





Handbook:

Resellers and Distributors Maintenance Release 23

www.portaone.com

Copyright Notice & Disclaimers

Copyright © 2000-2011 PortaOne, Inc. All rights reserved

PortaSwitch® Handbook: Resellers and Distributors, June 2011 Maintenance Release 23 V1.23.5

Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam, BC, V3B 2P7 Canada.

Changes may be made periodically to the information in this publication. The changes will be incorporated in new editions of the guide. The software described in this document is furnished under a license agreement, and may be used or copied only in accordance with the terms thereof. It is against the law to copy the software on any other medium, except as specifically provided in the license agreement. The licensee may make one copy of the software for backup purposes. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopied, recorded or otherwise, without the prior written permission of PortaOne Inc.

The software license and limited warranty for the accompanying products are set forth in the information packet supplied with the product, and are incorporated herein by this reference. If you cannot locate the software license, contact your PortaOne representative for a copy.

All product names mentioned in this manual are for identification purposes only, and are either trademarks or registered trademarks of their respective owners.

Table of Contents

	Preface	5
1.	Configuring a Reseller for Prepaid Services	6
	Re-branding Services via a Reseller	7
	Checklist	
	General and Network Configuration for PortaBilling®	9
	Create a Tariff for Charging the Reseller	9
	Enter Rates	10
	Create a Customer Class	12
	Create a Reseller	12
	Create a Tariff for the Reseller	14
	Create a Product for the Reseller	15
	Reseller Actions	18
	Login to Self-Care Interface	18
	Modify Tariff	
	Enter Rates	19
	Test Rate Configuration (Optional)	19
	Modify Product	
	Create Subcustomer	
	Generate Accounts	23
2.	Configuring a Reseller for Postpaid Services	
	Re-branding Services via a Reseller	
	Checklist	
	General and Network Configuration for PortaBilling®	
	Create Tariffs for Charging the Reseller	
	Enter Rates for Outgoing Calls Applied to the Reseller	
	Enter Rates for Incoming Calls Applied to the Reseller	
	Create a Customer Class	
	Create a Reseller	
	Create Tariffs to Be Used by the Reseller	
	Create a Product for the Reseller	
	Reseller Actions	41
	Login to Self-Care Interface	41
	Modify the Tariff for Outgoing Calls	41
	Enter Rates	
	Modify the Tariff for Incoming Calls	
	Test Rate Configuration (Optional)	
	Modify Product	
	Create Subcustomer	
	Create Accounts	
3.	Configuring a Distributor for Prepaid Services	
	Using Distributors to Expand Your Sales Network	
	Checklist	51
	Create a Distributor	
	Create a Customer	54
	Generate a Batch of Accounts for the Distributor	55

	Assign a Commission Rate to the Batch	56
	Distributor Actions	57
	Login to Self-Care Interface	
	Activate Accounts	
4.	Configuring a Distributor for Postpaid Services	60
	Using Distributors to Expand Your Sales Network	61
	Checklist	
	Create a Distributor	63
	Create a Quick Form for the Distributor	65
	Distributor Actions	
	Log in to Self-Care Interface	68
	Create Customers	68
	Add Accounts to an Existing Customer	69
	Record a Payment from the End User	69

Preface

This document provides PortaBilling® users with step-by-step instructions and examples for setting up various prepaid and postpaid services on a VoIP network where resellers or distributors are involved.

Where to get the latest version of this guide

The hard copy of this guide is updated at major releases only, and does not always contain the latest material on enhancements occurring between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at: www.portaone.com/support/documentation/

Conventions

This publication uses the following conventions:

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

The **exclamation mark** draws your attention to important information or actions.

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

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

60

Tips provide information that might help you solve a problem.

Trademarks and Copyrights

PortaBilling®, PortaSIP®, PortaUM® and PortaSwitch® are registered trademarks of PortaOne, Inc.

1 Configuring a Reseller for Prepaid Services

Re-branding Services via a Reseller

This section demonstrates how to configure a reseller who will be providing services under his own name. A prepaid service is used as an example, but the procedure is basically the same when setting up any other service (e.g. prepaid callback or postpaid residential VoIP), the only difference being the type of accounts used. Please consult the handbook for a given service regarding its specific configuration details.

The procedure is very similar to the general prepaid set-up described in the **PortaSwitch Handbook: Prepaid Services.** Only a few additional comments are necessary:

- Resellers are not allowed to create new tariffs or products. In addition to security considerations, this is because rating list to a product must be configured in order to create it properly. The person doing this must be well acquainted with your VoIP network structure (gateways, access lines, etc). Your reseller will not have this knowledge; in fact you will probably not even want to share such information with him. Therefore, your admin staff will create an initial framework of tariffs and products for him, and configure the products' rating list. If the reseller wants to sell a product under a different name later, he can simply clone the existing product.
- The correct sequence of actions is as follows:
 - 1. Create the tariff you will use to charge resellers (Applied to: **Reseller** type).
 - 2. Create a reseller, assigning this tariff to him.
 - 3. Create tariffs and products for his subscribers, making sure that you mark them as **Managed by** that reseller.
- Unless assigned the "Advanced Reseller" access level, resellers are not able to view their own rates on the web interface, so that you are in control when informing them of rate changes. For example, at the beginning of the month you may choose to enter a rate change effective the first day of the following month; however, you could notify the customer of this only one week in advance.

Please use the checklist on the following page to ensure that you have performed all the required operations in the correct sequence.

Checklist

Print the following page and use it to mark the operations you have completed while performing system setup according to the instructions in this section. Please make sure that you perform all of the operations (all of the boxes must be checked), otherwise the service will not work.

Operations to be performed by the administrator

Operation	Do	one
General, network and vendor configuration		
Perform configuration of general and network settings as	Γ	1
described in the Prepaid Calling Cards (Using a Gateway) chapter in	-	-
the PortaSwitch Handbook: Prepaid Services		
Perform configuration of the vendor part as described in the	[]
Prepaid Calling Cards (Using a Gateway) chapter in the		
PortaSwitch Handbook: Prepaid Services		
Rating configuration		
Create a tariff (referred to later as tariff A), which will contain	[]
the wholesale rates you apply to your reseller; make sure this		
tariff is designated as Applied To: Reseller		
Insert rates in tariff A for the destinations to which you will	[]
allow your reseller to send calls		
Create a customer class to be applied to your resellers	[]
Create a reseller and apply tariff A to him on the Additional	[]
Info tab		
Specify a username and password for the reseller to access the	[]
self-care interface		
Create a tariff (referred to later as tariff B), which will be applied	[]
to your reseller's subscribers; make sure this tariff is marked as		
"Managed by" the reseller		
Create a prepaid product to be used by your reseller; make sure	[]
this product is marked as "Managed by" the reseller		
Create one rating entry for this product, using the node you	[]
created earlier and tariff B		
Operations to be performed by the reseller		
Account provisioning		
Go to the customer self-care web page and log in using the	ſ	1
credentials provided	L	1
Insert rates in tariff B for the destinations to which you will allow	Γ	1
your subscribers to send calls	L	L
Create a subcustomer who owns the prepaid cards	Γ	1
Generate accounts for this subcustomer	ſ	ĺ
Testing	L	
Try to make a test call	[]

General and Network Configuration for PortaBilling®

Please follow the steps described in the *Prepaid Calling Cards (Using a Gateway)* chapter in the **PortaSwitch Handbook: Prepaid Services**.

Create a Tariff for Charging the Reseller

This tariff will be used to charge the reseller, so it should contain your selling rates for the reseller.

₼		\$	00 80	÷ 🕫	Þ	~ 🔍				Tariff M	anagem	ent			America/Vancouver	demoroot	? Help
•	•	Add	8 C	lose 🕓	Off-Pe	ak Perio	ds 🔋	xDR Re-ra	ating	🗵 LCR Rate	:5					💐 Logout	目 Log
				A	Applied	То		Ser	vice		M	nage	d By	_	Search		
			A	INY			V Ab	ry		- ANY				*	Sean	ch	
		Rate			Name	е		Currency	Applie	d To	Sei	vice		Managed By	Routing Desc	ription Delete	
~	Ē				1					٨d	Tariff			φ.	America/Vancourses	demorrant	2 Hole
w										Au	I I dI III			0	America) varicouver	NEL La servit	E heip
-		3446	000	3070 & L	IUSE	Ciuse										· ų Logouc	
						Na An	nie Niod To	Reseiler			* Coni	ncy	Usb = 05 Dol.	lar	•		
						Ар	pilea ru	Kezelle	12	•	Serv	ce	Voice Calls	v			
							Gener	al Info									
									_			_					
						Def	ault Off-F	eak Perioc	Niç	nt.		~					
						Des	tination	Group Set				~					
						Frei	+ Coll Pr	is reborgo	0	04							
						Log	in Fee	rcharge	0	~							
						Cor	inert Fee	•	0								
						Ro	ind Char	, aed Amoui	nt xxx	**.****							
						Def	ault Forn	nula					°fx				
						Sho	rt Descr	ption	Res	eller's Tariff		٦					
						Des	cription										
~	Ē	N		1 Pa		a M				Edit Tari	ff 'D oco	llor'	I.	Ð	AmoricalVancouvor	domorroot	2 Hole
LUL		Eauro		••••••••••••••••••••••••••••••••••••••		S) Elece		bcolouus				net		Ŵ	Millerica) varicouver		
-		Save		Sdye & Li	lose	⊗ close		ownioau	🕒 Op		ites 📴 i	esc				NU LOGOUC	Log
										6							
				Nan	ne diad Ta	Resell	er			Currency	USD Voice Coll						
				мрр	med to	Resell	31			Service	voice call:						
				[Gener	al Info	Web Up	load & Dov	wnload	Email Uplo	ad Notep	ad					
				 Defe	ult Off.	L Poak Pori	od m				1						
				Deat	inction	Oroup P.	ou Ni	ynt			1						
				Eroo	Socon	do un a											
				Post	Call Si	uo	0.0	0000 %									
				Login	n Fee		0.0	0000 U	SD								
				Conr	nect Fe	e	0.0	0000 U	SD								
				Rour	nd Cha	rged Amo	unt xx										
				Defa	ult Forr	nula						%					
				Shor	tDescr	iption	Re	eller's Tar	iff								
				Desc	cription							_	1				

In the Rating section of Admin-Index, choose Tariffs.



- 1. On the Tariff Management page, choose 🖪 Add.
- 2. Fill in the **New Tariff** form:
 - **Name** A short name of the tariff object; this is the name you will see later in the select menus.
 - **Currency** Choose the currency in which you will charge your reseller.

NOTE: The currency for the tariff is chosen only once, and cannot be changed later.

- Applied To Choose Reseller here.
- Service Choose Voice Calls here.
- 3. Click **Save.**
- 4. Repeat steps 1-3 until you have entered all of the tariffs.

Enter Rates

Rates are per-destination prices. Please refer to the *Rating and Invoicing* chapter in the **PortaBilling Administrator Guide** for more details on billing parameters.

Managing Rates Online

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

₫		\$	88 🛊	*	~ Q		Rates f	or tariff '	Reseller'				demoroot	? Help
•	٠	∎dd	🛛 🖬 Sav	e 🛞 Close	: 🔺 Upload	📒 Tariff							N Logout	📒 Log
					Effec	ctive From		Dest Number	ination Prefix	Group Co	untry			
	E		estination	Country	Peak/C	ff-Peak	Interval, First *	, second Next *	Price, US First *	SD/ minute Next *	Effective From YYYY-MM-DD HH24:MI:55*	1% 🔑 🖪	🏐 😑 Delet	е
]	NOT DEFIN	ED 💌								
۵		V	88 🗄	:• î>	<u> </u>		Rates f	or tariff 'I	Reseller'		() Americ	:a/Vancouver	demoroot	? Help
•	٠	Add	🛛 🖬 Sav	e 🛞 Close	: 🔺 Upload	📒 Tariff							N Logout	📒 Log
					Effec	stive From		Dest Number	ination Prefix	Group	untry			
	E	dit [estination	Country Description	Peak/C	ff-Peak	Interval, First *	, second Next *	Price, US First *	SD/ minute Next *	Effective From <u>YYYY-MM-DD</u> HH24:MI:S5*	% 🛛	🎁 😑 Delet	B
	6		47		Night	~	30 30	6 6	0.12	0.12	immediately	1		

- On the Tariff Management page you will see a list of available tariffs. Click the Rates icon next to the name of the tariff. When you are in Tariff Management for a particular tariff, click on Rates in the toolbar.
- 2. In the Edit Rates screen, click 🖪 Add.
- 3. Fill in the required information:

 Destination – The destination prefix may be entered directly, e.g. 47 for Norway, or you can access the destinations directory by clicking the Destination link (in the column header). Here you can find the desired prefix by country name.

NOTE: The phone prefix you are trying to create a rate for must already exist in Destinations.

- Interval First First billing unit in seconds.
- Interval Next Next billing unit in seconds.
- **Price First** Per-minute price for first interval.
- **Price Next** Per-minute price for next interval.
- **Off-peak Interval First** First billing unit in seconds for off-peak time.
- **Off-peak Interval Next** Next billing unit in seconds for off-peak time.
- Off-peak Price First Per-minute price for first interval of offpeak time.
- **Off-peak Price Next** Per-minute price for next interval of off-peak time.

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

• **Effective From** – If you want this rate to take effect sometime in the future, you can either type in a date manually, or use the calendar (click the DD-MM-YYYY link).

NOTE: When using the calendar, you can specify that the date you are entering is in a different time zone than your current one. PortaBilling® will then automatically adjust the time.

- Rate Formula Wizard 🏂 Launches the wizard for creating a custom rating formula
- **Payback Rate, Hidden, Forbidden** or **Discontinued** These flags are optional.
- 4. Click the **Save** button in the toolbar, or the **s** icon on the left end of the row.
- 5. Repeat these steps if you need to enter more rates.

Importing Rates from a File

You may import thousands (or even hundreds of thousands) of rates at once using PortaBilling's rate import tool.

A rates table (.CSV or .XLS) may be prepared using a spreadsheet processor (i.e. Microsoft Excel) and then easily imported into PortaBilling®. Or you may use PortaBilling's "LCR Blending" report tool, which will generate a .CSV file with the selling price (based on the estimated termination cost and your markup).

Please consult the *Rate Import* chapter of the **PortaSwitch Handbook:** Wholesale Services for more details.

Create a Customer Class

Customer class provides the ability to define a group of parameters in a centralized way, then apply those parameters to many customers at once. (If you have already created a customer class that you can use for prepaid card distributors, skip this step and go to the next one.)



If the invoicing and collection parameters for resellers are not relevant at this moment, skip this step and use the **Default** customer class for your resellers.

- 1. In the **Billing** section of the Admin interface, choose **Customer Classes**.
- 2. On the Customer Class Management page, choose 🗄 Add.

