PORTA ONE

Porta Switch®

# Handbook:

## Resellers and Distributors

## Maintenance Release 23

www.portaone.com

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# 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.

**Tips** provide information that might help you solve a problem.

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# 1. Configuring a Reseller for Prepaid Services

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# 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.

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# 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 | Done |
|---|---|
| **General, network and vendor 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** | [ ] |
| 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 credentials provided | [ ] |
| Insert rates in tariff B for the destinations to which you will allow your subscribers to send calls | [ ] |
| Create a subcustomer who owns the prepaid cards | [ ] |
| Generate accounts for this subcustomer | [ ] |
| **Testing** | |
| Try to make a test call | [ ] |

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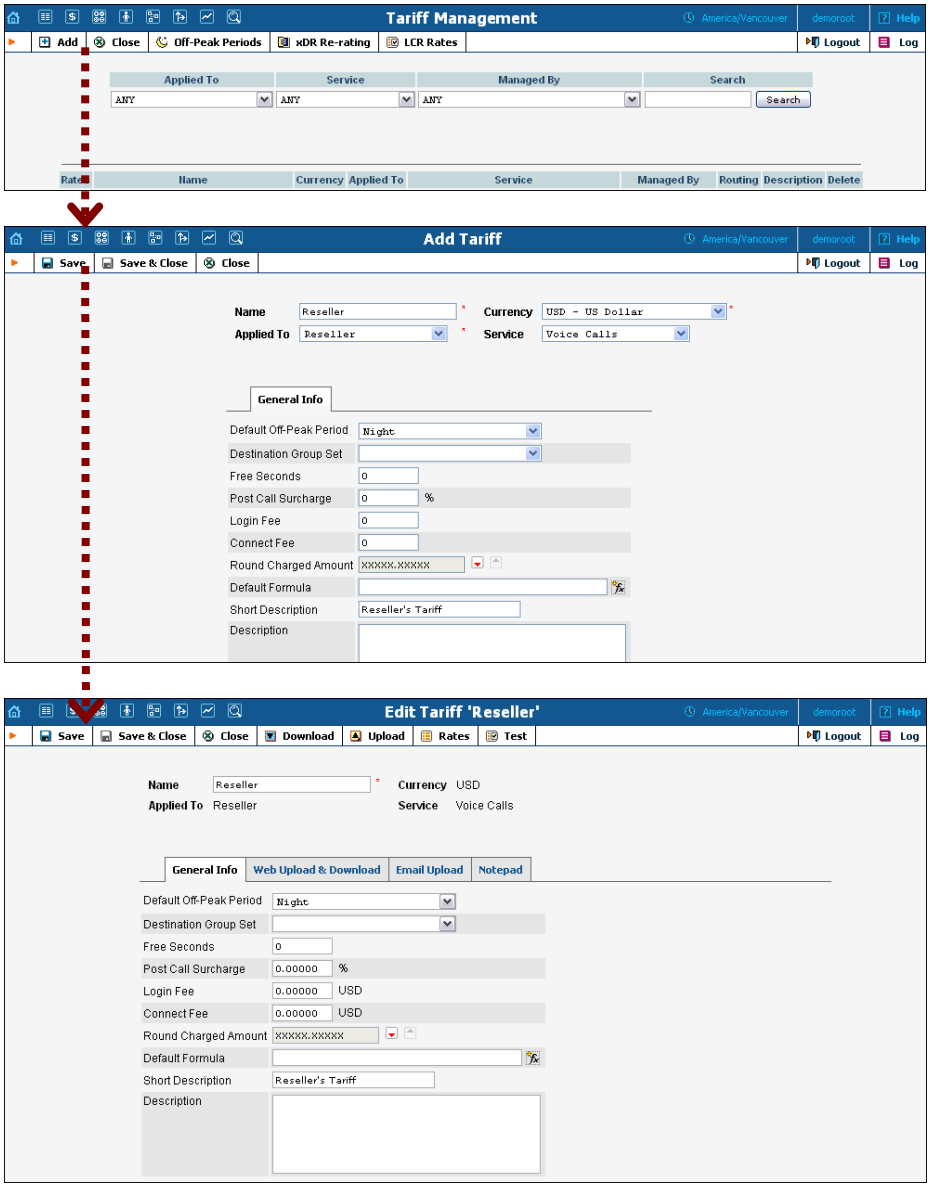
# General and Network Configuration for PortaBilling®

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.




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

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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.

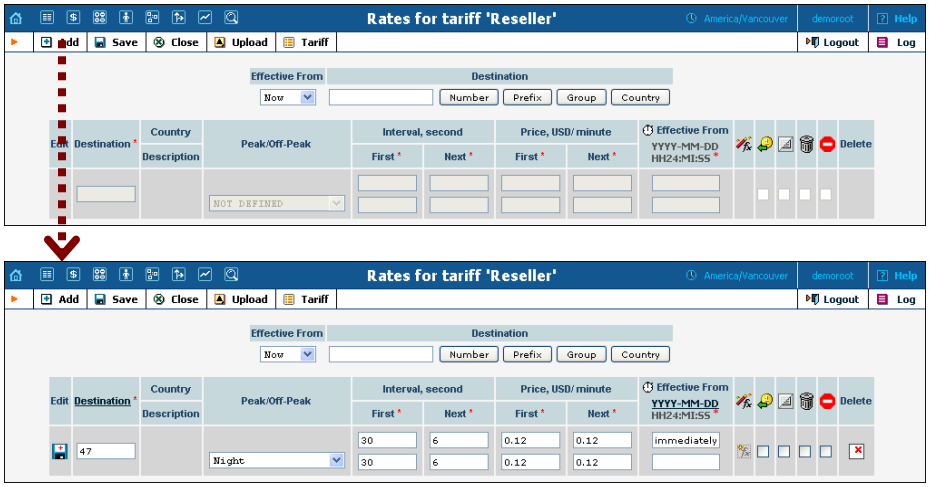
   - **Applied To** – Choose **Reseller** here.
   - **Service** – Choose **Voice Calls** here.
3. Click **Save.**
4. Repeat steps 1-3 until you have entered all of the tariffs.

# 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.




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:

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- **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 off-peak 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 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,

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which will generate a .CSV file with the selling price (based on the estimated termination cost and your markup).

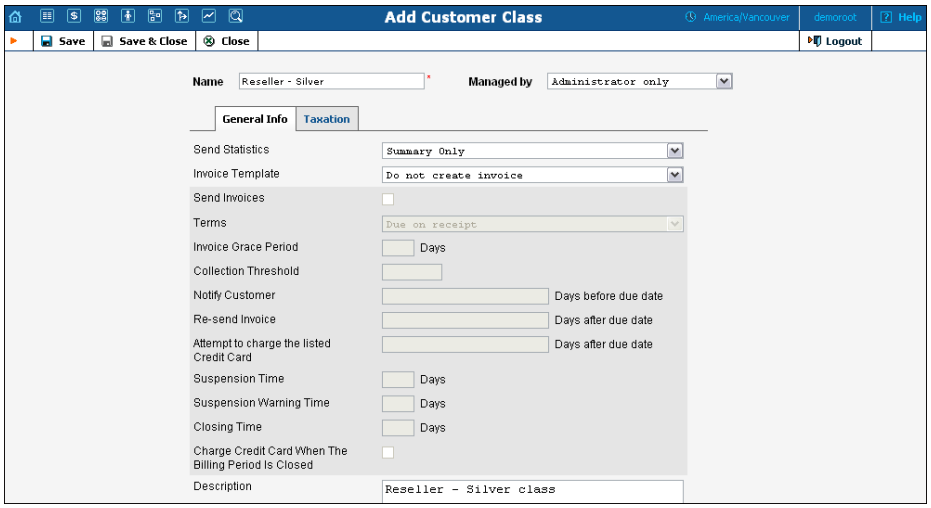
Please consult the *Rate Import* chapter of the **PortaSwitch Handbook: Wholesale Services** for more details.

# 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**.




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).

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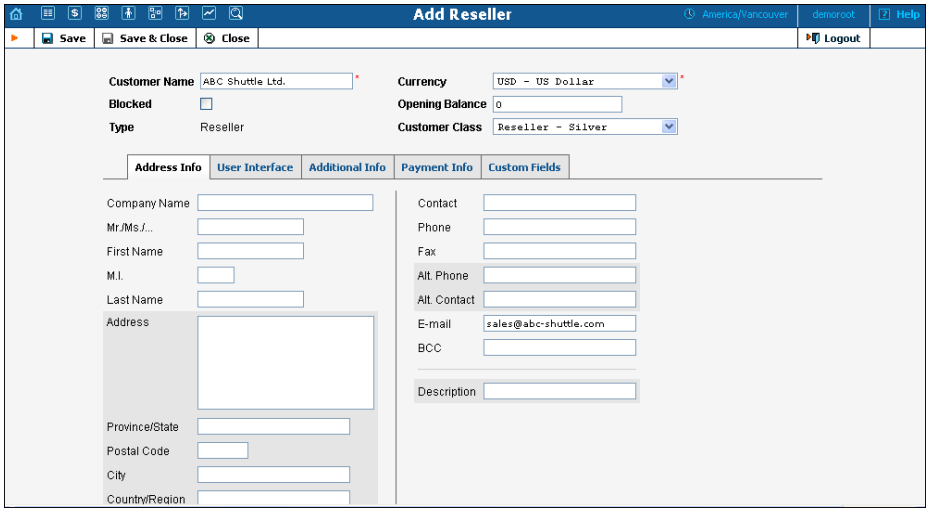


In the **Participants** section of Admin-Index, choose **Resellers**.

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.

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- **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.

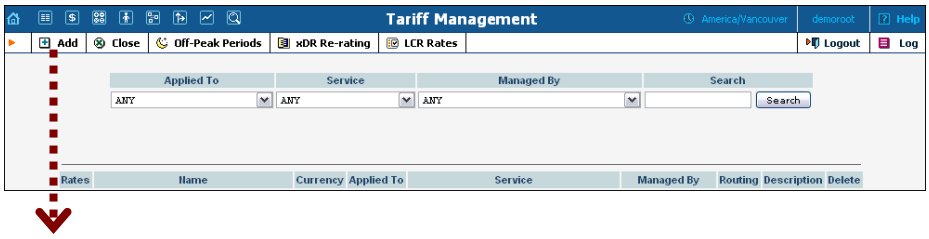
### User Interface tab

- **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.

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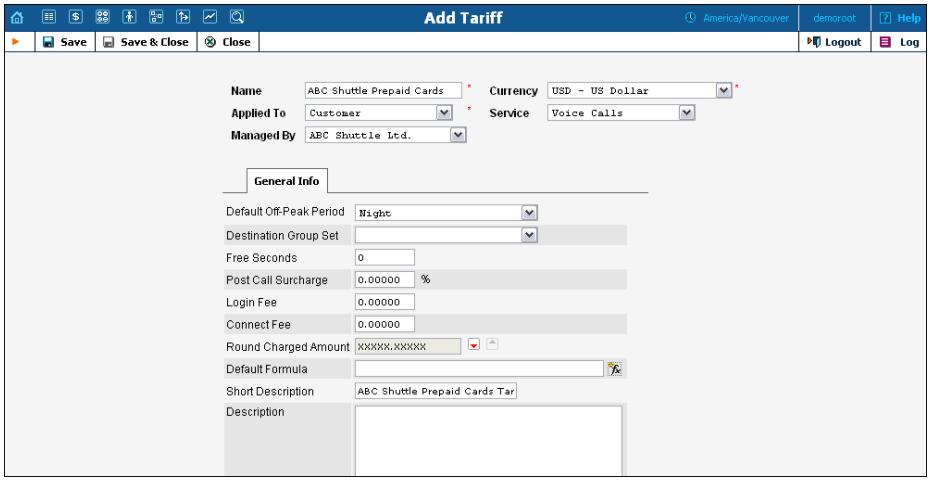



In the **Rating** section of Admin-Index, choose **Tariffs**.

