamp") to store the user's location and the date and time of the last location change in PortaBilling®.
- In the ESPF handler config file, specify which locations to block Internet service for by default (e.g., AEROSPACE OR MARITIME) in the [RestrictedLocations] section.
- Configure the xDR mediator to read the LU/MUR files and update the user's location. Please contact PortaOne support if you want assistance.
- Build or adjust your external self-care portal to communicate with PortaBilling®.

This integration is useful for Australian CSPs interested in becoming an MVNO. It provides a ready-to-use solution to roll out services virtually instantly and therefore become an active player in the telecommunications market.

## Integration with Qualution

Qualution is the OSS (Operation Support System) used by some North American MVNOs to manage service provisioning on the MVNE side (e.g. they may use it for SIM card management and the like). It operates as middleware between PortaBilling® and the mobile network.

PortaBilling® is integrated with Qualution via API and performs real-time management of users' volume discount plan usage. As soon as an MVNO

subscriber exceeds their allocated quota, PortaBilling® sends a notification to Qualution via the API.

**NOTE:** To perform real-time management of users' volume discount plan usage, every account in PortaBilling® must have an individual volume discount plan assigned to them via product.

If several volume discount plans apply to the same service and destination group, PortaBilling® will send notification to Qualution only after the last one is used up (e.g. if a user has a quota of 100 domestic SMS and another quota for 50 domestic SMS, the notification will be sent immediately after the user sends 150 SMS).

This integration widens the pool of the potential business partners and enlarges the service provider's opportunities for how to organize their network infrastructure.

## Integration with Protei CAMEL gateway

As an OCS (Online Charging System), PortaBilling® can be integrated with 2.5/3G and 4G mobile networks. In 2.5 and 3G networks, the CAMEL protocol is the de-facto standard for real-time charging.

In this case, PortaBilling® can interoperate with mobile operator networks via the Protei CAMEL gateway.

In this configuration, the Protei CAMEL gateway is deployed within a service provider's network and acts as a mediation component between PortaBilling® and a mobile operator's network, converting the CAMEL protocol to the Diameter protocol and vice versa.

This allows PortaBilling® to communicate with the MSC (Mobile Switching Center) – a switching node that routes calls and messages to and from other telecommunication networks, including PSTN, ISDN and other mobile operators' networks – for real-time calls and SMS authorization and rating.

When a customer makes a call, MSC performs the call authorization in PortaBilling® to verify that the customer has sufficient balance and is allowed to call that destination. Since MSC uses the CAMEL protocol, its call authorization request is sent via the Protei CAMEL gateway, where it is converted to Diameter Ro and then delivered to PortaBilling®. PortaBilling® locks in the funds to cover the initial period of the call and sends a confirmation message to MSC. This message also passes via the Protei CAMEL gateway where it is converted to CAMEL and then delivered to MSC.

When the period is over, MSC sends a request to lock in the funds for the subsequent period, etc. When the call is over, MCS sends a Credit Control Request - Terminate (CCR-Terminate) message to PortaBilling® to report the end of the call. PortaBilling® produces a CDR record for this call. In the message exchange between MCS and PortaBilling® all the protocol conversion – from CAMEL to Diameter and from Diameter to CAMEL – is done using the Protei CAMEL gateway.

A similar procedure is followed when a customer sends an SMS.

This kind of integration allows service providers interested in entering the mobile market to integrate with mobile operator's networks that use the CAMEL (Phase 1, 2 and 3) protocol to communicate with a billing system for real-time call authorization and rating.

## Integration with Protei HLR/HSS and Protei PCRF

In order to operate as full MVNOs/MVNEs on the mobile market, service providers often encounter a prerequisite (raised from the hosted MNO) to deploy such equipment as HLR/HSS and PCRF within their own networks. The joint solution developed by PortaOne, Inc. and PROTEI can easily help you meet this requirement.

PortaBilling® guarantees its integration with Protei HLR/HSS and Protei Policy Controller (PCRF) core network elements. As a provisioning system, PortaBilling® synchronizes subscriber information defined within the system with Protei HLR/HSS, and policy/service quality parameters with Protei PCRF.

To enable provisioning to Protei HLR/HSS and Protei PCRF, an administrator enables the **Mobile Network Provisioning** service for a product. For example, the administrator creates a product and configures voice calls, messaging and/or Internet access services for it. The administrator configures the corresponding service policies and enables the **Mobile Network Provisioning** service for this product. Upon assigning this product to an account with an associated SIM card, PortaBilling® provisions account and policy/service quality parameters to Protei HLR/HSS and Protei PCRF. When the administrator makes changes for an account (creating, blocking, etc.) or product, PortaBilling® immediately provisions the updated data to Protei HLR/HSS or Protei PCRF.

This integration helps service providers meet the MNO's requirements necessary to operate as full MVNOs/MVNEs. It also allows service providers to manage their subscribers and associated services independently, thereby achieving more autonomy from the host MNO.

## SMS processing via Protei SMSC

CSPs can provide SMS services to their mobile subscribers and charge them for SMS delivery in real-time using PortaBilling® and Protei SMS center (SMSC).

PortaBilling® functions as an OCS and communicates with Protei SMSC via the Diameter Ro interface with the direct debiting authorization mode.

When John Doe sends an SMS, Protei SMSC sends the CCR (Credit Control Request) Diameter message of the Event\_Request type to authorize John's account in PortaBilling®. Upon successful authorization, PortaBilling® sends a CCA (Credit Control Answer) message back to Protei SMSC and immediately charges John's account for the SMS. The SMSC then delivers John's message to the recipient.

PortaBilling® controls John's balance and service quotas to deny SMS service when he has no funds or exceeds the allocated quota and to resume it when funds are replenished or a quota is renewed.

CSPs can also deliver SMS notifications to subscribers about various billing events (e.g. exceeding a credit limit or a balance top up). PortaBilling® communicates with Protei SMSC for SMS notification delivery via PortaSIP®.

Following the example above, to notify John about reaching his credit limit or making a successful password change, PortaBilling® creates a notification and sends it to PortaSIP®. PortaSIP® sends it to Protei SMSC via the SMPP protocol. The SMSC then delivers the SMS to John's phone.

With this integration, CSPs receive a cost effective solution to provide SMS services out-of-the-box. They also improve the customer experience since SMS notifications are a convenient way to notify subscribers about their activities in a timely manner.

## USSD services with Protei USSD gateway

PortaBilling® is integrated with the Protei Unstructured Supplementary Service Data (USSD) gateway to provide customer care services to mobile subscribers in GSM networks. A subscriber sends a USSD message to request information (e.g., a balance check) or an action (voucher activation) by dialing a service code. In order to retrieve the requested data, the Protei USSD gateway interacts with PortaBilling® via API. PortaBilling® acts as the BSS.

Here, in more detail, is how it works:

You configure the service menu in the Protei USSD gateway and provide the service codes to your subscribers upon signup. Let's say that John Doe wants to check his account balance. He dials a short USSD code – \*123#. The USSD gateway accepts his message and requests his balance information from PortaBilling® via the API. PortaBilling® identifies John's account and returns his balance amount in the API response to the USSD gateway. John Doe then receives the USSD message, "Your current balance is 43.25 USD."

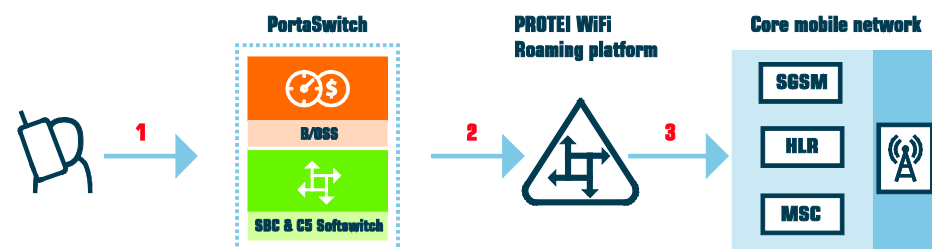
By using the Protei USSD gateway in their network infrastructure, service providers automate their customer care services. This improves the customer experience and also reduces the administrative load.

