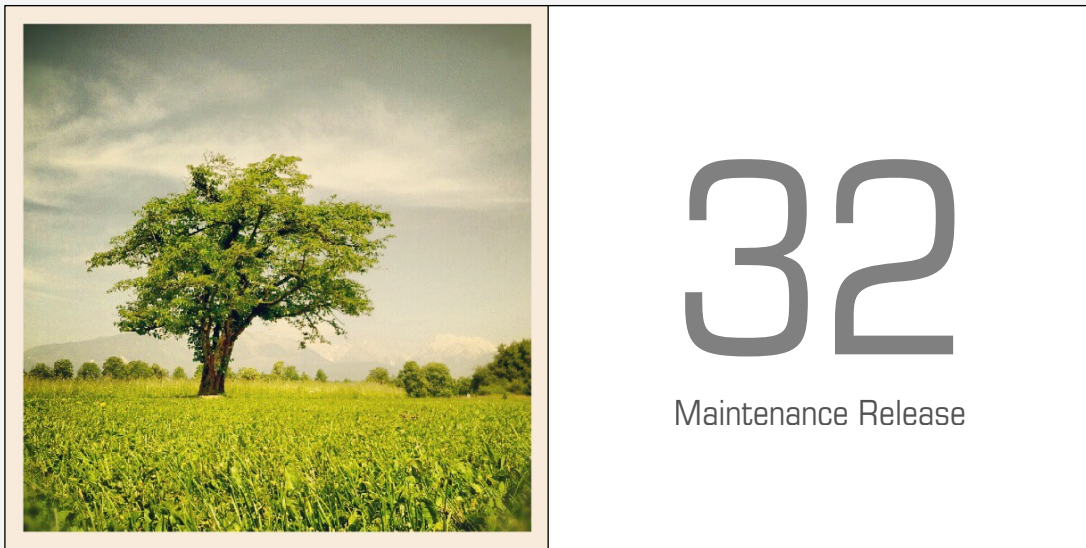


Porta  Switch[®]



New Features Guide

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PortaSwitch: New Features Guide, March 2013
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.

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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.

PortaBilling Help

[Home](#)

Contents

- Main Menu
- Management
- Billing
- Rating
- Participants
 - Representative Management
 - Representatives
 - Add / Edit Representative
 - Add / Edit Distributor
 - Add / Edit Reseller
 - Customer Management
 - Add / Edit Customer
 - Retention Restrictions
 - Batch Management
 - E-payments Log
 - Customer Sites
 - **Out-of-Turn Invoice**
 - Account Management

Out-Of-Turn Invoice

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. The administrator can generate an out-of-turn invoice (to cover only a few specific items) on demand. The **Out-Of-Turn Invoice** screen is accessible from the **Edit Customer** page by clicking the **Out-Of-Turn Invoice** button. It shows you the xDRs that are available for the out-of-turn invoice.

Edit Customer 'EasyCall Ltd.'

[Save](#) [Save & Close](#) [Close](#) [xDRs](#) [Batches](#) [Accounts](#) [E-Payments Log](#) [Invoices](#) [Out-Of-Turn Invoice](#) [Logout](#) [Log](#)

Customer ID: EasyCall Ltd.

Customer Class: Default customer class

Blocked:

Opening Balance: 0.00000 USD

Balance: 100.00000 USD

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Taxation	Abbreviated Dialing	Subscriptions	Netquad	Service Features	Permitted SP Provider
Address Info	Balance Adjustments	Web Self Care	Dialing Rules	Additional Info	Payment Info
Extensions	Handgroups	Custom Fields			

Action: Manual Charge

Service: Credits / Adjustments

Amount: 99 USD

Date: 2012-12-20

Visible Comment:

Internal Comment: #15657

1 2

Include into Out-Of-Turn Invoice

Action Description: Use this transaction to manually charge the Customer for a specific service they used (increases the Customer's balance).

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

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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 PortaBilling® (please refer to the **PortaBilling® Templates Guide** for more details).

Edit Customer Class 'Default customer class'

Name: Default customer class | Currency: Not set

Managed By: Administrator Only

General Info | Taxation | Notification List

Send Statistics: Do Not Send

Invoice Template: Do Not Create Invoice

Send Invoices:

Invoice Grace Period: _____ Days

Collection Threshold: _____

Notify Customer: _____ Days before due date

Re-Send Invoice: _____ Days after due date

Attempt to Charge the Listed Credit Card: _____ Days after due date

Suspension Warning Time: _____ Days

Suspension Time: _____ Days

Closing Warning Time: _____ Days

Closing Time: _____ Days

Charge Credit Card When the Billing Period Is Closed:

