

Porta  Switch[®]



New Features Guide

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Maintenance Release 41
V1.41.7

Please address your comments and suggestions to: Sales Department,
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Preface

PortaSwitch® Maintenance Release 41 is the next leap-forward release, consistent with our “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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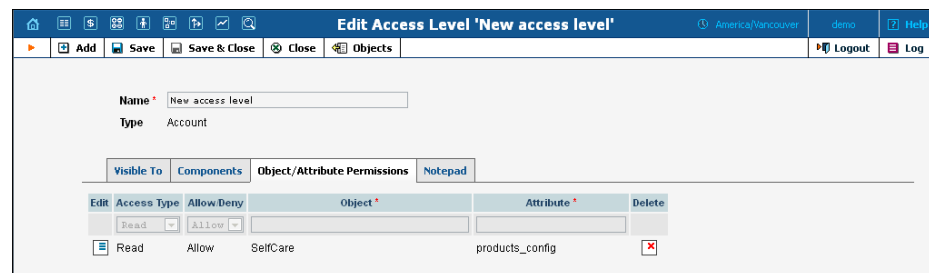
French and Spanish Version of Self-care Portals

We have now added French and Spanish languages to the customer and account self-care interfaces.

Self-management of Assigned Add-On Products

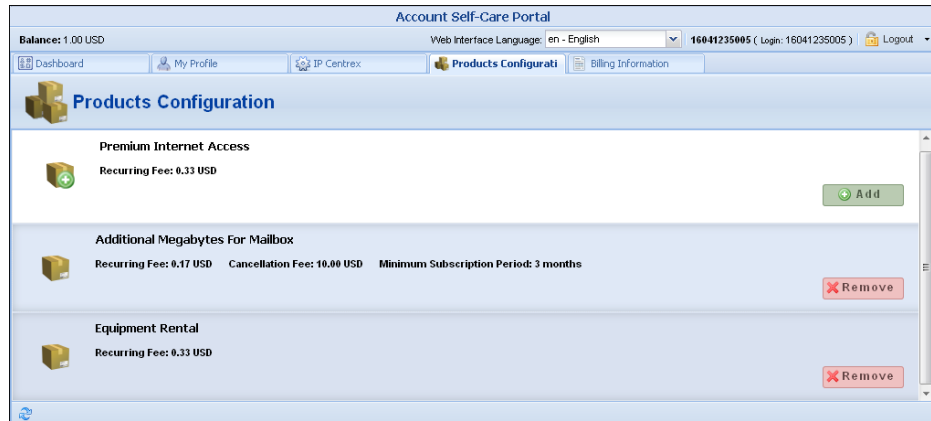
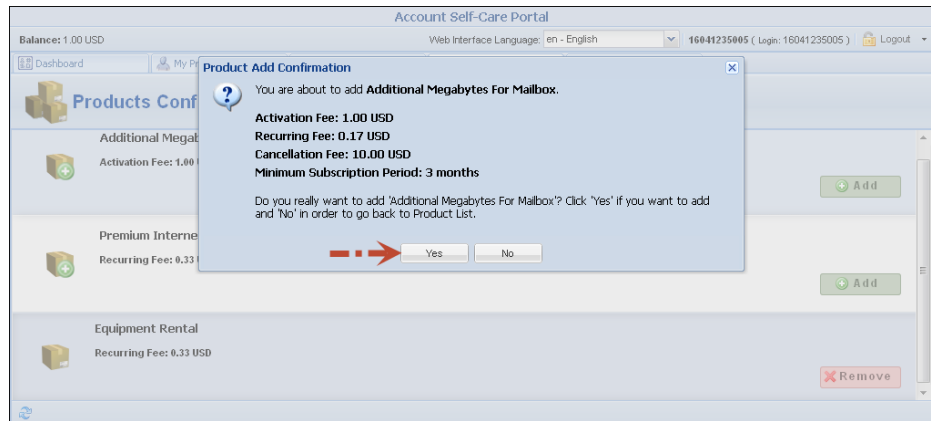
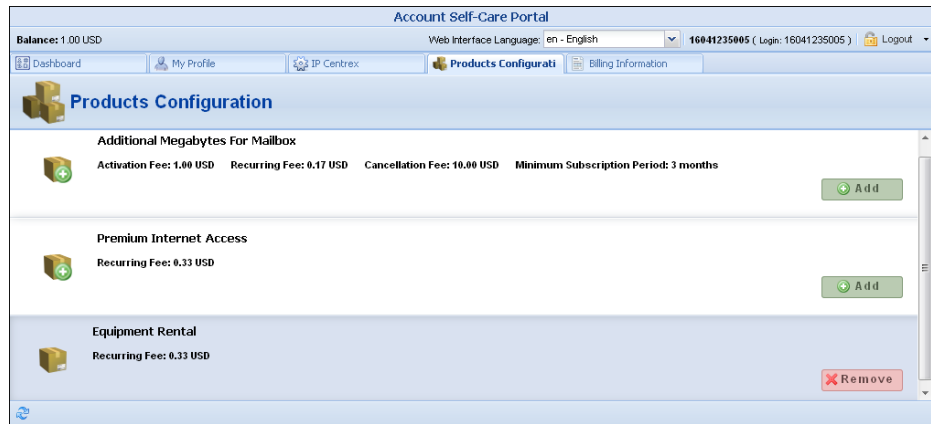
Your customers have the opportunity to manage add-on products by themselves now via the self-care interface. They can change sets of products by including any of the new add-on products available to them or removing the ones that are no longer needed.