	Add Customer Class	America/Vancouver	demoroot	🕑 Help
🕨 🔒 Save 📓 Save & Close 🛞 Close			🕅 Logout	
Name Reseller - Silv	er Managed by Administrator	only		
	xation			
Send Statistics	Summary Only	~		
Invoice Template	Do not create invoice	~		
Send Invoices				
Terms	Due on receipt			
Invoice Grace Period	Days			
Collection Threshold				
Notify Customer	Days before due	date		
Re-send Invoice	Days after due da	te		
Attempt to charge the lis Credit Card	ted Days after due da	te		
Suspension Time	Days			
Suspension Warning Ti	me Days			
Closing Time	Days			
Charge Credit Card Wh Billing Period Is Closed	en The			
Description	Reseller - Silver class			

- 3. Fill in the parameter related to the invoicing and collection process for your resellers.
- 4. Click Save&Close.

Create a Reseller

The reseller entity you are about to create will define your relationship with a business partner who is reselling your services under his own name and allow him further independent service management (e.g. creating his own accounts).

☆ = \$ 22 ∔ 12 1>		Add Reseller	③ America/Vancouver	demoroot	? Help
🕨 🖬 Save 🗟 Save & Close	⑧ Close			💵 Logout	
Customer Name Blocked Type	ABC Shuttle Ltd. *	Currency USD - US Dollar Opening Balance 0 Customer Class Reseller - Silver	v .		
Address Info	User Interface Additional Info	Payment Info Custom Fields			
Company Name Mr./Ms.J First Name M.I. Last Name Address Province/State Postal Code City Country/Region		Contact Phone Fax Alt Phone Alt Contact E-mail Fales@abc-shuttle.com BC Description			

In the Participants section of Admin-Index, choose Resellers.

- 1. On the Reseller Management page, choose 🖪 Add Reseller.
- 2. Fill in the **New Reseller** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for this reseller; this will be used on the web interface.
- **Currency** The currency in which this reseller will be billed.
- **Opening Balance** Starting balance for the customer; the default is zero.
- **Customer Class** Choose the customer class you have created in the previous step

Address Info tab

- **Email** Make sure you enter the reseller's valid email address here; otherwise he will not be able to receive files with the PINs he generates. Also, once the billing period is over this email address will be used to deliver of a list of xDRs and an invoice to your reseller.
- **Bcc** Delivery to the specified email address of your account representative a copy of every outgoing email sent to the customer; this may be used for debug and archiving purposes.

Additional Info tab

• **Default Tariff for Voice Calls** – This is the tariff that will be applied by default to calls placed by the reseller's subscribers; choose tariff A here.

- **Billing Period** Frequency of distribution of accounting information. For more details about different available billing periods, see the **PortaBilling Administrator Guide**.
- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are full statistics (attach a complete list of xDRs) or do not send (no not deliver call statistics to this customer via email at all).

Payment Info tab

• **Credit Limit** – If left empty, there is no credit limit for this reseller; so you will probably want to enter a value here.

User Interface tab

- Time Zone The time zone in which the reseller will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.
- Web Interface Language The language to be used on the customer's self-care web interface.
- 3. Click Save&Close.

Create a Tariff for the Reseller

This tariff will be used by the reseller to charge his subcustomers. The reseller will perform the actual tariff configuration on the self-care interface. You just need to provide him with a framework by pre-allocating a tariff.

a		88	A state	e d 🖌 🖸		Tariff Man	agement				
•	•_Add	8	Close	🔱 Off-Peak Periods	🔋 xDR Re-rating	🗵 LCR Rates				🕅 Logout	📒 Lo
				Applied To	Service		Managed By		Search		
			ANY	1	✓ ANY	M ANY		~	Search	1	
l I										-	
	Rate	s		Name	Currency Appl	ied To	Service	Managed By	Routing Descript	ion Delete	

🕼 🗉 S 🍔 🛊 📴 Þ 🛩 🕻	Add Tariff	America/Vancouver	demoroot	? Help
🕨 🖬 Save 📓 Save & Close 🛞 Clo	ose		M) Logout	目 Log
N A B	Aame ABC Shuttle Prepaid Cards Currency USD - US Dollar Applied To Customer Service Voice Calls Managed By ABC Shuttle Ltd.	v.		
	efault Off-Peak Period			
Di	estination Group Set			
Fr	ree Seconds 0			
Po	ost Call Surcharge 0.00000 %			
La	ogin Fee 0.00000			
Cr	onnect Fee 0.00000			
R	ound Charged Amount 🛛 🗙 🛪			
D	efault Formula			
Sł	hort Description ABC Shuttle Prepaid Cards Tar			
Di	escription			

In the Rating section of Admin-Index, choose Tariffs.

- 1. On the Tariff Management page, choose 🗄 Add.
- 2. Fill in the **New Tariff** form:
 - **Name** A short name of the tariff object; this is the name you will see later in the select menus.
 - **Currency** Choose the currency in which your reseller plans to operate.

NOTE: The currency for the tariff is chosen only once, and cannot be changed later.

- Applied To Choose Customer here.
- Managed By Choose your reseller in the list.
- You may skip all the other parameters, as the reseller will be able to adjust them according to his needs.
- Short Description A short tariff description which will be understandable to your reseller.
- **Description** An extended tariff description.
- 3. Click Save&Close.
- 4. Repeat steps 1-3 until you have entered all of the tariffs your reseller needs.

Create a Product for the Reseller

As was the case above with tariffs, you need only create a framework for your reseller to enable him to perform further independent product management.

۵	≣ \$	88 †	•	▶ ~	Q		Product	Managemer	nt	٩	America/Vancouver	demoroot	? Help
•	🔁 Add	🛞 Close	:									M Logout	目 Log
	- R.												
						Manageo	i By	Searc	h				
						ANY	*		Search				
					\$?	Name	Currency	Managed By	Description	Delete			
							,						
	V												

۵		\$	00 80	ŧ	80	•	~	Q				Add Pr	oduct		0	America/Vancouver	demoroot	? Help
•		Save	8	Clos	:												り Logout	
					Pro Mai Bre	duct nageo Ger akago	Name I By neral I e	Pre AB	paid Cards C Shuttle Lt Maintenance 0.1	d. Fee	v	Currend	y USD -	US Dollar		V		
					Acc Def Info Des	ount I ault E URL scripti	Defaul Discou on	t ACL	Account : None http://www. Prepaid	abc-sh Cards	are uttle.cor	v v n/prepaid						
۵		\$	00		0.0	₽		0			Edit P	roduct 'P	repaid	Cards'	٩	America/Vancouver	demoroot	? Help
•	٠	Add		Save		Sav	e & Clo	ose	🛞 Close 👔	🛛 Rate	Lookup	Clone 🗎					🕅 Logout	目 Log
				1	Prod Mana	uct N Iged I	ame [By ≠	Prep ABC 8	aid Cards Shuttle Ltd.			Currency	USD					
				F	leas	Geno e defi	eral In ine at l	fo east	Maintenance one Services a	Online nd Rati	e Signup ng entry	Services a	nd Rating	Subscriptions	Service Features	Notepad		

In the Rating section of the Admin-Index page, choose Products.

- 1. On the Product Management page, click the 🗄 Add icon.
- 2. Fill in the Add Product form:
 - **Product name** Product object name.
 - **Currency** Product currency. Only tariffs which have the same currency will be permitted in the rating list.
 - Managed By Choose your reseller from the list.
- 3. Click **Save**.
- 4. The **Services and Rating** tab now becomes active, and you can edit this product's rating list.

Enter Node and Tariffs into the Product's Rating List

The reseller will not have access to information about your network, and therefore cannot view rating list information. You may define it for him as follows:

۵		\$	88	*	0.0	(†	~	1 Q				E	dit P	roduc	t 'Pr	repaid	Ca	rds'				① Ar	merica/Vancouv	ver	demoroot	?] Help
•	•	Add		Save	6] Sa	ve &	Close	8	Clos	• Ø	🗿 Rate	Lookup	🖻 Cle	one										💵 Logout		Log
					Pro Mar	duct l laged	Nam I By	e Pre ABC	paid Shu	Cards ttle Lto	I.			Curr	ency	USD											
	1					Gei	neral	Info	Ma	intena	nce	Online	Signup	Servi	ces an	d Rating	Su	bscriptions	5	ervice	Featu	res	Notepad				
					Plea	se de	fine	at leas	t on	e Servi	ces a	and Ratin	ng entry														
۵		\$	00	ł	0)] [~			Add	Se	rvice	s and	Ratin	ng to	Produ	uct	'Prepaio	d C	ards	•	① A	merica/Vancouv	ver	demoroot	?] Help
•		Save		Sav	re &	Close) Clos	e																💵 Logout		
							Pro Ser	duct N vice	ame	Pr V	epai oice	d Cards Calls		×	Prod	uct Curre	ncy	USD									
				_		Gen	eral	Ove	rdra	it Prot	ectio	n															
					Node)		F	STN-	GU-N	-01			~	Acce	ss Code	[
					Tarif	•		A	BC S	hutt	e P	repaid	Cards	~	Info E	Digits	[ANY				•	•				
					Rese	eller 1	ariff	ŀ	esel	ler			1	~													

۵		\$	80	÷	0:0 0	ĵ.	-) Q		Add S	ervices a	ind	Rating	to Produ	ict 'Prepaid	Cards'	0	America/Vancouver	demoroot	? Help
•		Save		Save	& C	lose	8) Close	:										💵 Logout	
							Proc Serv	luct Na ⁄ice	me	Prepa Voic	id Cards e Calls		Pr	oduct Currei	ncy USD					
						Gene	eral	Over	draft	Protecti	on								_	
				CI	neck	Min	imur	n Fund	s	Do not	check 🔽	1								
				Mi	n. S	essi	on D	eposit		0.00000		USC								
				M	ax. S	essi	ion D	eposit				USC								
			-	M	ax. A	utho	rizati	on Chu	ink			USC								
				01	/eru	se N	lotific	ation												
	_	_	N		_	_	_	_												I
۵		\$	00	1	80	Þ	~				Edi	t Pr	oduct '	Prepaid	Cards'		٩	America/Vancouver	demoroot	Help
•	•	Add	a 9	iave		Sav	/e &	Close	8	Close	🙇 Rate Loc	kup	🗎 Clone						💵 Logout	📒 Log
				P	rod Iana	uct N Iged	lame By	Prep ABC	aid (Shut	Cards tle Ltd.			Currend	x y USD						
						Gen	neral	Info	Maii	ntenance	Online Si	jnup	Services	and Rating	Subscriptions	Service Fea	tures	Notepad		
				,	Voic	e Ca	nlls						-							
					Edit			Not	le		Access Co	ie I	nfo Digits		Routing/R	ating		Delete		
							PS	STN-GV	V-NY-	01	Any code		ANY	ANY - A	BC Shuttle Prepa	aid Cards — E	Reselle	<u>n</u> 💌		

- 1. When the **Services and Rating** tab is selected, click on the **Add** icon.
- 2. Choose Voice Calls in the Service select menu.
- 3. In the **Node** select menu, select the node where your IVR will be running.
- 4. You can also use an access number for rating entry in the **Access** code field. For example, if you have a node with two access numbers, local (12345) and toll-free (1800 12345), you can set up the product's rating list in such a way that if a customer calls via a toll-free line, he will be billed using a different tariff (one that includes surcharges).

NOTE: For more information about the Access Code feature, refer to the System Concepts section of the **PortaBilling Administrator Guide**.

- 5. The **Info-digits** menu allows you to apply different tariffs depending on the type of line from which your customers originate calls. If you are unsure whether your telco sends such information, leave the default value ANY.
- 6. In the **Tariff** menu, select the tariff that will be applied to end-users (prepaid calling card customers of your reseller).
- 7. In the Reseller's Tariff drop-down menu, you can also choose which tariff will be used to charge the reseller when an account with this product makes a phone call. By default, the system applies the tariff assigned to the reseller in customer info in this case DEFAULT TARIFF appears in the select menu. However, here you can override this and, for instance, bill the reseller at a higher rate for use of a product that requires higher maintenance on your end.
- Configure overdraft protection for this product on the Overdraft Protection tab. (Please consult the *Rating* section in the PortaBilling Web Reference Guide for a description of the parameters available here.)
- 9. Click Save&Close to save this rating entry.
- 10. Repeat steps 1-9 if you want to define more rating entries.

Reseller Actions

At this point you have finished with the administrator part of the work. You just need to send the reseller his login credentials for the PortaBilling® self-care interface, while the rest of the tasks described below will be performed by the reseller himself. They are listed here for your convenience only; normally the reseller will use the instructions in the self-care guide.

Login to Self-Care Interface

Open the customer self-care page in a browser (by default https://<your-porta-billing-slave-server-name>:8444) and type in the username / password which was provided to you.

NOTE: Sometimes administrators try pressing the **Logout** button on the admin interface and then logging in using the reseller's username and password. This will not work, since you are still in the admin realm, to which your reseller does not have access. You must login from the customer's self-care interface.

Modify Tariff

The reseller can adjust various parameters of a tariff (e.g. off-peak period or rounding).



1. In the Rating section of Reseller-Index, choose Tariffs.



- 2. On the Tariff Management page, click on the name of the existing tariff.
- 3. If necessary, modify the tariff parameters:
 - **Default Off-peak Period** If you do not differentiate between peak and off-peak rates, just choose **Not defined**; otherwise, select one of the previously defined off-peak periods.
 - Round Charged Amount Instead of calculating xDRs with a 5-decimal-place precision, round up xDR amount values (e.g. XXXXX.XX000 means rounding to cents, so that 1.16730 becomes 1.17).
 - **Default Formula** The default rating formula which will be applied to every new rate created in the tariff. If you leave this empty, "old-style" rating will be used.
 - Short Description A short tariff description. This will be shown in the rate lookup on the admin interface and the self-care pages for your accounts and customers. For example, for a tariff named Cust-ABC-Easy Call-1800, the short description will provide better information for your reseller ABC, who will be using this tariff, such as: "EasyCall – via a toll-free number".
 - **Description** An extended tariff description.
- 4. Click **Save**.
- 5. Repeat steps 1-4 until you have adjusted all of the tariffs.

Enter Rates

The interface for rate management by the reseller is identical to the one provided to the administrator and described earlier in this chapter.

Test Rate Configuration (Optional)

1. While in the **Edit Tariff** window, click on the **Edit Test** button to go to the Test Call Rating screen.

₼	II \$ 🕄 🛉) 🛩 🖭 🗖	est Rating for 1	Tariff 'ABC Shuttle Prepaid Cards'	③ Europe/Prague	ABC Shuttle Ltd.	🕑 Help
•	🛞 Close					り Logout	
	Date and Time	O YYYY-MM-DD Now	HH24:MI:SS	Result of the testing			
	Destination	47087905676					
	 Simulate ses Simulate auti 	sion charges based on horization based on the a	the session duration available funds				
	Session time	01:10 HH	:MI:SS, MI:SS or SS				
-							

2. Type in the phone number for which you would like to test the rating, as well as the estimated call duration, then click on the **Test** button.





- 3. You will now see the estimated amount charged for this call, as well as a detailed explanation of the rating process.
- 4. Press the S Close button to return to the Edit Tariff window.

Modify Product

If necessary, you may modify certain product parameters, e.g. maintenance fee amounts and scheduling.