## Voice over WiFi solution for roaming users

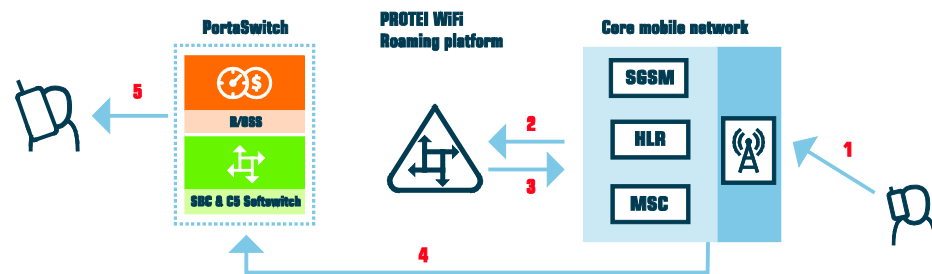
To stay competitive, wireless operators need to permit their customers to use their services even when they are traveling outside of their home networks. Introducing roaming service support, however, is costly and cumbersome, both for you and for your users. With PortaSwitch® you can deploy roaming services using WiFi and a mobile application at no cost and with no extra charges to your users.

The voice over WiFi solution, introduced with this release, includes PortaSwitch® and the PROTEI WiFi Roaming platform, which updates the users' mobile carrier about their current location. Thus, when a user is in roaming, all incoming calls to them arrive to PortaSwitch®, which then delivers them to the user's mobile application.

This is how it works in more detail:



When a user connects to WiFi and the mobile application registers with PortaSwitch® (1), PortaSwitch® forwards the user's registration to the PROTEI WiFi Roaming platform (2). The PROTEI WiFi Roaming platform passes the user's current location to the user's mobile carrier within the LU (Location Update) message (3).



When someone dials the user's phone number (1), the mobile carrier addresses the PROTEI WiFi Roaming platform with a PRN (Provide Roaming Number) message (2). The PROTEI WiFi Roaming platform responds with the user's local roaming number and prefix (3) based upon which their mobile carrier routes the call to PortaSwitch® via SIP (4). PortaSwitch® then processes the call and delivers it to the user's mobile application (5).

To instruct PortaSwitch® to forward user registrations to the PROTEI WiFi Roaming platform, define its IP address for the **third\_party\_registrars** option on the Configuration server web interface.

PortaSwitch® operates in the high-availability mode; therefore, it forwards user registrations in the “fire-and-forget” mode. In case of an unlikely network connectivity issue between PortaSwitch® and PROTEI WiFi Roaming platform, the registration will be updated when the application renews it in a few minutes.

With this solution, you introduce roaming service support at no cost, allow your customers to receive incoming calls free of charge and make outgoing calls at reduced rates. This increases your competitiveness in the market and improves customer experience.

## Integration with YateUCN CAMEL gateway

PortaBilling® is integrated with YateUCN as the CAMEL gateway to enable CSPs to provide voice calls in 3G networks.

In this integration, YateUCN acts as the mediation component between the mobile core and PortaBilling® and also converts messages from CAMEL to Diameter Ro and back. Thus, YateUCN communicates with the mobile core via CAMEL and via Diameter Ro with PortaBilling®.

Let's have a closer look at how the call flow works:

When a user makes a call, MSC (Mobile Switching Center) performs a call authorization in PortaBilling®. MSC sends the CAMEL request to YateUCN, which converts it to a Diameter CCR-I (Credit Control Request – Initiate) message and then delivers it to PortaBilling®. Once



PortaBilling® authorizes the call, YateUCN performs a reverse conversion to send the response back to MSC.

During the call, MSC sends periodic requests to update the session and lock in another portion of funds to cover the call. When the user hangs up or is left with insufficient funds to cover and continue the call, MSC sends a CCR-T request to report the end of the call. PortaBilling® then produces an xDR record and updates the user's balance. The entire communication between PortaBilling® and MSC is done using YateUCN.

YateUCN is compatible with 3G and LTE networks since it implements the functions and protocols of both core layers. PortaBilling® is also integrated with **YateUCN EPC** to introduce LTE services to subscribers and perform real-time billing for their usage. It is also integrated with **YateHSS/HLR** for SIM card provisioning.

Thus, both Yate and PortaBilling® solutions provide flexibility for organizing your network infrastructure. They also offer an opportunity to upgrade 2G and 3G network solutions to the next generation.

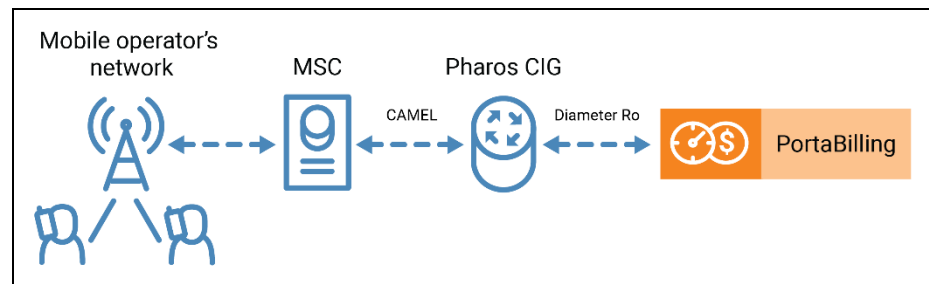
## Integration with the Pharos CIG

With PortaBilling® as the Online Charging System (OCS), mobile virtual network operators (MVNO) can offer a full range of mobile services to their customers. PortaBilling® supports 2.5/3G and 4G mobile networks and uses Diameter (Ro) as the main protocol for online charging. Since the CAMEL protocol is the main protocol used for real-time charging in 2.5 and 3G networks, additional gateway is required to convert the CAMEL requests to Diameter (Ro) requests.

PortaBilling® is integrated with one more gateway that converts the CAMEL requests to Diameter (Ro) requests and vice versa – the Pharos CIG (Charging Interworking Gateway). With the Pharos CIG, PortaBilling® supports real-time charging for domestic and roaming voice calls, SMS, and **USSD**.

The Pharos CIG is deployed within a service provider's network and acts as a mediation component between PortaBilling® and a mobile operator's network. The Pharos CIG communicates with the MSC (Mobile Switching Center) using the CAMEL protocol and then converts the CAMEL to Diameter (Ro) to communicate with PortaBilling®, and vice versa.





This is how it works:

Let's say you are the MVNO in South Africa who provides domestic/roaming voice calls and SMS to subscribers. John Doe is your subscriber. When John Doe makes a call to a destination 27115557122, South Africa, the MSC performs the call authorization in PortaBilling® to verify that John Doe has sufficient funds to call this destination. The MSC sends the authorization request to PortaBilling® via the Pharos CIG using CAMEL protocol. The Pharos CIG receives the authorization request from the MSC, converts it from CAMEL to Diameter (Ro) and sends this request to PortaBilling®. PortaBilling® locks in the funds to cover the initial period of the call and replies to the Pharos CIG with a confirmation message using Diameter (Ro). The Pharos CIG receives the reply from PortaBilling®, converts it from Diameter to CAMEL, and sends it to the MSC. When the initial period of the call is over, the MSC sends requests to lock in the funds for the subsequent periods. When John Doe finishes the call, the MSC sends a request to PortaBilling® to inform it that the call is over. PortaBilling® creates an xDR record for this call.

You can find the configuration details and the workflow for roaming voice calls and SMS services in [PortaBilling® Administrator Guide](#) in the **Real-time billing for roaming services** chapter.

This integration allows service providers to run MVNO in 2.5 and 3G networks and offer a full range of mobile services to their customers using another CAMEL to Diameter gateway.

## Charging for USSD sessions

PortaBilling® supports charging for USSD sessions for service providers that launch MVNOs in a 2.5/3G network using Pharos Charging Interworking Gateway (Pharos CIG).

Unstructured Supplementary Service Data (USSD) requests allow mobile phone users to request information or perform various actions by dialing short codes. For example, a user can dial \*136# to check the current balance or \*136\*4# to change the package.

The advantage of the USSD services is that they require neither Internet access nor a smartphone. With USSD requests, MVNOs can provide services that are easy to access from any mobile phone.

Usually, USSD requests are free of charge, but service providers may charge users for some of them (e.g., USSD requests for activation of premium features, accessing banking services, or receiving various content such as news, currency exchange rates, weather forecasts).

### *Specifics*

**NOTE:** To enable charging for USSD sessions, the PortaBilling® integration with the Pharos CIG must be configured.

The USSD sessions charge is time-based. For example, a South African MNO MTN uses a twenty-second interval for USSD sessions charging, meaning that the users are charged \$0.2 for every 20 seconds of a USSD session. During a session, every 20 seconds PortaBilling® receives a new Diameter request from the Pharos USSD gateway. This interval is configured in tariff rates in PortaBilling®. Every 20 seconds of the session show up as a separate xDR in PortaBilling®.