Managing of products is done on the **Products Configuration** tab now available on the **Account Self-care Interface**. On the interface, this tab is hidden by default. To make it visible, the administrator creates a new access level for required accounts on the **Access Level Management** page and then modifies the **Object / Attribute Permissions** as shown in the screenshot below.



All changes in product sets are done by means of the **Add** and **Remove** buttons. Before new add-on product(s) are included with a set, the system checks the new products for compatibility.

For example, if your customer is already assigned the “Equipment Rental” add-on product and wants to assign a newly available “Additional Megabytes for Mailbox” add-on product, all he needs to do is press the **Add** button and then press **Yes** in the new pop-up window to confirm the action. The “Additional Megabytes for Mailbox” add-on product will then be assigned to this account.



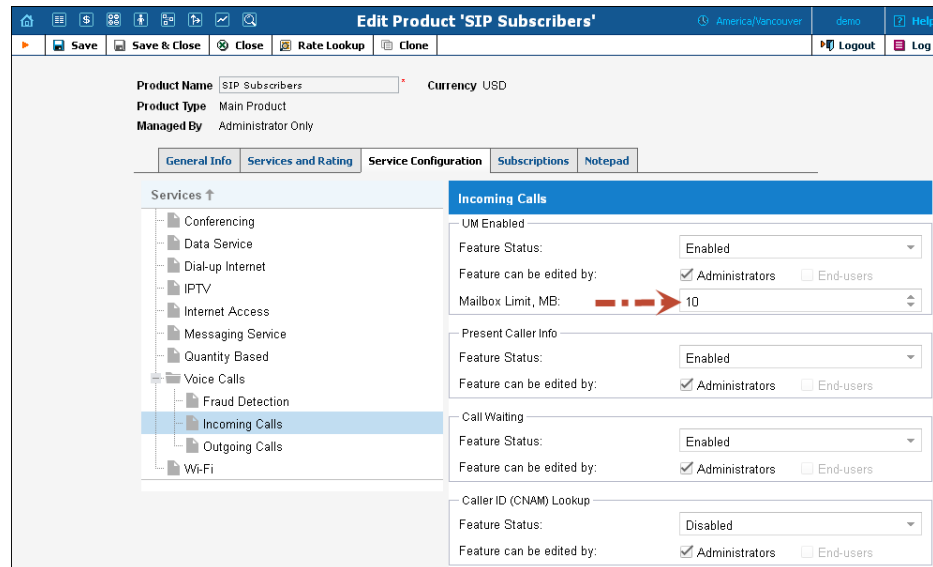
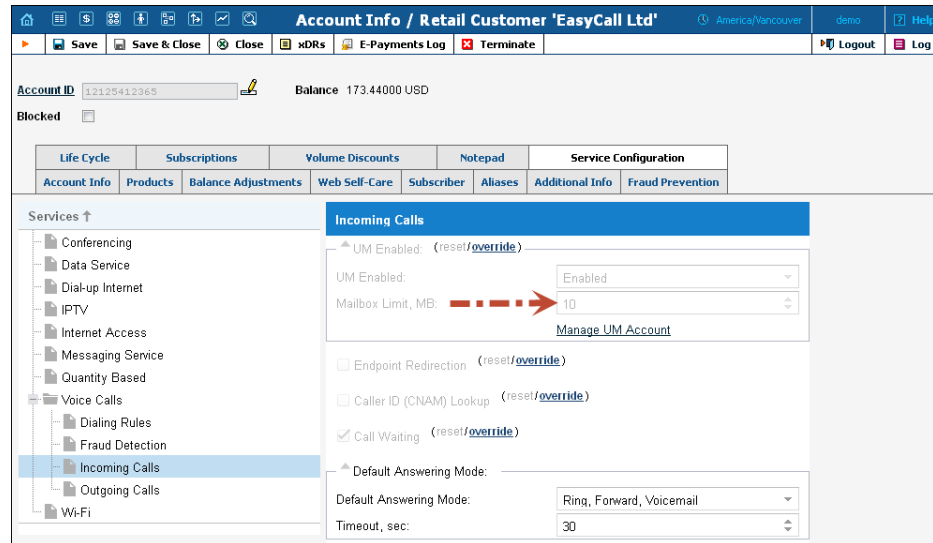
Now your customers can manage their own add-on products via the self-care interface, and thus reduce the workload for administrators.

