PortaOne

PortaSwitch®

32

Maintenance Release

New Features Guide

www.portaone.com

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Maintenance Release 32
V1.32.3

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Preface

PortaSwitch® Maintenance Release 32 is the next leap-forward release, consistent with the "fast releases, precisely on time" ideology introduced in 2012.

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**

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.

Trademarks and Copyrights

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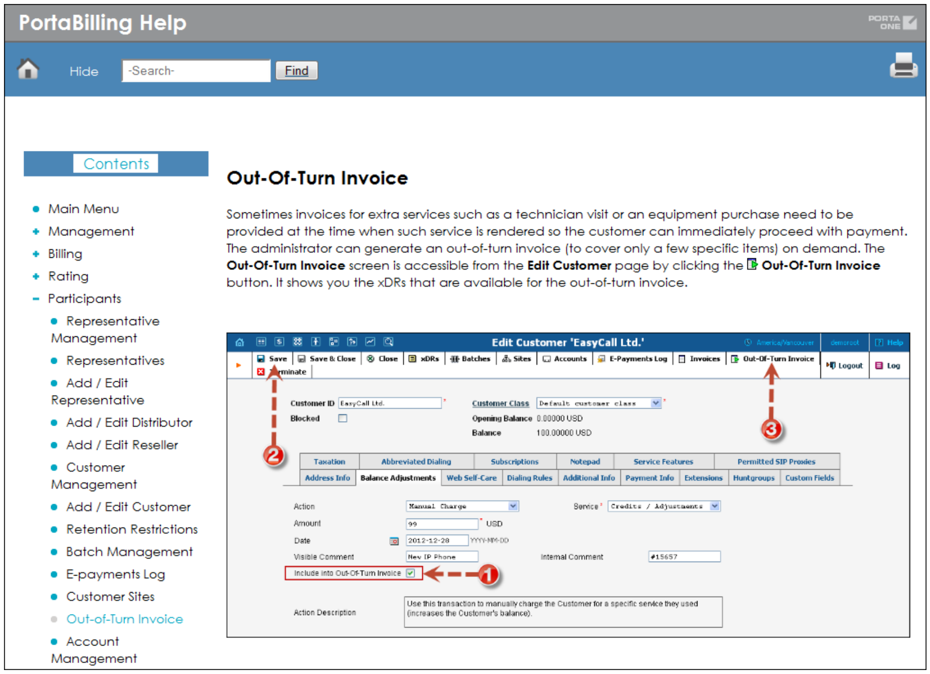
Online Help

PortaBilling® Help was improved and moved from the customer web server to the PortaOne website, online. This allows our team to update the content of PortaBilling® help at any time, thereby providing all users with descriptions of the latest changes to the web interface, regardless of when the system updates.

In addition to moving the PortaBilling® help location there are other major improvements that will benefit all users who work with the PortaBilling® web interface – for both administrative and self-care. Among the advantages are the following:

- The process of navigation through help pages is easier now due to the new **Contents** panel on the left. This panel contains sections that duplicate functional blocks on the web interface.
- New online help content is identical to the **PortaBilling Web Reference** guide, so now you may choose whether to use a PDF version of the **PortaBilling Web Reference** guide or the online help.
- Online help is always up-to-date for every release starting from MR32; it contains the description of all new elements on the web interface.
- The Search field at the top of the screen allows you to find the description of any field or functionality you are interested in, so there is no need to browse through the Web Reference guide or search for a specific page on the web interface to open a relevant help page.
- One option is that you can print an open help page for even more convenient system configuration.



