



PortaSwitch



New Features Guide

Maintenance
Release

42



Documentation

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Preface

PortaSwitch® Maintenance Release 42 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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Recurring Payments Without Storing Credit Card Info

The Auto-payments functionality helps to improve the payment process for both end user and service provider, as it is convenient and requires minimum effort from both sides. However, this functionality requires that the service provider store the end user's credit card information. To do that, the service provider must obtain PCI DSS or a similar security certification. The process of this certification is time consuming and requires periodic updating.

However, there is an alternative method for dealing with this situation. Some payment processors can store credit card information on their servers. After an initial transaction, the payment processor generates a reference transaction ID which can be used later for subsequent recurring payments.

The process of payment in this case is as follow: The customer makes an online payment via the self-care interface, enters the credit card information and will use this same credit card for future payments. The credit card data is sent to the payment processor. If the transaction is successful, the payment processor returns a reference transaction ID (which refers to the credit card info stored by the payment processor). Later, when the customer makes another payment, it is done automatically using the stored reference transaction ID.

With this functionality you can launch the service almost immediately since no PCI DSS certification is required.

Multi-level Distributors

Now your distributors are able to create their own subdistributors and share a commission with them, thus extending the size of the distribution network, which in turn will increase the number of customers and your total revenue.

Before any transaction takes place between the end user and the subdistributor, the system checks whether the parties involved have sufficient balance to cover the transaction. This promotes an efficient control of credits and balances for the entire distribution “branch.”

The following example explains how this functionality works and how commissions are distributed between the distributor and his subdistributors.

An administrator creates the *ABC* distributor. The *ABC* distributor logs into his self-care interface and creates the *John* subdistributor. The *John* subdistributor logs into the self-care interface and creates his retail customers. The administrator assigns a default payment commission of 20% to the *ABC* distributor and the *ABC* distributor assigns a default payment commission of 10% to the *John* subdistributor. Then the subdistributor makes a manual payment of \$10 for the retail customer. The balance for each party involved is changed as follows:

- The customer receives \$10 on his balance which he can spend on services.
- The subdistributor now owes the distributor \$9 more (amount of payment minus commission: $\$10 - (\$10 \times 10\%) = \$9$).
- The *ABC* distributor owes the service provider \$8 more (the amount of payment minus commission: $\$10 - (\$10 \times 20\%) = \$8$).

With the help of this functionality, you can now build a branched distribution structure and as a result, increase your total revenue.

New Interface for Managing Products

PortaBilling® offers a completely new interface for managing products. This new interface is user friendly, more intuitive and easier to manage.

The main changes to the **Product Management** interface include the following:

1. When creating a new product, there is a user friendly wizard that allows each parameter to be defined, step by step. During the first steps, you define the name of the product, its currency and the services that are included with this product. The next step is to define the usage charges for consuming the services. On the left side of the **Usage Charging** tab there is information about which service is used and where, and on the right side of that tab there is information about the parameters for charging for this service.

The screenshot shows the 'New Product' configuration page with the 'Usage Charging' tab selected. The 'Service Used At' section contains a table with columns for Service, Node, Access Code, and Tariff. The table has one row: Service: Voice Calls, Node: PortaSIP, Access Code: (empty), Tariff: SIP Phone Subscribers. Below the table are 'Update' and 'Cancel' buttons. A red dashed arrow points from the 'Update' button down to the 'Next' button at the bottom of the page.

This screenshot is identical to the previous one, but the 'Update' button is no longer visible. A red arrow points to the edit icon (a square with a pencil) in the 'SIP Phone Subscribers' tariff cell of the table.

The screenshot shows the 'Usage Charging Entry' dialog box open over the configuration page. The dialog has the following fields and options:

- Originating line information: ANY
- Service allowed for suspended users: None
- Rate match mode: Default
- Overdraft Protection section:
 - Remaining balance requirement: No restriction
 - Lock at least [] USD for each session (checkbox)
 - Limit maximum locked funds for each session to [] USD (checkbox)
 - Each subsequent fund lock allocates no more than [] USD (checkbox)
 - Send alerts when overdraft is detected (checkbox)

 The dialog has 'Save' and 'Cancel' buttons at the bottom. A red dashed arrow points from the 'Save' button to the 'Next' button on the main page.

2. In the next step you define the discount plans.

The screenshot shows the 'New Product' configuration interface. The 'Volume Discount' tab is active. The 'Product Name' is 'SIP Subscribers', 'Currency' is 'USD - US Dollar', and 'Default Discount Plan' is 'EUROPE'. Other tabs include 'Included Services', 'Service configuration', 'Usage Charging', 'Recurring Charging', 'Additional info', and 'Notepad'.

3. Then you define the recurring charges. Here you can select the subscriptions that will be applied to all accounts with this product.

The screenshot shows the 'New Product' configuration interface with the 'Recurring Charging' tab active. A table lists subscription details. A callout box highlights the 'Linksys Phone Rental' subscription.

Subscription	Activation fee	Promotion periods	Recurring fee	Cancellation fee	Del..
Linksys Phone Rental	5.00 USD	--	0.20 USD	10.00 USD	X

The screenshot shows the 'New Product' configuration interface with the 'Recurring Charging' tab active. The table is populated with the following data:

Subscription	Activation fee	Promotion periods	Recurring fee	Cancellation fee	Del..
Linksys Phone Rental	5.00 USD	--	0.20 USD	10.00 USD	X

And in the last steps, you specify additional information such as a product description and the default access level for all accounts that have this product. After that, the configuration for the new product is complete and the product now appears on the **Product Management** page.