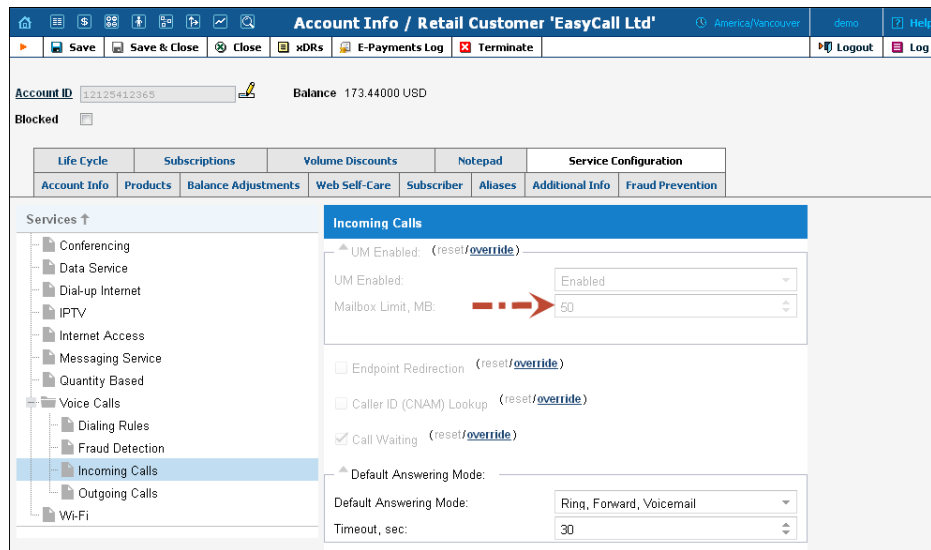
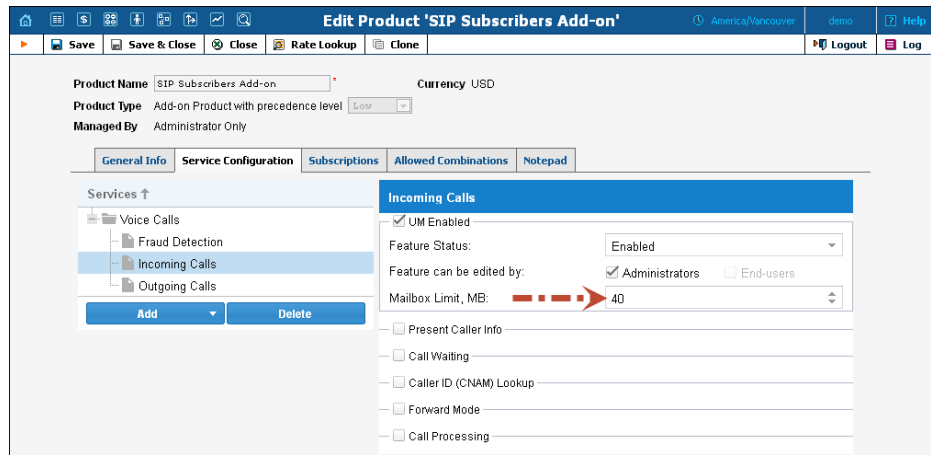
Quota Management for User Mailbox

PortaBilling® allows you to define / change your mailbox limit. The mailbox limit is set via the main product; increasing the limit can be done via add-on products. Thus you can offer your customers different mailbox packages with periodic fees based on the mailbox size used.

The mailbox limit default value is 10 MB.

Let's have a look at the following example. Your customer has a mailbox limit set to 10 MB. He wants to increase the limit to 50 MB (an optional service that has a \$5 per month fee). To do this, the administrator creates an add-on product, which sets the additional mailbox limit to 40 MB and has a subscription fee of \$5 per month. He then associates this add-on product with the main product and assigns it to the account. The customer now has the desired mailbox limit of 50 MB.





