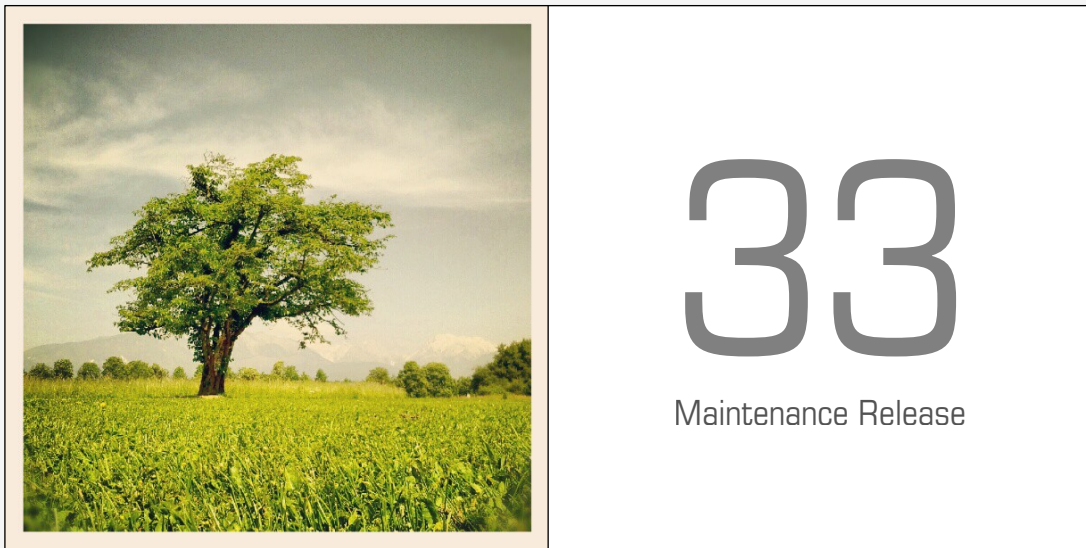# Porta Switch®

33

Maintenance Release

New Features Guide

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Table of Contents

Preface

PortaSwitch® Maintenance Release 33 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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Prorated Thresholds in Volume Discount Plans

This new functionality permits you to prorate volume discount thresholds according to the number of days remaining in the first usage period (the period that defines how often the volume discount is reset) after the volume discount assignment.

Let's consider a few usage examples:

1. **Free minutes** – A volume discount plan with a monthly usage period is created with a 100% discount for up to 1000 minutes, and after 1000 minutes a regular rate is applied.
   - If the volume discount plan is assigned on October 1st, then the threshold is 1000 minutes.
   - If the volume discount plan is assigned on October 20th, then the threshold becomes 387 minutes (since 12 days remain in October).
   - If the volume discount plan is assigned on October 30th, then the threshold is 65 minutes (since 2 days remain in October).

   The threshold is then 1000 minutes for the following month and thereafter.

2. **Regular discounts** – A volume discount plan offers no discount for the first 100 minutes, a 10% discount for up to 200 minutes and a 20% discount after 200 minutes. The volume discount plan has a weekly usage period. If the volume discount plan is assigned on Wednesday then the first threshold is 71 minutes and the second threshold is 143 minutes since only 5 days remain in the current usage period. Thresholds are then 100 and 200 minutes for the next week and thereafter.

3. **Change of Volume Discount Plan** – The **"Premium"** volume discount plan is created with a 100% discount for the first 1000 minutes and after 1000 minutes a regular rate is then applied. A **"Standard"** volume discount plan is created with a 100% discount for to the first 500 minutes and after that a regular rate is applied. The volume discount plan has a monthly usage period. If the **"Premium"** volume discount plan is assigned on October 8th, then the threshold is 774 minutes (since 24 days remain). If the volume discount plan is changed to **"Standard"** on October 21st, the threshold is 177 minutes (since 11 days remain).

With this new functionality you can provide your customers with correct billing for incomplete volume discount usage periods, thus preventing your business from revenue losses.

Invoices Review

In order to provide your customers with correct invoices, PortaBilling® allows you to review invoices before sending them to your customers. The administrator reviews the invoices and then approves them, or if necessary, performs balance adjustments (for example, to correct an invoice total) or sends them for regeneration (if, for example, during an

invoice review the administrator finds something wrong with the invoice template requiring him to change it). Only after that step are the invoices delivered via email to your customers.

This functionality can be used for the following situations:

- **Billing of premium customers** – If you have premium customers you naturally want to provide them with high quality services. The invoices are no exception. You want to make sure that all charges are included and that the invoice total is calculated correctly.

