



PortaBilling



Customer Self-care Interface

Maintenance Release

44

Documentation

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PortaSwitch® Customer self-care interface, November 2014

Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam BC V3B 2P7 Canada.

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Preface

This document provides a general overview of the Customer self-care interface.

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 that occur inbetween minor 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**



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.

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Timesaver means that you can save time by taking the action described here.

Tips provide information that might help you solve a problem.

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Hardware and Software Requirements

Client System Recommendations

- OS: Windows XP, Vista, 7 or 8, UNIX or Mac OS X
- Web browser: Internet Explorer 8.0 (or higher), Mozilla Firefox 3.6 (or higher)
- JavaScript and cookies enabled in web browser
- Display settings:
 - o Minimum screen resolution: 1024 x 768

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Login to the Customer Self-care Interface

Your ITSP will provide you with a URL and credentials for logging in to the Customer self-care portal upon subscribing to their services.

Overview

The Customer self-care interface was designed for end-users to access their profile data, check billing information, download invoices and, most importantly, manage their IP Centrex settings. The front-end design offers simple and intuitive navigation. This includes an easy-to-use structure of menus and controls, graphic icons and improved presentation of information.

For your convenience, the customer self-care interface is divided into four tabbed sections:

- Dashboard (your home page)
- My Profile
- IP Centrex
- Billing Information

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At the top of the interface you can always view billing information such as your balance, credit limit, etc.

Common Features

Most of the data on the self-care portal is formatted like a page and sorted into columns. You can go to the next page or the previous page, jump to

the first or last page, or use the **Refresh** icon to update any of the pages. You can also change the number of columns and sort them in ascending or descending order by clicking your mouse on the name field of any of these columns. If you point your mouse at the name field you will see a triangle; click on it and a drop-down menu will appear. You can

choose how to sort your data and add or remove columns by ticking or unticking items in the drop-down menu:

				Cu	stomer Self-C	are	e Portal					
Balance: 180.20 USD					Web Interfa	ce L	anguage: Select a lang	uage	Eas	yCall (Lo	gin: EasyCall) 🛛 👸	Logout
Dashboard	🐣 My Profile		Ę	IP Centrex	📑 Biling	Info	ormation					
Extensio	ns											
	~	Edit	Confi	Extension Num	Extension Name	Ŧ	Assigned To Phone Lin	e	Primary Group	Publi	Recorded Name	Delete
General		;	1	222	John	1 ~	↓ Sort Ascending ↓ Sort Descending		-		Not Set	×
Sites Phone Lines External Numbers		;	1	333	Catherine			V	Edit		ot Set	×
Abbreviated Dialing		;	1	555	Andrew		000111555	V V		er	ot Set	×
A Incoming Calls								7	Extension Name			
Call Recording Buntgroups								V	Assigned To Pho Primary Group	one Line		
🚔 Identity 🖑 Music On Hold								V	Published			
Widdle Off Hold								V	Recorded Name			
								V	Delete			
		🔾 Add	Extensio	n 🕅 4 Page	1 of 🕨 🖗	11	2					1-30

Action Buttons

The top right hand side of the interface provides you with the following information and actions:



- 1. Your ID and a login name that was used to log in.
- 2. The **Logout** button that terminates your current session on the web interface. Also, you can change your password here if necessary.

In order for changes to take effect when adding / editing information, you need to click the \blacksquare Save icon on the appropriate page. If you do not want to save the information entered – just press **Cancel**.



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Dashboard

Your home page is organized like a dashboard so that you can easily view the most important information separated by category into different windows. In addition, these windows can be moved around, rearranged or minimized as you wish.

You will see three information windows on the Dashboard:

