

Porta  Switch[®]



New Features Guide

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Preface

PortaSwitch® Maintenance Release 30 is the next leap-forward release, consistent with the “fast releases, precisely on time” ideology introduced earlier in 2012 year.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only and does not always contain the latest material on enhancements introduced between major 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 performing the action described here.



Tips provide information that might help you solve a problem.

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Bundle Promotion

It is vital for any company to have a powerful marketing plan for attracting new clients and encouraging existing ones to spend more money on services. A widespread marketing practice is to offer promotional discounts based on monthly amounts spent.

For example, your promotion could be something like “Get 10 percent off if you spend over \$1000 on voice calls,” or “Get \$10 credit on SMS service if you spend at least \$20 on voice calls,” etc. Another practice is to set a usage minimum so that you can continue to offer your customers low rates with a small or no monthly fee, and at the same time, recover your costs for providing the service. The new Bundle Promotion feature allows your marketing department to realize all of these ideas.

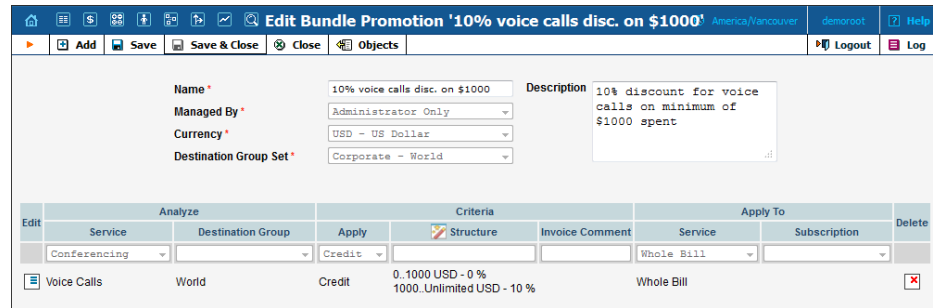
This new feature harmoniously supplements the PortaBilling® volume-based discount feature (the one that allows you to dynamically adjust rates based on the amount of services your customer has already used). Unlike our volume-based discount, Bundle Promotion allows you to encourage customers to use one service to obtain a discount for another service, or increase or even decrease a customer’s invoice total, based on how much money has been spent on these services during the billing period.

The differences between inter-service promotions and volume discounts

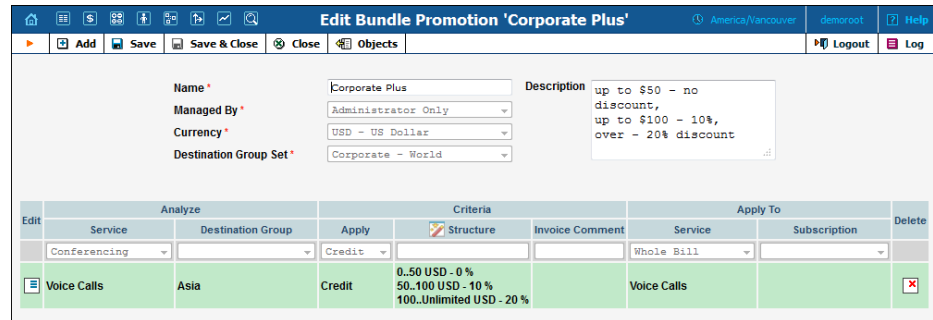
	Inter-service Promotions	Volume Discounts
Scope	Credit can be applied to a different service	Discount applied to the same service
Discount base	Discount base for credit amount is calculated based on the total service usage within this period	Discount is applied only to the service consumption after the threshold is reached
Discount amount	Can be a fixed amount or calculated as % of the sum of charged amounts	Calculated as a % reduction of the rate
Applied to	Discount can be applied to any service or subscription charges	Discount can only be applied to a service
Discount applied	At the end of the billing period	In real-time (when the service is consumed)
Presentation	Separate xDR on the invoice	Incorporated in the original xDR

The key features of the Bundle Promotions feature include the following:

- Promotional discounts based on the amount of money spent for a service within the billing period. For example, if you wish to offer 10 percent off (of the invoice total) *if* the customer spends over \$1000 on voice calls (bringing the invoice total to \$900), you would create a corresponding destination group and define a single discount rule for it.