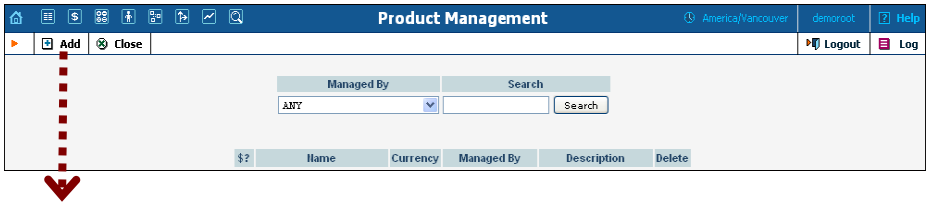
1. On the Tariff Management page, choose **Add**.
2. Fill in the **New Tariff** form:
   - **Name** – A short name of the tariff object; this is the name you will see later in the select menus.
   - **Currency** – Choose the currency in which your reseller plans to operate.

**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.

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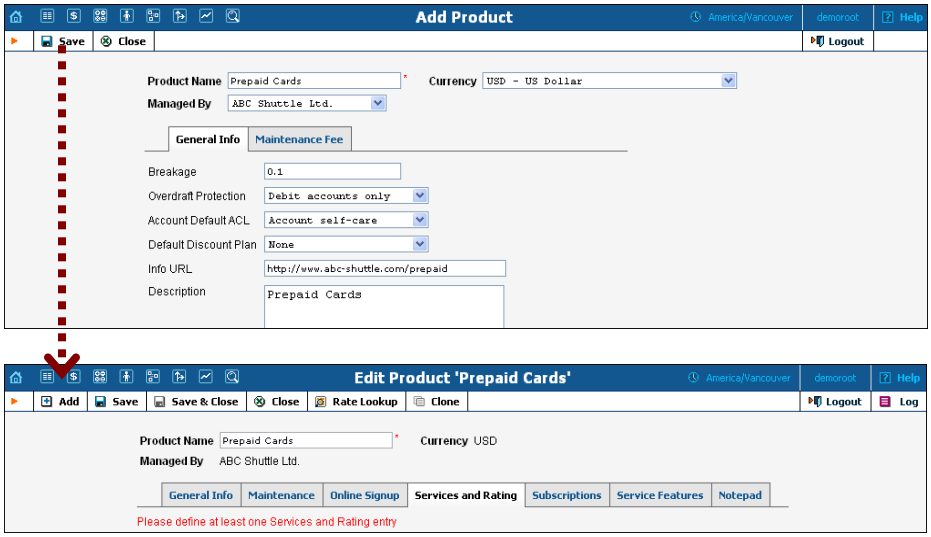
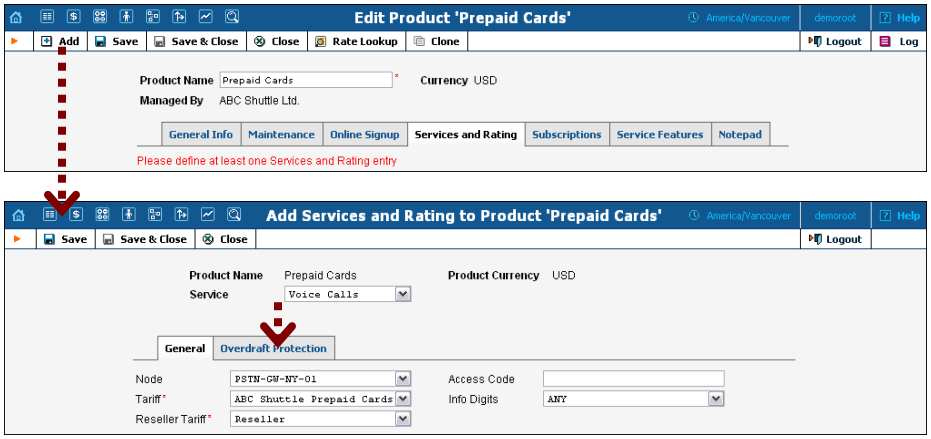



In the **Rating** section of the Admin-Index page, choose **Products**.

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:

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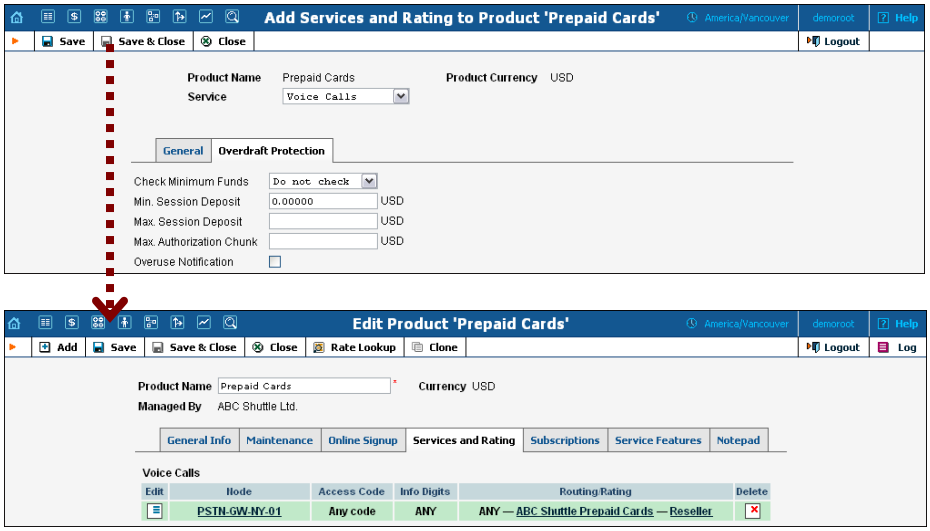


1. When the **Services and Rating** tab is selected, click on the **Add** icon.
2. Choose **Voice Calls** in the **Service** select menu.
3. In the **Node** select menu, select the node where your IVR will be running.
4. You can also use an access number for rating entry in the **Access code** field. 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.
8. 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.

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# 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.

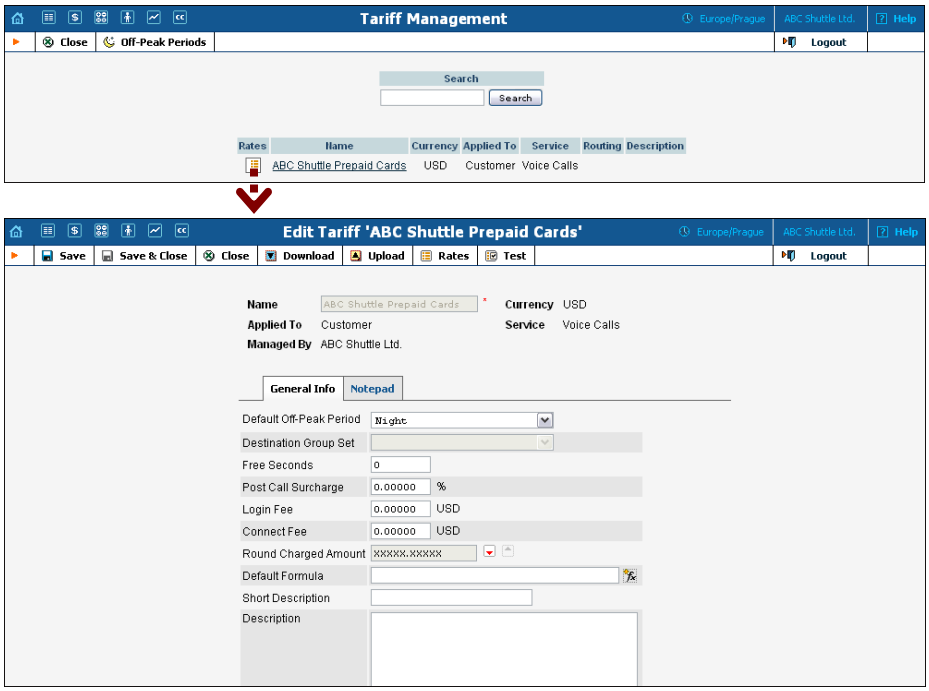
# Login to Self-Care Interface

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**.

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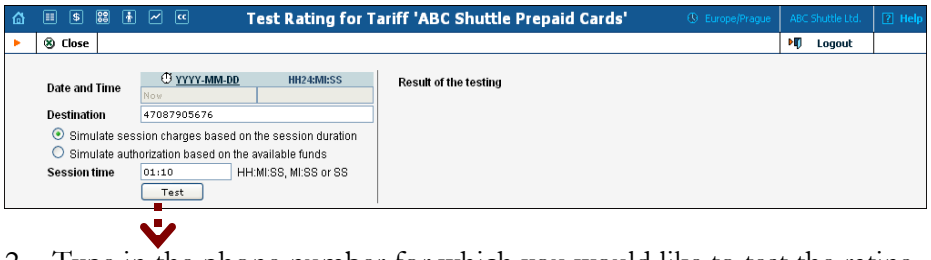
2. On the Tariff Management page, click on the name of the existing tariff.
3. If necessary, modify the tariff parameters:
   - **Default Off-peak Period** – If you do not differentiate between peak and off-peak rates, just choose **Not defined**; otherwise, select one of the previously defined off-peak 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 **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.

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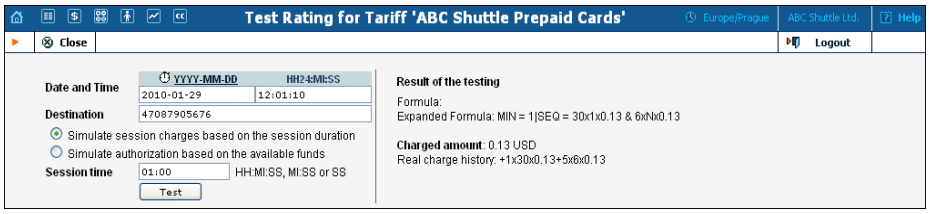
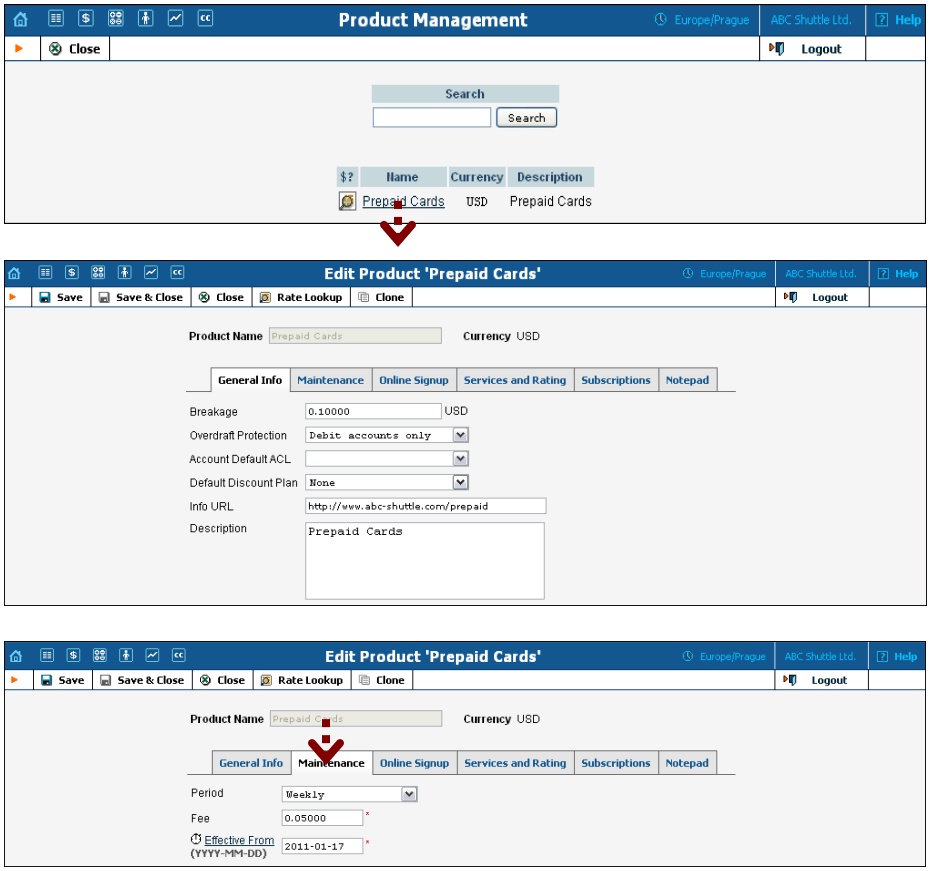



3. You will now see the estimated amount charged for this call, as well as a detailed explanation of the rating process.
4. Press the **Close** button to return to the **Edit Tariff** window.