Description: _____

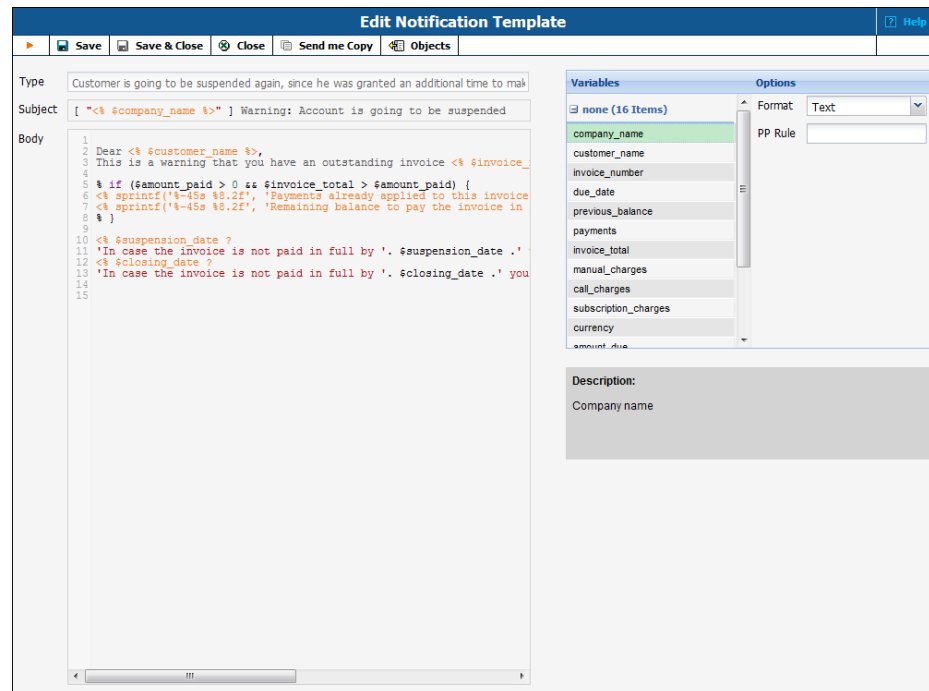
Edit Customer Class 'Default customer class'

Name: Default customer class | Currency: Not set

Managed By: Administrator Only

General Info | Taxation | Notification List

Notification	Mail		SMS	
	Send	Template	Send	Template
Customer is going to be suspended again, since he was granted an additional time to make a payment, but no payment has been received so far	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Due date for invoice is approaching	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Periodic payment error	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Balance warning threshold crossed	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Payment receipt	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Invoice is voided	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Invoice is generated	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Credit limit exceeded	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Customer is about to be suspended	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Customer is closed	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Account screened	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Account quarantined	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Invoice is overdue	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Volume discount threshold crossed	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Customer is about to be closed	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Customer was suspended	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System
Payment applied to the customer account	<input checked="" type="checkbox"/>	System	<input type="checkbox"/>	System



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.

Timestamp	Status
2013-02-06 00:13:15	Blocked
2013-02-10 03:53:36	Unblocked
2013-02-15 09:53:48	Suspended
2013-02-25 04:44:06	Unsuspeneded

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.

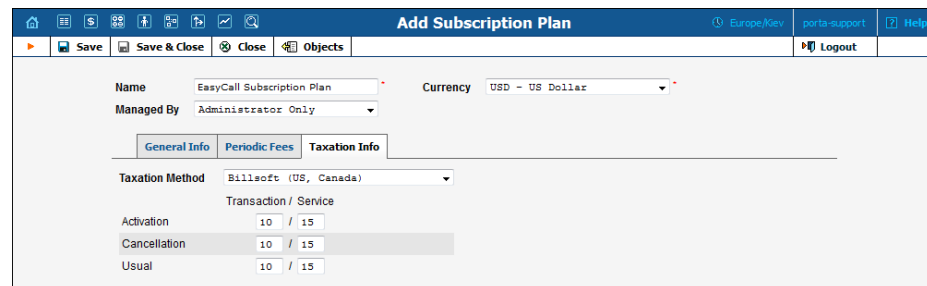
Billsoft® Taxation Improvements

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.



The screenshot shows the 'Add Subscription Plan' web interface. The title bar includes 'Add Subscription Plan', 'Europe/Dev', 'porta-support', and 'Help'. The main content area has a header with 'Save', 'Save & Close', 'Close', and 'Objects' buttons, and a 'Logout' button. The form fields include 'Name' (EasyCall Subscription Plan), 'Currency' (USD - US Dollar), and 'Managed By' (Administrator Only). Below these are three tabs: 'General Info', 'Periodic Fees', and 'Taxation Info'. The 'Taxation Info' tab is active, showing a 'Taxation Method' dropdown set to 'Billsoft (US, Canada)'. Below this is a table for 'Transaction / Service' with three rows: 'Activation', 'Cancellation', and 'Usual', each with a value of '10 / 15'.

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.