Let's consider examples for 2 types of USSD sessions:

1. Sessions with menu options. For example, John Doe wants to check the currency exchange rates. He dials \*102\*3#. A new USSD session starts and John receives a USSD message with a menu with various options ("News, press 1", "Currency exchange rates, press 2", "To go to the main menu, press 0" etc.). John dials 2 and receives a USSD message with exchange rates. Then he decides to also check the news. John dials 0 to go back to the main menu and dials 1 to check the news. After that, John presses the "Close" button to terminate the session. The duration of the session is 45 seconds. From the session initiation, the Pharos USSD gateway has sent to PortaBilling® three Diameter requests of 20 seconds each, so the total cost of this USSD session is  $\$0.2 \times 3 = \$0.6$ .
2. Sessions without menu options. Let's say John Doe dials \*102\*444# to change the current package to "Basic," the cheaper one. John receives a USSD message that his package was successfully changed. He presses the "Close" button (no other actions are available). The service provider charges John Doe \$0.2 for this request as if it was a twenty-second session.

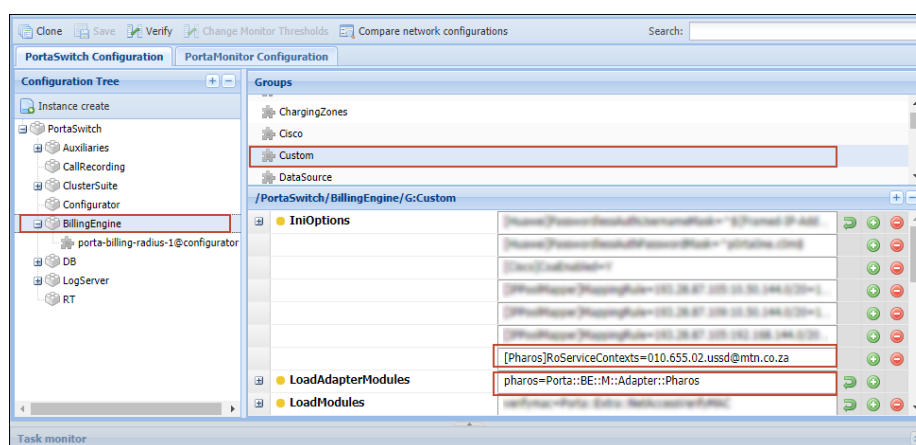
### *Benefits*

Service providers operating at markets where USSD services are in demand can monetize these services.

## Configuration

To configure charging for USSD sessions, do the following:

- Go to the **Configuration server > BillingEngine > Custom** group:
  - for the **Custom.IniOptions** attribute, add the following string:  
**[Pharos]RoServiceContexts=[the value of the *Service-Context-Id* AVP that is sent in the Diameter request for USSD]**.  
 For example, for an MVNO launching in the MTN network, this string looks as follows:  
**[Pharos]RoServiceContexts=010.655.02.ussd@mtn.co.za;**
  - for the **Custom.LoadAdapterModules** attribute, specify:  
**pharos=Porta::BE::M::Adapter::Pharos.**



- Go to PortaBilling®:
  - Create a separate service to charge for USSD sessions (select **Voice calls** as a service type).
  - Add the available USSD short codes (e.g., \*101#, \*102\*3#) to the list of destinations in PortaBilling® as custom destinations.
  - Add rates for each short code to the vendor tariff (e.g., Destination – \*101#, Rate – \$0; Destination – \*102\*3#, Interval – 20 seconds, Rate – \$0.3).
  - Create a customer tariff to charge for USSD sessions. Create a rate for each short code (e.g., Destination – \*101#, Rate – \$0; Destination – \*102\*3#, Interval – 20 seconds, Rate – \$0.6).
  - Open the mobile service product and add the USSD service on the **Services** page.
  - Open the **Usage charges** page for the product and add a record with the following access code: OUTGOING.SI[the number specified in the value of the *Service-Identifier* AVP in the Diameter request for USSD].  
 For example, if you configure an MVNO launching in the MTN network, the access code looks as follows: OUTGOING.SI120.

Next to the **Access code** field, select the created customer tariff for USSD charges.

SAVE CLONE RATE LOOKUP

arges

Usage charges

ADD

Service	Node	Access code	Tariff	
Network access	Any node	Any code	Internet access	▼
Service	Node	Access code	Tariff	
Voice calls	Any node	OUTGOING.SI35	Outgoing basic	▼
Service	Node	Access code	Tariff	
Voice calls	Any node	INCOMING.SI35	Incoming	▼
Service	Node	Access code	Tariff	
Messaging service	Any node	SMPP.SI30	SMS	▼
Service	Node	Access code	Tariff	
USSD	Any node	OUTGOING.SI120	USSD for customers	▼

- Create a voice calls service policy, enable the **Rise MSCC result code** attribute for it, and assign this service policy to the product (or an account).

# 4. M2M/IoT

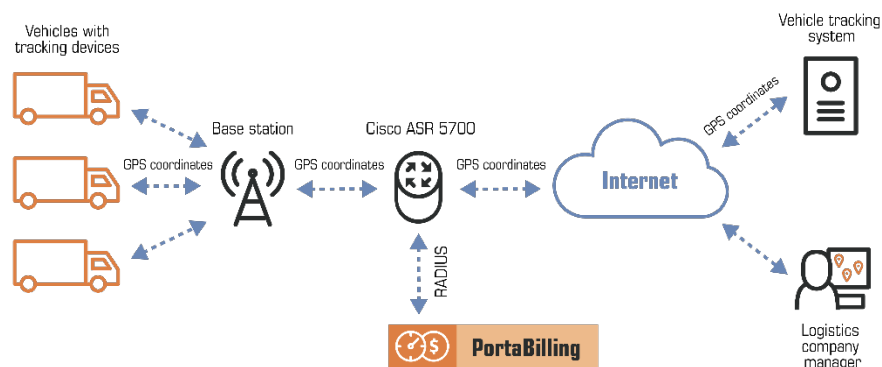
## Integration with Cisco ASR 5700

PortaBilling® is integrated with the Cisco ASR 5700. This is a GPRS Gateway Support Node (GGSN) that routes data traffic between a mobile network and an IP-based network (the Internet). This integration enables wireless operators to deliver M2M connectivity services, bill customers for their Internet usage and control session availability.

Cisco ASR 5700 performs the functions of a network access server (NAS). It communicates with the PortaBilling® OCS (Online Charging System) via the RADIUS protocol to authorize M2M devices and send accounting requests. PortaBilling® can then perform real-time charging for Internet access services.

Consider the following example:

A logistics company wants to track their vehicles. Each vehicle has a device with a SIM card to send GPS coordinates over the Internet. When a device establishes a data session, Cisco ASR 5700 sends an authorization request to PortaBilling® to verify that the account (which represents a device in PortaBilling®) has sufficient funds/quota and is permitted to use the service. It periodically sends interim (also called keep-alive) accounting requests with information about the volume of consumed traffic. Based on that information, PortaBilling® verifies whether a device can continue to send data. If there are no funds (or quota), Internet access is no longer available and the GPS coordinates cannot be sent.



**NOTE:** Cisco ASR 5700 does not support PoD (Packet of Disconnect) and CoA (Change of Authorization) requests. To avoid overdrafts, use an external application to check the account's (device) balance/quota and disconnect an Internet session.

This integration enables wireless operators to extend the variety of equipment for providing M2M connectivity services.

## Integration with Cisco Jasper

PortaBilling® is integrated with Cisco Jasper, the automated connectivity management platform. This integration enables you to deliver IoT connectivity services to all of your subscribers so that they can connect any device via their SIM card.

Within your infrastructure, PortaBilling® serves as the service and revenue management system. It provisions the account and SIM card information to Cisco Jasper, manages customer balances, collects billing information and issues invoices.

Cisco Jasper handles communication with the mobile network to activate SIM cards for your subscribers.