۵		\$	•	~		Product Management				? Help
•	🛞 Cla	se						ÞØ	Logout	
						Search Search \$? Name Currency Descript	ion			
						💋 <u>Prepaid Cards</u> USD Prepaid C	ards			
						V				
۵	II \$	80	₩ ~			Edit Product 'Prepaid Cards'	③ Europe/Pragi	ue ABC	Shuttle Ltd.	? Help
•	🖬 Save	. 9	iave & l	lose	🛞 Close 🛛 💆 Rate	Lookup 🖷 Clone		١	Logout	
				I	Product Name Prepa	id Cards Currency USD				
				_	General Info	Maintenance Online Signup Services and Rating	g Subscriptions Notepad			
					3reakage	0.10000 USD				
					Overdraft Protection	Debit accounts only				
					Account Default ACL	M				
				1	Default Discount Plan	None				
					nfo URL	http://www.abc-shuttle.com/prepaid				
				I	Description	Prepaid Cards				
۵	II \$	88	<u>i</u> ~	••		Edit Product 'Prepaid Cards'	③ Europe/Prag.	ue ABC	Shuttle Ltd.	? Help
•	🖬 Save		5ave &	Close	🛞 Close 🔯 Rate	e Lookup 🖷 Clone		Þ	Logout	
					Product Name Prepa	Currency USD				
				-	General Info	Maintenance Online Signup Services and Rating	g Subscriptions Notepad			
					Period We	ekly V				
					D Effective From 20:	11-01-17 *				
					U Effective From (YYYY-MM-DD) 20:	11-01-17 *				

- 1. In the **Rating** section of the Reseller-Index page, choose **Products**.
- 2. On the Product Management page, click on the name of the product in the list.
- 3. Change values in the **Edit Product** form:

General Info tab

- Breakage A leftover balance which is considered "useless" (for statistical purposes). Accounts with a balance below breakage will count as *depleted*. This does not affect account authentication or authorization, so the account can still make calls if there is enough money left to cover at least the first interval.
- Info URL If you have an external server with a description of product features, enter the URL here (e.g. http://www.myproduct.com). Your customers will be able to go there from their self-care pages.
- **Description** Your description of the intended use of this product.

Maintenance tab

- **Period** Surcharge application interval; will be shown in call history as a separate line each time it is charged. **None** disables maintenance fees.
- Fee Surcharge amount.
- **Effective From** Apply the specified maintenance fee only after a certain date (no fees assessed until then); choose **Immediately** to start applying charges as soon as possible.

NOTE: The Maintenance Fees functionality is an obsolete feature and may be removed in future releases. Please use subscription plans to apply periodic charges.

4. Click **Save&Close**.

Create Subcustomer

A subcustomer is an owner of accounts. The subcustomer's contact information is used to distribute account usage information, call statistics, invoices, and so on. At least one subcustomer object is required to contain the actual accounts (prepaid cards).





3 🎟 🕏 🎇 (∳ ~ ≪		Add	Subcustom	er		Europe/Prague	ABC Shuttle Ltd.	? Help
• 🗟 Save 🗟 S	Save & Close 🛛 🛞	Close						💵 Logout	
Customer Name Blocked Type	David Welsh	*	Currency Opening Balanc Customer Class	USD - US D e 0 s ABC Shuttl	e Ltd.	▼			
Address Info	User Interface	Dialing Rules	Additional Info	Payment Info	Service Features	Custom Fields			
Company Name [Mr./Ms.f [First Name [M.I. [Last Name [Address [Contact Phone Fax Alt. Phone Alt. Contact E-mail BCC Description	 +1 205 111 00 	3				
Province/State Postal Code City Country/Region									

- 1. In the **Participants** section of the Reseller-Index page, choose **Subcustomers**.
- 2. On the Subcustomer Management page, choose 🖪 Add.
- 3. Fill in the **New Subcustomer** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for the customer object; will be used on the web interface.
- **Currency** The currency in which this customer will be billed.
- **Opening Balance** Starting balance for the customer; the default is zero.
- **Customer Class** Choose the customer class you have created in the previous steps.

Address Info tab

- **Email** Email address for distribution of accounting information. After the billing period is over, a list of xDRs and other statistics will be sent to this address.
- **BCC** Delivery to the specified email address of your account representative a copy of every outgoing email sent to the customer; this may be used for debug and archiving purposes.

User Interface tab

Time Zone – The time zone in which the customer will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.



• Web Interface Language – The language to be used on the customer's self-care web interface.

Additional Info tab

- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer via email at all).
- 4. Click Save&Close.

Generate Accounts

NOTE: Before generating accounts for a production system, read the section on "Provisioning prepaid accounts".

1. Go to the **Subcustomers** screen (the screen which contains a list of customers). It should look like the screenshot below:

₲ ः \$ ः •	🗹 🖭 Subc	ustomer Management	③ Europe/Prague	ABC Shuttle Ltd.	? Help
🕨 🖻 Add 🛞 Close				▶Ø Logout	
ANT	Representative 7 V xDRs Hame Accounts C	Search Irrency Credit Limit Balance	E-mail Status Delete	<u>ed</u> 1	
	🔎 David Welsh 🗔	USD 0.00000 <u>david</u>	@welsh-voip.com 🛛		
	¥				
☆ 🗉 \$ 📰 👬 2	Accounts of	Subcustomer 'David W	/elsh' 🕓 Europe/Prague	ABC Shuttle Ltd.	? Help
🕨 🔄 Add 📑 🗛ccoun	t Generator 🛞 Close			▶¶) Logout	
Acc	ount ID Batch	Ctrl # SIP Sta	Advector Accounts	ranced earch	
☆ 🗉 \$ 🐯 🗹 🗠	Account Generat	or for Subcustomer 'Dav	rid Welsh' (§ Europe/Prague	ABC Shuttle Ltd.	P Help
▶ 🕑 Generate 🛞 Close	e			▶Ø Logout	
Number of account	ts 100 * Product	USD - Prepaid Cards	× *		
Blocked	Opening Bala	ance 10			
Account Info	User Interface Additional Infe	Life Cycle Service Features			
Туре	⊙ Debit ○ Credit ○ Voucher				
Inactive					
Generation method	Random				
	🔿 Sequential				
	O DID Inventory				
ID Prefix	98				
ID Length	12 *				
Service Password	 Empty 				
	🔘 Auto Generated				
	Auto Generated Digits Only				
Batch	David2010 New batch	×			

- 2. Next to the subcustomer name, click on the Account \Box or \Box icon (in the Accounts column), which will take you to the account management for that customer.
- 3. Click on the **Account Generator**.
- 4. Fill in the Account Generator form:
 - **Number of Accounts** Number of accounts (prepaid cards) to be generated.
 - **Product** Choose the product which you would like your accounts to have.
 - **Blocked** It is normal practice to generate all prepaid cards as blocked, so they cannot be misused before being sold to the dealer or end customer. You can always choose later to unblock the whole batch of cards, or an individual card.
 - **Opening Balance** The initial balance on the card.

Account info tab

- **Type** Select **Debit** for prepaid service.
- **Inactive** Check this if you want to generate the accounts as initially inactive and assign them to a distributor later on.
- **Generation Method** Choose **Random** here; this will assign every account a unique, randomly-generated PIN.
- ID Prefix If you would like all of the generated accounts to start with the same digit string (e.g. 98), enter it here. Thus, if you enter 98 and an ID length of 10, account IDs (PINs) will look like this: 98NNNNNNN, where N = random digits.
- ID Length All account IDs (PINs) will be numerical and of the specified length. In order to avoid problems with printing prepaid cards, PortaBilling® will not generate account numbers with a leading zero. Also, PortaBilling® will only allow generation of a batch with feasible parameters, e.g. it is impossible to generate a batch of 1,000 accounts with ID length 4 and ID starting at 55.
- Service Password To improve security, you can use an account password during authentication, in addition to a PIN. Not all IVRs support this feature. If you choose Empty, no password will be assigned for the account, and the password check will be switched off during authentication. Choosing Empty is recommended by default. If you decide to use passwords, then please use the Auto-generated digits only option, since then the password can be entered in the IVR via phone keys.
- **Batch** A batch is a management unit for accounts. If a new batch name is provided in the text field, all accounts will be placed into a new batch with the given name. Otherwise, an existing batch should be selected from the drop-down list.

User Interface tab

- Login If you choose Account ID (default), your customer will use his account ID (PIN) to login to the self-care pages. If you choose Empty, the account owner will not be able to use the self-care pages at all until a login ID has been assigned for his account.
- Password Auto-generated means that a random password for web access will be assigned for each account (these passwords will be included in the .CSV file with account information).
 Empty means that no password will be assigned, so account owners will be able to login to the web interface simply by providing their account ID (PIN).
- **Time Zone** When an account owner accesses the web self-care pages to see a list of his calls, the time will be shown in the time zone most appropriate for him.
- Web Interface Language The language to be used on the account's self-care web interface.

Additional Info tab

- **E-Commerce Enabled** If checked, this will allow your debit card owners to make online payments via the PortaBilling® web interface. (Leave unchecked.)
- **Discount Plan** Applies a specific discount plan to this group of accounts. (Leave as **Product Default**.)

Life Cycle tab

- Activation Date Account activation date.
- **Expiration Date** Account expiration date.
- **Life Time** Relative expiration date; account will expire on "first usage date" + "life time" days. If you do not want to use this feature, leave the field blank.
- 5. Click 🖿 Generate. A confirmation screen will indicate that your information has been accepted.
- 6. Click ⁽³⁾ Close to return to the account administration page.

NOTE: Account generation tasks are executed every few minutes; it may take a while to generate large numbers of accounts.



Notification about the generated cards will be sent by email to the user who created them, in this case – to the reseller. A CSV file with information about the new accounts will be attached.

	∣ <u>E</u> ile <u>E</u> dit ⊻	jew <u>I</u> nser	t F <u>o</u> rmat <u>T</u> o	ools <u>D</u> ata <u>W</u> in	dow <u>H</u> elp		Тур	e a questio	on for help	• - B	×
	📂 🖬 🖪 (d	🗿 🛕 🛛 Σ	- 🕜 🔡	Arial	v 10	• B I U		•a• \$	💷 - 🖇	<mark>≽ - <u>A</u> -</mark>	
	A27 🗸	<i>f</i> ∗ da	avid-2007-q1								
	A	В	С	D	E	F	G	Н		J	
1	Batch	Ctrl #	PIN	VoIP Password	Web login	Web Password					
2	david-2007-q1	1	9880432870		9880432870	ra5ouua					_
3	david-2007-q1	2	9837363426		9837363426	v7tkgh					
4	david-2007-q1	3	9862540976		9862540976	7mnwdlr					
5	david-2007-q1	4	9875333322		9875333322	xkso9rd					
6	david-2007-q1	5	9827198290		9827198290	lmr4lq					
7	david-2007-q1	6	9823848944		9823848944	7juqnumg					
8	david-2007-q1	7	9834353865		9834353865	ybanc7ac					
9	david-2007-q1	8	9857182371		9857182371	5yksog					
10	david-2007-q1	9	9803729922		9803729922	jnfz2yna					
11	david-2007-q1	10	9817591850		9817591850	hl5urlk					
12	david-2007-q1	11	9890273996		9890273996	bw9xhv					-
н н	► H\ AccountsD	avidVelshPr	epaidCardsd /					Ú.)		
Rea	dγ										

2. Configuring a Reseller for Postpaid Services

Re-branding Services via a Reseller

This section demonstrates how to configure a reseller who will be providing services under his own name. The postpaid residential VoIP service is used as an example, but the procedure is basically the same for configuring any other service (e.g. PINless dial or business IP Centrex), the only difference being which nodes are used in the product's rating list. Please consult the handbook for a given service regarding its specific configuration details.

The procedure is very similar to the general set-up described in the **PortaSwitch Handbook: Residential VoIP Services.** Only a few additional comments are necessary:

- Resellers are not allowed to create new tariffs or products. In addition to security considerations, this is because rating list to a product must be configured in order to create it properly. The person doing this must be well-acquainted with your VoIP network structure (gateways, access lines, etc). Your reseller will not have this knowledge; in fact you will probably not even want to share such information with him. Therefore, your admin staff will create an initial framework of tariffs and products for him, and configure the products' rating list. If the reseller wants to sell a product under a different name later, he can simply clone the existing product.
- The correct sequence of actions is as follows:
 - 4. Create the tariff you will use to charge the resellers (Applied to: **Reseller** type).
 - 5. Create a reseller, assigning this tariff to him.
 - 6. Create tariffs and products for his subscribers, making sure that you mark them as **Managed by** that reseller.
- Unless assigned the "Advanced Reseller" access level, resellers are not able to view their own rates on the web interface, so that you are in control when informing them of rate changes. For example, at the beginning of the month you may choose to enter a rate change effective the first day of the following month; however, you can notify the customer of this only one week in advance.

Please use the checklist on the following page to ensure that you have performed all the required operations in the correct sequence.

Checklist

Print the following page and use it to mark the operations you have completed while performing system setup according to the instructions in this section. Please make sure that you perform all of the operations (all of the boxes must be checked), otherwise the service will not work.

Operations to be performed by the administrator

Operation	D	one
General and network configuration		
Perform configuration of general and network settings as described in	ſ	1
the Basic Residential VoIP Service chapter in the PortaSwitch	Ľ	1
Handbook: Residential VoIP Services		
Perform configuration of the vendor part as described in the Basic	[1
Residential VoIP Service chapter in the PortaSwitch Handbook:	-	-
Residential VoIP Services		
Rating configuration		
Create a tariff (referred to later as tariff A), which will contain the	[]
outgoing wholesale rates you apply to your reseller; make sure this	-	-
tariff is designated as Applied To: Reseller		
Insert rates in tariff A for the destinations to which you will allow	[]
your reseller to send calls		
Create a tariff (referred to later as tariff \mathbf{B}), which will contain the	[]
rates you charge your resellers for incoming calls (calls delivered to an		
IP phone of one of their subscribers); make sure this tariff is		
designated as Applied To: Reseller		
Insert incoming call rates in tariff B for the destinations covering the	[]
phone numbers your reseller will allocate to his customers		
Create a customer class to be applied to your resellers	[]
Create a reseller and apply tariff A to him on the Additional Info tab	[]
Specify a username and password for the reseller to access the self-	[]
care interface		
Create a tariff (referred to later as tariff C), which will be applied to	[]
outgoing calls of your reseller's subscribers; make sure this tariff is		
marked as "Managed by" the reseller		
Create a tariff (referred to later as tariff D), which will be applied to	[]
incoming calls to your reseller's subscribers; make sure this tariff is		
marked as "Managed by" the reseller	_	_
Create a product to be used by your reseller; make sure this product is	[]
marked as "Managed by" the reseller	_	_
Create one rating entry for this product, using the PortaSIP® node	L	
and an empty access code. This entry will use tariff C to charge the		
end user and tariff A to charge the reseller.	r	-
Create another rating entry for this product, using the PortaSIP®	L	
node and the access code INCOMING. This entry will use tariff D to		
charge the end user and tariff B to charge the reseller.		

Operations to be performed by the reseller

Account provisioning

Go to the customer self-care web page and log in using the credentials	[]
provided		
Insert rates in tariff C for destinations to which you will allow your	[]
subscribers to send calls		
Insert rates in tariff D for incoming calls to your subscribers' IP	[]
phones		
Create a subcustomer who will be using the service	[]
Create accounts (phone lines) under this subcustomer	[]
Testing		
Try to make a test call	[]

General and Network Configuration for PortaBilling®

Please follow the steps described in the *Basic Residential VoIP service* chapter in the **PortaSwitch Handbook: Residential VoIP Services**.