ance: 62.35 US	D					Credit	Limit: 100.00 US	D en - English	~	EasyCall Ltd. (Login: john_easycall)	🔒 Log
Dashboard	4	My Profile	Ę	iP Centrex		🔡 Bíln	g Information				
Das	hboard										
Recent Calls							Brief Billing In	nformation			
Date/Time	Account ID	From	То	Duration	Cost, USD	P	Balan	ce.		62.35 USD	
2012-10-31 12:19:09	000999111	000999113	000999111	0:32	0.00		Credit			100.00 USD	
2012-10-31 12:19:09	000999113	000999113	000999111	0:32	0.00		Contact Info	rmation			
2012-10-31 12:05:44	000999111	000999111	000999113	0:09	0.00		Contact	John Alex Doe			
2012-10-31 12:05:44	000999113	000999111	000999113	0:09	0.00		Address Email	Suite 408, 2963 Glen john@easycall.com	Drive		
2012-10-31 12:05:35	000999113	000999111	000999113	0:00	0.00						
2012-10-31 10:59:46	000999113	000999111	000999113	0:05	0.00						
2012-10-31 10:59:46	000999111	000999111	000999113	0:05	0.00						
2012-10-31 10:59:40	000999113	000999111	000999113	0:00	0.00						
2012-10-31 10:57:55	000999111	000999111	000999113	0:07	0.00						
2012-10-31 10:57:55	000999113	000999111	000999113	0:07	0.00						
2012-10-31 10:57:45	000999113	000999111	000999113	0:00	0.00						
2012-10-31 10:56:19	000999113	000999111	000999113	0:00	0.00						
2012-10-31 10:56:19	000999111	000999111	000999113	0:00	0.00						
2012-10-31 10:55:20	000999111	000999111	000999113	0:00	0.00						
2012-10-31 10:55:20	000999113	000999111	000999113	0:00	0.00						

Column	Description
Contact	Here you can view your contact info such as address,
Information	email, etc.
Brief Billing	This reflects thumbnail billing information such as
Information	your current balance and credit limit.
Recent Calls	This table lists the most recent calls and call details
	generated by your phone lines (account IDs on the
	web interface).

My Profile tab

The **My Profile** tab allows you to view and change your personal (or your company's) details such as contact information, personal info, password, etc.:

			Custo	mer Self-Care Port		
alance: 180.20 USD				Web Interface Lange	age: en - English	👻 EasyCall (Login: EasyCall) 🔒 Logout
B Dashboard	🖁 🐣 My Profi	le 🎡 IP o	Centrex	Billing Information		
General						
	«	Personal Information	n		Contact Information	on
General		Company Name	EasyCal Ltd.		Contact	John
Settings		Mr./Ms./	Mr.		Phone	+1-415-404-44-44
A Change Password		First Name	John		Fax	
		M.I.	Alex		Alt. Phone	
		Last Name	Doe		Alt. Contact	
					E-Mai	
		Address Information	n			
		Address				
		Province/State	BC			
		Postal Code	V3B 2P7			
		City	Coquitlam			
		Country/Region	Canada			
		E Save				

Tab	Description
General	Here you can enter general information such as
	company name, address, etc.
Additional	Here you can define extra information (such as
Information	driver's license ID or tax code) in addition to
	standard information. The fields for this tab are set
	by the Administrator.
Settings	Here you can choose the language to be used on your
	self-care web interface.
Change	Here you can change your current password for the
Password	self-care portal.



Enter your mobile number in the **Alt. Phone** field to receive SMS notifications.

IP Centrex tab

This tab allows you to manage phone lines, add extensions and huntgroups and configure other IP Centrex services. Here you can also modify the options for separate phone lines.

General

	Customer Self-C	Care Portal	
Balance: 180.20 USD	Web Interface Language:	en - English 💌	EasyCall (Login: EasyCall) 👸 Logout 🔹
🔠 Dashboard 🦂 My Profi	e 🕼 IP Centrex	Biling Information	
General			
~	Paging/Intercom		
्यु General	Paging/Intercom Prefix	123456	
Stefensions Stefensions Stefensions Stefension Concenting Content Con	Extension Number Length	3	
	E Save		

Field	Description
Paging /	Intercom calls enable users belonging to the same
Intercom	group to use two phones like on-door
	speakerphones. Here you can see whether this feature
	is enabled or not for your phone line.
Paging /	This appears only if Paging / Intercom is enabled;
Intercom	this is a special code that is dialed before the other
Prefix	extension number to automatically connect both
	extensions. When a two-way audio channel is
	established, speakerphone mode is immediately
	activated on the phone of the party being called.
Extension	Here you can see the number of digits for an
Number	extension number (e.g. 3, as per usual). Keep this in
Length	mind when adding extensions.

Extensions

Here you can define a list of extensions for phone lines within your IP Centrex environment. You can easily add new extensions or change existing ones without any actual reconfiguration of your phone.