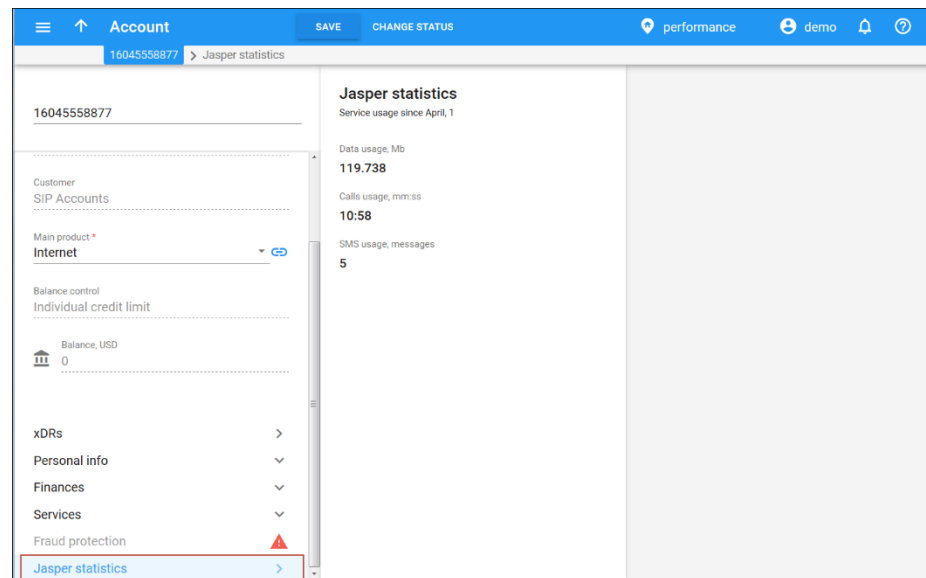
This is how it works:

When an administrator creates a customer and assigns a SIM card to the customer's account in PortaBilling®, PortaBilling® provisions the customer data to Cisco Jasper. It instructs Cisco Jasper to activate the SIM card associated with the account and to assign the rate plan to it. When an administrator or distributor blocks/terminates the account, PortaBilling® instructs Cisco Jasper to deactivate the account's SIM card.

When the subscriber uses up all of the allocated Internet quota, PortaBilling® receives notification from Cisco Jasper and changes the account's product to block service availability. The SIM card is consequently deactivated in Cisco Jasper.

As soon as the subscriber purchases additional quota, their account is assigned a new product in PortaBilling® and their SIM card is reactivated in Cisco Jasper meaning the subscriber can once again access the Internet.

The Jasper statistics panel displays the subscriber's service usage details from Cisco Jasper on the PortaBilling® web interface.



The panel contains information about the services used by a user within the current month: the total amount of data transferred, voice calls made and SMSs sent. If the user has exceeded the allocated quota, the administrator sees the corresponding notification in PortaBilling®.

Usage details are displayed for the current month and are updated on demand – when you open the page, the data is retrieved from Jasper.

To configure provisioning to Cisco Jasper, do the following:

- Enable the Jasper module on the Configuration server;
- Configure the External System Provisioning Framework (ESPF), and
- Enable the Mobile service provisioning service feature for the products you use for granting and denying service usage to subscribers. Make sure the product names match the names of the rate plans in the Jasper Call Control Center.
- To display the service usage details from Cisco Jasper, install the integration plug-in available in PortaBilling®. Please contact the PortaOne® support team for assistance with how to install the integration plug-in.

Cisco Jasper partners with 550+ mobile networks worldwide, enabling you to provide IoT connectivity to your subscribers across several networks. This allows you to expand your services into other markets while your business grows.



# 5. CRM/ERP

## Integration with the Microsoft Active Directory

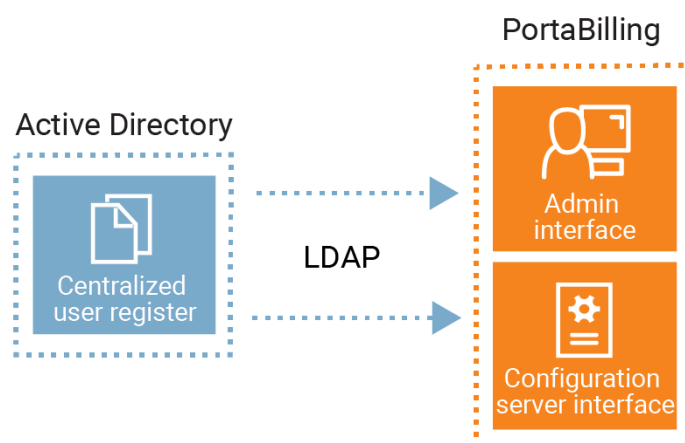
The Microsoft Active Directory (AD) is a directory service that enables service providers to manage users within their entire infrastructure from a single location. An AD administrator can create/block/delete user records, manage their details, and provide access to all corporate resources (for example, Microsoft SharePoint, Microsoft Teams, or Odoo CRM) via the AD. Thus, an AD administrator can quickly enable access for new employees and instantly block access to all corporate resources when somebody leaves the company. This saves significant time on user management and it improves infrastructure security.

An AD administrator can create user records in AD to manage access to:

- PortaBilling® web interface
- The Configuration server web interface

Therefore, users can access the PortaBilling® and Configuration server's web interface in addition to other resources using a single set of credentials. This simplifies the login process and reduces the risk of losing or forgetting multiple passwords.

To communicate with the AD, PortaBilling® supports the Lightweight Directory Access Protocol (LDAP). The (LDAP) user password is stored in the AD database. Thus, the user is authenticated in PortaBilling® through the AD. The LDAP is also used for data synchronization (user name, login, password, email, country, role, expiration date) between the AD and PortaBilling®.



This is how it works:

1. The AD administrator creates a user record in the AD that is then automatically created in PortaBilling®.
2. The user logs in to the PortaBilling® web interface using their LDAP credentials provided by an AD administrator.
3. PortaBilling® sends an authentication request to the AD via the LDAP.
4. The AD verifies the user login and the LDAP password.
5. Access to the PortaBilling® web interface is provided according to the user access role.
6. When an AD administrator changes a user's access role or user details, the data is synchronized with PortaBilling® via the LDAP.
7. When the AD administrator deletes the PortaBilling® user record from the AD, it is automatically deleted from PortaBilling®, too.

Let's say a service provider hires a new employee, David. David is an accountant and needs read-only access to PortaBilling®. The AD administrator opens the AD and creates a new user record with the Helpdesk access role. The AD sends the user data via the LDAP and creates a new user record in PortaBilling®. Now David can log in to PortaBilling® using his LDAP password. In a few months, when David leaves the company, the AD administrator blocks David's user record in the AD. The AD then synchronizes with PortaBilling® and blocks the user record there. Thus, David's access to PortaBilling® is blocked.

Specifics:

- To log in to PortaBilling® or the Configuration server web interface, the AD administrator must create a user record in the AD first.
- The AD stores the user data (e.g., login, password) and authenticates the user's access to PortaBilling® via the LDAP.
- Only an AD administrator can create/delete/block the PortaBilling® user record and manage the mandatory user fields:
  - Name/Surname
  - Email
  - Login
  - Password
  - Role
  - Country
  - Company
  - Expiration date
- User details specified in the AD are read-only in PortaBilling®.

- By default, data in PortaBilling® synchronizes every 10 minutes with AD. You can change synchronization frequency on the Configuration server.
- Access to the Configuration server via SSH is disabled.

Integration with the Microsoft Active Directory allows service providers:

- to enable users to access their corporate resources with a single set of credentials, and
- to manage PortaBilling® users within a centralized user register. This reduces significant time on user management for company administrators.

Contact the PortaOne support team to configure PortaBilling® to interact with the Microsoft Active Directory.

### **Redundant LDAP servers for the Microsoft Active Directory**

The LDAP server is used to authenticate AD users in PortaBilling® and to synchronize data between the AD and PortaBilling®.

You can specify multiple LDAP server addresses to provide redundancy. Thus, if the first LDAP server is down for some reason, the other server is used for AD user authentication. This ensures that AD users can access PortaBilling® or the Configuration server web interface without interruptions.

For example, David, an AD user, logs in to the PortaBilling® web interface using his LDAP credentials. PortaBilling® sends an authentication request to the AD via the LDAP. The first LDAP server (1.1.1.1) is unavailable, thus, the system connects to the second LDAP server (2.2.2.2). The AD verifies the user login and the LDAP password. David can now access the PortaBilling® web interface.

Redundant LDAP servers provide AD users with stable access to PortaBilling® and Configuration server web interfaces.

Find the detailed description on how to configure PortaBilling® to interact with the Microsoft Active Directory in the [How to](#) chapter of the PortaSwitch® Configuration Server Web Reference Guide.