Create Tariffs for Charging the Reseller

As mentioned in the checklist, you will need two separate tariffs: one applied to outgoing calls (including forwarded calls) and one applied to incoming calls. These tariffs will be used to charge the reseller, so they should contain your selling rates for the reseller.

ሰ		\$	88	•	A	\sim	0		Tai	riff Mar	nageme	int					demoroot	P Help
•	💌 A	Add	® C	lose 🔇	i off-f	Peak I	Periods	📵 xDR Re-ra	ting E	.CR Rates							💵 Logout	🔳 Log
			A	NY	Applie	d To	~	Servi	ce V	ANY	Man	nageo	d By	~	Sea	arch Sea	rch	
		Rate			Nan	ne		Currency	Applied To		Serv	ice		Managed	By R	outing Desc	ription Delete	
			/															
ຜ		\$	88 (•	Þ	~	Q			Add 1	ariff			0	Ameri	ica/Vancouver	demoroot	? Help
•		jave		5ave & Cl	ose	8 C	lose										り Logout	目 Log
							Name Applied Ger	Reseller - To Reseller	Outgoing c	alls ,	Curren Service	cy P	USD - US Dol Voice Calls	1ar •	×	x		
							Destinati	ion Group Set				~						
							Free Sec	onds	0									
							Post Cal	l Surcharge	0.00000	%								
							Login Fe	e	0.00000									
							Connect	Fee	0.00000									
							Round C	harged Amount	*****	XXX			**					
							Cerauit F	ormula				1	74					
							Descripti	ion	Reselle calls	r's Tar	iff for	Out	cgoing					
		-																

		88	÷		Þ -	2 🔍		E	lit Ta	riff '	Rese	ller	- Outgo	oing calls	•				
•	Save		Save	& Clos	ie 🤅) Close		Download		Upload	🗄 R	ates	😨 Test				N)	Logout	Log
				Name		Reselle	er - 0	utgoing ca	ls	* c	urrency	US	D						
				Applie	ed To	Reselle	er			s	ervice	Voi	ce Calls						
1																			
				G	ienera	l Info	Web	Upload & I	ownloa	ad Er	nail Uplo	bad	Notepad						
1			-	Defeul		aali Darii	ad [6							-	
				Delauli	I OII-P	eak ren	uu [Night				*							
				Destina	ation (Group Se	et					 Image: A set of the set of the							
			1	Free Si	econd	s)											
				Post C	all Su	rcharge		0.00000	%										
				Login F	ee			0.00000	USD										
				Conne	ct Fee		1	0.00000	USD										
				Round	Charg	ged Amo	unt 🛛	*****	x		A								
				Default	Form	ula	1					_		f.					
				Short D	escri	otion	Ē												
				Descrij	ption			Reseller salls	's Ta	riff	for O	utgo	ing						

In the Rating section of Admin-Index, choose Tariffs.

- 1. On the Tariff Management page, choose **Add**.
- 2. Fill in the **New Tariff** form:
 - **Name** A short name of the tariff object; this is the name you will see later in the select menus.
 - **Currency** Choose the currency in which you will charge your reseller.

NOTE: The currency for the tariff is chosen only once, and cannot be changed later.

- Applied To Choose Reseller here.
- Service Choose Voice Calls here.
- 3. Click **Save**.
- 4. Repeat steps 1-3 until you have created both tariffs.

Enter Rates for Outgoing Calls Applied to the Reseller

Managing Rates Online

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

۵			88 i		~ Q	Rates	for tariff	'Reseller	- Outgoii	ng calls'			demoroot	
•	٠	Add	🖬 Save	🛞 Close	萬 Upload	📒 Tariff							🕅 Logout	📒 Log
					Effec	tive From		Dest Number	ination Prefix	Group	ountry			
	E	dit De	stination *	Country Description	Peak/C	ff-Peak	Interval	l, second Next *	Price, U First *	SD/ minute Next *	Effective From YYYY-MM-DD HH24:MI:55*	1× 🔑 🛛	🗑 😑 Dele	te
					NOT DEFINI	ID 💌								
		2												

6	•	\$	88 🚯	1 h		lates	for tariff	'Reseller	- Outgoir	ıg calls'	() Americ	a/Vancouver	demoroot	? Help
•	🗈 Ad	dd	🖬 Save	🛞 Close	萬 Upload 🔠 T	ariff							N Logout	目 Log
					Effective Fr	om 🚺		Dest Number	tination Prefix	Group	ountry			
	Edit	Des	tination *	Country Description	Peak/Off-Pea	¢	Interval First *	, second Next *	Price, US First *	6D/ minute Next *	Effective From YYYY-MM-DD HH24:MI:55*	14. 👂 🖪	🗑 😑 Dele	te
		47	·		Night	~	30 30	5 5	0.12	0.12	immediately	1]

- On the Tariff Management page you will see a list of available tariffs. Click the Rates icon next to the name of the tariff. When you are in Tariff Management for a particular tariff, click on Rates in the toolbar.
- 2. In the Edit Rates screen, click 🗄 Add.
- 3. Fill in the required information:
 - Destination The destination prefix may be entered directly, e.g. 47 for Norway, or you can access the destinations directory by clicking the Destination link (in the column header). Here you can find the desired prefix by country name.

NOTE: The phone prefix you are trying to create a rate for must already exist in Destinations.

- Interval First First billing unit in seconds.
- o Interval Next Next billing unit in seconds.
- **Price First** Per-minute price for first interval.
- **Price Next** Per-minute price for next interval.
- **Off-peak Interval First** First billing unit in seconds for off-peak time.
- Off-peak Interval Next Next billing unit in seconds for offpeak time.
- Off-peak Price First Per-minute price for first interval of offpeak time.
- Off-peak Price Next Per-minute price for next interval of offpeak time.

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

• Effective From – If you want this rate to take effect sometime in the future, you can either type in a date manually, or use the calendar (click the DD-MM-YYYY link).

NOTE: When using the calendar, you can specify that the date you are entering is in a different time zone than your current one. PortaBilling® will then automatically adjust the time.

• Rate Formula Wizard 🌤 – Launches the wizard for creating a custom rating formula

- **Payback Rate, Hidden, Forbidden** or **Discontinued** These flags are optional.
- 4. Click the **Save** button in the toolbar, or the **i**con on the left end of the row.
- 5. Repeat these steps if you need to enter more rates.

Importing Rates from a File

You may import thousands (or even hundreds of thousands) of rates at once using PortaBilling's rate import tool.

A rates table (.CSV or .XLS) may be prepared using a spreadsheet processor (i.e. Microsoft Excel) and then easily imported into PortaBilling®. Or you may use PortaBilling's "LCR Blending" report tool, which will generate a .CSV file with the selling price (based on the estimated termination cost and your markup).

Please consult the *Rate Import* chapter of the **PortaSwitch Handbook:** Wholesale Services for more details.

Enter Rates for Incoming Calls Applied to the Reseller

The process of entering incoming call rates is similar to the one described above. If you do not actually charge the reseller for incoming calls (in most cases, there is no cost associated with them), or charge him the same rate for numbers in various countries, you can simply use the wildcard destination (|) to enter a single rate in the tariff.

Create a Customer Class

Customer class provides the ability to define a group of parameters in a centralized way, then apply those parameters to many customers at once. (If you have already created a customer class that you can use for prepaid card distributors, skip this step and go to the next one.)



 \mathbf{X}

If the invoicing and collection parameters for resellers are not relevant at this moment, skip this step and use the **Default** customer class for your resellers.

- 1. In the **Billing** section of the Admin interface, choose **Customer Classes**.
- 2. On the Customer Class Management page, choose 🖪 Add.

🖞 II S 🕄 🛉 🗗 🏱 🛩	Q	Add Customer Class	1	America/Vancouver	demoroot	? Help
🕨 🗟 Save 🗟 Save & Close 🛞	Close				💵 Logout	
Name	e Reseller - Silver	* Managed by	Administrator only			
Send	d Statistics	Summary Only	~			
Invoid	ce Template	Do not create invoice	~			
Send	d Invoices					
Term	าร	Due on receipt				
Invoid	ce Grace Period	Days				
Colle	ection Threshold					
Notify	ý Customer		Days before due date			
Re-se	end Invoice		Days after due date			
Attem Credi	npt to charge the listed lit Card		Days after due date			
Susp	oension Time	Days				
Susp	oension Warning Time	Days				
Closi	ing Time	Days				
Charg Billing	rge Credit Card When The Ig Period Is Closed					
Desc	cription	Reseller - Silver class	8			

- 3. Fill in the parameter related to the invoicing and collection process for your resellers.
- 4. Click Save&Close.

Create a Reseller

The reseller entity you are about to create will define your relationship with a business partner who is reselling your services under his own name, and will allow him further independent service management (e.g. creating his own accounts).

₫	II \$	88 🚯 🗈 🏠	2		Add Rese	eller		(b) Al	merica/Vancouver	demoroot	[Help
•	🗟 Save	🗟 Save & Close	🛞 Close							M) Logout	
		Customer Nam Blocked Type	e ABC Shuttle Ltd.	x	Currency Opening Balanco Customer Class	USD - US Do 0 Reseller -	Silver	×			
		Address Ir	fo User Interface	Additional Info	Payment Info	Custom Fields					
		Company Name Mr./Ms.J First Name M.I. Last Name Address			Contact Phone Fax Alt. Phone Alt. Contact E-mail BCC Description	sales@abc-shut	tle.com				
		Province/State									
		City Country/Region									

In the Participants section of Admin-Index, choose Resellers.

- 1. On the Reseller Management page, choose **Add Reseller**.
- 2. Fill in the **New Reseller** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for this reseller; this will be used on the web interface.
- **Currency** The currency in which this reseller will be billed.
- **Opening Balance** Starting balance for the customer; the default is zero.
- **Customer Class** Choose the customer class you have created in the previous step

Address Info tab

- **E-mail** Make sure you enter the reseller's valid email address here; otherwise he will not be able to receive files with the PINs he generates. Also, once the billing period is over this email address will be used to deliver of a list of xDRs and an invoice to your reseller.
- **Bcc** Delivery to the specified email address of your account representative a copy of every outgoing email sent to the customer; this may be used for debug and archiving purposes.

Additional Info tab

- **Default Tariff for Voice Calls** This is the tariff that will be applied by default to calls placed by the reseller's subscribers; choose tariff A here.
- **Billing Period** Frequency of distribution of accounting information. For more details about different available billing periods, see the **PortaBilling Administrator Guide**.
- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer via email at all).

Payment Info tab

• **Credit Limit** – If left empty, there is no credit limit for this reseller; so you will probably want to enter a value here.

User Interface tab

- Time Zone The time zone in which the reseller will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.
- Web Interface Language The language to be used on the customer's self-care web interface.

3. Click Save&Close.

Create Tariffs to Be Used by the Reseller

These tariffs will be used by the reseller to charge his subcustomers. Since the rates for outgoing and incoming calls are different, you will need two tariffs. The reseller will perform the actual tariff configuration on the selfcare interface. You just need to provide him with a framework by preallocating tariffs.

ቆ	≣ \$	88 🛉	P	Z 🔍			Tari	iff Mar	agement			٩	America/V	ancouver	demoroot	?	Help
►	Add	🛞 Close	🌾 off-l	Peak Perio	ds 🔋 xDR F	Re-rating	🗹 L0	R Rates							り Logout		Log
		ANY	Applie	d To	M ANY	Service	~	ANY	Manage	ed By	r 	~	Search	Searc	h		
	Ate	s	Han	ne	Curre	ency Applie	ed To		Service			Managed B	y Routi	ng Descr	iption Delete		
ŵ		8	10 în	~ Q				Add	Tariff			0	America/\	/ancouver	demoroot	2	Help
•	🖬 Save	e 🗟 Sav	ve & Close	🛞 Close	2										N Logout		Log
				Nai Apj Ma	ne AB blied To Cu naged By AB General Info	C Shuttle - astomer C Shuttle	Outgo	ing calls	* Currenc; * Service	y U V	NSD - US Do Voice Calls	llar 🗸	×				
				Defa	ult Off-Peak Pe	eriod Nig	ht		~	•							
				Des	tination Group	Set			~	•							
				Free	Seconds	0											
				Post	Call Surcharg	e 0.00	0000	%									
				Logi	n Fee	0.00	0000										
				Con	nect Fee	0.00	0000		-								
				Rou	nd Charged An	nount xxx	XX.XXX	XX									
				Defa	ult Formula						f×						
				Des	cription	Res	elle ls	r's Tar	iff for Ou	ıtgo	ing						

In the Rating section of Admin-Index, choose Tariffs.

- 1. On the Tariff Management page, choose **•** Add.
- 2. Fill in the **New Tariff** form:
 - **Name** A short name of the tariff object; this is the name you will see later in the select menus.
 - **Currency** Choose the currency in which your reseller plans to operate.

NOTE: The currency for the tariff is chosen only once, and cannot be changed later.

- Applied To Choose Customer here.
- Managed By Choose your reseller in the list.
- You may skip all the other parameters, as the reseller will be able to adjust them according to his needs.
- Short Description A short tariff description which will be understandable to your reseller.
- **Description** An extended tariff description.



- 3. Click Save&Close.
- 4. Repeat steps 1-3 until you have entered all of the tariffs your reseller needs.

Create a Product for the Reseller

As was the case above with tariffs, you need only create a framework for your reseller to enable him to perform further independent product management.

奋	II \$	00 98	*	:	Þ ~) Q		Pr	oduct	Managem	ent		8	America/Vancouve	er demoroot	🕐 Help
•	🛃 Add	8	Close												N Logout	📒 Log
						\$?	ANY	Managed By me	▼ Currency	Se Managed By	arch	Search Descriptio	on Delete			
₫		00	÷ (: •	h ~	Q			Add	Product			Q	America/Vancouve	er demoroot	? Help
•	📄 💼 ave	8	Close												💐 Logout	
			-	Prode Mana Break Overo Accou Defau Info U Desc	uct Nam ged By General age Iraft Prot unt Defau ult Disco URL ription	e Pos ABC	paid services Shuttle Lt Maintenance Debit acc Account : n None	d. v	Cur	rency USD -	US Doll	Lar	W ,			
		00	•		•	A		n lu n	- 1	n - 1 1 -		•	0			
Ш b	e odd	60	ûll Eave		Eave & f		(X) Close (8	Edic Pro		Postpaid s	ervic	es		- America/Vancouve	er demoroot	Help
			P	rodu Manag	ct Name led By ieneral i	Postp ABC S	aid services Shuttle Ltd.	Online Signu	Curre Servic	ency USD	Subscr	iptions !	Service Feature	s Notepad	- 19 Logout	
			PI	lease	define a	t least	one Services a	nd Rating entry	/						-	

In the Rating section of the Admin-Index page, choose Products.

- 1. On the Product Management page, click the 🖪 Add icon.
- 2. Fill in the **Add Product** form:
 - Product name Product object name.
 - **Currency** Product currency. Only tariffs which have the same currency will be permitted in the rating list.
 - Managed by Choose your reseller from the list.
- 3. Click **Save**.
- 4. The **Services and Rating** tab now becomes active, and you can edit this product's rating list.