Branch Office extensions can only be added, deleted or modified on the Main Office self-care portal.

					Customer Se	elf-Care Portal				
Balance: 180.20 USD					We	eb Interface Language:	en - English	*	EasyCall (Login: EasyCall)	🔒 Logou
B Dashboard	🐣 My Profile			🎡 IP Centrex	BI	ing Information				
Extension				I		1				
	~	Edit	Conf	Extension N	Extension Name	Assigned To Phon	Primary Group	Publi	Recorded Name	Del
a General Sectors Constants		7	1	222	John	000111666		V	Not Set	
Sites Phone Lines External Numbers		;	1	333	Catherine	000111777	-		Not Set	•
Abbreviated Dialing		7	1	555	Andrew	000111555			Not Set	,
a) incoming Calis ≪ Outgoing Calis ③ Call Recording A fundgroups A fundgroups √ Music On Hold										
	(🗿 Add	d Extens	ion 🛛 🖣 Pa	age 1 of 🕨	N 2				1 -

To add a new extension number, click the ⁽²⁾ Add Extension button and enter the following information:

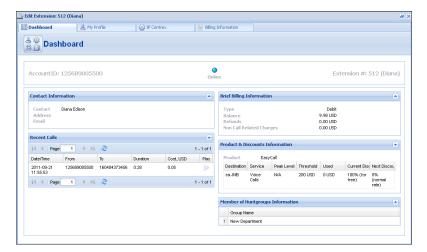
- Extension Number Type in the number the end-user will dial on his phone (an extension number should contain only digits).
- Extension Name Enter the logical name for this extension (e.g. name of the person using this line: "John").
- **Branch Office** Select a branch office to which the extension will be assigned. Leave this field empty for assigning the main office's phone extension. (Note that the **Branch Office** field is only available on the Main Office self-care portal).
- Assigned To Phone Line This is the number that the extension is associated with. Here you should specify one of your phone lines by selecting it from the drop-down list. (Note that each phone line from the list can only be used once.
- **Primary Group** Select the huntgroup to which this extension belongs to allow calls within a group to be picked up by dialing the group pickup prefix (without specifying the group number). Make sure that you have assigned the extension to some huntgroup beforehand.
- **Published** Clear this check box to exclude certain extensions from being accessible via dial-by-name (e.g. you do not want telemarketers to directly reach your CEO or CFO because their names are publicly accessible).
- **Recorded Name** You can record or upload a voice prompt with the actual person's name for each extension. This can be used in the **Dial-by-name Directory** feature. If a caller does not know the extension number of the person he is trying to reach, he may look up the called party using the first three letters of his surname.