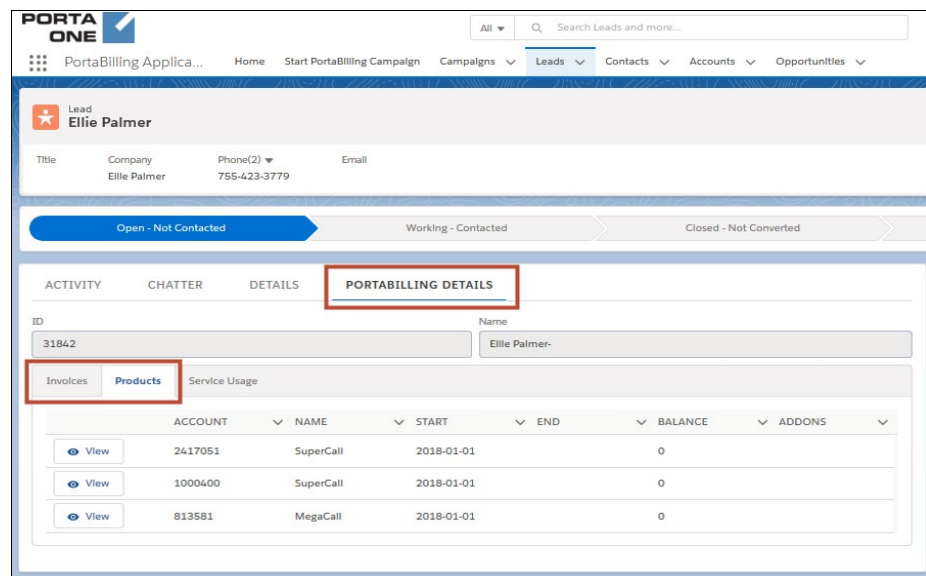
## **Integration with Salesforce CRM**

PortaBilling® is integrated with the Salesforce customer relationship management (CRM) system which is designed for the automation of business processes. This integration enables your sales team to:

- perform marketing campaigns for PortaBilling® customers via CRM; and

- use all the CRM features that are built into the system to: contact and follow up with customers, review history, analyze campaigns, etc.

To create a marketing campaign, your sales manager needs a list of customers that he can contact (e.g. via call or SMS). He filters the existing PortaBilling® customers into different groups by using different criteria – country, product, etc. Selected customers become campaign members. When your sales manager opens a customer profile in Salesforce, the **PortaBilling details** tab appears and there he can see the customer's payment history and products.



For your sales team's convenience, they can do the following, via the CRM, without logging into PortaBilling®:

- access relevant information about customers (e.g. their products, invoices and balance), and
- manage customer products and/or add-on products.

Consider the following example:

A sales manager, John Doe, creates a marketing campaign in which he wants to sell international calls to Mexico. This is already configured in the MexicoGo add-on product. So to make this happen, he filters his customers for those who:

- live in the USA;
- use the SuperCall main product.

**Start Portabilling Campaign**

Portabilling Customer Preview (Total : 2132)

Customer Class: All  
Country: United States of America  
Created Date From: mm / dd / yyyy  
Created Date To: mm / dd / yyyy

Products: MainDataProduct, MainMessagingProduct, MainVoiceProduct, MegaCall  
Included products combination: SuperCall

Start Campaign

LAST NAME	FIRST NAME	STREET	EMAIL	COUNTRY	STATE	POSTAL CODE
Quinn	Chloe	1625 Gabrielle Rue		US	Nebraska	68200
Moon	Lillian	6387 Leffer Ford		US	Washington	77864
Frank	Madison	9337 Camilla Squares		US	Louisiana	24042
Biley	Sophie	70429 Antone Rapid		US	South Carolina	93055
Cannon	Khloe	7211 Kyle Mission		US	New York	35032
Howard	Alexa	7735 Matteo Port		US	Iowa	24836
Santos	Claire	892 Ondricka Forest		US	Illinois	27487

Once the list of customers is ready, John opens the first customer profile, that of Ellie Palmer. Aside from the standard dashboards (e.g. to log calls, create tasks, etc.), there is a **PortaBilling details** tab that gives complete information regarding Ellie's invoices and products.

**Lead Ellie Palmer**

Title: Company  
Phone: 758-423-3779  
Email:

Open - Not Contacted | Working - Contacted | Closed - Not Converted | Converted | Mark Status as Complete

ACTIVITY | CHAT | DETAILS | **PORTABILLING DETAILS**

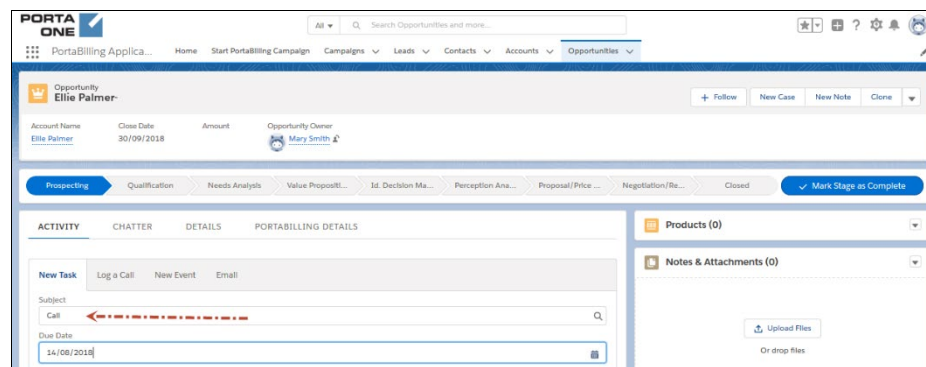
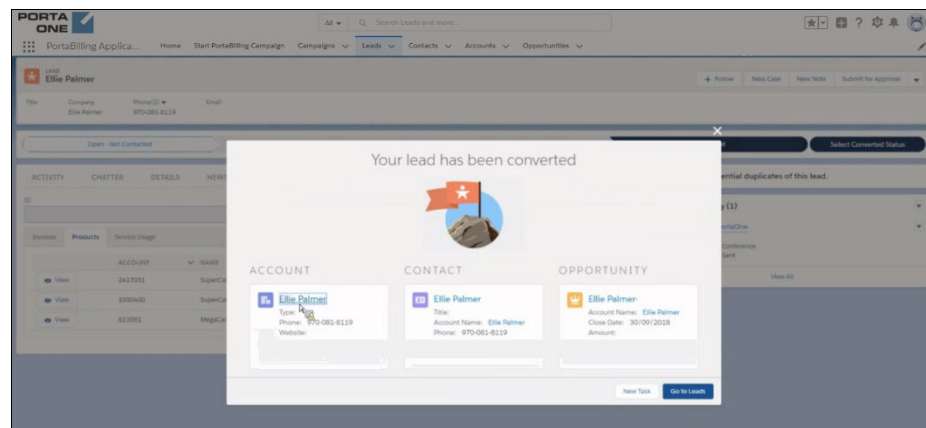
ID: 31842 | Name: Ellie Palmer

Tab: Invoices | **Products** | Service Usage

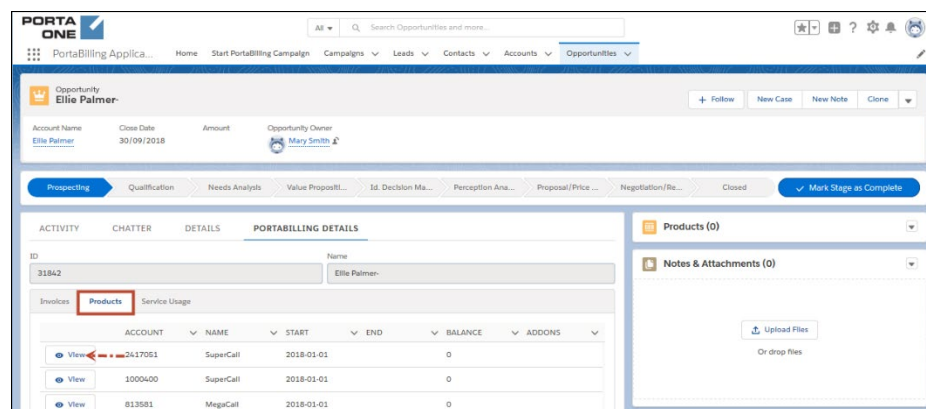
ACCOUNT	NAME	START	END	BALANCE	ADDONS
2617051	SuperCall	2018-01-01		0	
1000600	SuperCall	2018-01-01		0	
813581	MegaCall	2018-01-01		0	