Invoice Rounding

PortaBilling® invoices for customers can be set to up to five-decimal-point precision, although it is more usual to see just two decimal points. To avoid confusion, it is possible to specify up to what number after the decimal point the invoice total amount will be rounded off to.

When an invoice is produced, the invoice total is calculated according to the rounding algorithm (which is set by the owner of the system), and then the difference between the sum of all the charges and the invoice amount is written as a separate xDR with the proper (plus or minus) sign.

For example, an invoice total is XXXXX.XX000. An X (to the left) means that the digit(s) in this position will be unchanged, while a 0 (to the right) means that this position will be rounded off.

The screenshot shows the 'Add Customer Class' configuration page. The 'Name' field is 'Retail SIP' and 'Currency' is 'USD - US Dollar'. The 'Managed By' dropdown is set to 'Administrator Only'. The 'General Info' tab is active, showing various settings. The 'Invoice rounding' field is highlighted with a red box and contains the value 'XXXXX.XX000'. Other settings include 'Send statistics via email' (Full Statistics), 'Invoice Template' (Retail Customer), 'Send invoices via email' (After review and approval by admin), 'Auto-charge invoice balance to credit card' (checked), and various notification and timing settings.

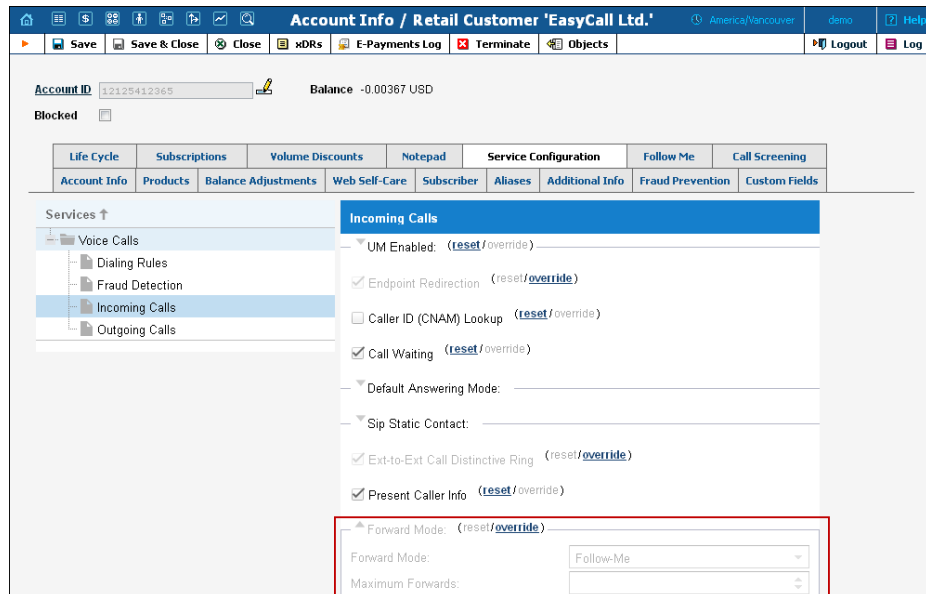
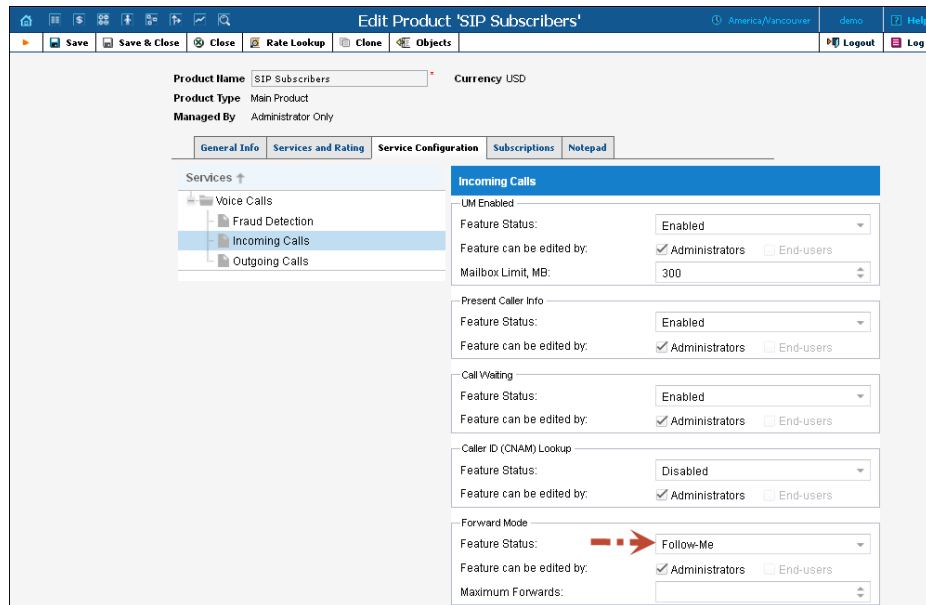
For example, the rounded off invoice total is X.XX000. The customer has the following xDRs: 3.94748, 0.42965 and 2.51593. The xDR total is 6.89306, which after rounding off becomes 6.89. An xDR for – (minus) 0.00306 is inserted into the database. The invoice produced has a total of 6.89.