The reseller will not have access to information about your network, and therefore cannot view rating list information. You may define it for him as follows.

Create Rating Entry for Outgoing Calls

This entry will define the tariff to be used when a subscriber of the reseller places an outgoing call.

ക		88 🛉		•	Q		Edit Pro	duct 'Postpaid	services'			demoroot	P Help
•	🗈 Add	🖬 Sav	e 🖩	Save &	Close	🛞 Close 🛛	🗿 Rate Lookup	Clone				🕅 Logout	目 Log
			Prod Mana	uct Name nged By	Post ABC 1	aid services Shuttle Ltd.	x	Currency USD					
				General	Info	Maintenance	Online Signup	Services and Rating	Subscriptions	Service Feat	ures Notepad		
	_		Pleas	e define :	atieast	one services a	and Hating entry						
₫ ►	Save	🕄 🚯	re & Cl	Þ ∠ ose ⊗	Q Close	Add Serv	ices and Ra	ating to Produc	t 'Postpaid:	services'	③ America/Vancouver	demoroot । । Logout	? Help
				Prod Serv	uct Nar ice	ne Postpa Voice	id services Calls 🗸	Product Curre	ncy USD				
		-	6	General	Overd	Iraft Protectio	n						
			Node		Por	rtaSIP - 193	3.28.87.36 💌	Access Code					
			Tariff ^ Recoll	or Toriff*	ABO	C Shuttle -	Outgoing ca	Info Digits	ANY		~		
₫	II \$	🕄 🗄	e & Cl	b ∼ ose ⊗	Q / Close	Allowed S	ervices and	d Rating of Pro	duct 'Postp	aid servic	e€ [•] America/Vancouver	demoraat	? Help
				Prod Serv	uct Nai ice	ne Postpa Voice C	id services :alls	Product Curre	nncy USD				
			6	ieneral	Overd	Iraft Protectio	n						
			Check Min. Se Max. Se Max. Au	Minimum ession De ession D uthorizatio	Funds posit posit on Chur	Do not 0.00000	Check V USD USD USD	1					
			0 10103	-o recurico									
۵	II \$		-	•	Q		Edit Pro	duct 'Postpaid	services'		America/Vancouver	demoroot	? Help

₼		88 🗼	P Þ 🛩 🔍		Edit Prod	luct 'Postpai	d services'					P Help
•	🔁 Add	🖬 Save	📓 Save & Close	🛞 Close 👔	🧕 Rate Lookup	Clone					M Logout	📒 Log
		Produ Mana	uct Name Postpaid ged By ABC Shu	services ttle Ltd.	* Ci	urrency USD						
			General Info Mai	ntenance Or	nline Signup Ser	rvices and Rating	Subscriptions	Service Features	Notepad		_	
		Voic	e Calls									
		Edit	Node	Acce	ess Code Info Digi	ts	Routing	g/Rating		Delete		
			PortaSIP - 193.2	28.87.36 Any code ANY ANY — ABC Shuttle - Outgoing			alls — <u>Reseller - Ot</u>	tgoing calls	×			

- 1. When the Services and Rating tab is selected, click on the Add icon.
- 2. Choose Voice Calls in the Service select menu.
- 3. In the **Node** select menu, select the PortSIP node.
- 4. The **Access Code** should be left empty. This entry then will be applied by default, and thus will cover the situation when a user dials a number from his phone or forwards a call using the follow-me feature. (If you want to distinguish between these two scenarios, you may use the access codes OUTGOING and FOLLOWME respectively.)
- 5. The **Info Digits** field only makes sense when a call originates from your customer in a public telephony network. Therefore, just leave it empty for the SIP service.

- 6. In the **Tariff** menu, select the tariff that will be applied to end users (residential VoIP customers of your reseller), referred to here as tariff C.
- 7. In the **Reseller's Tariff** drop-down menu, you can also choose which tariff will be used to charge the reseller when an account with this product makes a phone call. By default, the system applies the tariff assigned to the reseller in customer info (here, tariff A) in this case **DEFAULT TARIFF** appears in the select menu.
- Configure overdraft protection for this product on the Overdraft Protection tab. (Please consult the *Rating* section in the PortaBilling Web Reference Guide for a description of the parameters available here.)
- 9. Click Save&Close to save this rating entry.
- 10. Repeat steps 1-9 if you want to define more rating entries; for instance, if you use a PortaSIP® cluster with multiple nodes, each node must be added to the rating list.

Create Rating Entry for Incoming Calls

This entry will define the tariff to be used when a subscriber of the reseller receives an incoming call.



- 1. When the Services and Rating tab is selected, click on the Add icon.
- 2. Choose **Voice Calls** in the **Service** select menu.
- 3. In the **Node** select menu, select the PortaSIP® node.
- 4. Enter **INCOMING** in the **Access Code**; this entry will then be used for calls going to IP phones.

- 5. The **Info Digits** field only makes sense when a call originates from your customer in a public telephony network. Therefore, just leave it empty for the SIP service.
- 6. In the **Tariff** menu, select the tariff that will be applied to end users (residential VoIP customers of your reseller) when they receive a phone call, referred to here as tariff D.
- 7. In the **Reseller's Tariff** drop-down menu, make sure to choose the tariff which will be used to charge the reseller when an account with this product receives a phone call, referred to here as tariff B. If you do not do so, the system will apply the resellers' default tariff; this is probably undesirable, since that tariff contains rates for outgoing calls.
- Configure overdraft protection for this product on the Overdraft Protection tab. (Please consult the *Rating* section in the PortaBilling Web Reference Guide for a description of the parameters available here.)
- 9. Click Save&Close to save this rating entry.
- 10. Repeat steps 1-9 if you want to define more rating entries; for instance, if you use a PortaSIP® cluster with multiple nodes, each node must be added to the rating list.

Reseller Actions

At this point you have finished with the administrator part of the work. You just need to send the reseller his login credentials for the PortaBilling® self-care interface, while the rest of the tasks described below will be performed by the reseller himself. They are listed here for your convenience only; normally the reseller will use the instructions in the self-care guide.

Login to Self-Care Interface

Open the customer self-care page in a browser (by default https://<your-porta-billing-slave-server-name>:8444) and type in the username / password which was provided to you.

NOTE: Sometimes administrators try pressing the **Logout** button on the admin interface and then logging in using the reseller's username and password. This will not work, since you are still in the admin realm, to which your reseller does not have access. You must login from the customer's self-care interface.

Modify the Tariff for Outgoing Calls

The reseller can adjust various parameters of a tariff (e.g. off-peak period or rounding).





۵	II \$	88 🛉	~ «	1	ariff Management	③ Europe/Prague	ABC Shuttle Ltd.	? Help
•	🛞 Close	😂 Off-	Peak Period	s			🕅 Logout	ĺ
					Search Search			
				Rates Name	Currency Applied To Service Routing Des	cription		
				ABC Shuttle - Outgo	ing calls USD Customer Voice Calls			
				V				
合	II (\$	88 🚯	~ cc	Edit Tariff '	BC Shuttle - Outgoing calls'	Europe/Prague	ABC Shuttle Ltd.	? Help
•	Save	Save	& Close	🛞 Close 🔳 Download 🔺	Upload 🔲 Rates 😥 Test		M Logout	
				Applied To Custome Managed By ABC Shu General Info Not	r Service Voice Calls Life Ltd.			
				Default Off-Peak Period	Night 💌			
				Destination Group Set	×			
				Free Seconds	0			
				Post Call Surcharge	0.00000 %			
				Connect Fee	0.00000 USD			
				Round Charged Amount	*****			
				Default Formula				
				Short Description				
				Description	Reseller's Tariff for Outgoing calls			

- 1. In the Rating section of Reseller-Index, choose Tariffs.
- 2. On the Tariff Management page, click on the name of the existing tariff.
- 3. If necessary, modify the tariff parameters:
 - Default Off-peak Period If you do not differentiate between peak and off-peak rates, just choose Not defined; otherwise, select one of the previously defined off-peak periods.
 - Round Charged Amount Instead of calculating xDRs with a 5-decimal-place precision, round up xDR amount values (e.g. XXXXX.XX000 means rounding to cents, so that 1.16730 becomes 1.17).
 - **Default Formula** The default rating formula which will be applied to every new rate created in the tariff. If you leave this empty, "old-style" rating will be used.
 - Short Description A short tariff description. This will be shown in the rate lookup on the admin interface and the self-care pages for your accounts and customers. For example, for a tariff named Cust-ABC-Easy Call-1800, the short description will provide better information for your reseller ABC, who will be using this tariff, such as: "EasyCall – via a toll-free number".
 - **Description** An extended tariff description.
- 4. Click 🖬 Save.
- 5. Repeat steps 1-4 until you have adjusted all of the tariffs.

Enter Rates

The interface for rate management by the reseller is identical to the one, provided to the administrator and described earlier in this chapter.

Modify the Tariff for Incoming Calls

This is similar to the process of adjusting outgoing rates, as described above.

Test Rate Configuration (Optional)

1. While in the **Edit Tariff** window, click on the **Edit Test** button to go to the Test Call Rating screen.



2. Type in the phone number for which you would like to test the rating, as well as the estimated call duration, then click on the **Test** button.



- 3. You will now see the estimated amount charged for this call, as well as a detailed explanation of the rating process.
- 4. Press the **Close** button to return to the **Edit Tariff** window.

Modify Product

If necessary, you may modify certain product parameters, e.g. maintenance fee amounts and scheduling.



۵	[5	88	ł	~	••			Р	roduc	t Man	agement		() E.	irope/Prague	AB	C Shuttle Ltd.	🕑 Help
•	Q	🖲 Clo	se														Þ	Logout	
										\$2	Na	S	Search Search						
										5	Postpaid	services	USD						
											V	,							
₼		1	5	88	÷	\sim	••			Edit Pr	oduct	'Post	paid services'				ABO		? Help
•		Sa Sa	/e		Sav	e & C	lose	🛞 Close	🔯 Ral	te Lookup	Clone						۶ŋ	Logout	
								Product Nai	ne Post	paid services			Currency USD	1	1	٦			
								Gener	al Info	Maintenance	Online	e Signup	Services and Rating	Subscriptions	Notepad				
								Breakage				U	ISD						
								Overdraft Pr	otection	Debit ac	counts	only	~						
								Account Def	ault ACL				v						
								Default Disc	ount Pla	None			~						
								Info URL											
								Description											

- 1. In the **Rating** section of the Reseller-Index page, choose **Products**.
- 2. On the Product Management page, click on the name of the product in the list.
- 3. Change values in the **Edit Product** form:

General Info tab

- Info URL If you have an external server with a description of product features, enter the URL here (e.g. http://www.myproduct.com). Your customers will be able to go there from their self-care pages.
- **Description** Your description of the intended use of this product.
- 4. Click Save&Close.

Create Subcustomer

A subcustomer is an owner of accounts (phone lines). The subcustomer's contact information is used to distribute account usage information, call statistics, invoices, and so on.





₲ ▦ \$ 跳	÷ ~ «		Add	Subcustom	ier		Burope/Prague	ABC Shuttle Ltd.	🛛 Help
🕨 🖬 Save 📓	Save & Close 🛛 🛞	Close						💵 Logout	
Customer Name Blocked Type	David Welsh	*	Currency Opening Balanc Customer Class	USD - US D e 0 ABC Shuttl	ollar f	✓*✓			
Address Inf	o User Interface	Dialing Rules	Additional Info	Payment Info	Service Features	Custom Fields			
Company Name Mr./Ms./ First Name M.I. Last Name Address			Contact Phone Fax Alt. Phone Alt. Contact E-mail BCC Description	+1 205 111 00	3				
Province/State Postal Code City									
Country/Region									

- 1. In the **Participants** section of the Reseller-Index page, choose **Subcustomers**.
- 2. On the Subcustomer Management page, choose 🖪 Add.
- 3. Fill in the **New Subcustomer** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for the customer object; will be used on the web interface.
- **Currency** The currency in which this customer will be billed.
- **Opening Balance** Starting balance for the customer; the default is zero.
- **Customer Class** Choose the customer class you have created in the previous steps.

Address Info tab

- **E-mail** E-mail address for distribution of accounting information. After the billing period is over, a list of xDRs and other statistics will be sent to this address.
- **BCC** Delivery to the specified email address of your account representative a copy of every outgoing email sent to the customer; this may be used for debug and archiving purposes.

User Interface tab

Time Zone – The time zone in which the customer will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.



• Web Interface Language – The language to be used on the customer's self-care web interface.

Additional Info tab

- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer via email at all).
- 4. Click **Save&Close**.

Create Accounts

1. Go to the **Subcustomers** screen (the screen which contains a list of subcustomers). It should look like the screenshot below:

ക		\$ 😂 🛉 📈	~	Sub	customer	Manage	ment		/Prague		? Help
•	🔁 A	dd 🛞 Close								🕅 Logout	
		ANY	Representati DRs Name David Welst	Accounts	Currency Credi USD	t Limit Bala 0.00	Search nce E-ma 000 <u>david@welsh</u> :	Search Il Status voip.com	Advance search Delete	<u>ed</u> 1	
4	III (s 22 # Z	α Δα	V	f Subcust	omer 'D	avid Welch'	C Europe	Pranue	ABC Shuttle Ltd	2 Help
	E Ar	id 🕀 Account i	eperator 🛞	Counts o	i Subcust			© corope	priague		E nep
		Acco	unt ID ANY	Batch	•	Ctrl #	SIP Status ANY	Show Accounts	Adv SE	anced earch	1
۵			Add	Account	for Retail C	ustomer	'David Welsh	• () Eu	rope/Pragu	e ABC Shuttle Ltd.	? Help
•	🖬 Save	e 🔒 Save & Close	🛞 Close							N) Logout	
		Account ID 1267 Blocked Account Info	* User Interface	Product Opening Subscriber	USD - Balance 0 Additional Info	Postpaid :	services V * Service Features	Custom Fields			
		Type Credit Limit Service Password E-mail Batch	O Debit O Cred	t Voucher Auto	~						

- 2. Next to the subcustomer name, click on the Account 🖵 or 🗊 icon (in the Accounts column), which will take you to the account management for that customer.
- 3. Click on **Add**.
- 4. Fill in the **Add account** form:
 - Account ID SIP ID, i.e. the phone number which will be used to login to the SIP server and receive incoming calls.
 - **Product** choose the product, which you would like your account to have.

- **Blocked** you may create your account as blocked, although this is rarely done with SIP service accounts.
- **Opening Balance** the initial balance on the account.

Account Info tab

- Type Account type; select credit for postpaid service.
- **Credit limit** For a credit account, specify the credit limit. If you leave this field empty, it means there is no credit limit for this account (but a customer credit limit may still apply).
- Service Password The account ID and this password will be used to authenticate SIP server login.
- **E-mail** Enter the account owner's e-mail address here. If he ever forgets his password for the web self-care pages, he will be able to reset it, and a new password will be sent to this e-mail address. You can also just leave this field empty.
- **Batch** A batch is a management unit for accounts. If a new batch name is provided in the text field, the created account will be placed into a new batch with the given name. Alternatively, an existing batch could be selected from the drop-down list. If you leave this field empty, the created account will not be tied to any specific batch.