- Multiple discount thresholds. For example, you can define a promotional discount rule for calls to Asia (thus only the amount of money spent on calls to Asian destinations will determine whether or not the discount should be applied). The discount will be applied to voice call service (cost of all calls within the billing period) so that: up to \$50 – no discount is applied, a 10% discount is applied for \$50 worth of calls and a 20% discount is applied for spending over \$100.



- Charges based on usage minimum. For example, if you signed a contract with your wholesale partner stating that you give great rates but that you require a minimum of \$5000 in monthly traffic to be forwarded to you (otherwise there is a \$1000 charge).

Edit Bundle Promotion 'Wholesale \$5000 usage minimum'

Name: Wholesale \$5000 usage minimum
 Managed By: Administrator Only
 Currency: USD - US Dollar
 Destination Group Set: Wholesale - World

Description: Charge \$1000 if customer spends less than \$5000

Analyze		Criteria			Apply To		Delete
Service	Destination Group	Apply	Structure	Invoice Comment	Service	Subscription	
Conferencing		Credit			Whole Bill		
Voice Calls	Asia	Charge	0.5000 USD - 1000 USD 5000.Unlimited USD - 0 USD	\$5000 usage minimum	Subscriptions		

- Decrease a subscription fee or all subscription fees applied to the customer and his credit accounts by a defined percentage. For example, you can waive the customer’s monthly user charge if he spends at least \$100 on voice calls.

Note that if you select *Subscriptions* in the **Service** list and leave the **Subscription** list empty for a bundle promotion, then the bundle promotion will be applied to the customer and all his credit accounts.

Edit Bundle Promotion 'User charge waive over \$100'

Name: User charge waive over \$100
 Managed By: Administrator Only
 Currency: USD - US Dollar
 Destination Group Set: Residential - World

Description: Waive customer's monthly user charge on minimum spending of \$100

Analyze		Criteria			Apply To		Delete
Service	Destination Group	Apply	Structure	Invoice Comment	Service	Subscription	
Conferencing		Credit			Whole Bill		
Voice Calls	World	Credit	0.100 USD - 0 % 100.Unlimited USD - 100 %	User charge waive over \$100	Subscriptions	User Charge - Residential Plus	

- Multiple promotions in the same bundle promotion. For example, your bundle promotion could state: “Spend \$10 dollars on SMS and your subscription fee will be waived!” or “Spend \$50 either on calls or on SMSs and all your monthly fees will be waived” or “Spend \$25 on calls to South America and you will get a 5% discount on all your voice calls.”

Edit Bundle Promotion 'Residential Plus'

Name: Residential Plus
 Managed By: Administrator Only
 Currency: USD - US Dollar
 Destination Group Set: Corporate - World

Description: \$10 dollars on SMS - SMS product fee waived; \$50 on calls or on SMS - all monthly fees waived;

Analyze		Criteria			Apply To		Delete
Service	Destination Group	Apply	Structure	Invoice Comment	Service	Subscription	
Conferencing		Credit			Whole Bill		
SMS		Credit	0.10 USD - 0 % 10.Unlimited USD - 100 %	SMS usage credit	Subscriptions	SMS	
Voice Calls		Credit	0.50 USD - 0 % 50.Unlimited USD - 100 %	Usage credit	Subscriptions		
SMS		Credit	0.50 USD - 0 % 50.Unlimited USD - 100 %	Usage credit	Subscriptions		
Voice Calls	Latin America	Credit	0.25 USD - 0 % 25.Unlimited USD - 5 %	Usage credit	Voice Calls		

- The discount can either be a percentage of the charged amount in the 0 – 100 range (a 0% discount means “no discount applied,” while a 100% discount means “all charges waived”), or a fixed value.

Note that if you leave the **Destination Group** field empty, it means that all charges will be analyzed for this service.