This new functionality avoids causing confusion among your customers and presents invoices in a way they are accustomed to seeing them.

Migration of the Forward Mode Option

The **Forward Mode** option has been added at the **Product** level.

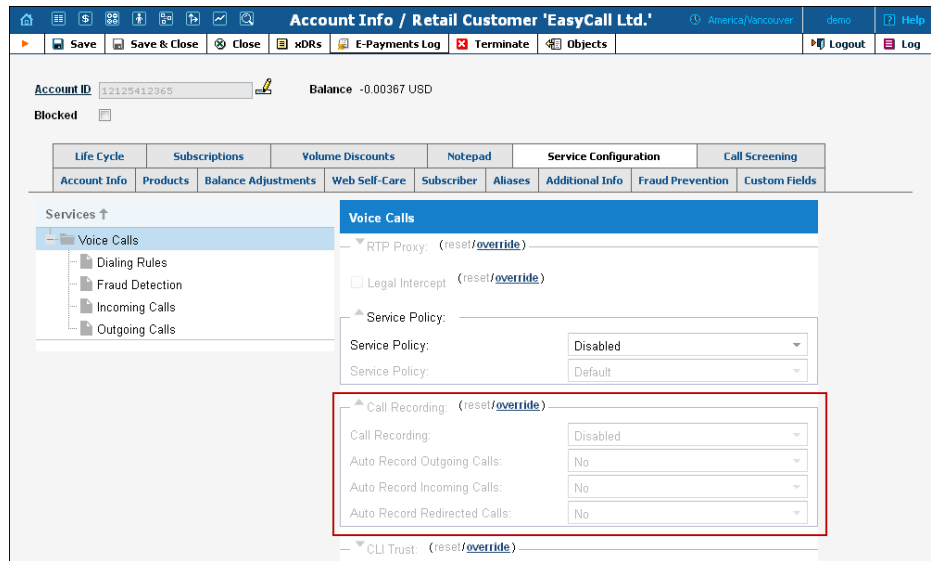
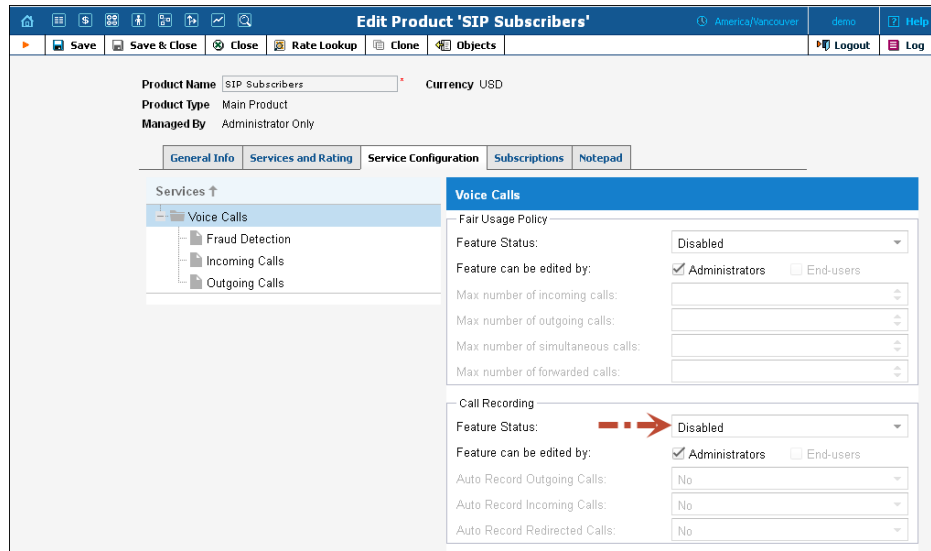
Now it is possible to define this option for a specific product and have it automatically assigned to all accounts that have this product. This makes it easier to configure the forwarding mode for multiple accounts. Furthermore, you can offer add-on products with periodic fees depending on the type of forwarding and the number of maximum forwards configured.