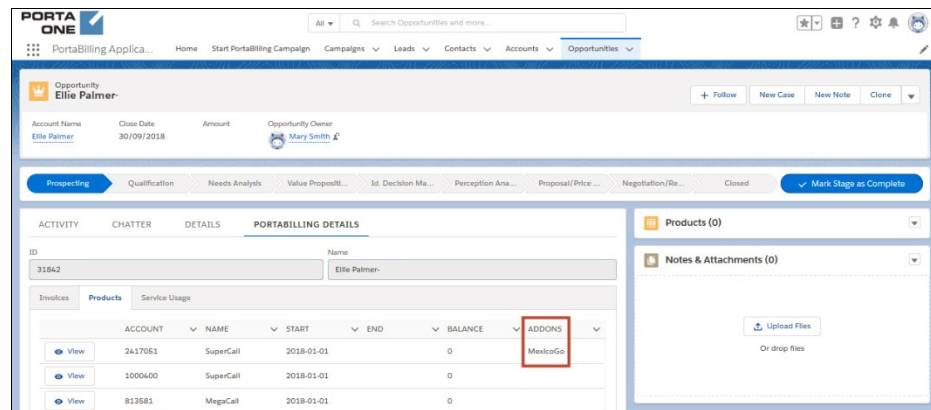
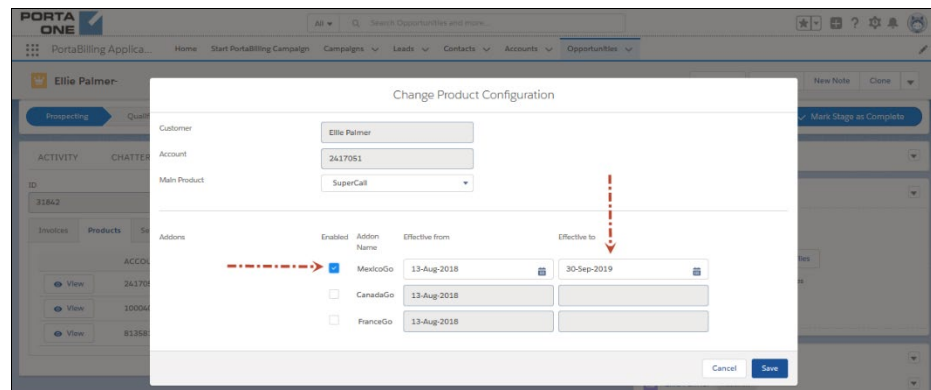
Campaign History (1)  
Campaign for USA, 2018  
Start Date: 01/08/2018  
Type: Email  
Status: Sent

John calls her and offers additional services – i.e. 100 minutes of free calls to Mexico (the MexicoGo add-on product). Ellie Palmer is interested and asks that she be called back the following day to discuss the offer in detail. John then converts Ellie Palmer from the Lead category to the Opportunity, Account and Contact categories (the standard Salesforce sales process) and creates a task to remind him to call her the following day.



The following day, after hearing about the offer in more detail, Ellie Palmer agrees to purchase the new service. To update her service package, John clicks the **PortaBilling details** tab. On the **Products** section he clicks **View** next to the mandatory Account ID. Then he selects the checkbox in front of the **MexicoGo** add-on product and adds the required info into the **Effective to** field. Once John saves his changes the CRM relays this updated data to PortaBilling®. John then closes the deal for Ellie Palmer.





You can find more information about the Salesforce CRM on the [website](#). Please contact the PortaOne® support team for assistance with how to configure the Salesforce CRM.

This integration helps boost your sales by organizing your marketing campaigns. In addition, it allows your sales team to manage customer products via the CRM web interface, to ensure that they have up-to-date information about your customers' service usage.

## Invoice data export to SAP Business One ERP

PortaBilling® is integrated with SAP Business One ERP (Enterprise Resource Planning). PortaBilling® operates as a product inventory and the OCS (Online Charging System). SAP Business One is used to manage accounting processes (e.g. track accounts payable and account receivable, produce financial reports, etc.). So now you can use both systems in sync to streamline your business processes.

You create customers via a SAP Business One web interface. Their data is then automatically replicated to PortaBilling®.



This integration is to meet the business demands of a Communication Service Provider (CSP) from South Africa. There they use ledger codes to categorize revenue data by services. For example, a unique ledger code is allocated to a particular call direction:

- 400000001 – for local calls.
- 400000002 – for international calls.
- 400000003 – for wholesale calls.

These codes are specified in PortaBilling® for destination groups, subscriptions and manual transactions. First PortaBilling® calculates the charges and groups the data according to the ledger codes. Then PortaBilling® creates and sends the invoice report to SAP Business One via the SOAP API. The resulting report contains the accumulated costs for specific services and customers all grouped by ledger codes.

An accounting manager can now produce general ledger reports via SAP Business One for a specific period, e.g. an expense report for a particular quarter.

PortaBilling® sends the invoice report to SAP Business One when the invoice is produced upon:

- the customers' billing period closure,
- as an out-of-turn invoice generation, and/or for
- an xDR re-rating and an invoice regeneration.

To send data from PortaBilling® to SAP Business One, you must use middleware. PortaBilling® must communicate with that middleware via the SOAP API.



Since your business requirements most likely differ from South Africa CSPs, you need to develop your own middleware.

This integration automates the data transfer for invoicing and reporting to SAP Business One.

## **Sending invoice-related events to Odoo CRM**

PortaBilling® is integrated with the Odoo customer relationship management (CRM) system. Odoo CRM helps automate sales actions, communicate with customers and streamline operations, etc.

With this integration, PortaBilling® automatically notifies Odoo CRM about invoice-related events and customer status changes. CSPs can use this information for customer interactions via Odoo – in particular, to send invoice notifications and payment reminders in SMS messages or emails.

Usually, CSPs who use PortaBilling® require PortaSIP® to send SMS notifications. This integration allows CSPs to use the Odoo CRM to do this.

PortaBilling® notifies Odoo about the following events:

- invoice is generated;
- unpaid/partially paid invoice is overdue;
- customer is suspended; and
- commitment is terminated.

PortaBilling® sends corresponding data to Odoo via the API. The communication between Odoo and PortaBilling® is minimized as it only happens when such an event takes place in PortaBilling®. This approach allows to minimize the load on both systems.

For example, customer John Doe is charged \$30 per month for the Internet service. When his monthly invoice is generated, PortaBilling® notifies Odoo by provisioning the invoice number and the amount due. After that, Odoo sends an SMS notification to the customer. John Doe can rely on that notification to remind him to pay for the Internet on time and thereby avoid having to check it on the self-care web interface. If the invoice is overdue, John Doe also receives a notification.

If John Doe stops paying for the Internet service, PortaBilling® suspends the customer for non-payment and blocks the service. At the same time, PortaBilling® sends a notification to Odoo about the suspended customer. Odoo then sends an SMS message to alert John that the service has been blocked because of the overdue invoice.

### ***Benefits***

With this feature, CSPs can send payment reminders to customers via Odoo and thus, improve the payment collections process.

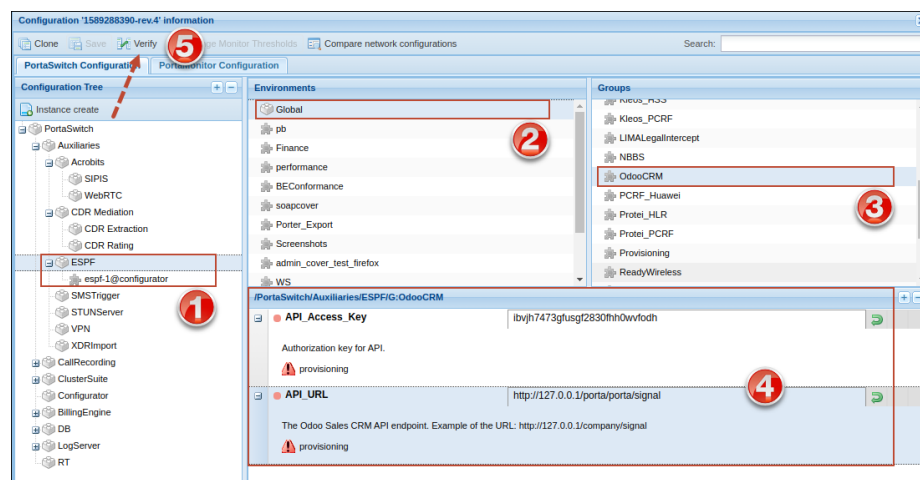
### **Configuration**

To enable data provisioning to the Odoo CRM, do the following:

1. Request from Odoo:
  - **API\_Access\_Key** – The Odoo administrator’s authorization key for the Odoo CRM API.
  - **API\_URL** – The Odoo CRM API endpoint.