# Modify Product

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




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:

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### 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

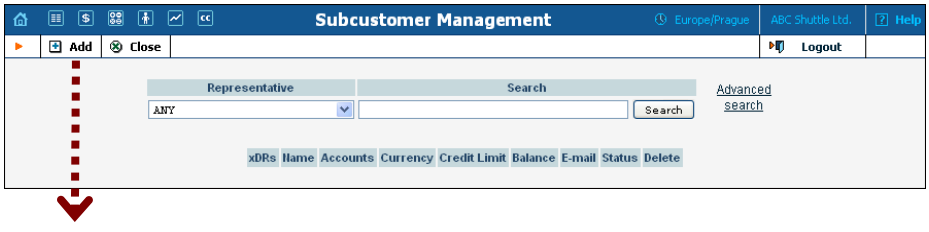
- **Period** – Surcharge application interval; will be shown in call history as a separate line each time it is charged. **None** disables maintenance fees.
- **Fee** – Surcharge amount.
- **Effective From** – Apply the specified maintenance fee only after a certain date (no fees assessed until then);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

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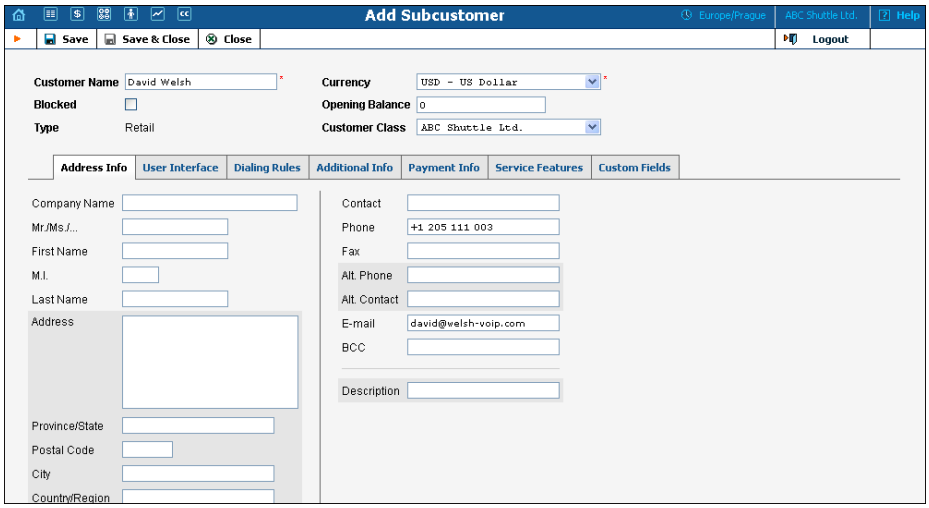


1. In the **Participants** section of the Reseller-Index page, choose **Subcustomers**.
2. On the Subcustomer Management page, choose **Add**.
3. Fill in the **New Subcustomer** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

### 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.

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

### Additional Info tab

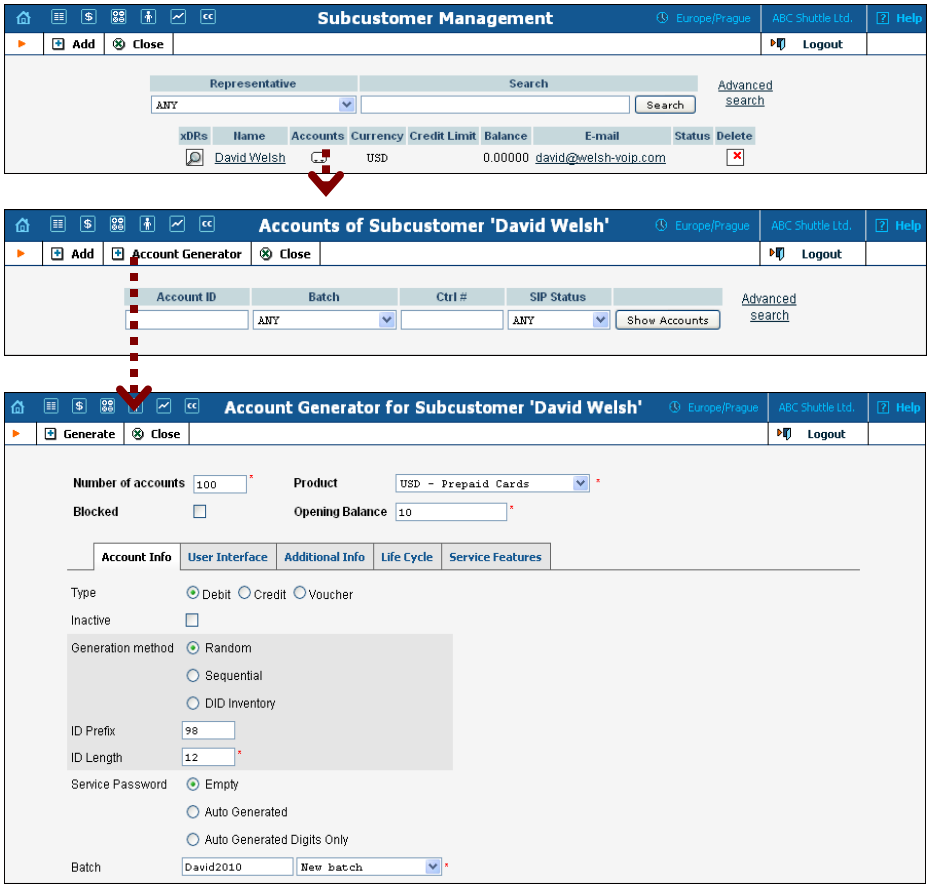
- **Send Statistics – Summary only** – Distribute a call summary only, and do not attach a details file; this might be useful in the case of a large amount of calls. Other options are **full statistics** (attach a complete list of xDRs) or **do not send** (no not deliver call statistics to this customer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

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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 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: 98NNNNNNNN, 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.

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### 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 **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.

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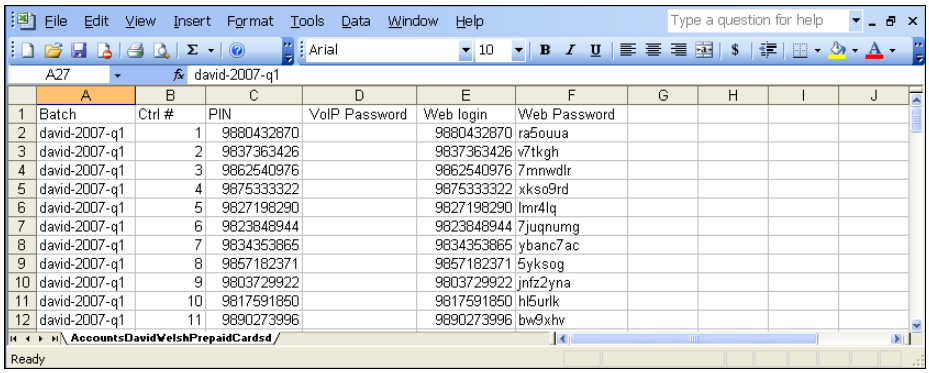

File Edit View Insert Format Tools Data Window Help — Type a question for help

Arial 10

A27 david-2007-q1

| | A | B | C | D | E | F | G | H | I | 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 | | | | |

AccountsDavidWelshPrepaidCardsd

Ready

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# 2. Configuring a Reseller for Postpaid Services

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# 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.

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# 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 | Done |
|---|---|
| **General and network configuration** | |
| Perform configuration of general and network settings as described in the *Basic Residential VoIP Service* chapter in the **PortaSwitch Handbook: Residential VoIP Services** | [ ] |
| Perform configuration of the vendor part as described in the *Basic 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 **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 and an empty access code. This entry will use tariff C to charge the end user and tariff A to charge the reseller. | [ ] |
| Create another rating entry for this product, using the PortaSIP® node and the access code INCOMING. This entry will use tariff D to charge the end user and tariff B to charge the reseller. | [ ] |

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## 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 | [ ] |

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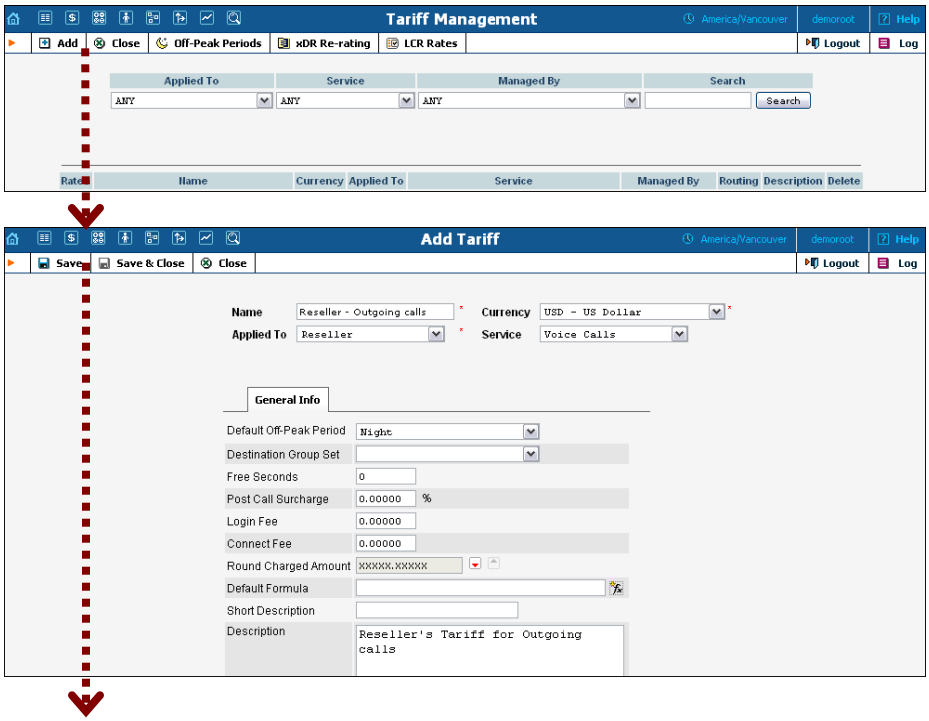
# General and Network Configuration for PortaBilling®

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.

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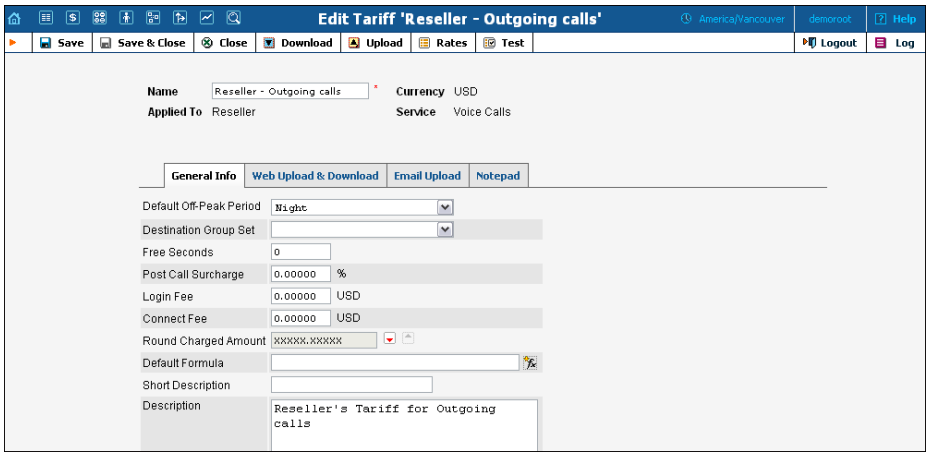



In the **Rating** section of Admin-Index, choose **Tariffs**.