Migration of the Call Recording Option

The **Call Recording** option is no longer used at the **Customer** level. This option has been migrated to the **Product** and **Account** levels.

These changes allow you to increase revenue by offering your customers the add-on product with **Call Recording** functionality enabled.

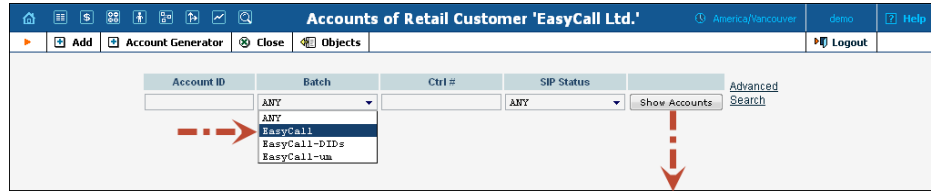


Maintaining Add-on Products in Batch Mode

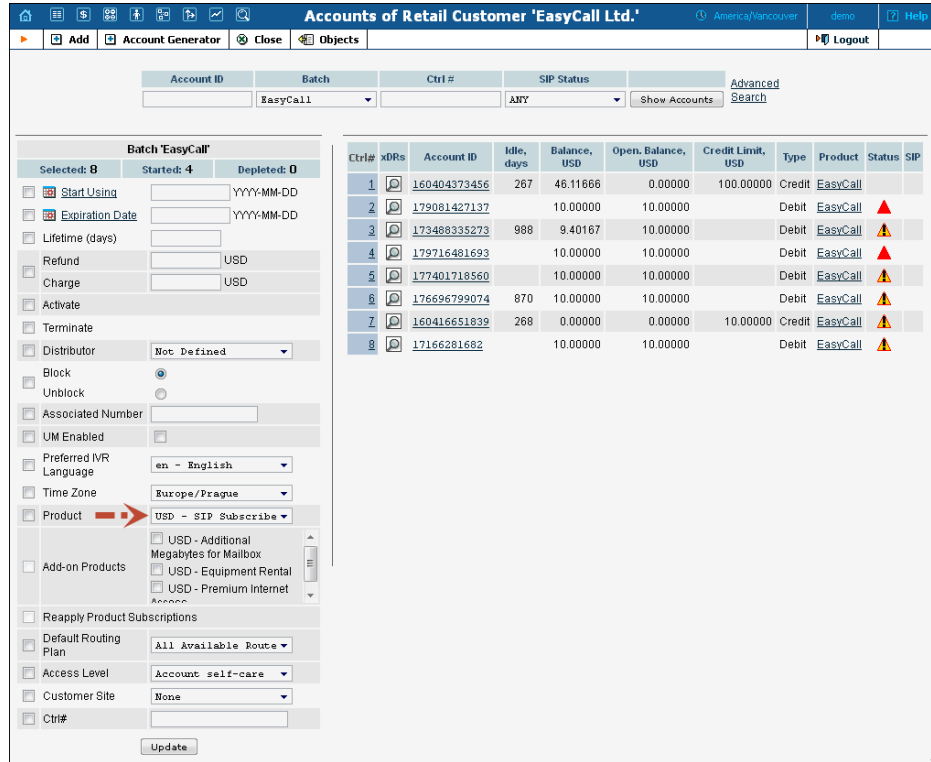
Now you have the opportunity to assign add-on products to accounts in batch mode. Thus, you can immediately change product configurations for an entire set of accounts.

Let's have a look at the following example. You want to assign all available add-on products to all accounts assigned to the "SIP Subscribers" main product which also belong to the "EasyCall" batch. To do this, you need to do the following:

- open the **Accounts Info** page;
- select the necessary batch and click the **Show Accounts** button;



- select the desired main product from the **Products** list;



- select the **Products** and **Add-on Products** check boxes;

Batch 'EasyCall'

Selected: 8 Started: 4 Depleted: 0

Start Using YYYY-MM-DD

Expiration Date YYYY-MM-DD

Lifetime (days)

Refund USD

Charge USD

Activate

Terminate

Distributor Not Defined

Block

Unblock

Associated Number

UM Enabled

Preferred IVR Language en - English

Time Zone Europe/Prague

Product USD - SIP Subscribe

Add-on Products

- USD - Additional Megabytes for Mailbox
- USD - Equipment Rental
- USD - Premium Internet Access