These changes make the process of managing products easier and more user friendly, thus reducing the workload on administrators.

Multiple Discount Plans per Account

PortaBilling® allows you to assign several discount plans per account. Each add-on product will now include a volume discount plan. When several add-on products with discount plans are assigned to an account, the account receives a combination of those discount plans.

Ways to Combine Discount Plans

There are several ways that discount plans can be combined with each other. These are defined within the Discount Wizard and can be one of the following: **Never**, **Always**, **When discount lower than 100 is active** and **After reaching the last threshold limit**.

Never

This way of combining provides full override for when a higher priority discount prevents the use of a lower priority one.

Always

Using this way of combining, discount rates are summed up to 100% (there is no money back for a consumed service). For example, two 30% discounts will result in a 60% final discount; 70% + 40% discount rates will result in a 100% discount.

When discount lower than 100 is active

As long as a higher priority discount defines the 100% rate, none of the lower priority discounts are applied. Only after the volume exceeds the 100% discount rate threshold can the rest of the discounts be applied. For example, Germany discounted calls by 100% exclusively for 50 minute calls only, followed by a 50% discount rate for 1000 minute calls, while another discount for the EU offered a 30% discount rate. The EU discount would only become applicable if the 50 minutes are completely used, and then the total discount rate will be $30+50=80\%$ – for a call to Germany.

After reaching the last threshold limit

A higher priority discount prevents the use of lower priority ones until the last limited threshold is reached (regardless of discount rate). For example, Germany discounted calls by 100% exclusively for 50 minute calls, followed by a 50% discount rate for 1000 minute calls, while another discount for the EU offered a 30% discount rate. For calls to Germany the EU discount would only become applicable if the full 1050 minutes are used.

Let's have a look at the following example. Your customer has account number 12126505550 in PortaBilling®. This account is assigned a main product (SIP Product) that sets the rates – so that calls to the US&Canada cost 0.2 USD/min. The administrator assigns 2 discount plans to this account in the following order:

1. A 50% discount on calls to the US for the first 60 minutes.
2. A 100% discount on calls to US&Canada for the first 20 minutes.

Destination Group	Service	Peak Level	Precedence	Threshold	Used	Remaining	Current Discount	Next Discount Level	Discount Start Date	Discount Reset Date	Discount Info
US	Voice Calls	ANY	Add-On Product (Middle)	60	0 minute	60 minute	50.000000%	N/A	2014-07-29	2014-07-30	[?]
US&Canada	Voice Calls	ANY	Add-On Product (High)	20	0 minute	20 minute	100.000000% (for free)	N/A	2014-07-29	2014-07-30	[?]

The account number 12126505550 makes the next calls:

1. First, to Canada – for 15 minutes – it is charged using the “US&Canada” discount plan and comes to 0.0 USD.

Destination Group	Service	Peak Level	Precedence	Threshold	Used	Remaining	Current Discount	Next Discount Level	Discount Start Date	Discount Reset Date	Discount Info
US	Voice Calls	ANY	Add-On Product (Middle)	60	0 minute	60 minute	50.000000%	N/A	2014-07-29	2014-07-30	[?]
US&Canada	Voice Calls	ANY	Add-On Product (High)	20	15 minute	5 minute	100.000000% (for free)	N/A	2014-07-29	2014-07-30	[?]

2. Then, to the US – for 20 minutes – it is charged using the “US” discount plan and comes to 2 USD (20 * 0.2 * 50%).

Destination Group	Service	Peak Level	Precedence	Threshold	Used	Remaining	Current Discount	Next Discount Level	Discount Start Date	Discount Reset Date	Discount Info
US	Voice Calls	ANY	Add-On Product (Middle)	60	20 minute	40 minute	50.00000%	N/A	2014-07-29	2014-07-30	[?]
US&Canada	Voice Calls	ANY	Add-On Product (High)	20	15 minute	5 minute	100.00000% (for free)	N/A	2014-07-29	2014-07-30	[?]

- Finally, to Canada – for 10 minutes – it is charged using the “US&Canada” discount plan, but only for 5 minutes which comes to $5 * 0 = 0.0$ USD, and then for 5 minutes without a discount plan which comes to 1 USD ($5 * 0.2$).

Destination Group	Service	Peak Level	Precedence	Threshold	Used	Remaining	Current Discount	Next Discount Level	Discount Start Date	Discount Reset Date	Discount Info
US	Voice Calls	ANY	Add-On Product (Middle)	60	20 minute	40 minute	50.00000%	N/A	2014-07-29	2014-07-30	[?]
US&Canada	Voice Calls	ANY	Add-On Product (High)	20	20 minute	0 minute	100.00000% (for free)	N/A	2014-07-29	2014-07-30	[?]

This functionality allows the service provider to offer a flexible product portfolio that can be custom-tailored to market requirements and increase revenue via the sale of a la carte monthly calling plans.

Traditional Chinese Version of Self-care Portals

We have now added Traditional Chinese language to the customer and account self-care interfaces.

New API Methods

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

- Products
- Subscriptions
- Accounts