Balance: 180.20 USD					ner Self-Care Portal Web Inter	face Language en - English		EasyCall (Login: EasyCall)	G Logout
Dashboard	My Profile	1	IP Centrex	📄 Biling Info					
Extensions									
	« Edit	Confl	Extension Number	Colorador Nama	Assigned To Phone Line	Primary Group	Publis	Recorded Name	Delete
i General	< Edit	Conti	Extension Number	Extension Name Andrew	Assigned to Phone Line 000111555				Delete
Extensions			444	Andrew		This extension is not as:	· ·	Please 🍌 Browse	
Sites					Save	Cancel			
Phone Lines External Numbers		1	222	John	000111666	-	V	Not Set	×
Abbreviated Dialing			333	Catherine	000111777			Not Set	×
Dialing Rules		1	333	Catherine	000111777	-		Not Set	· ·
incoming Calls									
Call Recording									
Huntgroups									
ldentity									
Music On Hold									
	O AC	ld Extensio	n 🚺 🖣 Page	1 of 🕨 陆	24				1-2
				Custon	ner Self-Care Portal				
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	, My Profie	4	iP Centrex	Custon	Web Inter	face Language: en - English		EasyCall (Login: EasyCall)	🔒 Logout
Dashboard		4	2 IP Centrex		Web Inter	face Language: en - English		💌 EasyCall (Login: EasyCall)	🔒 Logout
Dashboard		14) IP Centrex		Web Inter	face Language∷ en - English		EasyCall (Login: EasyCall)	🔓 Logout
Dashboard		Confi	Difference In the International States State	Billing Info	Web Inter	face Language: en - English Primary Group	Publis	EasyCall (Login: EasyCall) Recorded Name	Cogout Delete
Dashboard &	K Edit		Extension Number	Extension Name	Web Inter			Recorded Name	Delete
Dashboard &			-	Billing Info	Web Inter		Publis		
Dashboard &	< Edt		Extension Number	Biling Info	Web Inter rmation Assigned To Phone Line 000111666		V	Recorded Name Not Set	Delete
Dashboard &	K Edit		Extension Number	Extension Name	Web Inter			Recorded Name	Delete
Dashboard &	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
Dashboard & Commentations Centeral States Prone Lines External Numbers External Numbers	< Edt		Extension Number	Biling Info	Web Inter rmation Assigned To Phone Line 000111666		V	Recorded Name Not Set	Delete
Dashboard & Extensions Ceneral Estensions Sates Estensi Numbers Estensi Numbers Estensi Numbers Estensi Numbers Estensi Ruies Noroning Ruies	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
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Dashboard & Extensions Coneral Extensions States Prione Lines Edental Numbers Edental Numbers Category Cat	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
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Databaard Extensions Concernal Strensions St	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
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Databaard Extensions Concernal Strensions St	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
Databaard Extensions Concernal Strensions St	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
Databaard Extensions Concernal Strensions St	K Edt		Extension Number 222 333	Extension Name John Catherine	Web Inter mation Assigned To Phone Line 000111666 0000111777			Recorded Name Not Set Not Set	Delete ×
Databoard Extensions Concertal Conce	Eat	Confi	Extension Number 222 333	Extension Name John Catherine	Veb inter			Recorded Name Not Set Not Set	Delete ×

Once all the information is entered, click the **Save** button. You can easily change the number and extension name and manage phone line assignments by simply clicking on that extension number or on the **Edit** icon. To remove the extension from the list, click the **Delete** × button. Having saved the new extension, you can choose **Primary Group** this extension will belong to by clicking the **Edit** icon:

				Custo	mer Self-Care Portal				
Balance: 180.20 USD					Web Inter	face Language: en - E	nglish	EasyCall (Login: EasyCall)	🔒 Logout
🔝 Dashboard 🛛 🖁 🦀 My Profile		1	IP Centrex	📄 Billing Inf	ormation				
Extensions									
ec.	Edit	Confi	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Publis	Recorded Name	Delete
a General Extensions 쥀 Sites		1	222	John	000111666	-	V	Not Set	×
Sites Phone Lines Kernal Numbers		1	333	Catherine	000111777			Not Set	×
Abbreviated Dialing			444	Andrew	000111555	~	~ 7	C Please 🍌 Browse	
Dating Rules jurcomp Calls [™] Outpop Calls [™] Outpop Calls [™] Controps [™] Hartprops [™] Hartprops [™] Music On Hold					3300	Sales Departm	ent Ext	+ 85 2	
	🔘 Add	Extension	4 4 Page	1 of 🕨 🕅	æ				1 - 3 0

To view and edit information about the *extension*, press the **Configure** *I* icon next to the extension number. You will see the **Edit Extensions** page (note that some details are read-only):



Sites

A site is a group of customer's accounts that can be conveniently managed as a single entity. For instance, all of the phone lines used in a sales department or in 'office building A' can be joined into a single group. This allows you to apply certain configuration parameters or service restrictions to the accounts in that group. You can limit the combined number of simultaneous calls for all accounts of a particular site. This is useful if, for instance, 'office building A' has limited bandwidth and can only support 30 calls – no more calls will be allowed in order to avoid severe degradation of the sound quality on all calls in progress. Any account that is not assigned to a specific site will share the limitations of the Default site.

			Customer Self-Care	Portal			
Balance: 180.20 USD				Web Interface Language: en - English	~	EasyCall (Login: EasyCall)	🔒 Logou
10 Dashboard	🔏 My Profile	iii IP Centrex	🖹 Biling Information				
Sites							
		Default Site	Site Name:	Default Site			
🎡 General							
Extensions			Limit Simultaneous Calls:	Yes	~		
Section Phone Lines			Max Number of Simultaneous Cals:	4			
External Numbers Abbreviated Dialing			Max Number of Incoming Calls:				
Dialing Rules			Max Number of Outgoing Calls:				
Incoming Calls Outgoing Calls			Max Number of Forwarded Calls:				
Call Recording							
A Huntgroups			Codec Connectivity Profile:	Unknown	~		
Music On Hold			Max Bandwidth:				
			Max Incoming Bandwidth:				
			Max Outgoing Bandwidth:				
			Location Information:		~		
			Current Location:				
			Allowed Mobility:		~		
			,.				