Reapply Product Subscriptions

Default Routing Plan All Available Route

Access Level Account self-care

Customer Site None

Ctrl#

Ctrl#	xDRs	Account ID	Idle, days	Balance, USD	Open. Balance, USD	Credit Limit, USD	Type	Product	Status	SIP
1		160404373456	267	46.11666	0.00000	100.00000	Credit	EasyCall		
2		179081427137		10.00000	10.00000		Debit	EasyCall	▲	
3		173488335273	988	9.40167	10.00000		Debit	EasyCall	▲	
4		179716481693		10.00000	10.00000		Debit	EasyCall	▲	
5		177401718560		10.00000	10.00000		Debit	EasyCall	▲	
6		176696799074	870	10.00000	10.00000		Debit	EasyCall	▲	
7		160416651839	268	0.00000	0.00000	10.00000	Credit	EasyCall	▲	
8		17166281682		10.00000	10.00000		Debit	EasyCall	▲	

- select add-on products from the list by ticking the check boxes next to the desired add-on product names; and
- click the **Update** button.

Batch 'EasyCall'

Selected: 8 Started: 4 Depleted: 0

Start Using YYYY-MM-DD

Expiration Date YYYY-MM-DD

Lifetime (days)

Refund USD

Charge USD

Activate

Terminate

Distributor Not Defined

Block

Unblock

Associated Number

UM Enabled

Preferred IVR Language en - English

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- USD - Equipment Rental
- USD - Premium Internet Access

Reapply Product Subscriptions

Default Routing Plan All Available Route

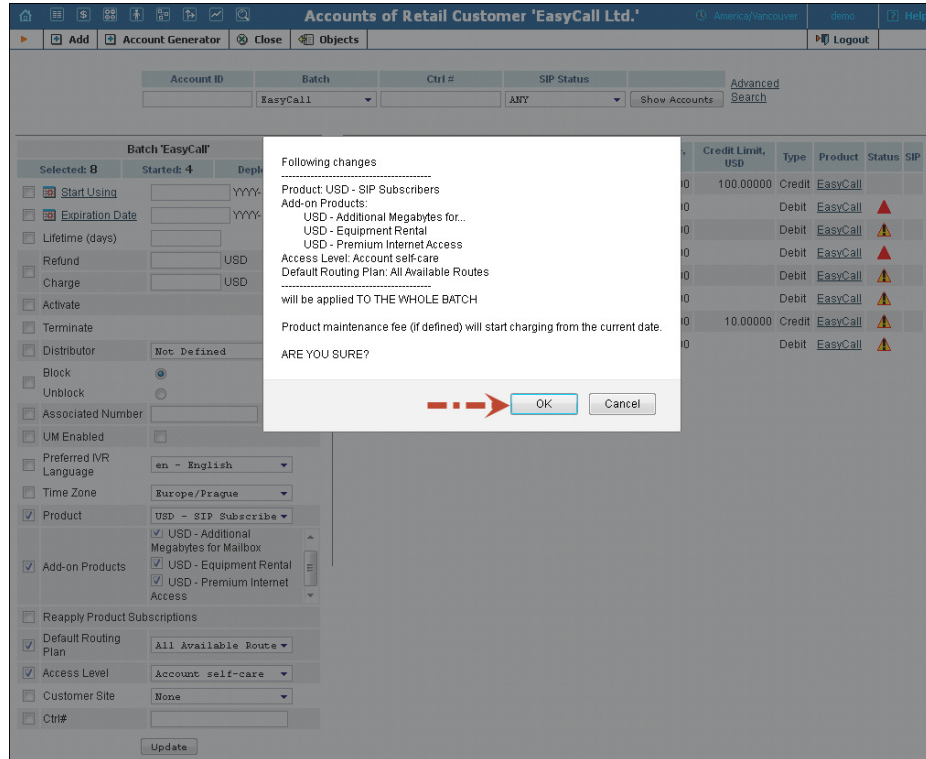
Access Level Account self-care

Customer Site None

Ctrl#

Ctrl#	xDRs	Account ID	Idle, days	Balance, USD	Open. Balance, USD	Credit Limit, USD	Type	Product	Status	SIP
1		160404373456	267	46.11666	0.00000	100.00000	Credit	EasyCall		
2		179081427137		10.00000	10.00000		Debit	EasyCall	▲	
3		173488335273	988	9.40167	10.00000		Debit	EasyCall	▲	
4		179716481693		10.00000	10.00000		Debit	EasyCall	▲	
5		177401718560		10.00000	10.00000		Debit	EasyCall	▲	
6		176696799074	870	10.00000	10.00000		Debit	EasyCall	▲	
7		160416651839	268	0.00000	0.00000	10.00000	Credit	EasyCall	▲	
8		17166281682		10.00000	10.00000		Debit	EasyCall	▲	

The prompt window will be shown with the selected settings, where all of the selected add-ons are enumerated among the other configuration changes. Click the **OK** button to save changes.