Additional Info tab

- **IP Phone** When using the PortaSwitch® auto-provisioning feature, here you may enter the name of the particular phone which this account will be provisioned to. Leave this field empty for basic SIP service, and use manual provisioning instead.
- IP Phone Port The specific port (phone line) on the IP phone which this account should be provisioned to (e.g. Sipura-2002 supports two phone lines, so two separate accounts can be provisioned on the same device on different lines). Leave this field empty for basic SIP service, and use manual provisioning instead.

Life Cycle tab

- Activation date Account activation date.
- **Expiration date** Account expiration date; since we are setting up a postpaid service, which should function for a long time, leave this field blank.
- **Life Time** Relative expiration date; since we are setting up a postpaid service, which should function for a long time, leave this field blank.

User Interface tab

- Login Account login to web self-care pages. Can be the same as account ID.
- **Password** Password for the web self-care pages.
- **Time Zone** When an account owner (SIP services subscriber) accesses web self-care pages to see a list of his calls, we can show the time in the time zone most appropriate for him.
- Web Interface Language The language to be used on the customer self-care web interface.

Service Features tab

Using this tab, you can activate / deactivate various features of the services provided to this account. Note that features are defined per *service type* (the physical service provided to the user such as Conferencing, Data Service, Voice Calls, Messaging etc.)

Please consult the **PortaBilling Web Reference Guide** for a description of parameters available here. For now you may leave these with their default values.

- 5. After clicking Save&Close, you will see a confirmation screen announcing that a new account has been created.
- 6. Repeat steps 3-6 if the customer has more than one phone line (extension).



3. Configuring a Distributor for Prepaid Services

Using Distributors to Expand Your Sales Network

This section demonstrates how to configure a distributor who will be selling your prepaid products to end users.

The procedure is very similar to the general prepaid set-up described in the **PortaSwitch Handbook: Prepaid Services.** Only a few additional comments are necessary:

- You (the administrator) will generate a batch of accounts for the distributor, who will then activate individual accounts when they are ready to be sold.
- Accounts are initially created as inactive, and the distributor must activate them before they can be used.

Checklist

Print the following page and use it to mark the operations you have completed while performing system setup according to the instructions in this chapter. Please make sure that you perform all of the operations (all of the boxes must be checked), otherwise the service will not work.

Operations to be performed by the administrator

Operation	D	one
General and network configuration		
Perform configuration of general and network settings as	[]
described in the Prepaid Calling Cards (Using a Gateway) chapter in		
the PortaSwitch Handbook: Prepaid Services		
Rating configuration		
Create a distributor and set his commission rate on the	[1
Additional Info tab	_	-
Specify a username and password for the distributor to access	ſ	1
the self-care interface	-	-
Create an internal customer object which will hold the prepaid	Γ	1
accounts	-	-
Generate a batch of prepaid cards which will be assigned to your	Γ	1
distributor	-	-

Operations to be performed by the distributor

Account provisioning

Go to the customer self-care web page and log in using the	[]
credentials provided		
Activate the prepaid cards	[]

Create a Distributor

The distributor entity you are about to create will define your relationship with a business partner who is distributing your services and allow him further service management (e.g. creating his own customers and accounts).

۵	II \$	88 4	•	2 Q		Add Distri	butor		(America/Vancouver	demoroot	🕐 Help
•	🖬 Save	🕞 Sa	ve & Close	8 Close							🔰 Logout	
		Custo	mer Name	John Distributor	*	Currency	USD - US Do	llar	× *			
		Block	ed			Opening Balance	100					
		Туре		Distributor		Customer Class	Distributor	- Service	*			
		A	Address Info	User Interface	Additional Info	Payment Info	Custom Fields					
		Compa	any Name			Contact			1			
		Mr./Ms.	<i>J</i>			Phone			ĺ			
		First N	ame		7	Fax						
		M.L				Alt. Phone			1			
		Last N	ame			Alt. Contact			ĺ			
		Addres	ss			E-mail			1			
						BCC			ĺ			
						Description []			
		Provine	reiState									
		Postal	Code									
		Citv										
		Countr	WRegion									
)	
	_											
ω						Add Distr	butor			America/Vancouver	demoroot	2 Help
-	Save	lad Si	ave & Llos	S Close							NU Logout	
		Custome	er Name 🕽	ohn Distributor	*	Currency	USD - US Do	llar	~			
		Blocked]		Opening Balance	100					
		Туре	D	istributor	.	Customer Class	Distributor	- Servic	e 💙			
								-				
	_	Add	dress Info	User Interface	Additional Info	Payment Info	Custom Fields					
		Default S	ale Comm	ssion* 15	%		Billing Period	I I	Monthly		*	
	0	Default P	ayment Co	mmission * 10	%		Next Billing D	ate	2010-04-01			
	8	Subscrip	tion Discou	nt Rate	%		Shift Billing D	oate To 🛅		YYYY-MM-DD		
	-				A		Send Statisti	cs	Customer	class' default	*	
	+	vepresei Fox ID	LIT9[[A6	Not	derined	×	Invoice Temp	late	Customer	class' default	~	
		axiD					Send Invoice	s	Customer	class' default	~	

In the Participants section of Admin-Index, choose Distributors.

- 1. On the Distributor Management page, choose 🗄 Add Distributor.
- 2. Fill in the **New Distributor** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for this distributor; this will be used on the web interface.
- **Currency** The currency in which this distributor will be billed.
- **Opening Balance** Starting balance for the distributor.
- Customer Class Choose the customer class for the distributor.

Additional Info tab

- Default Sales Commission This commission is applied when an account is created or a distributor is assigned (e.g. if the distributor's commission percentage is 15%, and a new account with a \$10 balance has been created, then the distributor is charged \$8.5 and has a \$1.5 profit).
- Default Payment Commission This commission is applied when payment is entered (e.g. when the distributor makes payment of \$10 towards an account, and his payment commission is 10%, then the distributor is charged \$9 and has a \$1 profit).
- **Billing Period** Frequency of distribution of accounting information. For more details about different available billing periods, see the **PortaBilling Administrator Guide**.
- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer via email at all).

Payment Info tab

- **Credit Limit** If left empty, there is no credit limit for this distributor; so you will probably want to enter a value here.
- **Balance Warning Threshold** The distributor can be notified by email when his balance is dangerously close to the credit limit and he will soon be unable to activate accounts. Here you can enter the value for such a warning threshold. This can be entered:
 - as a percentage (e.g. 90%). The warning will be sent when the customer's balance exceeds that percentage of his credit limit. So, if the credit limit is USD 1000.00 and the threshold is 90%, a warning will be sent as soon as the balance exceeds USD 900.00.
 - as an absolute value. The warning will be sent as soon as the balance goes over the specified value.

User Interface tab

- Time Zone The time zone in which the distributor will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.
- Web Interface Language The language to be used on the customer's self-care web interface.
- 3. Click Save&Close.

Create a Customer

In the case of prepaid card services, the identity of the actual customer (end user) is not stored in the billing, and he or she is identified only by the PIN number used. Still, you will need at least one customer object in PortaBilling® to maintain the customer-account hierarchy, so that all of the prepaid card accounts are organized in one location.

☆ == \$ \$\$ 🛊 🖻 Þ ∼ 🔍	Add Customer		demoroot	? Help
🕨 🖬 Save 📓 Save & Close 🛞 Close			M Logout	
Customer Name EaryCall Ltd. " Blocked Type Retail	Currency USD - US Dollar			
Address Info User Interface Dialing Rules	Additional Info Payment Info Service Features Custom Field	5		
Company Name	Contact Phone Fax Att. Phone Att. Contact E-mail BCC Description			
Province/State Postal Code City CountryRegion				

In the Participants section of Admin-Index, choose Customers.

- 1. On the Customer Management page, click 🖿 Add Customer. In this example, we assume that you are creating the customer manually, so choose **Manually** from the drop-down menu (do not use any of the Quick Form options).
- 2. Fill in the **New Customer** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** Short name for the customer object; to be used on the web interface.
- **Currency** The currency must match the currency of your prepaid product.
- **Opening Balance** Starting balance for the customer; the default is zero.
- **Customer Class** Choose the customer class you created in the previous step.
- 3. Click Save&Close.

Generate a Batch of Accounts for the Distributor

To generate a batch of accounts under the distributor, use the account generator. When a distributor is selected, the account generator automatically enables only inactive debit accounts to be created.

- 1. Go to the **Customers** screen (the one containing the list of customers).
- 2. Next to the customer name, click on the Account \Box or \Box icon (the one in the **Accounts** column) to go to account management for that customer.

₫		SS 🛉	-	۱.	~ Q		Customer Management						demoroot	
•	🛃 Add	🛞 Clos	se 🛛										N) Logout	目 Log
					Туре		Repre	sentative		Search		Advanced search		
		I	Direct	Custo	omers	▼ [A]	4Y		•		Search	ocuren		
			xDRs		Name	Accou	nts Currency	Credit Limit	Balance	E-mail	5	Status Delete		
				asyCa	ill Ltd.	Ē	USD		0.00000					
~		00 1	.		a 🔊		C D - t - il d		F0-1	11441		to		178 I
ធ	•					Account	of Recall C	Lustomer	EasyCal	I Lta.	₩ Am	erica/vancouver	demoroot	[2] нер
•	🕈 Add	Acco	unt Gen	erator	· S Llose								NU Logout	I
			÷.	Acce	ount ID	Batch	Ct	rl# S	IP Status		Ad	vanced		
					A	NY	~	ANY	~	Show Account	ts <u>S</u>	earch		
			-											
씁	II \$	88 🚯	Ma	1	🗠 🔍 Acc	ount Genera	tor for R	etail Custo	omer 'Ea	syCall Ltd.	🔍 🚯 Ame	rica/Vancouver	demoroot	🛛 Help
•	🗈 Gene	erate 🛞) Close							-			📲 Logout	
		Number	of acco	unts	20	Product	USD - H	asyCall	*	*				
		Blocked				Opening Balar	ICE 10							
				_										
		Acc	ount In	foU	lser Interface	Additional Info	Life Cycle	Service Featur	es					
		Туре			🛙 Debit 🔘 Cre	dit 🔿 Voucher								
		Inactive		V	1									
		Generatio	on meth	od 🤇	Random									
				C) Sequential									
				C	DID Inventor	,								
		ID Prefix												
		ID Length	n	13	2 *									
		Service P	Passwor	n G	Empty									
		2011001		- 0	Auto General	ied.								
				0	Auto General	ad Digite Only								
		Detah			/ Auto General									
		Daten		E	asycall	USD - Kasy	cari 💌							
۵.	II \$	88 †	-	Þ		ount Genera	tor for R	etail Custo	omer 'Ea	svCall Ltd.	🕓 Ame	erica/Vancouver	demoropt	? Help
-	🗄 Gene	rate 🕅	Close										NO Logout	
				-									,	
		Number	of acco	unts	20	Produc	USD - H	lasyCall	~					
		Blocked		ſ		Oneping Palar	ICE 10	×						
		Liveneu				Spectrum	10							
		Aco	ount In	fo U	ser Interface	Additional Info	Life Cycle	Service Featur	es					
		E				1								
		E-comme	erce Ena	abled										

{...

3. Click on **Account Generator**.

Product default

John Distributor

Discount Plan

Distributor

- 4. Fill in the "Account generator" form:
 - **Number of accounts** Number of accounts (prepaid cards) to be generated.
 - **Product** Choose the product which you would like your accounts to have.
 - **Opening balance** The initial balance on the card.

Account info tab

- Account type Account type; select **Debit** for prepaid service.
- **Inactive** Allows to generate the accounts as initially inactive. This box is automatically checked if the distributor is selected.
- **Batch** A batch is a management unit for accounts. If a new batch name is provided in the text field, all accounts will be placed into a new batch with the given name. Otherwise, an existing batch should be selected from the drop-down list.

Please refer to the *Prepaid Calling Cards (Using a Gateway)* chapter in the **PortaSwitch Handbook: Prepaid Services** for a description of the other parameters.

5. Click **Generate**; a confirmation screen will indicate that your information has been accepted.

Assign a Commission Rate to the Batch

You can also assign a commission rate to the batch that the accounts belong to. In this case, the batch commission rate will be used when the distributor activates the account.

1. While in the **Edit Customer** window, click on the **Batches** button to go to the Batch Management screen.



۵		\$	88	•	8 :0	1	Q		В	atches of	Retail Cust	omer '	'EasyCall Ltd.		America/Vancouver	demoroot	? Help
•	•	Add		Save		Sav	e & Close	🛞 Cla	ose							M Logout	📒 Log
										(Searc	h Sear	rch				
								Edit		Name *	Sale Commis	sion Pa	ayment Commission	Delete			
									Easy	/Call	10	1	.2	×			
								≡	Case	d							
									Easy	Call							
								=	Easy	/Call-DIDs							
								=	easy	call-um							

- 2. Click the icon next to the batch name to edit it.
- 3. Enter the Sale and Payment commission.
- 4. Then click the 📕 Save icon.

Distributor Actions

At this point you have finished with the administrator part of the work. You just need to send the distributor his login credentials for the PortaBilling® self-care interface, while the rest of the tasks described below will be performed by the distributor himself.

Login to Self-Care Interface

Open the customer self-care page in a browser (by default https://<yourporta-billing-slave-server-name>:8444) and type in the username / password which was provided to you.

Activate Accounts

When the batch of accounts has been generated, the Distributor can activate these accounts.

- 1. In the **Participants** section of the Distributor-Index page, choose **Accounts**.
- 2. On the Account Info page, click Show Accounts button.

۵					Ac	CO	ount Info				John		? Help
•	🛞 Close	e									١	Logout	
			Account ID		Customer		Batch	Ctrl #		Advanced			
				ANY	~		ANY 💙		Show Accounts	<u>search</u>			



			÷					Αςτοι	ınt Info								🕐 Help
Þ	8	Close														🕅 Logout	
				Account	ID	C	ustomer		Batci		ct	rl#			Advanced		
						ANY		✓ AN	Y	~			Show Ac	ounts	search		
					Acco	ount ID	ldle, days	Currency	Balance	Credit Limit	Туре	Product	Batch	Status			
					17166	281682		USD	10.00000		Debit	EasyCall	EasyCall				
					17194	352566		USD	10.00000		Debit	EasyCall	EasyCall				
					17325	800382		USD	10.00000		Debit	EasyCall	EasyCall				
					17701	566220		USD	10.00000		Debit	EasyCall	EasyCall				
					17742	460096		USD	10.00000		Debit	EasyCall	EasyCall				
					17751	.079376		USD	10.00000		Debit	EasyCall	EasyCall				
					17796	395977		USD	10.00000		Debit	EasyCall	EasyCall				
					17851	292828		USD	10.00000		Debit	EasyCall	EasyCall				
					17913	261019		USD	10.00000		Debit	EasyCall	EasyCall				
					17962	105877		USD	10.00000		Debit	EasyCall	EasyCall				

- 3. Click on the Account ID of a specific account.
- 4. Choose **b** Activate in the toolbar to activate this account.