The promotion will be applied at the end of the billing period – when all customer service charges and balance adjustments have been calculated – and will be reflected on the invoice in a separate line(s) on the invoice. Let’s look at the following example:

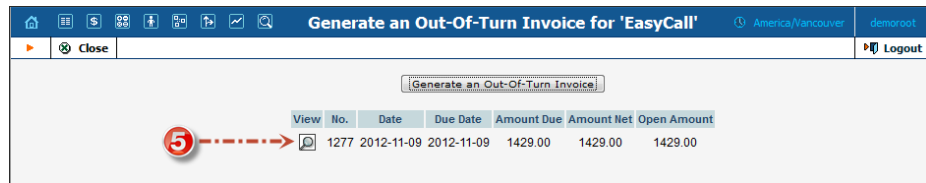
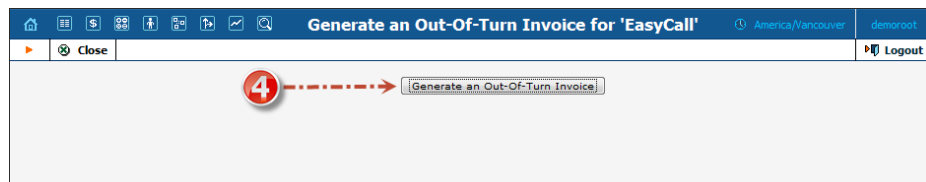
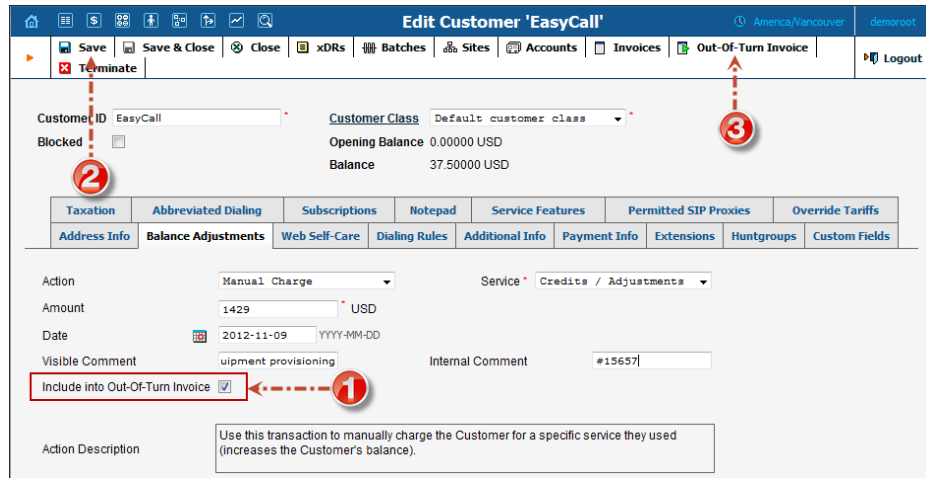
- You apply the promotion: “10 percent off if the customer spends over \$1000 on voice calls” (see the first example above).
- At the end of the month a customer has spent \$1200 on phone calls.

When the customer’s billing period closes, an extra xDR will be created and the customer will see a line with a \$120 **credit** on his invoice. The description for this transaction will be **10% (\$1200)** so it will be easy to understand what it relates to. The invoice total will be \$1080.

This new feature will supply your marketing department with a rich, yet easy-to-use tool to attract more customers and subscribers to your very flexible promotions.

Out-of-Turn Invoice Generation

Sometimes invoices for extra services such as a technician visit or an equipment purchase need to be provided at the time when such service is rendered so the customer can immediately proceed with payment. This requires an invoice that is separate from the “normal” invoice generated at the end of the billing period. You can now generate an out-of-turn invoice (to cover only a few specific items) on demand.



For example, if your customer visits your office to buy a new IP phone, your clerk will locate the customer’s account, issue an invoice covering the cost of the phone, take the money for the phone and give the phone and the invoice to the customer.

All you need to generate an invoice is to apply one or more “Manual Charge” transactions that contain a description(s) that will be visible for a customer and then mark it / them as **Include in Out-Of-Turn Invoice**. You can then generate an out-of-turn invoice with these transactions on the **Out-Of-Turn Invoice** page.

Transactions included in an out-of-turn invoice won’t be reflected in the regular invoice issued at the end of the customer’s billing period.

This new tool will simplify business activities for even the most demanding companies as well as decrease billing departments’ administrative overhead by providing an all-in-one solution for issuing an invoice to a customer.

US Inter / Intra State Rates

For many US wholesale telecom operators, the price per minute may depend not only on the actual destination (area code and exchange) but also on whether the caller resides in the same state as the called party (in case of intra-state calls additional taxes will apply). This dramatically affects the LCR algorithm, since for some calls it may be beneficial to send them to carriers that offer a more expensive “base” per-minute rate but do not charge intra-state calls separately.