## 2. On the Configuration server:

- Create an ESPF instance (if it doesn't exist);
- Fill in the **API\_Access\_Key** and **API\_URL** values for the **Global.OdooCRM** group using the data from the step 1.
- Click **Verify** to apply the configuration.



## 3. Configure the External Systems Provisioning Framework (ESPF) in PortaBilling®.

# 6. Support ticketing system

## Integration with Zendesk

CSPs can use Zendesk as a support ticketing system integrated with PortaBilling®. Customer support agents can track and process customer requests using all the advantages of Zendesk (e.g., user-friendly agent workspace, conversation update notifications, multi-channel communication).

To give more Zendesk capabilities to support agents, CSPs can install an application for PortaBilling® on Zendesk. This application is designed to display a subset of customer data from PortaBilling® in the Zendesk web interface. This allows support agents to process common customer requests faster, eliminating the need to search for customer records in PortaBilling® manually.

The application is currently available with basic functionality (as a minimum viable product). It allows support agents to:

- Quickly open a customer's record in PortaBilling® via a link in Zendesk.
- Look up a PortaBilling® customer record by name or account ID and link it with the corresponding Zendesk entity.

Extension of application functionality is planned to cover the most common support agents' tasks. If your company would benefit from such integration or if you have particular feature requests (e.g., to see the recent customer's xDRs or to change product right in Zendesk), [contact](#) our Sales department.

The integration with Zendesk works as follows:

1. Customer records in PortaBilling® are connected to Organizations in Zendesk.
2. When a new customer is created in PortaBilling®, its record with contact information (customer's name, domain, email, phone number) is automatically provisioned to Zendesk (i.e., a new Organization is created).
3. PortaBilling® customer records and Zendesk Organizations that were created before configuring this integration can be linked:
  - The support agent can find the customer by name or account ID and link the organization with the customer manually – via the Zendesk application for PortaBilling®.
  - The PortaBilling® administrator can link the customer with the Organization on the PortaBilling® side.

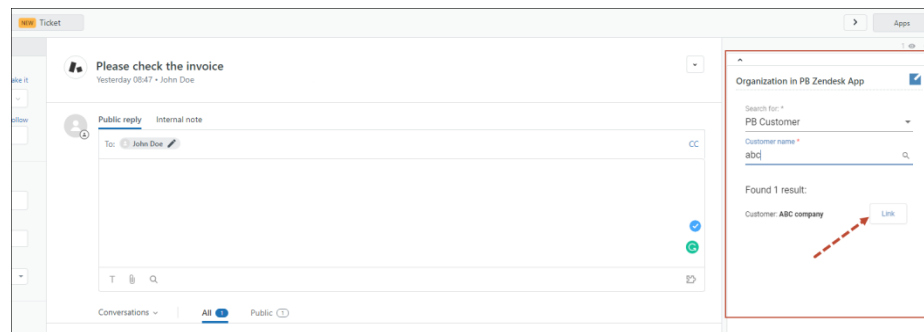
4. When a new query arrives to Zendesk from a customer's authorized email or phone number, Zendesk identifies it and creates a ticket for this customer.
5. A customer can send a query directly from the PortaBilling® self-care web interface.
6. All Zendesk tickets for a particular customer are displayed in the PortaBilling® web interface.
7. When Zendesk cannot identify a ticket (for example, the customer writes from a different email address), a support agent can manually assign it to the Zendesk Organization linked with that specific customer in PortaBilling®.
8. All changes to customer contact information in PortaBilling® are automatically updated in Zendesk, too.

Let's consider an example:

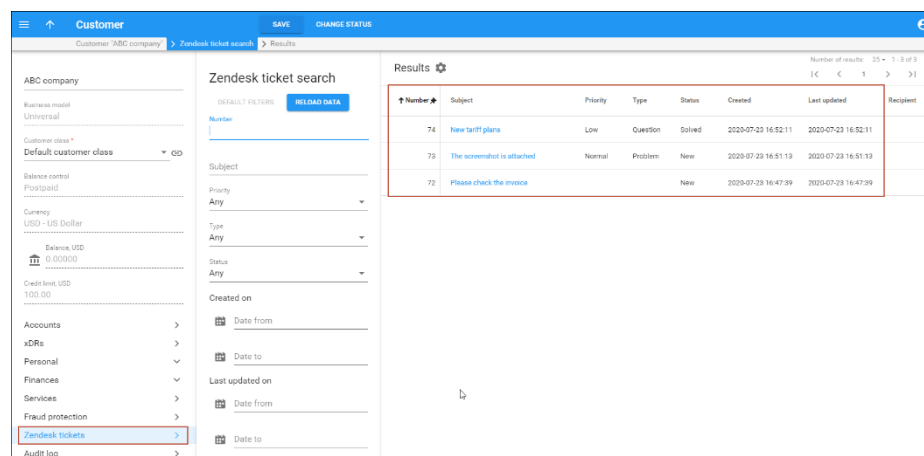
1. John Doe, an accountant at the ABC company, has a concern about a new invoice. John opens the self-care web interface, fills in the form, and sends a message to CSP's customer support.

The screenshot shows the 'Customer Self-Care Portal' interface. At the top, there's a header with 'Web Interface Language: en - English', 'ABC company (Log out: ABC company)', and a 'Logout' button. Below the header, there's a 'Billing Information' tab. The main content area has a sidebar with 'Brief Billing Information', 'Volume Discounts', and 'Quotas and Service Wallets'. A 'Leave us a message' form is overlaid on the right. The form has the following fields: 'Your name' (filled with 'John Doe, ABC company'), 'Email address' (filled with 'john.doe@abc.com'), 'Phone (optional)' (empty), 'Subject' (filled with 'Please check the invoice'), and 'Description' (filled with 'Please enter the details of your request. A member of our support staff will respond as...'). A 'Send' button is at the bottom right of the form. A red dashed arrow points to the 'Subject' field.

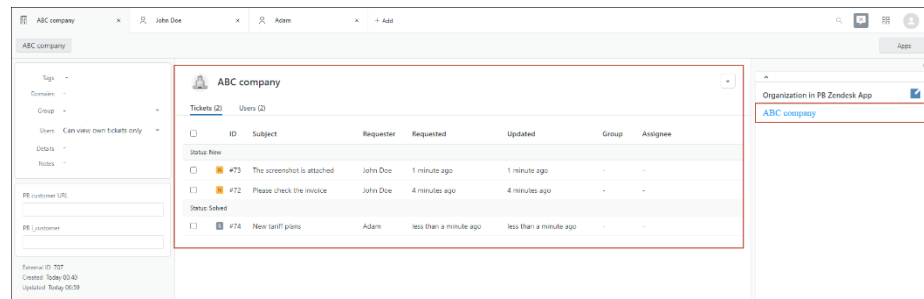
2. The ticket is automatically created and linked to the ABC organization in Zendesk.
3. A support agent sees that the ABC organization is not linked to any customer in PortaBilling®. The support agent then opens the Zendesk application for PortaBilling®, searches for the ABC customer, and links the organization to the customer.



4. Let's say John Doe sends a screenshot with invoice details to the CSP's support email. Zendesk identifies John by email as a user who belongs to the ABC organization/customer, and creates another ticket for ABC.
5. Then John asks his new colleague Adam to call support and ask about new tariff plans. Adam calls the CSP's support line using his own mobile phone number. A ticket is created in Zendesk for an unknown user.
6. The support agent finds out that it's a question from ABC, and assigns this ticket to the ABC organization (i.e., to the corresponding customer in PortaBilling®).
7. The PortaBilling® administrator opens the ABC customer page in PortaBilling®, selects the Zendesk tickets tab, and sees all the recent tickets. The administrator clicks on the first one to open it in Zendesk and read the issue details.



8. The support agent opens a ticket in Zendesk regarding the invoice issue. To quickly check the charges, the agent clicks on the ABC company link in the Zendesk application, which redirects them to the customer's page in PortaBilling®.



## Benefits

- As every ticket in Zendesk is linked to a particular PortaBilling® customer, CSPs can track spent time and calculate the cost of support per customer.
- Enhanced user experience for support agents with Zendesk as a ticketing system.
- Instant access to PortaBilling® customer records for support agents and to Zendesk tickets for PortaBilling® administrators.