			A	coun	io / Retail (Customer 'E	asyCall Ltd.'			🛛 Help
4	🖬 Sar	re 🗟 Save	& Close 🛞 Clo	e 也 Activa	te				🕅 Logout	
	Inacti	Accoun Ve Blocked	t ID 1716628168	2 Produ Balanc	ct EasyCall ce 10.00000 USI	D				
		Life Cycle	Subs	riptions	Service	Features				
		Account Info	User Interface	Subscriber	Additional Info	Custom Fields				_
l	Custo	imer <u>Ea</u>	syCall Ltd.		Opening Bala	nce 10.0	0000 USD			
	Туре	De	bit		Refunds		0 USD			
	E-ma	il 📃			Non Call Rela	ted Charges	0 USD			
	Batch	Ea	syCall							
	Contr	ol Number 11								
₼		•	A	count Inf	o / Retail (Customer 'E	asyCall Ltd.'	③ Europe/Prague	John Distributor	🕐 Help
•	🖬 Sav	e 🗟 Save (k Close 🛞 Clos	e					M) Logout	

ω.					ccount in	10 / Ke	Call	customer		. Conception age			The recip
•	🖬 Save	🖬 Sav	e & Close	🛞 Cla	se						M	Logout	
	Account	ID 1716	6281682	Pr	oduct EasyCa	11							
	Blocked			Ba	lance 10.0000	0 USD							
		Life Cy	cle		Subscription	s		Service Fea	tures				
	Acc	ount Info	Mainte	nance	User Interfac	e Subscr	iber	Additional Info	Custom Fields	-			
	Custome	er I	asvCall L1	td.		Openir	na Bal	lance 10.	00000 USD				
	Туре		Debit	_		Refund	is		0 USD				
	E-mail	[Non Ca	all Re	lated Charges	0 USD				
	Batch	1	asyCall										
	Control N	lumber .	1										
	Custome Type E-mail Batch Control N	Life C	And	td.	Subscription User Interfac	Subscr Openir Refund Non Ca	iber ng Bal js all Re	Additional Info	Custom Fields 00000 USD 0 USD 0 USD	-			

5. Press the S Close button to return to the Account Info window.6. Repeat steps 1-5 to activate more accounts.

When an inactive account is activated, the distributor is charged according to the sales commission rate. A summary of and the charges for this transaction are visible to the distributor in the xDR browser.

- 1. In the **Statistics** section of the Distributor-Index page, choose **xDR Browser**.
- 2. Specify from / to dates and press the Show xDRs button.



۵		\$	ł	2			Your xDR History			Europe/Prague	John Distributor	? Help
•	8	Close		Download							▶Ø Logout	
						i From D: To Date Service	10 2011-01-16 YYYYY Now YYYYY A11 Show xDRs	-MM-DD 15:00:18 HH24	:MI:SS * :MI:SS *			
۵		\$	•	~			Your xDR History			③ Europe/Prague	John Distributor	? Help
•	8	Close		Download	🔳 xDRs						▶Ø Logout	
			c	Credits /	Cu Fri To To To Si Si	ustomer om om tal Sessions tal Transactions how Totals By Servic ds	John Distributor 2011-01-16 15:00:18 2011-01-17 16:01:32 1 1 28	Credits/Refunds Payments Subscriptions Charged Taxes Services Charged Total	8.50000 US 0.00000 US 0.00000 US 0.00000 US 0.00000 US 8.50000 US	5D 5D 5D 5D 5D 5D		
			¢		Descri	ption	Comment	▼ Date/T	ime	e Amount, U	ISD	
			Di	stributor: Nev	w product sal	le	A:17166281682	2011-01-17 14:58:30			8.50000	
			St	ibtotal							8.50000	

3. Press the S Close button to leave the xDR browser or **xDRs** button to return to Your xDR History page.

4. Configuring a Distributor for Postpaid Services

Using Distributors to Expand Your Sales Network

This section demonstrates how to configure a distributor who will be selling your postpaid products to end users and collecting cash payments from them and entering these into the system.

The procedure is very similar to the general residential VoIP set-up described in the **PortaSwitch Handbook: Residential VoIP Services**. Only a few additional comments are necessary:

- A distributor is not allowed to create accounts in the same way as an administrator does he can only use quick forms to do this.
- When a postpaid customer is created with a certain credit limit and a zero opening balance, no money is collected from the customer, and so there is no basis for the distributor to receive commission. Thus, for postpaid customers the distributor will only receive commission when he collects money from the customer and then applies this to the customer's account as a payment.

Checklist

Print the following page and use it to mark the operations you have completed while performing system setup according to the instructions in this chapter. Please make sure that you perform all of the operations (all of the boxes must be checked), otherwise the service will not work.

Operations to be performed by the administrator

Operation	D	one
General and network configuration		
Perform configuration of general and network settings as	Γ	1
described in the Basic SIP Service section in the PortaSwitch	-	-
Handbook: Residential VoIP Services		
Rating configuration		
Create a distributor and set his commission rate on the	Γ	1
Additional Info tab		1
Specify a username and password for the distributor to access	Γ	1
the self-care interface		1
Create a quick form for your distributor	Γ	1
1 ,	L	1
Operations to be performed by the distributor		
Account provisioning		
Go to the customer self-care web page and log in using the credentials provided	[]

eredentidato provided		
Create new customers	[]
Generate accounts for customers	[]
Accept payments from customers and record payment	[]
information in the system		

Create a Distributor

The distributor entity you are about to create will define your relationship with a partner who is distributing your services, and will allow him further service management (e.g. creating his own customers and accounts).

₲ 🗉 🕏	S 🛉 🖿 Þ	<u>~</u> Q		Add Distri	butor		6	America/Vancouver	demoroot	🕑 Help
🕨 🖬 Save	🗟 Save & Close	🛞 Close							🔰 Logout	
In Save	Ind Save & Close Customer Name Blocked Type Address Info Company Name [Mr./Ms./	S Close John Distributor Distributor Distributor Vulser Interface	atiional Info	Currency Opening Balance Customer Class Payment Info Contact Phone	USD - US Doj 100 Distributor	llar - Service	• •		PI Logout	
	First Name [Fax						
	M.I. Last Name			Alt. Phone Alt. Contact						
	Address			E-mail BCC Description						
	Province/State [Postal Code [City [Countrv/Region]									
🔂 🗉 🕏				Add Distri	butor		٩	America/Vancouver	demoroot	🛛 Help
Save	Save & Close	ohn Distributor		Currency Opening Balance Customer Class	USD - US Do 100 Distributor	ollar : - Servia	∨ 2e ∨		₽¶ Logout	
	Address into Default Sale Commi Default Payment Co Bubscription Discou Representative Fax ID	ssion* 15 (mmission* 10 (nt Rate Not defin	nuonai Into % % ned	rayment Info	Billing Period Next Billing D Shift Billing D Send Statistic Invoice Temp Send Invoice:	l late late To 🔢 cs late s	Nonthly 2010-04-01 Customer Customer Customer	YYYY-MM-DD class' default class' default class' default	× × ×	

In the Participants section of Admin-Index, choose Distributors.

- 1. On the Distributor Management page, choose 🖸 Add Distributor.
- 2. Fill in the **New Distributor** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

Main form (top)

- **Customer Name** A short name for this distributor; this will be used on the web interface.
- **Currency** The currency in which this distributor will be billed.
- **Opening Balance** Starting balance for the distributor.
- **Customer Class** Choose the customer class for the distributor.

Additional Info tab

- Default Sales Commission This commission is applied when an account is created or a distributor is assigned (e.g. if the distributor's commission percentage is 15%, and a new account with a \$10 balance has been created, then the distributor is charged \$8.5 and has a \$1.5 profit).
- Default Payment Commission This commission is applied when payment is entered (e.g. when the distributor makes payment of \$10 towards an account, and his payment commission is 10%, then the distributor is charged \$9 and has a \$1 profit).
- **Billing Period** Frequency of distribution of accounting information. For more details about different available billing periods, see the **PortaBilling Administrator Guide**.
- Send Statistics Summary only Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer via email at all).

Payment Info tab

- **Credit Limit** If left empty, there is no credit limit for this distributor; so you will probably want to enter a value here.
- **Balance Warning Threshold** The distributor can be notified by email when his balance is dangerously close to the credit limit and he will soon be unable to activate accounts. Here you can enter the value for such a warning threshold. This can be entered:
 - as a percentage (e.g. 90%). The warning will be sent when the customer's balance exceeds that percentage of his credit limit. So, if the credit limit is USD 1000.00 and the threshold is 90%, a warning will be sent as soon as the balance exceeds USD 900.00. This is only applicable when the customer has a positive credit limit.
 - as an absolute value. The warning will be sent as soon as the balance goes over the specified value. For prepaid traffic exchange, where the credit limit is zero, you can enter 100.00 here.

User Interface tab

- Time Zone The time zone in which the distributor will see his xDRs, and which will also define his billing period. For example, if you choose America / New_York here and the billing period is Monthly, the billing period will start on the first day of the month at 00:00 New York time.
- Web Interface Language The language to be used on the customer's self-care web interface.

3. Click Save&Close.

Create a Quick Form for the Distributor

To make the process simpler and prevent any data errors, using a quick form is the only available option for distributors to provision new customers. A quick form allows the administrator to pre-define all of the important parameters (e.g. invoice settings, choice of product, activated service features, etc.), while the distributor only fills in the customer's personal data.