Site Name	Name for a group of accounts
	0 1
Limit	Engage real-time checks of the number of
Simultaneous	concurrent calls made by accounts that belong to
Calls	this site. When the specified number of concurrent
	calls has already been established (calls are in a
	"connected" state) and the account tries to place
	another call, that call will be rejected.
Max Number of	Allow only a specific number of concurrent calls
Simultaneous	(regardless of their type, such as incoming or
Calls	outgoing) for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Incoming Calls	incoming calls for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Outgoing Calls	outgoing calls for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Forwarded Calls	forwarded calls for accounts at this site.
Codec	Codec connectivity profile that will be used for
Connectivity	bandwidth allocation calculation. Every new call's
Profile	allocated bandwidth is calculated by considering a
	negotiated codec and its parameters to enable full
	use of the available bandwidth and block new calls
	if no more bandwidth is available.
Max Bandwidth	Bandwidth utilization limitation to ensure that only
	an acceptable number of calls are allowed, in order
	to avoid severe degradation of the sound quality on
	calls in progress.
Max Incoming	Bandwidth utilization limitation for incoming calls.
Bandwidth	

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Max Outgoing	Bandwidth utilization limitation for outgoing calls.
Bandwidth	
Location	Customer's permanent location for geo-IP fraud
Information	prevention.
Current Location	Customer's permanent location. It contains a
	country code top-level domain (in <i>iso_3166_1_a2</i>
	format, e.g. fr for France, de for Germany etc.)
Allowed Mobility	Stationary user (constant location) option can be
	used if the customer is not authorized to make calls
	from various countries (e.g. as a residential
	customer would make calls from his SIP phone).
	Calls made from any other country will be screened.
	The Roaming user (frequent location) option
	can be used for customers who travel frequently. In
	this case, a change in location would be considered
	acceptable.

Phone Lines

Here you can view the full list of phone lines and configure them if necessary:

					Customer Se	If-Care F	Portal					
Balance: 11.55 USD					Credit	Limit: 1,000	00 USD en - Eng	lish	 EasyCall Ltd 	I (Login: EasyCal	ILtd)	🔒 Logout 🔹
10 Dashboard	🔏 My Profile		iP Centr	2X	📄 Billing Ini	ormation						
Phone L	ines											😡 Help
i General	«	Configure	ID	ldle, days	Available Funds, USD	Туре	Product	Batch	Site	Forwarding Enabled	SIP	IP Phone Model
Extensions Sites		1	16041235003	0	Unlimited	Credit	SIP Subscribers		Default Site	-	0	Linksys/SP
Phone Lines		1	16041235004	0	100.00	Credit	SIP Subscribers		Default Site	~	0	Linksys/SP
Abbreviated Dialing		1	16041235005		99.93	Credit	SIP Subscribers		Default Site	-		
Alinoming Calls Autoring Calls Autoring Calls		1	17781225000		99.93	Credit	SIP Subscribers		Default Site	-		
Call Recording		1	19070712231		99.93	Credit	SIP Subscribers	1111	Default Site	-		
Music On Hold		1	42727269710		99.93	Credit	SIP Subscribers	1111	Default Site	-		
a masie on nord		1	60718744698		99.93	Credit	SIP Subscribers	1111	Default Site	-		
		1	60985666273		99.93	Credit	SIP Subscribers	1111	Default Site	-		
		∃ Group B	y Batch 👘 🗐 👘	Page	1 of 1 🕨	M &						1 - 8 of 8

Column	Description
Configure	Click the Configure <i>H</i> icon to edit the settings for a
	particular phone line.
ID	The primary identification for this phone line.
Idle, days	The amount of days the phone line has not been in
	use.
Available	The amount of funds available for the user to spend
Funds	on services.
Туре	The type of phone line. It may either be "Debit" or