Notification Templates per Customer Class

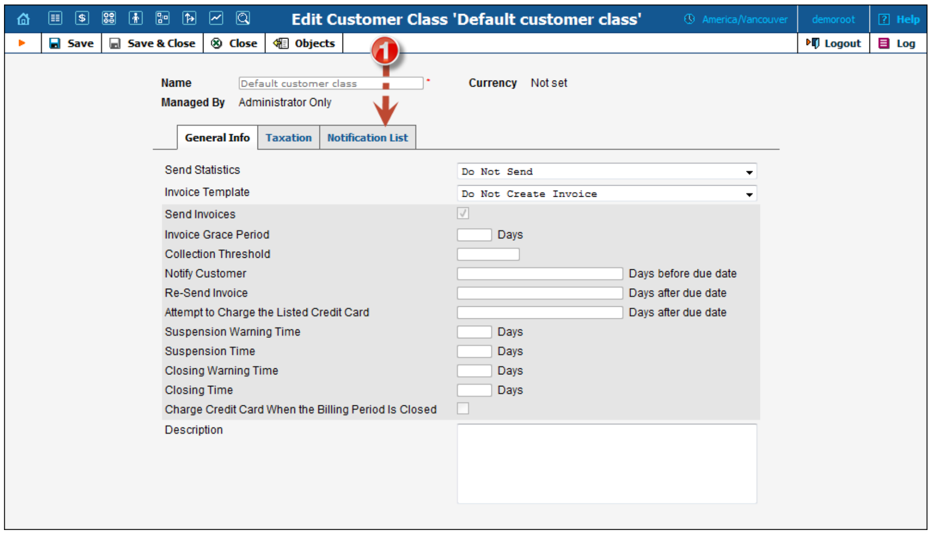
Very often large companies apply different communication policies to customers or groups of customers. For example, there may be a need to send different email or SMS notifications to business and residential customers or perhaps your customers are located in different countries and notifications must be sent in different languages.

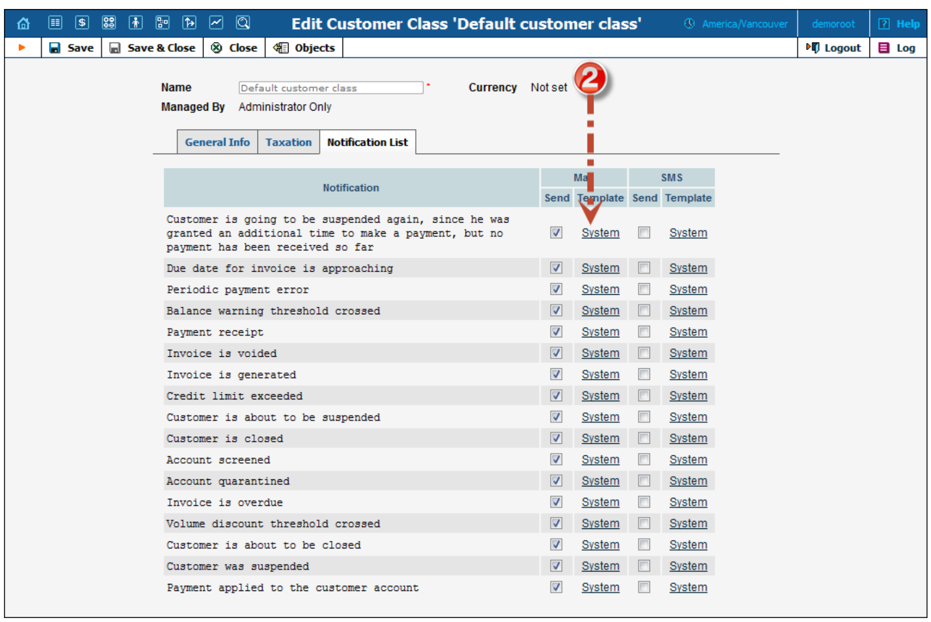
This can be achieved with the help of notification templates. Notifications are the text messages (email or SMS) that are sent from PortaBilling® to the end user: about a balance being close to the credit limit or about invoices being generated, etc.