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.

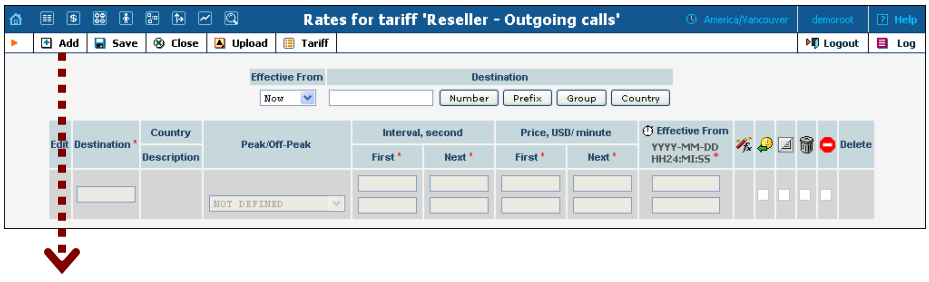
**NOTE:** The currency for the tariff is chosen only once, and cannot be changed later.

   - **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.

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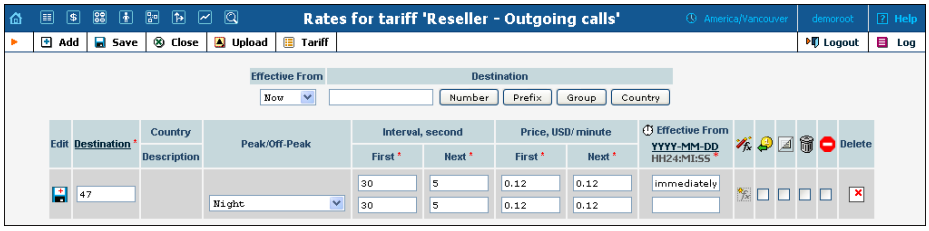


1. On the Tariff Management page you will see a list of available tariffs. Click the **Rates** icon next to the name of the tariff. When you are in Tariff Management for a particular tariff, click on **Rates** in the toolbar.
2. In the **Edit Rates** screen, click **Add.**
3. Fill in the required information: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

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- **Payback Rate, Hidden**, **Forbidden** or **Discontinued** – These flags are optional.

4. Click the **Save** button in the toolbar, or the 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.

## 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.)

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**.

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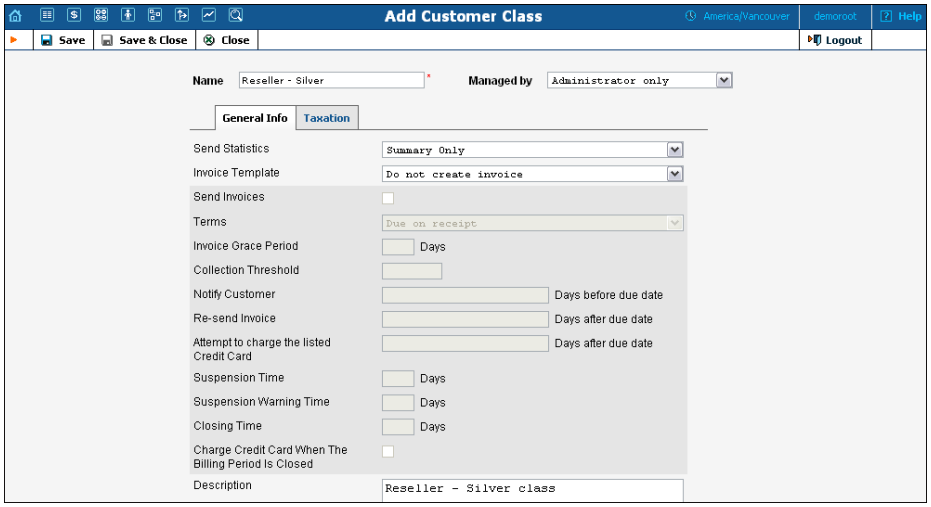
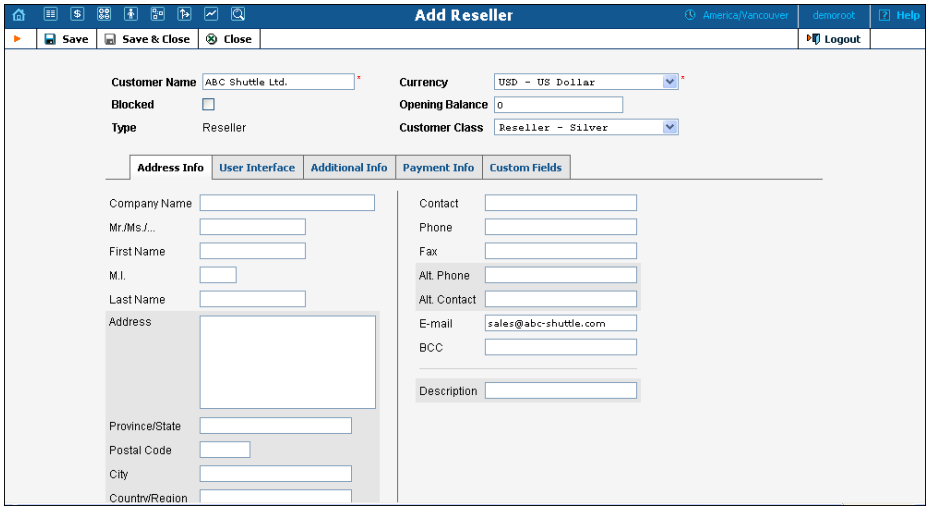



3. Fill in the parameter related to the invoicing and collection process for your resellers.
4. Click **Save&Close**.

# 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).




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:

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### 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.

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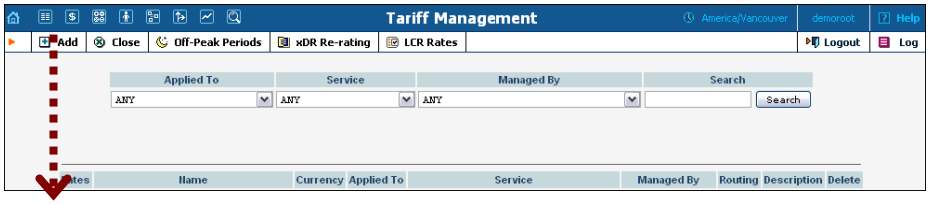
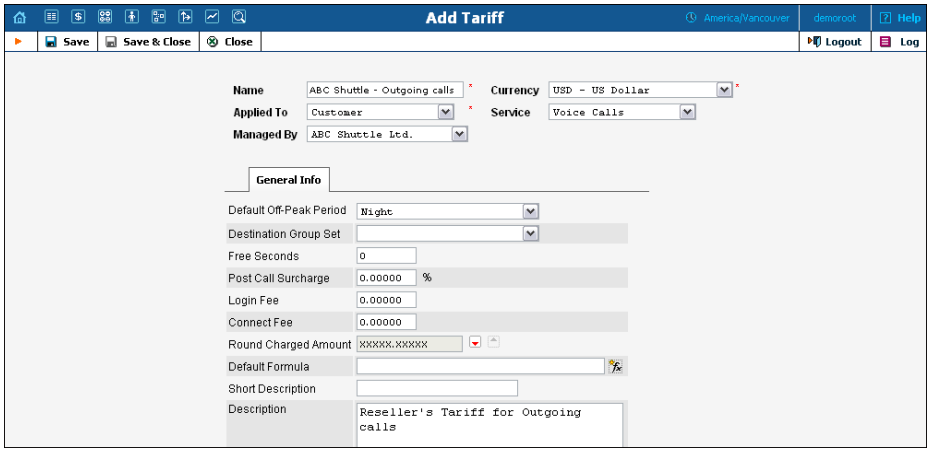
3. Click **Save&Close.**

# 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 self-care interface. You just need to provide him with a framework by pre-allocating tariffs.




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.

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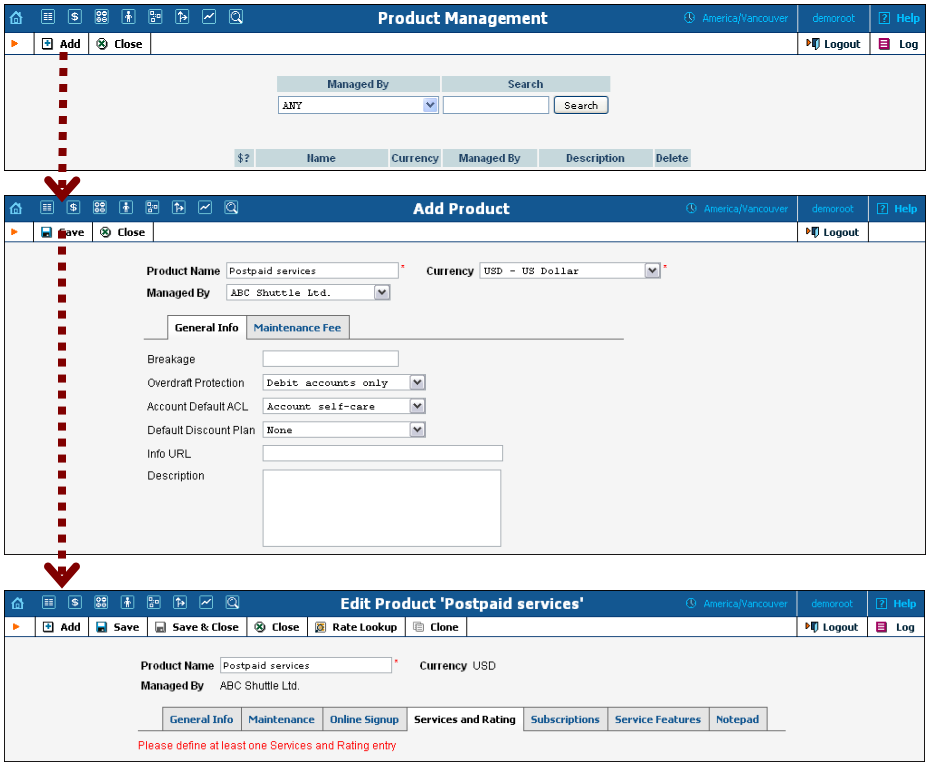
3. Click **Save&Close.**
4. Repeat steps 1-3 until you have entered all of the tariffs your reseller needs.

# 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.




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.

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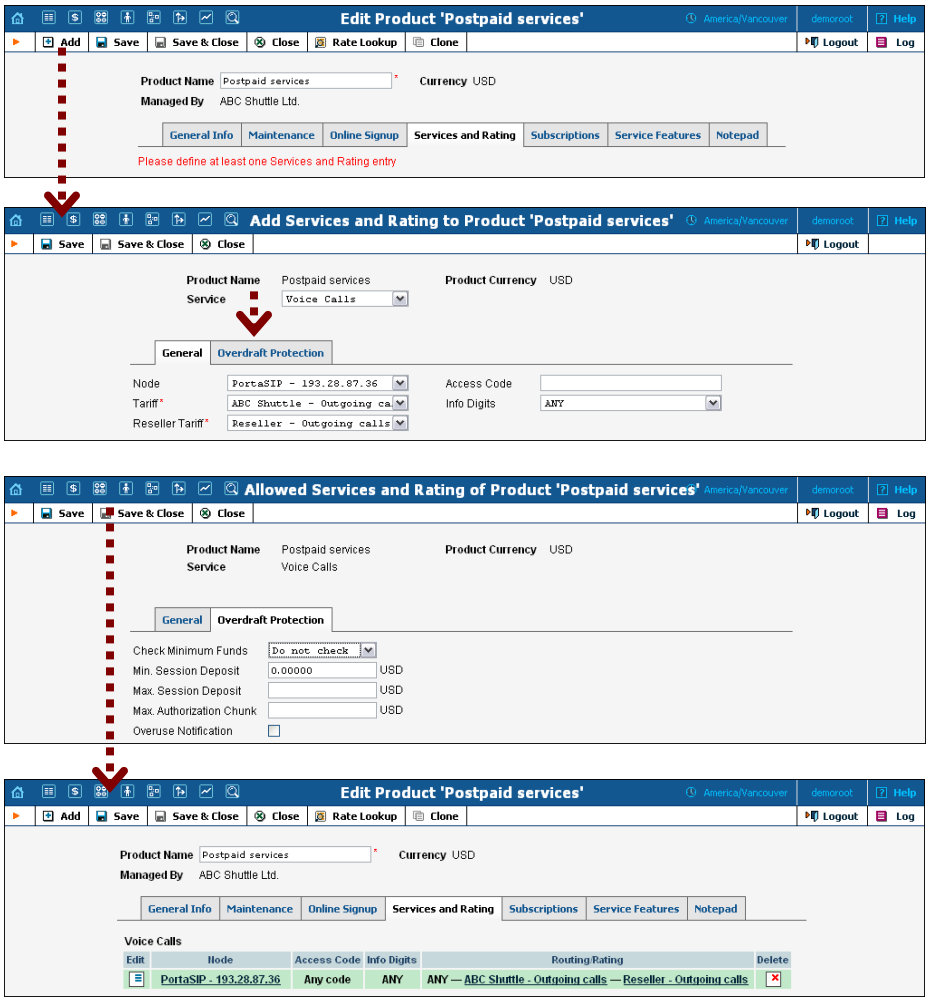
## Create Rating Entry for Outgoing Calls

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




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.