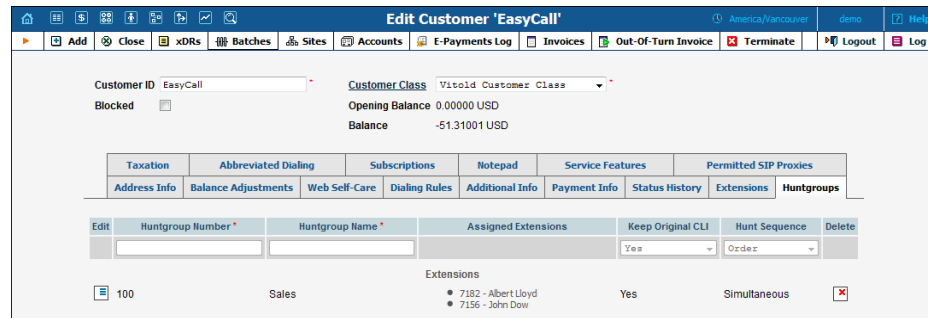
New Functionality for Huntgroups

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:

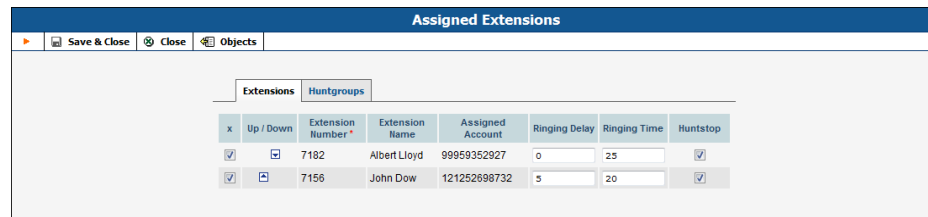
- **Yes** – The call is redirected with the phone number and name of the original caller.
- **No** – The call is redirected with the phone number and name of the huntgroup.
- **ID Only** – The call is redirected with the phone number of the original caller and name of the huntgroup.



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

The screenshot shows the 'Account Self-Care Portal' interface. At the top, it displays the user's balance (0.02 USD), language (en - English), and login information (1212123456789). The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The current page is titled 'MailBox Display Options'. On the left, a sidebar menu lists various settings categories, with 'MailBox Display Options' selected. The main content area contains the following configuration options:

Number of Messages per Page	15
Enable Page Selector	<input checked="" type="checkbox"/>
Maximum Number of Pages to Show	10
Length of From/To Field (0 for full)	50
Length of Subject Field (0 for full)	50

A 'Save' button is located at the bottom right of the configuration area. The footer contains the copyright notice: © 2001-2013 PortaOne, Inc. All rights reserved.

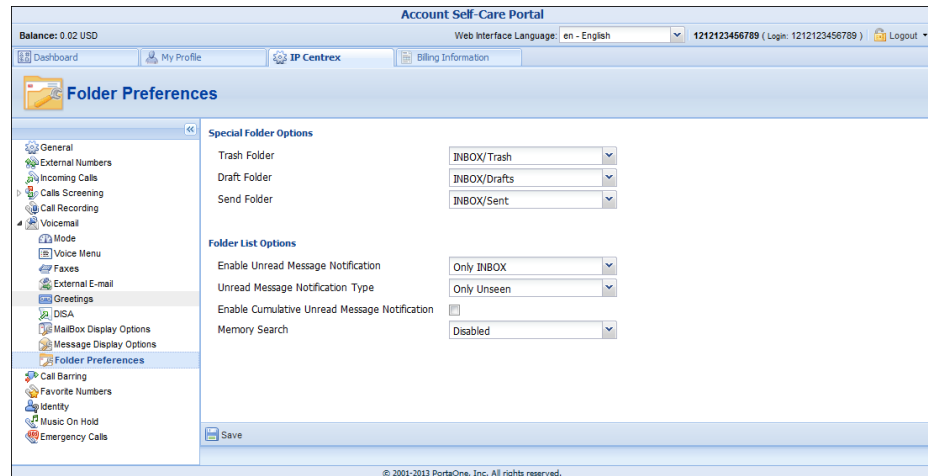
- Message Display Options

The screenshot shows the 'Account Self-Care Portal' interface. At the top, it displays the user's balance (0.02 USD), language (en - English), and login information (1212123456789). The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The current page is titled 'Message Display and Composition'. On the left, a sidebar menu lists various settings categories, with 'Message Display Options' selected. The main content area contains the following configuration options:

Wrap Incoming Text At	86
Width of Editor Window	76
Height of Editor Window	20
Format of Addresses Added From Address Book	No prefix/Address only
Show HTML Version by Default	<input type="checkbox"/>
Include Me in CC when I Reply All	<input checked="" type="checkbox"/>
Enable Mailer Display	<input type="checkbox"/>
Display Attached Images with Message	<input type="checkbox"/>
Enable Printer Friendly Clean Display	<input type="checkbox"/>
Enable Mail Delivery Notification	<input checked="" type="checkbox"/>
Prepend Signature before Reply/Forward Text	<input type="checkbox"/>
Prefix for Original Message when Replying	>
Sort by Received Date	<input checked="" type="checkbox"/>

A 'Save' button is located at the bottom right of the configuration area. The footer contains the copyright notice: © 2001-2013 PortaOne, Inc. All rights reserved.

- 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.