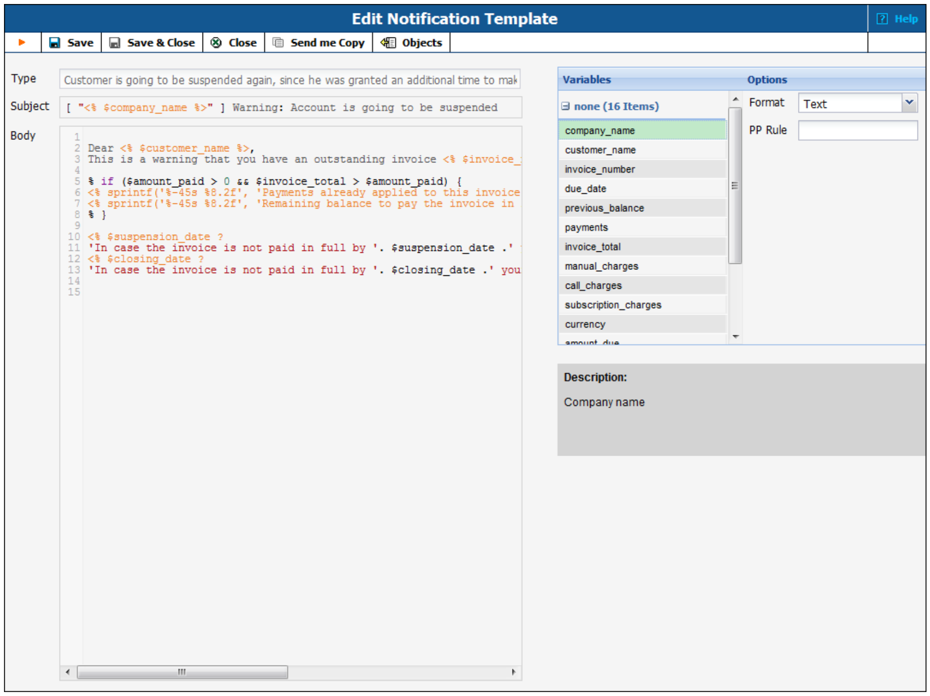
PortaBilling® presents customizing notification templates for an individual customer class. This new functionality allows you to manage email and SMS notification templates more easily than ever before. Now it is possible to customize notification message content directly from the web interface.

You may find notification templates on the **Notification List** tab of the **Customer Class** page. On this tab you can view the name of the template, sending preferences and template status: **System** (the default template) or **Custom** (the modified one). Upon clicking on the **Custom / System** link you will be redirected to the **Edit Notification Template** page that allows you to view the type of notification template and modify the subject, body, format and post processing rule for variables (**PP Rule** on the web interface).

In the **PP Rule** field you can specify Perl expressions just as in other templates within PortaBillling® (please refer to the **PortaBilling® Templates Guide** for more details).







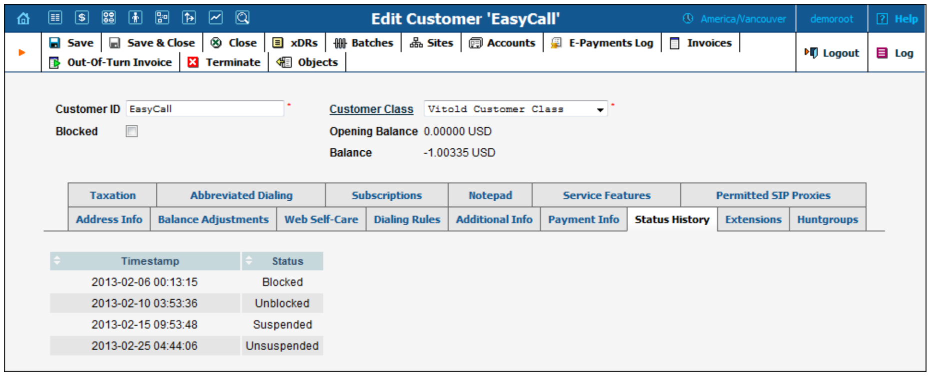
Note that custom notification templates previously uploaded into template storage will be migrated to the Customer Class settings during the software upgrade to MR32. All custom templates will be grouped by language and a separate Customer Class will be created for each language (for more details please refer to the **Important Upgrade Notes** section of the **PortaBilling® Administrator Guide**.)