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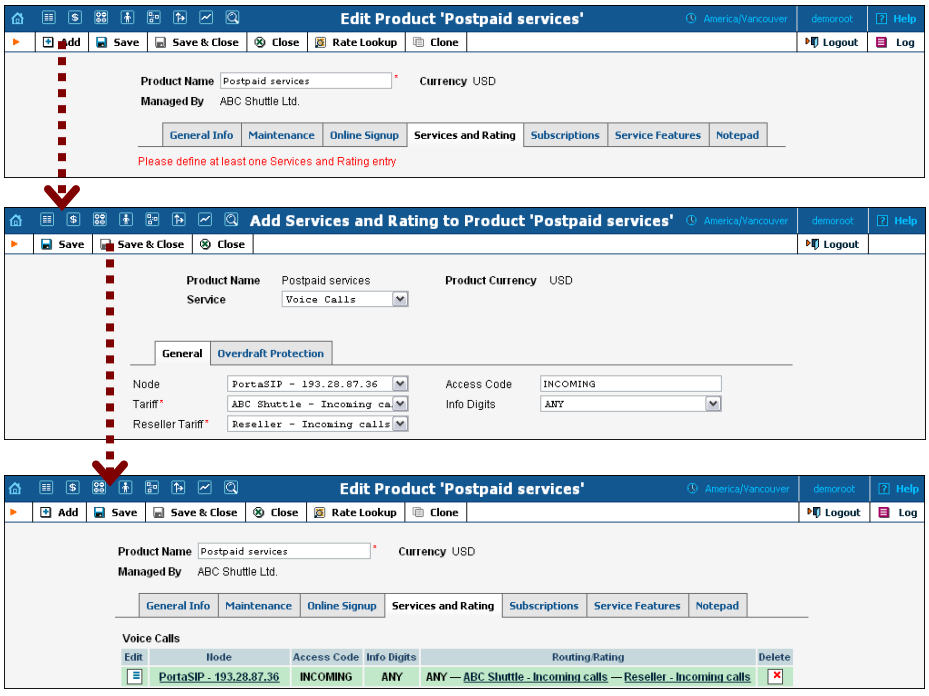
6. In the **Tariff** menu, select the tariff that will be applied to end users (residential VoIP customers of your reseller), referred to here as tariff C.
7. In the **Reseller's Tariff** drop-down menu, you can also choose which tariff will be used to charge the reseller when an account with this product 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.
8. 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.

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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.
8. 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).

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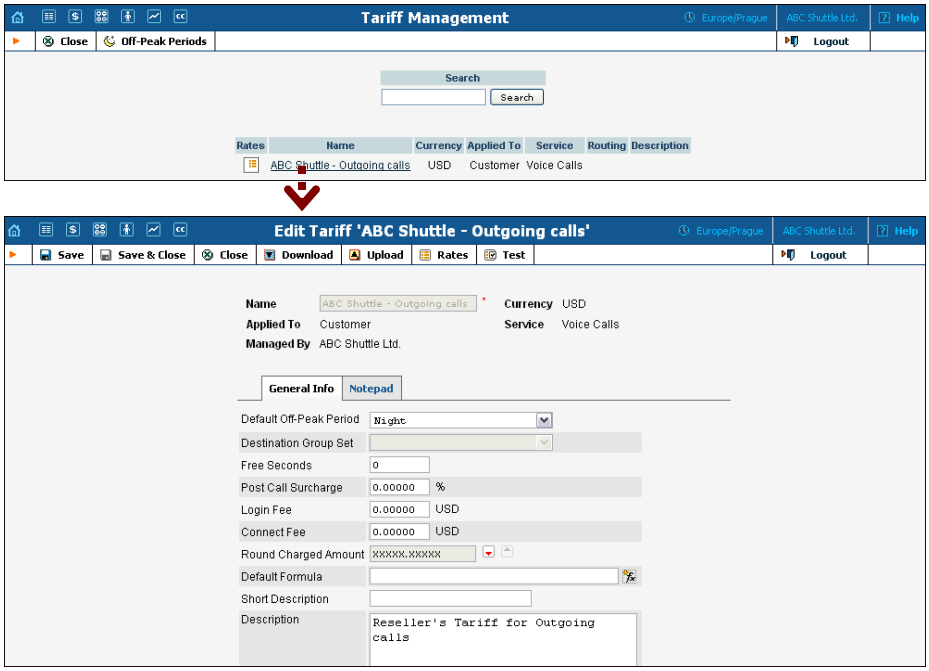


1. In the **Rating** section of Reseller-Index, choose **Tariffs**.
2. On the Tariff Management page, click on the name of the existing tariff.
3. If necessary, modify the tariff parameters:
   - **Default Off-peak Period** – If you do not differentiate between peak and off-peak rates, just choose **Not 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.

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# Enter Rates

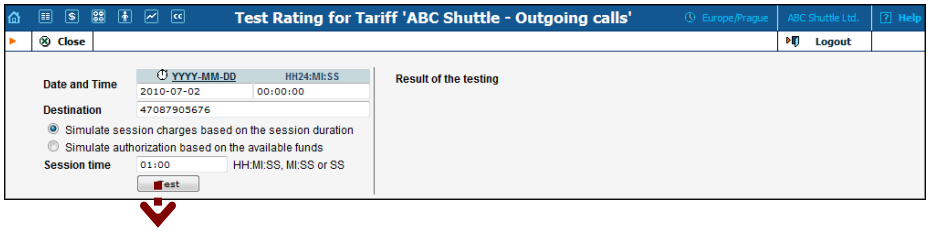
The interface for rate management by the reseller is identical to the one, provided to the administrator and described earlier in this chapter.

# Modify the Tariff for Incoming Calls

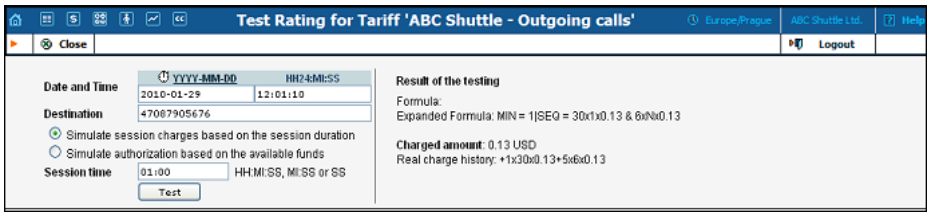
This is similar to the process of adjusting outgoing rates, as described above.

# Test Rate Configuration (Optional)

1. While in the **Edit Tariff** window, click on the **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.

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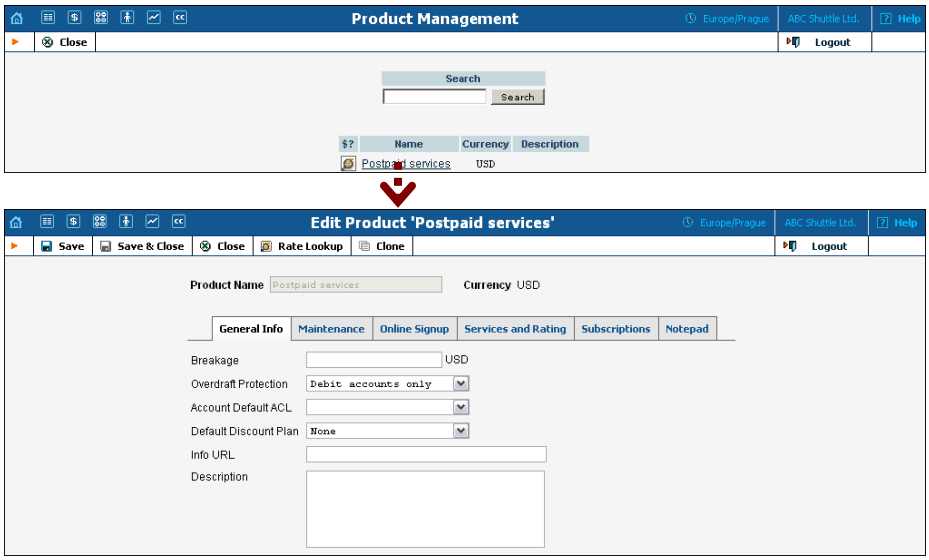



1. In the **Rating** section of the Reseller-Index page, choose **Products**.
2. On the Product Management page, click on the name of the product in the list.
3. Change values in the **Edit Product** form:

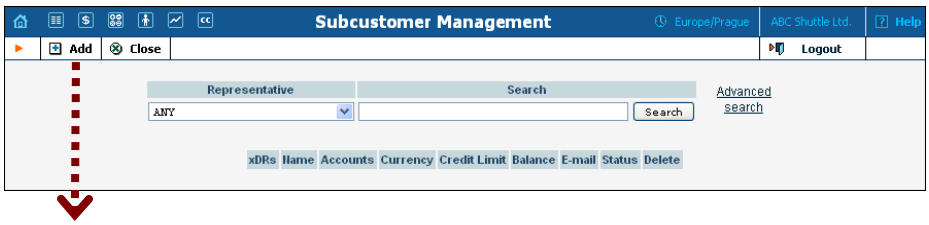
### General Info tab

- **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.