- **Billing of a new service** – An administrator creates a new service with new ratings, tariffs, products and invoice templates. If he is not sure whether all the new charges are correctly calculated he can activate the "send invoice after review and approval by administrator" option for a specific customer class. At the end of the billing period the invoices are created and marked as "needs review," but are not yet sent to customers and not available for download from the web interface. Only after the administrator checks and approves the invoices they are delivered to customers via email.

- **Changes in templates** – If, during the invoice review an administrator discovers a problem with a template and a PDF file also does not appear to be correct, he changes the template. Then, on the **Invoices Review** page he selects all of the "under review" invoices that were created using this template and regenerates correct ones. New PDFs are then generated and sent for a second review.

If the "auto-charge credit card" functionality is enabled together with the "review invoices" functionality, then the credit card will be charged after the administrator's approval of the invoice.

To prevent situations where invoice review has not been performed there is an additional field that defines how many days the invoices remain under review before they are auto-approved by PortaBilling®. Each day administrators, who belong to the corresponding mailing list, receive an email with a list of all the invoices to be reviewed. If an invoice is not reviewed by the end of the specified period, it is automatically approved and sent to the customer. An email with a list of all auto-approved invoices is sent to the administrators who belong to the corresponding mailing list.

Back-dated Charges for Invoices Under Review

When an administrator reviews invoices he can apply balance adjustments to be included on the current invoice. He specifies the amount and the date of the balance adjustment that is covered by the most recent billing period.

Consider the following example:
The administrator reviews invoice #123 for March 2013 with an invoice total of $150, notices an error (a $100 subscription is charged, but it should have been free this month according to the agreement). He can click the **Refund** button and apply a $100 credit to the customer. The invoice is then automatically scheduled for recalculation / regeneration. After that, the invoice shows a credit of $100 and the total is changed according to this transaction. As a result, the invoice total is $50.

With this functionality you can apply balance adjustments that will be included on the most recent invoice which is still under review.

Automation of BillSoft® Updates

BillSoft® provides their customers with regular updates and now PortaBilling® facilitates automatic updating of BillSoft®. This provides a safe and reliable way of updating BillSoft® with no unanticipated issues emerging during tax calculation.

Also, beginning with MR33 there are two new options for the BillSoft® installation directory:
* Installation to the system's default folder
* Installation to a separate folder for each of the system's environments

Thus if more than one company is hosted on one common system, each company may be associated with an individual BillSoft® contract. This provides the ability for installing particular versions of BillSoft® software with corresponding updates for each separate environment. Therefore, during tax calculation the folder for the environment will be checked first, and if the folder does not exist, all of the operations will be performed within the default folder.

Ringing Tone Generation

You may face a situation where some of your vendors do not provide the proper service quality. This causes a high Post Dial Delay which results in discontented customers. PortaSwitch® now presents a solution that helps owners of PortaSwitch® to prevent such a negative experience by generating the ringing tone to the caller. For the caller it will appear as if the call is already being connected to the called party. This feature is also useful when dealing with vendors that are unable to generate a "180 ringing." This functionality may be enabled by defining the corresponding value in the **Service Policies** and can later be assigned at the *account* level.

Authorization and Charging Based on the P-Charge-Info SIP Header

When CLI-based authorization is used and the call is forwarded to PortaSIP® for termination, the original caller is charged for the call. In order to charge the forwarder and instead, display an original CLI to the called party, the **P-Charge-Info** SIP header can be used. This header conveys information about the identity of the party to be charged.

For this functionality PortaBilling® introduces a new authorization rule based on the **P-Charge-Info** SIP header. The configuration is done from the **Call Handling** screen and defined in the **Authorize By** field.
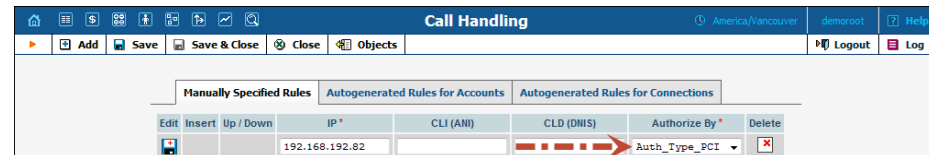
For calls made via this type of authorization the **P-Charge-Info** SIP header will be used and if the **P-Charge-Info** SIP header is missing in the request above, PortaSIP® will reject the call.

Let's take a look at the authorization and charging example based on the **P-Charge-Info** SIP header:
- Phone B is provisioned on your customer's IP PBX and has follow-me set up for off-net destination C. Phone B's number is consequently represented in PortaBilling® as an account.
- User A calls phone B's number.
- PBX forwards the call to your PortaSIP® server.
- The PortaSIP® server sends the call to the off-net destination C.
- User A's number is displayed on user C's phone.
- Phone B's account is charged for the forwarded call.