This functionality offers a flexible means for managing your customers' notification templates, thus meeting your company's communication policy requirements.

Ability to See When and How Customers' Status Changes

PortaBilling® administrators can now track important events in a customer's lifecycle, such as when a customer was blocked / unblocked, suspended / unsuspended or terminated. This information is available on the customer **Status History** tab and can be used to check a customer's history (e.g. to determine whether to thank him by inviting him to your loyalty program).

Your resellers and customers can also see this information on their Self-care interfaces.



Parallel Generation of Invoices and Statistics

In Maintenance Release MR32, the processes for creating invoices and customer statistics (xDRs) run in parallel mode. This allows you to simultaneously generate statistics, produce and email invoice PDF files for several customers. This substantially reduces the total amount of time required to complete the billing process, ensuring that even with an increased number of customers, billing can be completed during nighttime hours so that customers receive their invoices as early as possible in the morning.

In addition to running multiple invoice generation processes in parallel on the same PortaBilling® Web server, it is possible to further scale up the performance by utilizing multiple web servers in a Web Cluster.

The default configuration that appears right after the update to MR32 is designed for 3-4 CPU cores. It can be easily adjusted to your server hardware on the Configuration Server (the Worker group of the Admin instance).

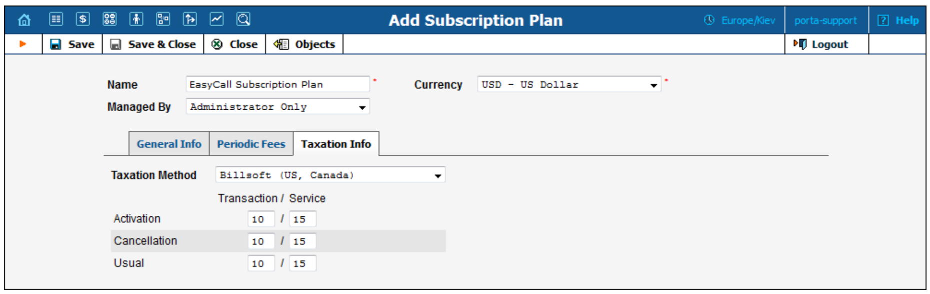
The same technology of parallel process execution for other resource-intensive calculations will be introduced in future releases.

Billsoft® Taxation Improvements

Taxes are an essential part of your business. Taking a huge number of customers into account can sometimes become rather intricate in terms of keeping track of taxes. We have improved the plug-in for the BillSoft EZTax suite so that along with the ability to automatically calculate service taxes you can now manually retrieve the service tax reports created by PortaBilling® and pass them to Billsoft® for further processing. The ultimate goal of this improvement is to safely maintain and provide access to the service tax reports of your many customers.

Beginning with MR32, you can assign specific Billsoft® Transaction / Service codes for subscription plans from the web interface. These codes define which service (e.g. hardware lease, service fee) the tax is being applied to. This can be done in the dedicated **Taxation Info** tab of the **Subscription Plan** page.

Please note that it is imperative to correctly match Transactions with Services in the Billsoft® EZTax suite. For taxation to be calculated and applied properly the information provided must be accurate.



Cloning of Volume Discount Plans

The configuration of the volume discount plan is an important step since it allows you to dynamically modify rates depending on the amount of traffic generated by customers. To minimize the work required for creating a new volume discount, PortaBilling® now offers the capability for creating a new volume discount plan as an exact copy or clone of an existing one.