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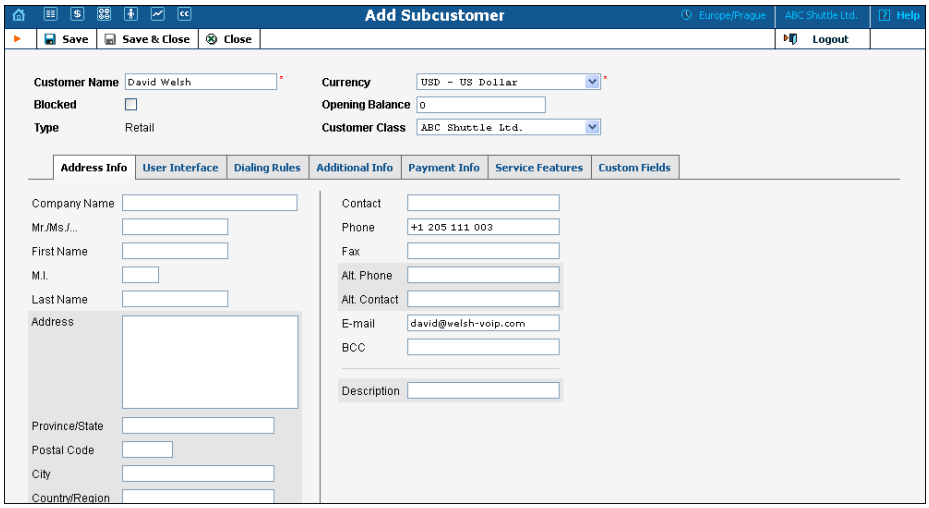


1. In the **Participants** section of the Reseller-Index page, choose **Subcustomers**.
2. On the Subcustomer Management page, choose **Add**.
3. Fill in the **New Subcustomer** form. Please note that there are several tabs with extra information available on the screen. The most important fields are:

### 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.

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

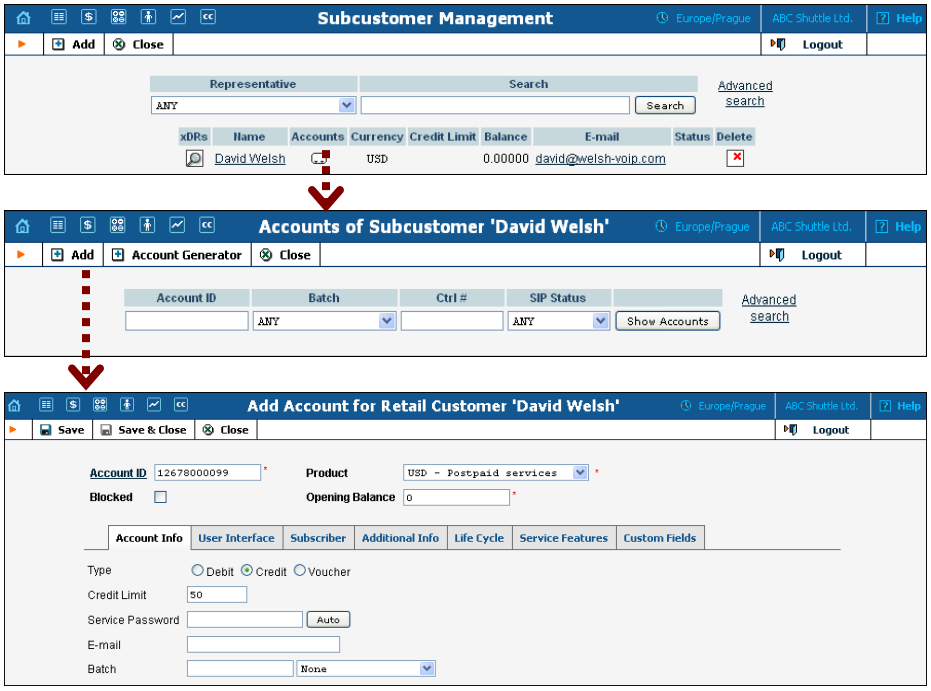
### Additional Info tab

- **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:




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.

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- **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.

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### 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).

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# 3. Configuring a Distributor for Prepaid Services

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# 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.

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# 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 | Done |
|---|---|
| **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 **Additional Info** tab | [ ] |
| Specify a username and password for the distributor to access the self-care interface | [ ] |
| Create an internal customer object which will hold the prepaid accounts | [ ] |
| Generate a batch of prepaid cards which will be assigned to your 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 | [ ] |

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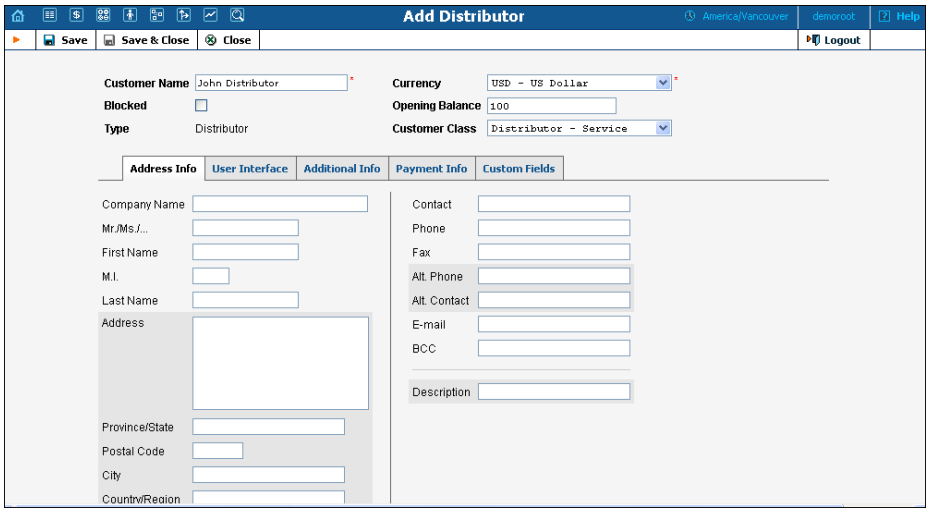
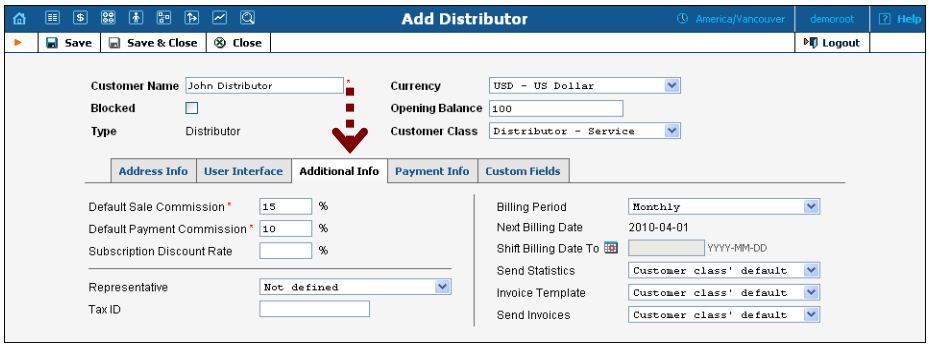
# Create a Distributor

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).




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.

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### 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.**

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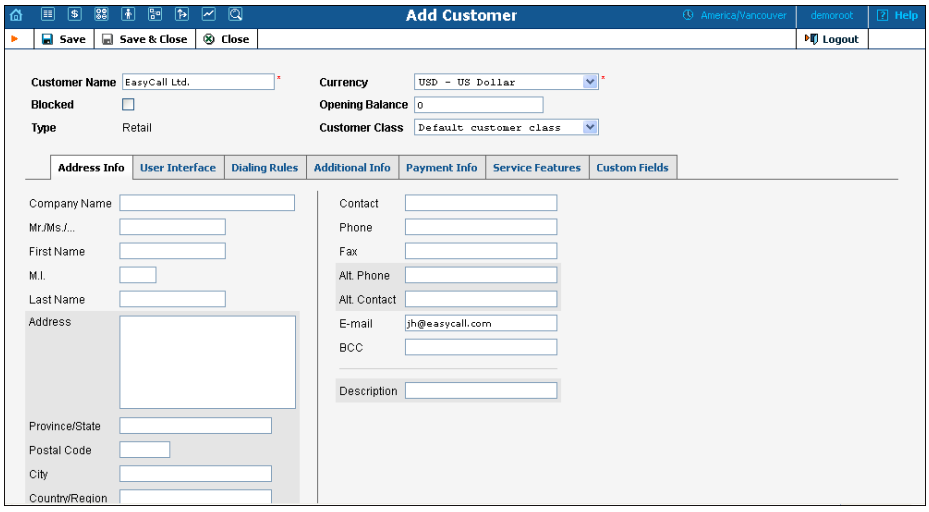
# Create a Customer

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.




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.**

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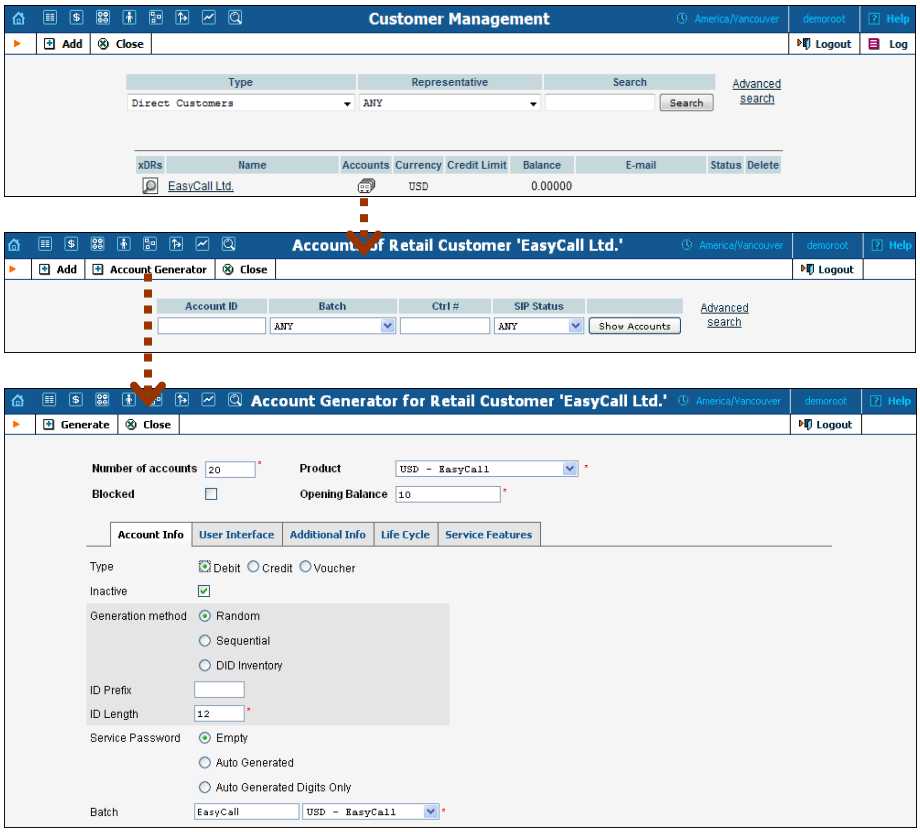
# Generate a Batch of Accounts for the Distributor

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 or icon (the one in the **Accounts** column) to go to account management for that customer.




3. Click on **Account Generator**.

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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.

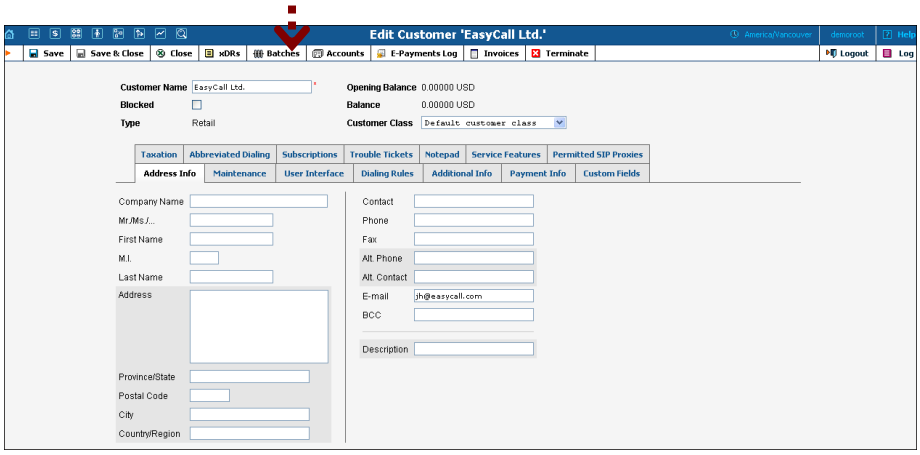
   Please refer to the *Prepaid Calling Cards (Using a Gateway)* chapter in the **PortaSwitch Handbook: Prepaid Services** for a description of the other parameters.

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.

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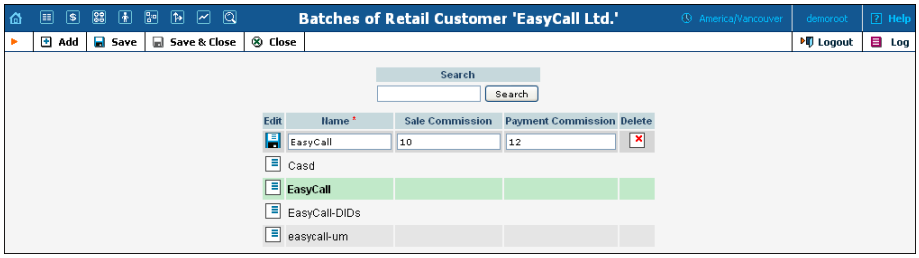



2. Click the icon next to the batch name to edit it.
3. Enter the Sale and Payment commission.
4. Then click the **Save** icon.