	2 00			· • _			_	aa Quic	K FOIII						
🕨 🖬 Sar	ve 🛞	Close												N Logo	ut
	Name		Creat	e Account				Currency t	JSD - US Do	llar	× *				
	Custo	mer Class	Dist	ributor		~	1	State P	ending						
- E.	🗹 Dis	splay Sum	mary Up	on Creatio	on										
		isible To	1												
- E.				A aldelievA	VCI e						Included	ACLE			
	Admin	n		Available 2	ICLO		~		Distrib	utor	Included	ACES		~	
- E	Book	keeper desk													
	No a Root	ccess													
- E.	test	ACIDict													
	Adva	nced Res	eller					Include->							
- - -	Rese	ller	evei					<-Remov	-						
														-	
							<u></u>								
× 🖬 🗟		a 99	ta 📈	Ø		Edit	Quick	Form 10	reste Ac	count			navica Mancou	ver demoraci	121
			e u		0.01	Concerned and the second	Quick		reace Ac	counc			nonedy raneod	NT Loss	
			1			0	- 1							1 1 1 1 1 1	_
	Name		Create	Account			• c	urrencv US	3D						
	Name Custon	ner Class	Create Distribu	Account Itor]* c s	urrency Us tate P∈	3D Inding						
	Name Custon	ner Class plav Sumr	Create Distribu	Account itor	n]* c s	urrency U≋ tate P∈	3D Inding						
	Name Custon V Dis	ner Class play Sumr	Create Distribu nary Upo	Account itor on Creatio	n]* c s	urrency ∪8 tate Pe	3D Inding						
	Name Custon V Disj	ner Class play Sumr ontrols	Create Distribu nary Upo Visible T	Account itor on Creation	n]* c s	urrency U≋ tate P∈	8D Inding						
	Name Custon V Disj	ner Class play Sumr ontrols rols have l	Create Distribu nary Upo Visible T	Account itor on Creation o ected. Plea	n ase add a	wailable c]* C S	urrency US tate Pe "Choose Co	3D Inding						
	Name Custon Disj	ner Class play Sumr ontrols rols have l	Create Distribu nary Upo Visible T	Account itor on Creation o ected. Plea	n ase add a	wailable c]* C S controls via	urrency US tate Pe "Choose Co	3D Inding Dontrols"						
	Name Custon V Disj C No cont	ner Class play Sumr ontrols rols have l	Create Distribu nary Upo Visible T	Account itor on Creation ected. Plea	n ase add a	wailable c]* C S controls via	urrency US tate Pe "Choose Co	3D Inding						
	Name Custon V Disp C No cont	ner Class play Sumr ontrols rols have l	Create Distribu nary Upo Visible T Deen Sel	Account itor on Creation ected. Plea	n ase add a Custo	wailable o omer C]* c s controls via	urrency US tate Pe "Choose Co to / Quick	SD Inding Introls" Introls Control Con	reate A	ccount'	Q A	merica/Vancou	ver demoroot	2
▲ • •	Name Custon V Disj C No cont	ner Class play Sumr ontrols rols have I toss are Close	Create Distribu nary Upo Visible T been sel	Account itor on Creation ected. Plea	n ase add a Custo	wailable o omer C]* C S controls via	urrency US tate Pe "Choose Co / Quick	SD Inding Introls" C Form 'C	reate A	ccount'	() A	merica/Vancou	Ver demorcol 바라 Logou	r t
	Name Custon V Disj C No cont	ner Class play Sumr ontrols rols have l	Create Distribu nary Upo Visible T been sel	Account itor on Creation ected. Ple:	n ase add a Custo	wailable o omer C]* C S controls via	urrency US tate Pe "Choose Co : / Quick	SD anding antrols" c Form 'C	reate A	ccount'	() A	merica/Vancou	ver demorcot	t 💽
Custom	Name Custon V Disj C No cont	ner Class play Sumr ontrols rols have tols have Close	Create Distribu nary Upo Visible T Deen Sel	Account itor itor co ected. Ple:	n ase add a Custo *	wailable o omer C Cu]* C S controls via controls rrency	urrency US tate Pe "Choose Co USD	sp Inding Introls" K Form 'C	reate A	ccount	() A	merica/Vancou	ver demoroot	t 2
Custom Custom Bucked	Name Custon V Dis C No cont	ner Class play Sumr ontrols rols have Close Close	Create Distribu mary Upo Visible T been Sel	Account itor itor co ected. Ple:	n ase add a Custo	wallable o ormer C Cu Q Op]* C S controls via controls rrency seening Bala	urrency US tate Pe *Choose Co • / Quick USD nce 0	sp Inding Introls" C Form 'C	reate A	ccount'	A (J)	merica/Vancoc	ver demoroat ▶¶ Logou	t 🛛
Custom Custom Blacked Type	Name Custon V Dis C No cont	ner Class play Summ ontrols rols have Close Retail	Create Distribu nary Upo Visible T Deen Sel	Account itor on Creation ected. Ple:	n ase add a Custo	vallable o omer C Cu Op Cu]* C S controls via controls rrency sening Bala stomer Cl	urrency US tate Pe "Choose Co : / Quick USD nce o uss Distrib	sp Inding Inding Inding C Form 'C	reate A	ccount'	() A	mericajVancou	ver democroat	t
Custom Custom Blacked Type	Name Custon V Dis C No cont	ner Class play Summ ontrols rols have rols have Close Retail User Inter	Create Distribu mary Upo Visible T been Sel	Account itor on Creation io ected. Ples 2 (2) Dialing Rul	n ase add a Custo *	vailable c ormer C Cu Op Cu itional In	rrency fo Payming Education Payming Payming	urrency US tate Pe "Choose Co i / Quick USD nce o iss Distrib ent Info s	SD antrois" c Form 'C utor	reate A	ccount	() A	mericajMancou	rver demorood ₽€ Logou	t ?
Custom Custom Blacked Type	Name Custon V Dis C No cont	ner Class play Summ ontrols rols have rols have Close Retail	Create Distribu nary Upo Visible T been Sel	Account itor on Creation io ected. Plex 2 (2) Dialing Rul	n Custo ^ /	wallable o omer C Cu D Op Cu ittional In)* C Sontrols via Controls via Controls Controls For Payments For Payments	Internet USD Internet USD Internet Info S	SD Inding Introls" C Form 'C utor iservice Featu	reate A	ccount	Q A	mericajMancou	vet democod	t 2
Custom Custom Blacked Tyffe Address Campar	Name Custom V Disj C No cont * S * S * S * S * S * S * S * S * S * S	ner Class play Sumr ontrols rols have l t and Close Retail User Inter	Create Distribu Mary Uppotent Visible T Decen Sel	Account itor on Creation ected. Plea	n Custo *	wallable o omer C Cu D Op Cu ittional In	ontrols via controls via controls contr	Internet USD Internet USD Internet Info S Internet Info S	sD inding ontrols" c Form "C utor service Featu	reate A	ccount'	Q A	merica/Vancos	ver denorco मि) Logou	2 t
Custom Custom Blacked Type Address V Cenpar	Name Custon V Disj No cont \$ 22 ve & er Name	ner Class play Sumr ontrols rols have l t Close Retail User Inter	Create Distribu Visible T Visible T P P P C P C C C C C C C C C C C C C C	Account itor o Creation ected. Ples	n ase add a Custo *	wailable o omer C Cu itional In V	a controls via controls via controls co	Internet USD *Choose Co *Choose Co USD Ince o Inso Distrib ent Info S	antrois" c Form *C utor	reate A	ccount'	a Ø.	merica[Vancoc	vve demorool ▶t) Logou	t
Custom Blacked Type Address Y Compar MrMsJ. Fiut Nar	Name Custon Disj C Disj S 22 S Ve & Ve & S I I S Info I I S Info I I S Info	ner Class play Sumr ontrols [rols have Close] Retail User Inter	Create Distribu Visible T Visible T P P P C P C C C C C C C C C C C C C C	Account itor on Creation ected. Ple: 2 Q Dialing Rul	n Custo	vailable c pmer C Cu O op Cu itional In ()	a controls via controls via controls co	transport US tate Per "Choose Co "Choose Co USD USD tate 0	st antrols" c Form 'C utor	res	ccount'	۵ ۵	merica/Varicol	vve demorcal Þij Lagau	t T
Custom Custom Biesked Type Address Compar Campar Custom Type	Name Custom Disj C Disj C C No cont S S S S S S S S S S S S S S S S S S S	er Class vlay Sumr ontrols	Create Distribu Visible T Visible T P P C C Create	Account thor on Creation octed, Pieze Dialing Rule Content of the second s	Custo	imer C Cu Op Cu itional In	ontrols via controls via controls via controls c	e	st inding ontrols" c Form 'C utor service Featu	reate A	ccount'	a Ø .	merica/Vancou	ver democrati I generation	t T
Custom C	Name Custon Disj C C Disj C C C C C C C C C C C C C	er Class Johy Sum ontrols []]]]]]]]]]]]]]]]]]]	Create Distribu Yisible T Piece sel	Account thor on Creation escled. Pier Dialing Rul	n Custo	imer C Cu Opccu itional In	s controls via controls via controls via controls via controls via controls controls controls contact		SD Inding C Form 'C Utor Service Featu	reate A	ccount'	4 Ø	merica/Mancou	ver demorood ▶€ Logou	t
Custom Custom Custom Custom Address Custom	Name Custon Disp C C Disp C C Disp C C C C C C C C C C C C C	er Class John Sum Trois have Close Retail User Interest User Interest User Interest	Create Distribu Visible T Visible T () C Create Visible T C C Create Visible T C C Create Visible T C Create Visibu Visib	Account itor on Creation o cected. Pier Dialing Rul	n ase add a	Cu Opp Cu Opp Cu Cu U Opp Cu Cu	Controls via controls via controls via controls via controls contr	Intervence US Intervence Interve	SD Inding Inding C Form 'C Utor Service Featu	reate A	ccount	4 Ø	merica/Maricol	ver democod PD Logou	t
Custom C	Name Custon Disj C Disj C No cont S est er Name I s Info uy Name me	er Class antrois trois have torse close Retail User Inter User Inter	Create Distribu Visible T Visible T () C Create Visible T () C Create C Create C C C C C C C C C C C C C C C C C C C	Account itor on Creation o o O O O O O O O O O O O O O O O O O	n ase add a Custo s es Add	Cu Cu Cu itional In Cu	Controls via controls controls via controls	urrency Us tate Pe Choose Co / Quick USD nce 0 USD nce 1	sD Inding Introls" C Form ¹ C		ccount	() A	merica/Mancos	ver demorcial PŪ Logou	t
Curtom Curtom Backed JyPe Address Compar Mons Figures Curtom Address	Name Custon Disj C. No cont S S S S S S S S S S S S S	er Class polay Sum ontrols Close Retail User Inter	Create Distribu Nary Upo Visible T Discensel	Account itor on Creation center cent	n Custo see Add	Cu Cu Opport Cu itional In	ontrols via ontrols via ontrols immediate of the second	transport USD USD USD USD uss Distrib e e e e	antrais" C Form *C Utor Service Feature	res	ccount'	4 D	mericajiVancos	ve demorcod	t I
Custom Custom Biocked Type Address Campar	Name Custon ✓ Disj C No cont 5 23 er Name i s Info w ne me	er Class ontrols rols have I Close Retail User Inter	Create Distribu Visible T Distribu Visible T Distribu Visible T	Account dor on Creation cected, Plet Claiming Rul Claiming Rul	n Custo see Add	Cu Cu Cu Cu Cu Cu Cu Cu Cu Cu Cu Cu Cu C	Controls via controls via controls via controls via controls control contact		antrois" C Form 'C utor Service Featu	res	ccount	0 A	mer (c.g.)Vancou	vve demorool ▶D Logou	It I
Custom C	Name Custon V Disj C No cont S S S S S S S S S S S S S S S S S S S	er Class pontrols rols have I Close Retail User Interior	Create Distribu Visible T Visible T P P P C C C C C C C C C C C C C C C C	Account thor on Creation ected, Plee Dialing Rul	n Custo see Add e	Cuarter C Cuarter C Opo Cu itional In	Contact Payment Fax A AL Phone Fax A AL Phone Fax A AL Phone Fax A AL Phone Fax A AL Phone Fax A	transport US tate Per 'Choose Co USD USD USD USD Ince O Ince Ince Inc	SD Inding C Form 'C Utor Service Featur	res	ccount	() A	merica/Mancou	ver demored ▶€ Logou	t
Custom C	Name Custon V Disj Vo Cont No cont Ve (3) Ve (3) Ve (3) Ve (1) Vame No cont Ve (3) Ve (1) Vame	er Class polay Summ ontrols [] [] [] [] [] [] [] [] [] [] [] [] []	Create Distribu Visible T Peeen sel	Account itor on Creation cected, Plet	n Custo es Add	Cu Cu Opper C Cu itional In V	Controls via controls via control control contact conta	USD	SD Inding ontrols" c Form 'C utor service Featu	res	ccount	() A	merica/Mancou	vet democol ▶€ Logou	t 1
Custom Custom Custom Custom Custom Address Custom Address Custom Address Custom Address Custom Address Custom Cus	Name Custon Custon Disp C C C C C C C C C C C C C C C C C C C	er Class play Sum ontrols close Retail User Inter	Create Distributionary Upconstructure Visible T Constructure face 1	Account itor a n Creation centre of the second sec	n Custo	Cu Operative Cu ittonal In V	Controls via controls controls via controls	e e on on on other other of the other of the other oth	SD Inding Introls" C Form 'C utor iervice Featu	res	ccount'	4 Ø	merica/Maricol	ver democod	t
Custom C	Name Custon Custon Disp Custon Support	er Class polay Sum ontrols Close Retail	Create Distributionary Upconstructure Visible T Constructure face 1	Account thor on Creation of the count of the	n Custo	Cu Cu Cu initional In V	Controls via controls via contr	e e on	SD Inding C Form ¹ C Utor Service Featu	reate A	ccount'	4 Ø	merica/Vancod	ver demorcial PŪ Logou	t 7



Configuring a Distributor for Postpaid Services

☆ = \$ \$ ₹ ₽ ₽ ~ Q Custome	r Controls / Quick Form 'Create Account' ③ America/Vancover	demoroot 🛛 🕐 H	lelp
Save Save & Close & Close Accounts		▶¶ Logout	
Customer Name	Currency LISD		
Blocked	Opening Balance		
Type Retail	Customer Class Distributor		
Address Info User Interface Dialing Rules Addition	II Info Payment Info Service Features		
Company Name	Contact		
Mr./Ms./	Phone		
First Name	Fax		
M.I.	Alt. Phone		
Last Name	Alt. Contact		
Address	E-mail		
	BCC		
	Description		
Province/State			
Postal Code			
City			
Country/Region			
	t 1 Controls / Quick Form 'Create Account' () America/Vancouver	demoroot 🛛 P	telp
Back Save Save Close October Close		N Logout	
Account ID	reduct Trop Reserved - 11 Field		
Plasted			
Biocked D			
Account Info User Interface Subscriber /	Additional Info Life Cycle Service Features		
Type Obbit Ocredit Vouc	her		
Credit Limit			
Generation method 💿 None			
O Random			
 DID Inventory 			
Service Password	•		
E-mail			

In the Management section of Admin-Index, choose Quick Forms.

- 1. On the Quick Form Management page, choose 🖬 Add.
- 2. Fill in the New Quick Form. The most important fields are:

Main form (top)

- Name The name of the quick form.
- **Currency** The quick form's currency. All customers created using this quick form will use this currency. It will also define the selection of available products for accounts.
- **Customer Class** The quick form's customer class, which is automatically assigned to a customer created using this quick form. Later, the quick form can be used to add more accounts to an existing customer with the same customer class.
- 3. On the **Visible To** tab, select the ACLs (e.g. Distributor) which will be able to use the quick form and click **Save**.
- 4. Click on 🗉 Choose Controls in the toolbar.
- 5. Fill in the information about the customer object.

NOTE: The checkbox next to the field defines its status with regard to data entry. If the box is checked, this means that the distributor will be prompted to enter a value

for this field. If the box is unchecked, you must provide a value for this field when defining the quick form, which will then be inserted into the database.

- 6. Now click **Save** in the toolbar to save the quick form information relating to the customer.
- 7. Click on 🖵 Accounts in the toolbar to enter information about the account being created by this quick form.
- 8. Fill in the parameters relating to the account, then click **Save**.
- If you want to use this quick form to create several accounts, click Next in the toolbar to access the information screen for the next account, then press Save.

Distributor Actions

At this point, you have finished with the administrator part of the work. You just need to send the distributor his login credentials for the PortaBilling® self-care interface, while the rest of the tasks described below will be performed by the distributor himself.

Log in to Self-Care Interface

Open the customer self-care page in a browser (by default https://<yourporta-billing-slave-server-name>:8444) and type in the username / password which was provided to you.

Create Customers



- 1. In the **Participants** section of the Distributor-Index page, choose **Customers**.
- 2. On the Customer Management page, click 🖬 Add and select the quick form.
- 3. Fill in the necessary information and then **Save** your work.

Add Accounts to an Existing Customer

1. Go to the **Customers** screen (the screen which contains a list of customers). It should look like the screenshot below:



- 2. Next to the customer name, click on the Account 🖵 or 🗊 icon (in the Accounts column), which will take you to account management for that customer.
- 3. Click on the **Add** button and select the quick form.
- 4. Fill in the Add Account form and Save the results of your work.

Record a Payment from the End User

The distributor can accept payment in cash from an end user (the owner of a prepaid or postpaid account) and record it in the billing system. This increases the customer's available funds, while the amount (minus commission) is added to the distributor's balance (the amount he owes to the service provider).

1. Go to the **Account Info** screen (the screen which contains a list of accounts) and use the search to find the end user's account (using the account ID or a combination of the batch and control number).

ຝ		1					Accou	nt Info				🚯 Europ	e/Prague	John Distributor	? Help
•	🛞 Clos	5e												🕅 Logout	
			Accoun	t ID	C	ustomer	V AN	Batel Y	• •	Cti	rl #	Show Acc	ounts	<u>Advanced</u> <u>search</u>	
				Acc	ount ID	ldle, days		Balance	Credit Limit	Type	Product EasyCall	Batch EasyCall	Status		
				15515	6100547		USD	10.00000		Debit	EasyCall	EasyCall			
				<u>15678</u> 15679	99990		USD USD	13.54000		Debit Debit	EasyCall EasyCall	EasyCall			
				19817	5264.99		USD	10.00000		Debit	EasyCall	EasyCall			
				27872	5505604		USD	10.00000		Debit	EasyCall	EasyCall			

2. Click on the account ID.

₲ 🗉	\$	ŧ	🗹 🗛	count In	fo / Reta	l Customer 'Ea	syCall Ltd.'		Johr		🕐 Help
•	Save		Save & Close	🛞 Close					Þ	Logout	
Account II Blocked	D 1329	1038	19783 I	Product Eas Balance 20.0	yCall 10000						
L	Life Cycl	e o I	Sub: Maintenance	scriptions User Interfa	ace Subscrit	vice Features er Additional Info					
Action Amount Visible Co Internal Co	omment	M M t	anual paymen o action anual paymen anual paymen	at at t	Action	Description s the account balance al Payment allows the	Use this when rece account to make mo	iving a payment from the calls.	ne Acc	ount owner	A

- 3. On the Maintenance tab, choose **Manual payment** and enter the amount to be charged.
- 4. Click Save&Close.

As soon as payment has been entered, the transaction is also recorded for the distributor (since he collected cash from the customer, and now owes part of it to the service provider). The distributor can check these transactions in the xDR browser.

		Your xDR History			
🛞 Close 🔳 Downlo	ad 🔳 xDRs				▶¶ Logout
	Customer From To Total Transactions	John Distributor 2010-04-01 15:30:54 2010-04-02 15:30:57 3	Credits/Refunds Payments Subscriptions Charged Taxes Services Charged Total	26.80000 USD 0.00000 USD 0.00000 USD 0.00000 USD 0.00000 USD 26.80000 USD	
	Show Totals By Ser	vices			
Credits / Re	Show Totals By Ser funds rescription	¢ices	▼ Date/Ti	me 🔶	Amount, USD
Credits / Ret	Show Totals By Ser	vices Comment A:132903819783	▼ Date/Ti 2010-04-02 15:20:24	me 🗘	Amount, USD 8.8000
Credits / Ret Distributor: Payment c Distributor: New produ	Show Totals By Ser funds escription ollected ict sale	Comment A:132903819783 A:155156100547	▼ Date/Ti 2010-04-02 15:20:24 2010-04-02 15:17:58	me 🗘	Amount, USD 8.8000 9.0000
Credits / Rel Distributor: Payment c Distributor: New produ Distributor: New produ	Show Totals By Ser funds escription ollected ict sale ict sale	Comment A:132903819783 A:155156100547 A:132903819783	▼ Date/Ti 2010-04-02 15:20:24 2010-04-02 15:17:58 2010-04-02 14:16:31	me 🗢	Amount, USD 8.8000 9.0000 9.0000