With future versions of the Zendesk application for PortaBilling®, support agents will be able to solve the most common queries via Zendesk. Thus, CSPs can reduce the time and expenses spent on support operations.

## Configuration

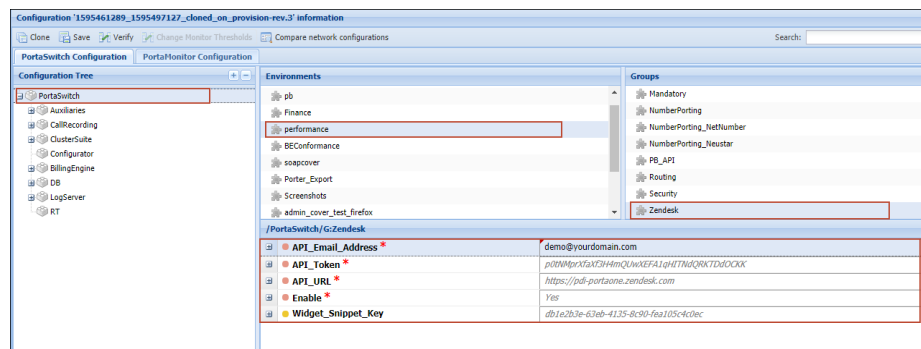
The Zendesk application for PortaBilling® is designed as a private application. To install it on Zendesk, make sure you use the Zendesk Support Suite “Professional” package or higher.

1. Configure the External Systems Provisioning Framework (ESPF) in PortaBilling®.
2. On the Configuration server, configure the following:

Attribute	Description
<b>Zendesk.API_Email_Address</b>	Email address for API authentication of the Zendesk administrator.
<b>Zendesk.API_Token</b>	Token for API authentication of the Zendesk administrator. You can get the token from <b>your_subdomain.zendesk.com/agent/admin/api/settings</b> .
<b>Zendesk.API_URL</b>	Your Zendesk account URL ( <b>your_subdomain.zendesk.com</b> ).
<b>Zendesk.Enable</b>	Set to <b>Yes</b> to enable Zendesk integration.
<b>Zendesk.Widget_Snippet_Key</b>	The Zendesk web widget snippet key for the customer self-care interface. You can get the key from



`your_subdomain.zendesk.com/agent/admin/widget (the Setup tab).`



**NOTE:** Each PortaBilling® environment is associated with a separate Zendesk domain.

3. Install and configure the Zendesk application for PortaBilling®. Contact the PortaOne® support team for assistance.
4. In PortaBilling®, create a user with read-only permissions to provide read-only access to PortaBilling® from the Zendesk application.

# 7. IPTV Provisioning

## Integration with Minerva IPTV platform

PortaBilling® is a converged real-time billing system, service provisioning environment and CRM used for rating and invoicing any type of service you provide to customers, including centralized funds management and consolidated bills.

For IPTV service provisioning, PortaBilling® is integrated with the Minerva IPTV platform. With this solution, service providers are able to:

- Configure channel packages and provide them to customers within a product configuration;
- Charge recurring fees to customers by using subscriptions;
- Manage customers' service packages so that while Minerva's channel packages only include sets of IPTV channels, service packages can include both channel sets and additional services such as the VOD catalogue, WHDVR or Caller ID presentation.

IPTV service activation is completed by using the External System Provisioning Framework (ESPF) in PortaBilling®. This makes it easy to provide IPTV service to your customers while eliminating additional manual work.

An IPTV service is activated for the subscriber when:

- A new account assigned to the IPTV product is created in PortaBilling®.
- An already existing account assigned to the IPTV product is unblocked in PortaBilling®.
- A product assigned to an already existing account is changed to a new product with IPTV.

The key assets of integration with Minerva that occur when an account in PortaBilling® corresponds to a customer in Minerva are:

1. When a customer is suspended in PortaBilling®, therefore the account is either blocked or switched to a product that no longer includes IPTV services. Their "subscriber" record is maintained in Minerva although it is disabled.
2. When a customer is terminated in PortaBilling®, the account is deleted in Minerva.
3. PortaBilling® adds information to the customer's bill about services provided and charges incurred.

This interoperation between PortaBilling® and the Minerva IPTV platform enables service providers to provide triple-play services to their users and therefore increase their revenue stream.

## Integration with the MatrixStream IPTV platform

For today's service providers, "triple play" is not just a buzzword – rather, it is the only way to remain competitive while retaining their customer base. Combined solutions provided by PortaOne in conjunction with the MatrixStream IPTV platform can be used to add IPTV to your service portfolio and expand your business growth.

The IPTV service is activated in PortaBilling® by using the External System Provisioning Framework (ESPF), which therefore simplifies service provisioning to end users and reduces manual work for your administrators.

When a new or existing customer signs up for the IPTV service, the available channel information (based on the assigned subscription) is provisioned into the IPTV delivery platform via an extensible XML API. If a customer's product configuration changes, or a customer is blocked (e.g. due to non-payment), PortaBilling® transfers this information to the IPTV delivery platform.

An IPTV service is activated for the subscriber when:

- A new account assigned to the IPTV product is created in PortaBilling®.
- An already existing account assigned to the IPTV product is unblocked in PortaBilling®.
- A product assigned to an already existing account is changed to a new product with IPTV.

The key assets of this integration are the following:

1. An account in PortaBilling® corresponds to a subscriber in MatrixStream.
2. When a customer is suspended in PortaBilling® or the account is blocked or switched to a product that no longer includes IPTV services, his "subscriber" record continues to be maintained in MatrixStream although it is disabled.
3. When a customer is terminated in PortaBilling®, the account is deleted in MatrixStream.
4. PortaBilling® provides information to the customer's bill about services provided and charges incurred.

In this way, service providers extend their service provisioning portfolio while remaining competitive in the market.

## Integration with Telebreeze IPTV platform

PortaBilling® is integrated with the Telebreeze IPTV platform (<https://telebreeze.com/>). The interoperation between PortaBilling® and Telebreeze enables you to:

- Define various channel packages in Telebreeze and bundle them into products for your customers. As soon as you create an account in PortaBilling® and assign a product that includes the IPTV service, the customer is created in Telebreeze and a corresponding channel package activated for them.
- Configure a variety of channel packages and manage customer service configurations using add-on products.
- Charge recurring fees to customers for IPTV channel packages via subscriptions.
- Manage customer information and service availability using the PortaBilling® web interface. Any changes in customer information are provisioned to Telebreeze. Customer services remain available as long as there are sufficient funds to cover them or their product configuration includes the IPTV service. If a customer is terminated in PortaBilling®, their record in Telebreeze is also deleted.

Thus, the key assets of this integration are as follows:

1. An account in PortaBilling® corresponds to a customer in Telebreeze.
2. Telebreeze channel packages are defined within PortaBilling® products.
3. Customers are charged for IPTV services via subscriptions. Video-on-demand and pay-per-view services are solely handled by Telebreeze. PortaBilling® receives balance update records and produces xDRs.
4. Customers are authenticated in Telebreeze by either device ID or Telebreeze login/password. This information is defined in a customer's custom fields.

**NOTE:** Do not change the account ID in PortaBilling® since the Telebreeze customer ID will not be updated and therefore further customer management will become inaccessible.

Integration with yet another IPTV platform expands your IPTV provisioning capabilities and enables you to provide full-scale triple-play services to customers.

# **8. Hosted IP PBX/IP Centrex solution**

## Integration with Mida Queue Manager

PortaSwitch® is integrated with the Mida Queue Manager. This application is used for call queuing and routing of incoming phone calls. It allows all call queues to be customized to have their own set of messages, working hours, timeouts, overflows and routing algorithms.

A call queue in the Mida Queue Manager is linked to an IP PBX phone line that receives all incoming calls. PortaSwitch® routes the calls from an IP PBX phone line to the Mida Queue Manager, where they are queued. The Mida Queue Manager distributes these calls in a predefined fashion among the dedicated phone lines on this IP PBX.

In PortaSwitch®, the Mida Queue Manager is configured as a vendor with two connections. The **Calls to vendor via SIP** connection delivers calls from the IP PBX to the Mida Queue Manager. The **Calls from vendor via SIP** connection delivers calls from the Mida Queue Manager to this IP PBX. All call queue configuration settings are defined via the Mida Queue Manager.

This integration allows service providers to offer advanced call queue features to their IP PBX customers.