In order to allow PortaSwitch® users to maximize the potential profits based on this discrepancy and simplify their rate management – it is now possible to maintain “inter-state” and “intra-state” rates as separate columns on the web interface (and in the tariff upload).

Integration with PayNearMe

To assist in penetrating new market segments you may offer your customers the capability to pay their bills and top-up their balances by using cash at any 7-Eleven or ACE Cash Express store across the United States. This opens up opportunities for providing services to new immigrant and migrant worker populations, who usually don’t have credit cards.

The payment process is quite simple. A customer views and prints the PayNearMe payment slip on the self-care interface. The payment slip contains the bar code to be scanned at a 7-Eleven or ACE Cash Express location. Customer pays cash to the store clerk, who then records the transaction – the payment information is immediately delivered to the service provider via the PayNearMe network. PortaBilling® records the transaction and updates the customer’s balance so the customer can immediately start using the service.

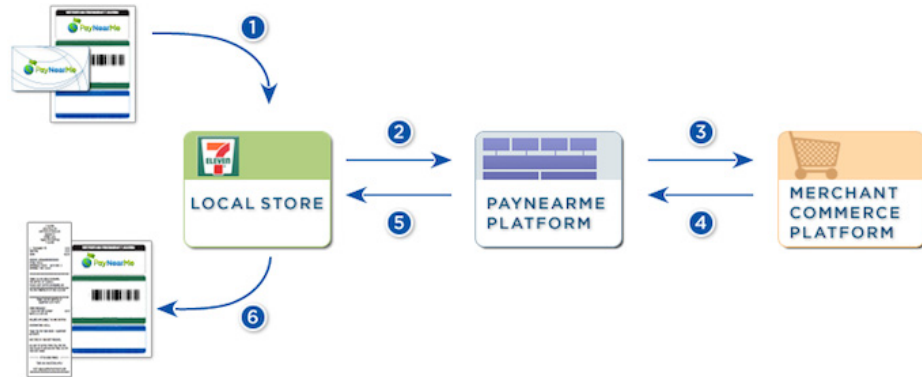
The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays 'Balance: 37.50 USD', 'Web Interface Language: en - English', and 'EasyCall (Login: EasyCall)'. Below this is a navigation bar with 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The main content area is titled 'Make a Payment' and includes a sidebar with options like 'Summary', 'General', 'Subscriptions', 'Transactions', 'Invoices', and 'Make a Payment'. The main form shows:

- Current balance: 37.50 USD
- Pay to the order of: A-Telecom
- Amount: 37.50 USD (0.00 USD minimum)
- Payment Method: PayNearMe
- Email: yarik@portaone.com
- A 'Pay Now' button.

 At the bottom, there is a 'Use Stored Card' option.