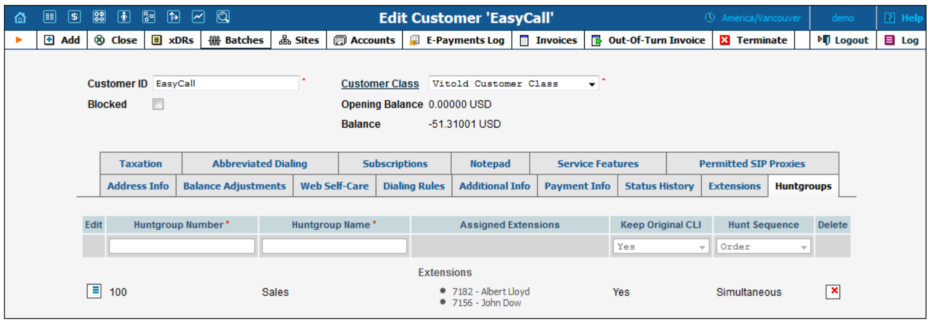
In this case all the parameters for the volume discount plan will be identical and all the discounts will be included, e.g. your old volume discount plan provided a first discount of 10 % off for calls to the US, and a second discount of 20% off for calls to Asia after reaching 500 minutes. The new volume discount plan will have the exact same settings. Once you clone the discount you can proceed to make minor adjustments to a newly created volume discount plan as needed.

New Functionality for Huntgroups

Keep Original CLI feature

Now customers can choose how to display caller info when a call is redirected to a huntgroup. The **Keep Original CLI** feature allows customers to see who is calling them and what number was dialed. It has the following options:

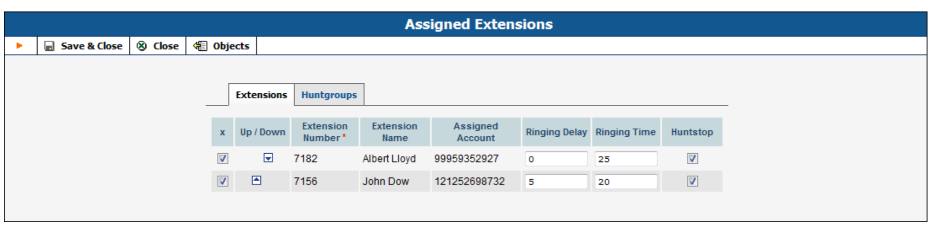
- **Yes** – The call is redirected with the phone number and name of the original caller.
- **No** – The call is redirected with the phone number and name of the huntgroup.
- **ID Only** – The call is redirected with the phone number of the original caller and name of the huntgroup.



This feature will benefit your IP Centrex customers who provide "call center" services, for which it is important to know not only who is calling, but which number was originally dialed.

Ring delay and duration for each extension

When assigning extensions to a huntgroup you can specify the ring delay and duration for each extension. This will allow your corporate customers to adjust their incoming call scheme to the particular needs of different departments.



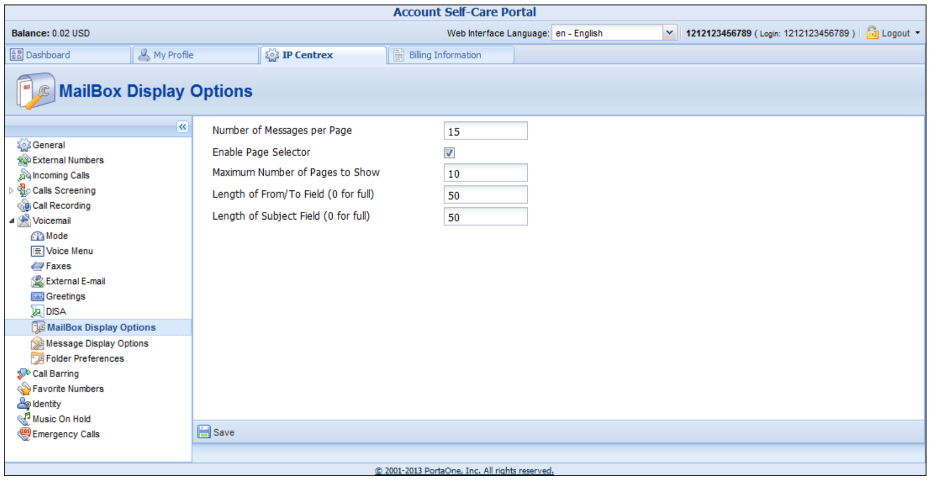
Auto-provisioning for New Models of IP Phones

The list of IP phones that are auto-provisioned by PortaSwitch® has been extended to include OneNetUno ATA-171.