Now it is no longer necessary to change product configurations for each account separately – everything can be done in batch mode with just a few clicks.

Integration with SureTax® Taxation Plugin

PortaBilling® now supports the SureTax® taxation plugin. SureTax® is another taxation system that allows you to accurately and easily calculate taxes for your US and Canada customers.

You can use this taxation method to tax voice call services and subscriptions. SureTax® (as a taxation method) can be defined within the customer class or for the individual customer.

Add Customer Class

Name: Residential customers | Currency: USD - US Dollar

Managed By: Administrator Only

Taxation Method: SureTax (US, Canada)

Regulatory Code: VOIP

Sales Type: Residential

Summary Type: Summary by Federal, State and Local Taxes

Decimal Digits: 2

Tax Exemption: No Exemptions

Edit Customer 'EasyCall Ltd.'

Customer ID: EasyCall Ltd. | Customer Class: Default customer class

Blocked: | Opening Balance: 0.00000 USD | Balance: 23.40910 USD

Billing	Taxation	Abbreviated Dialing	Subscriptions	Volume Discounts	Trouble Tickets	Notepad	Service Configuration	Permitted SIP Proxies	Override Tariffs
Address Info	Balance Adjustments	Web Self-Care	Additional Info	Payment Info	Auto-Payments	Status History	Extensions	Huntgroups	Custom Fields

Taxation Method: SureTax (US, Canada)

Sales Type: Residential

Summary Type: Summary by Federal, State and Local Taxes

Decimal Digits: 2

Tax Exemption: Default

When you select SureTax® as a taxation plugin, you can define such parameters as:

- type of customer
- summary type
- type of tax exemption

In addition to the BillSoft® taxation plugin used to tax US and Canada customers, PortaBilling® is now also integrated with SureTax®.

Automated Charges for DID Numbers Acquired from any DID Provider

It is now possible to charge activation and periodic fees for DID numbers received from DID providers other than DIDX or DIDWW.

After the DID numbers are manually uploaded to the system, the vendor specified in the vendor batch will be charged an activation fee for each number. When an uploaded DID number is assigned to a customer, this customer is charged according to specific prices (activation and periodic fees).

Let's have a look at the following example:

This DID number, 123456789, has the following pricing parameters: an activation fee = \$10 and a periodic fee = \$10. There is an Owner Batch assigned to the customer with the following pricing parameters: an additional activation fee = \$10 plus an additional periodic fee = \$4. If a customer has a monthly billing period and the administrator assigns the 123456789 DID number, the customer will be charged \$20 (\$10 for the DID number activation + an additional \$10 activation fee from the Owner Batch) during DID signup and \$14 (\$10 DID number periodic fee + \$4 additional periodic fee from Owner Batch) each month as a periodic fee.

It is easier to keep track of charges for DID numbers that have been manually uploaded to the system as they are now reflected within xDRs.

SIP over TCP for Outgoing Connections Parameters

In addition to the UDP for vendor connections with *Calls to Vendor via SIP* type, it is now possible to use TCP.

The screenshot shows the 'Edit Connection' window for 'Termination to Europe' for the 'GlobalNet' vendor. The 'Type' is 'Calls to Vendor via SIP' and 'Service Type' is 'Voice Calls'. The 'Remote IP' field is highlighted in red and contains the value '192.168.192.197'. The 'Remote IP Port' dropdown is set to 'TCP'. Other fields include 'Remote Gateway ID', 'CLD Tech Prefix', 'RTP Proxying' (set to 'Optimal'), 'Tariff' (set to 'GlobalNet Termination'), 'Caller Identity' (set to 'Do Not Supply'), 'Service Policy' (set to 'Default'), 'Vendor Authorization' (set to 'GlobalNet-SIP'), 'Translate CLD' (set to '<Do not translate the number>'), and 'Translate CLI' (set to '<Do not translate the number>').

So if your vendor only requires SIP over TCP you can now set this option via the connection property for that specific vendor.

New API Methods

New API methods have been added and now an external application can manage data related to:

- Products
- Nodes
- Services