# 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.

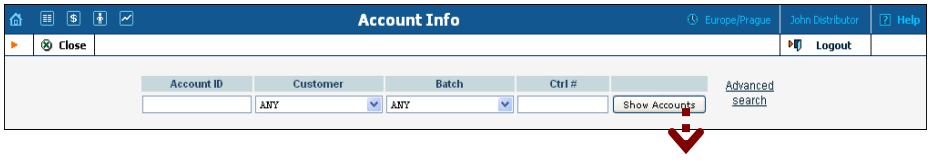
# Login to Self-Care Interface

Open the customer self-care page in a browser (by default **https://<your-porta-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.

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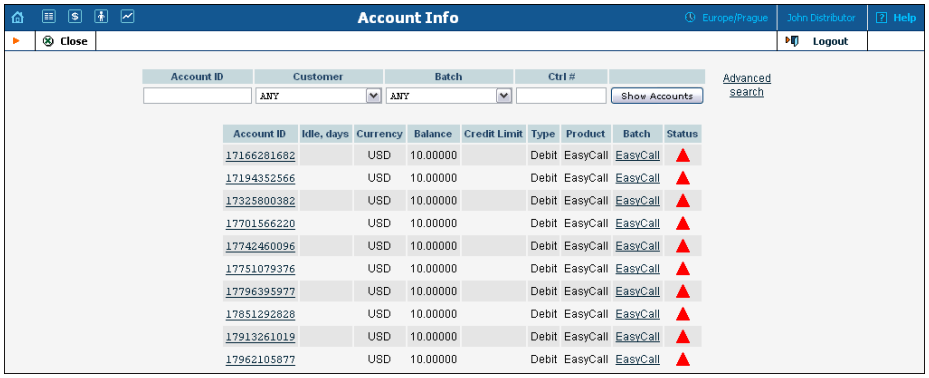
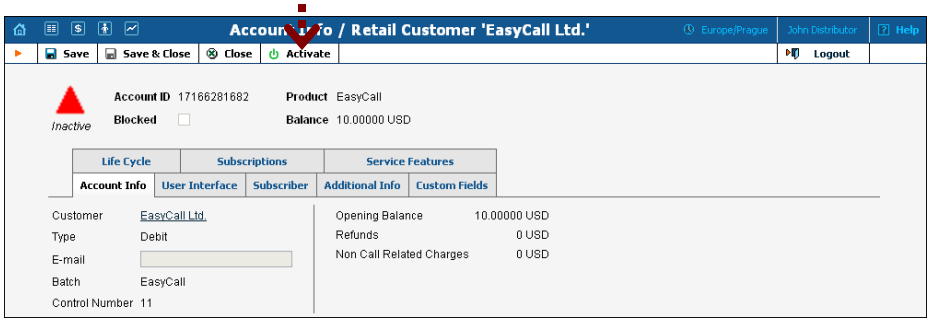
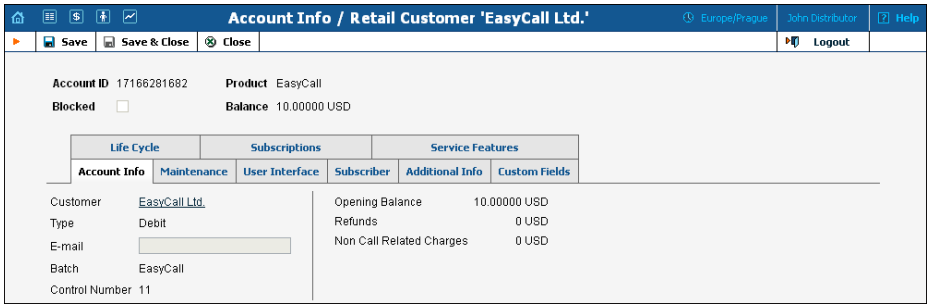



3. Click on the Account ID of a specific account.
4. Choose **Activate** in the toolbar to activate this account.




5. Press the **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.

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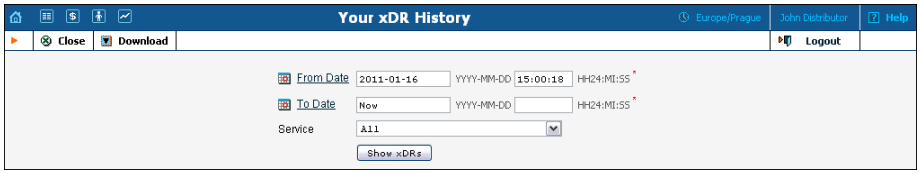


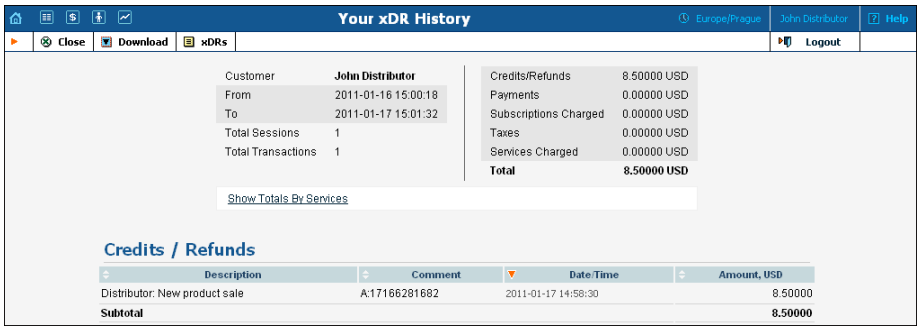


3. Press the **Close** button to leave the xDR browser or **xDRs** button to return to Your xDR History page.

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# 4. Configuring a Distributor for Postpaid Services

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# 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.

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# 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 | Done |
|---|---|
| **General and network configuration** | |
| Perform configuration of general and network settings as 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 **Additional Info** tab | [ ] |
| Specify a username and password for the distributor to access the self-care interface | [ ] |
| Create a quick form for your 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 | [ ] |
| Create new customers | [ ] |
| Generate accounts for customers | [ ] |
| Accept payments from customers and record payment information in the system | [ ] |

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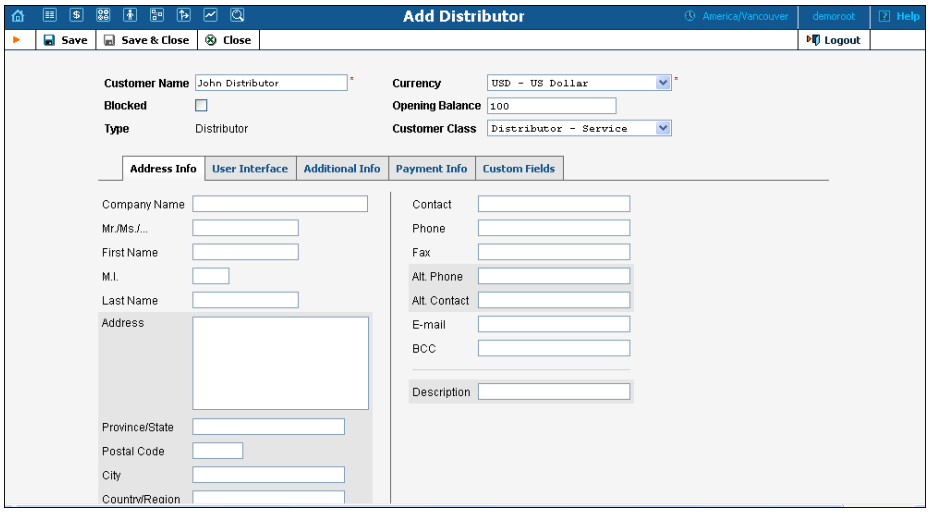
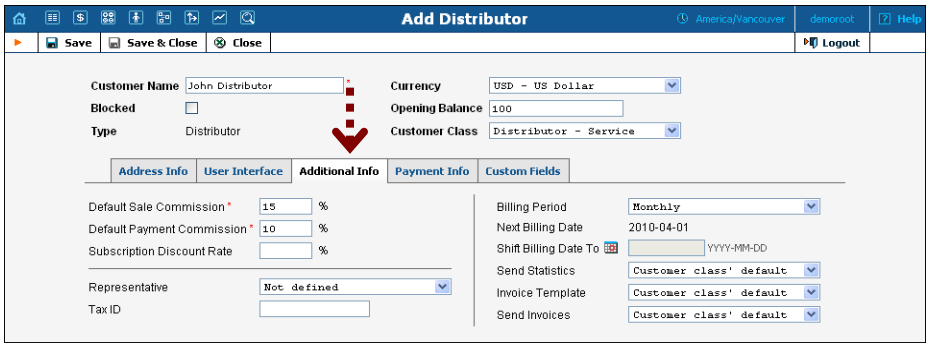
# Create a Distributor

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).




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.

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### 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.

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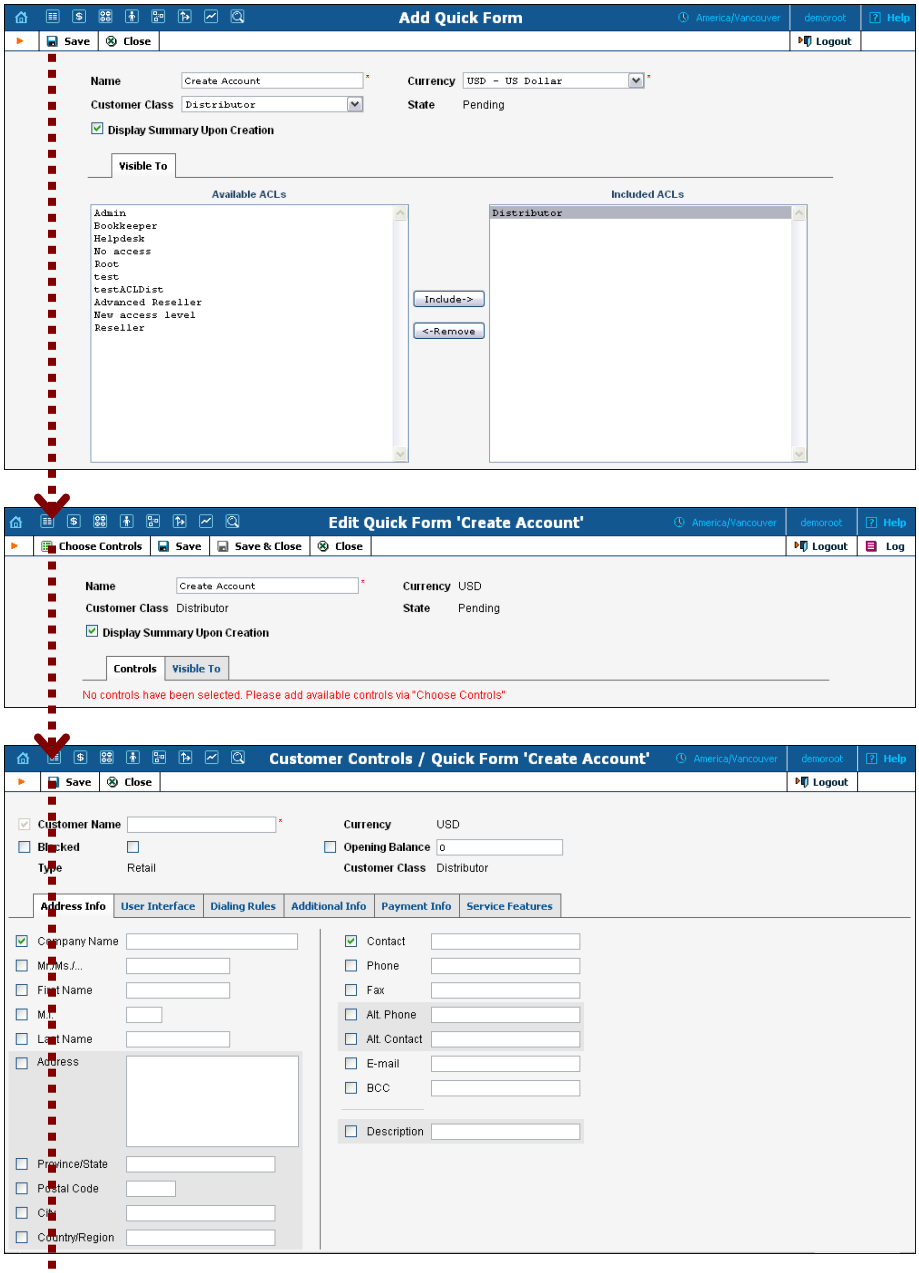
3. Click **Save&Close.**