The PayNearMe process flow

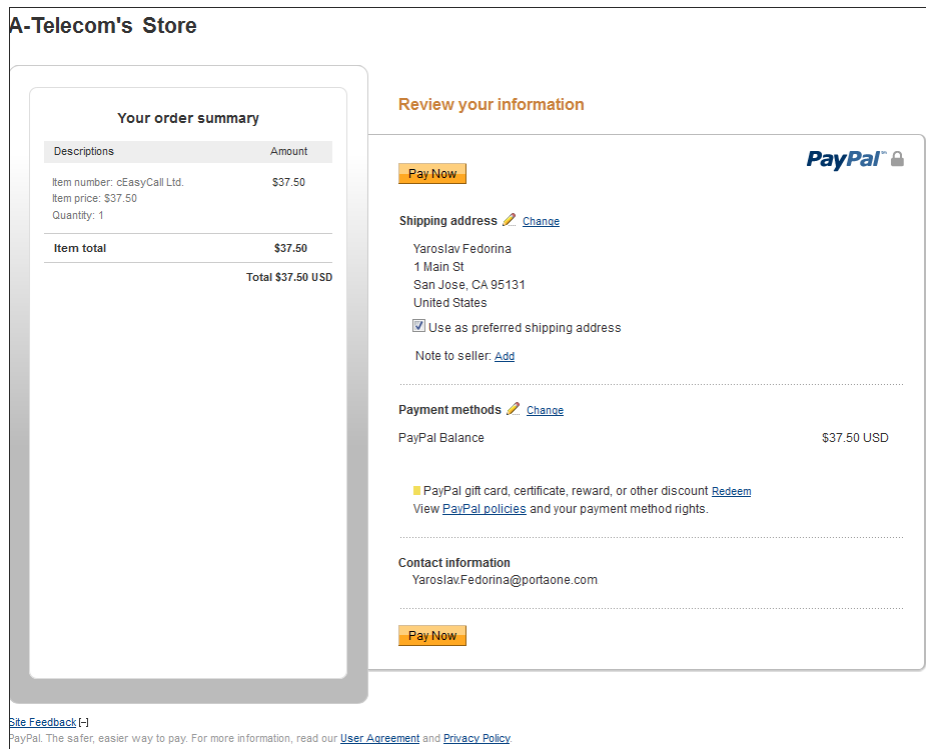
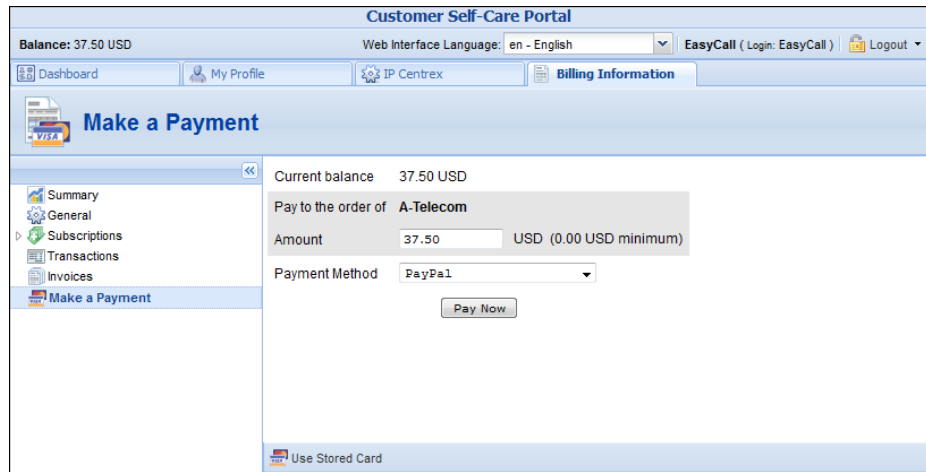
You can find the description of the payment process on the [PayNearMe web site](#).



Integration with PayPal

PayPal is a very popular payment method because of its increased security (credit card information is only stored on the PayPal side and never visible to the merchant) and how it can be used as a “virtual wallet” to pay for personal services and eBay purchases. Your customers may now use PayPal as yet another method for safely paying online for your services with just a few clicks.

Upon clicking the **Pay Now** button, the customer is redirected to the PayPal site where he logs into his PayPal account, chooses the funding source and authorizes the payment. PayPal then processes the payment and provides the result to PortaBilling® where the payment transaction is recorded and the customer’s balance is immediately updated. The customer is then redirected back to his self-care interface where he can view the payment status.



Integration with Cisco PDSN for CDMA Networks

This integration allows CDMA operators to deliver mobile broadband services to subscribers by connecting Cisco PDSN directly to PortaBilling® via RADIUS.

New xDR Re-rating mode

The PortaBilling® xDR re-rating feature has been improved and can now perform re-rating in two different modes:

- **The default mode (it works exactly as it used to)** – The xDRs produced according to the incorrect tariff are updated to the correct charged amount, and the balance is adjusted by the difference between the new and old charged amounts. This mode voids previous incorrect invoices (that have already been issued and sent to customers) and automatically produces updated ones in their place.
- **Delta mode** – If the xDRs produced according to the incorrect tariff fall within a previous (closed) billing period, then “corrective” xDRs are added to the current billing period and the original xDRs won’t change. These new xDRs contain the difference (delta) between the new (correct) and old (incorrect) charged amounts. Therefore, the previous invoices are not changed, and instead, a new updated invoice (that covers the current billing period) will include all of the corrected amounts.

In Delta mode, new xDRs will include the same service and timestamps as in the originals.

You can enable the xDR re-rating mode per environment on the configuration server (set the **DeltaMode** option to **Yes**).

This new functionality allows you to make legitimate corrections to invoice figures if the law in your country prohibits altering already issued invoices.