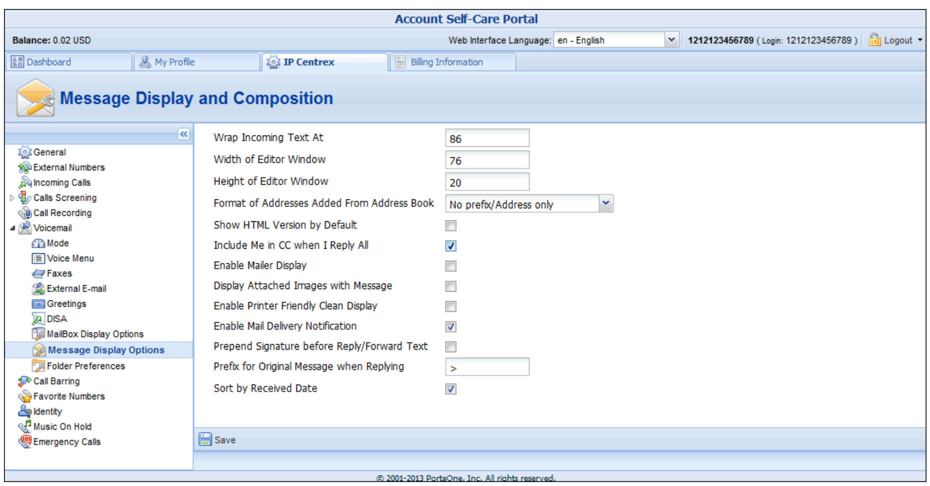
Further Feature Migration to the New Self-care Interface

A few new pages have appeared in the New Self-care interface in the current release:

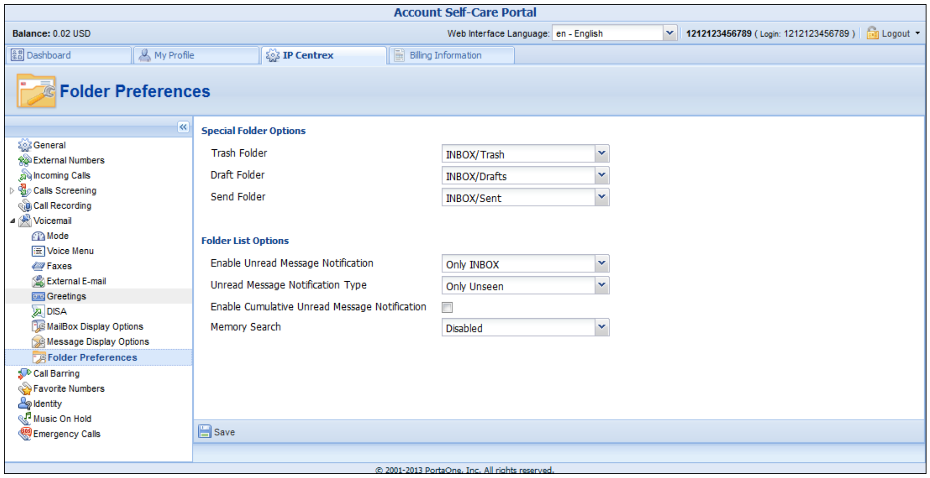
- MailBox Display Options



- Message Display Options



- Folder Preferences



A Handy New Period Wizard for the New Self-care Interface

Now your end-users can configure time intervals of any complexity for forwarding their calls. The new Period Wizard is intuitive and allows for configuring multiple time intervals from a single page in just a few mouse clicks.