# 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.

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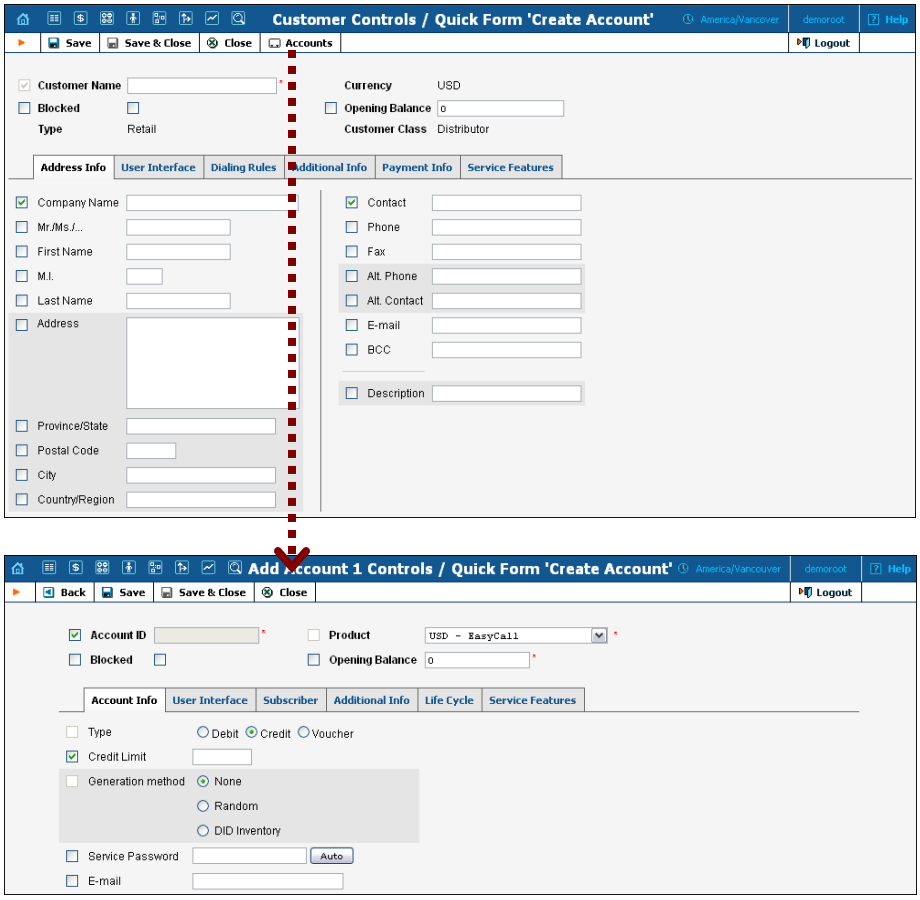


In the **Management** section of Admin-Index, choose **Quick Forms**.

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

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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**.
9. 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**.

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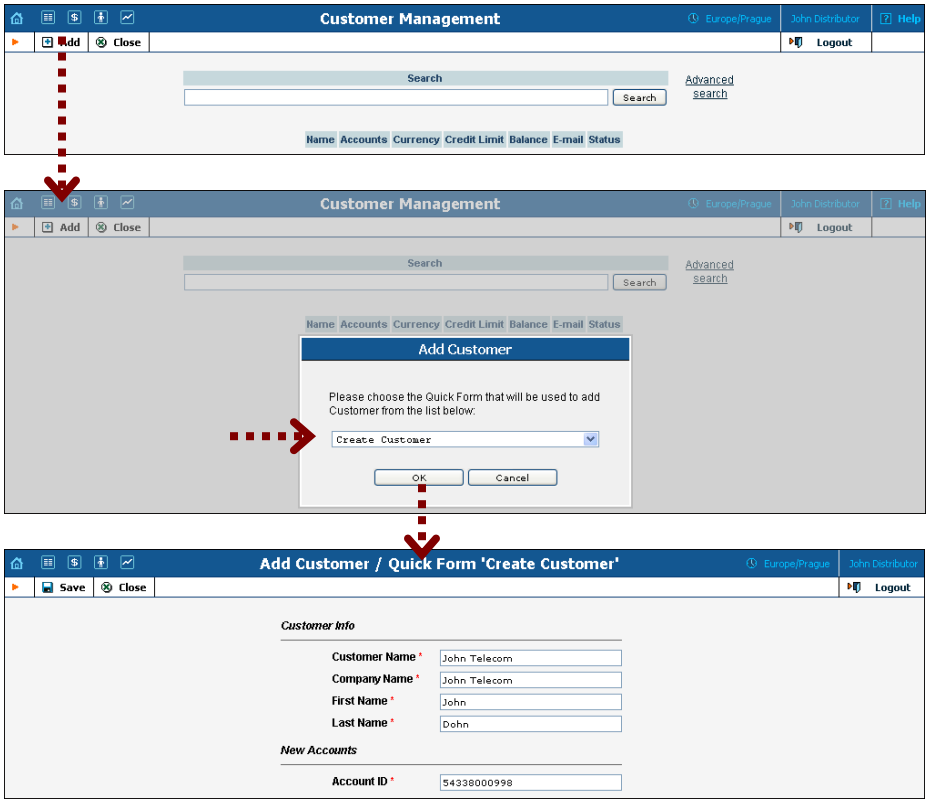
# Distributor Actions

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://<your-porta-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.

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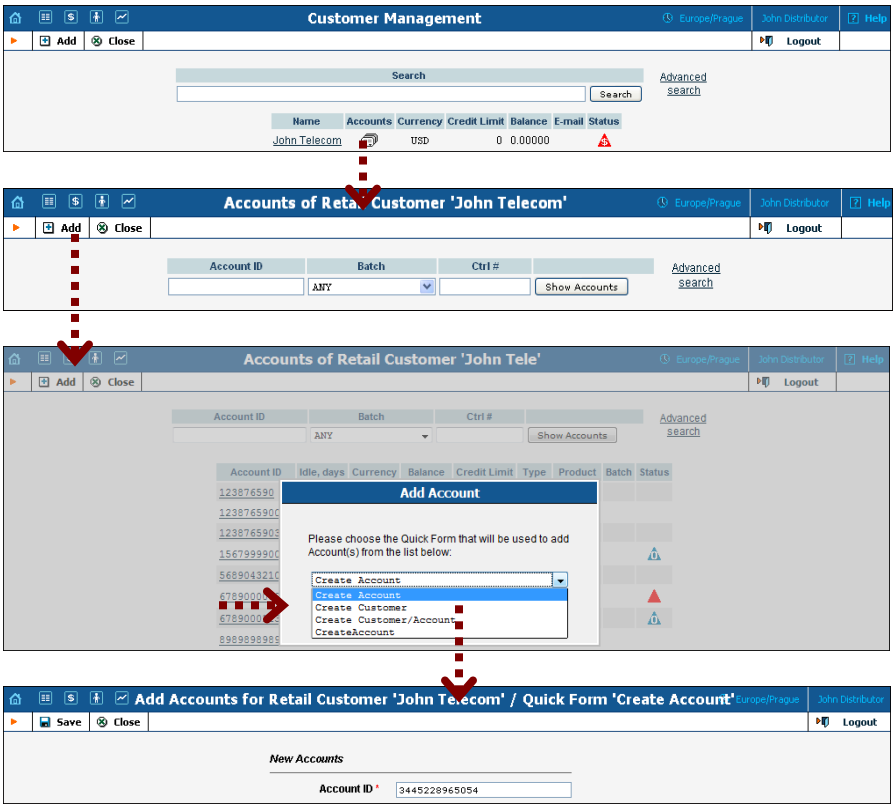
# Add Accounts to an Existing Customer

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).

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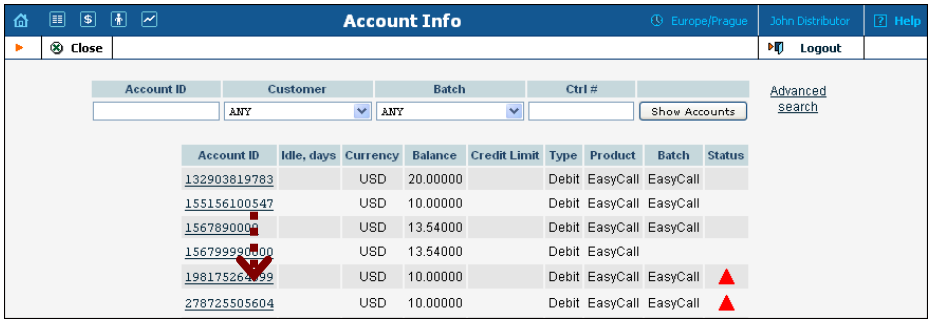
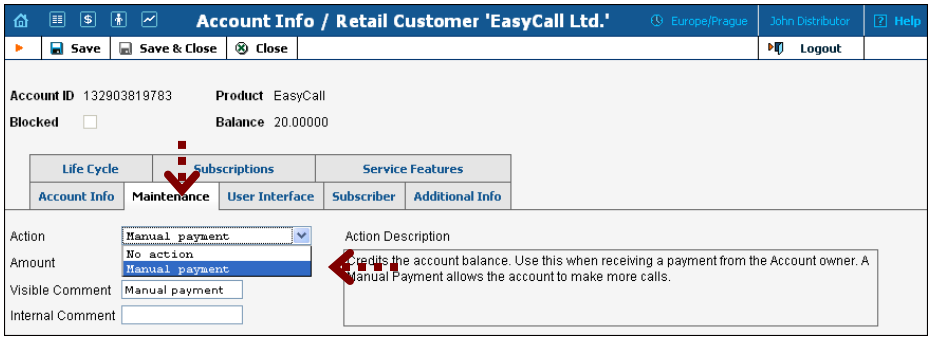
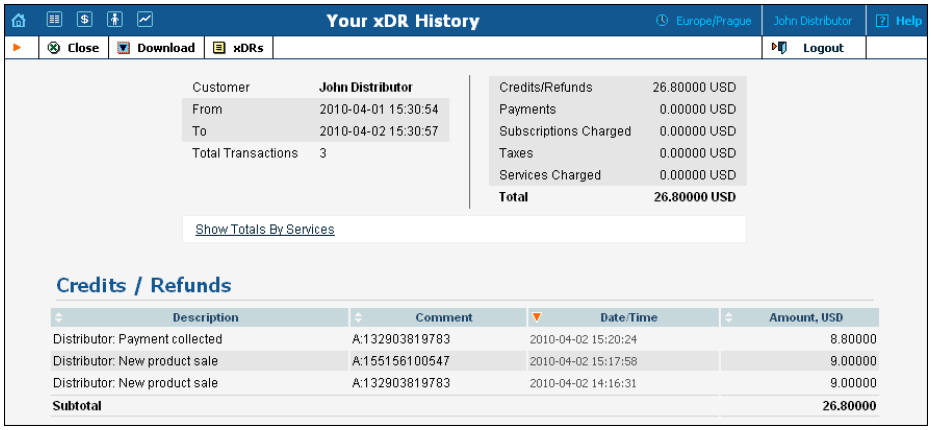



2. Click on the account ID.




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.

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