	"Credit." "Debit" is usually associated with prepaid
	cards. "Credit" is a phone line that will be invoiced
	for costs incurred.
Product	The product assigned to a particular phone line.
Batch	Batch is a group of phone lines under the same
	logical name. Here you can see the name of the batch
	that a particular phone line belongs to.
Site	The name of the site the phone line belongs to.
Forwarding	The forwarding field shows whether this function is
Enabled	enabled or disabled for a particular phone line. When
	it is enabled, the 🖋 icon is shown. The field with an
	- icon indicates that forwarding is disabled.
SIP	When the phone line is used by a phone to register
	with the SIP server, the \bigcirc icon is shown.
IP Phone	Indicates the IP phone that is assigned to a particular
Model	phone line.

You can also view phone lines grouped by batch by clicking the **E Group By Batch** button located at the top or bottom of the page.

You can configure forwarding when it is enabled for the phone line. Just click the **Configure** *I* icon next to the phone line to go to the Edit Phone Line page. There are several call forwarding modes: **Follow-Me**, **Advanced Forwarding, Forward to SIP URI** and **Simple Forwarding**.

Follow-Me Forwarding Mode

Using follow-me you can forward calls to multiple destinations. You can also configure it so that each of these destinations will be used during its own time period.

- 1. In the **IP Centrex** section, choose **Forwarding**.
- 2. Click ^O Add New Number.

Edit Phone Line: 000999123			8×
🔝 Dashboard 🦀 My Profile	ip Centrex	Billing Information	
Edit Forwarding			
Control Contr	Enable Rule Description Number I tide Advanced Settings Caling Party Display Ring for Ring Schedule:	Porwarding to a cell phone 35644890579 Caler Number and Name 15 Ø Always Only at the following time interval	
	🔚 Save 🗦 Back		
	Edit Forwarding		

- 3. Enter the following information:
 - Number Enter a number for redirecting calls (e.g. 35644890078).
 - **Description** A short description for this number.
 - **Ring for** If a call is not answered, set the number of seconds it will ring for until it is forwarded to the next number on the list.
 - **Calling Party Display** Choose how to display the caller's info during forwarding:
 - Select **Caller Number and Name** to see the phone number and the name of the original caller.
 - Select **Caller Number and Forwarder Name** to see the phone number of the caller and the forwarder's name (they will be displayed.)
 - Select **Forwarder Number and Name** to see the phone number and the name of the forwarder
 - Use this number Choose the period during which the number is used. If you check the box next to **Always**, the call will always be forwarded to your cell phone. If you want to forward calls to a cell phone only during a specific time period, check the box next to **Only at the following time interval** field and click the 😥 icon to define that interval. Please consult the *How* section for more information.

88 Dashboard	My Profile		Si IP C	entrex	Biling Information			
Forward	ding							
🎡 General	<u></u>	Currently	you are using	Order	forward ringing strategy.			
Serieral Reference Numbers		There are	e no number	s which will be used in	the ringing group.			
Dialing Rules		When vo	ur number is	called and the call is	not answered on your IP phon	e in 30 👶 seconds,		
Mincoming Calls			ward the cal					
St Forwarding								
Call Screening		Edit O	rder Numb	er	Description	Forward Settings	Enable	Delet
Call Recording Coll Recording Coll Recording Faxes Coll Recording		R.	3564	44890579	Forwarding to a cell phone	Ring Schedule: Always Ring for: 15 sec Calling Party Display: Caller Number and Name	۲	×
Call Barring La Identity Music On Hold								
		Add Net Add	ew Number	E Save	Page 1 of 🕨 🕅 🌊			1-10

- 4. Click the 🗄 Save icon to save the results of your work.
- 5. Repeat steps 2-4 until all the desired follow-me numbers have been added.

Advanced Forwarding Mode

This is similar to follow-me mode, but has a few extra options that allow you to route calls to SIP URI. To do this, follow the steps below:

- 1. In the IP Centrex section, choose Advanced Forwarding.
- 2. Click Add New Number to add the number on which you wish to receive forwarded calls.
- 3. Enter the information needed. The fields are very similar to those for adding a follow-me number as described above.
- 4. Below are additional fields that are not available when adding a follow-me number.
 - **SIP Proxy** Select SIP proxy from the drop-down menu.
 - Keep Original CLD Check this option to ensure that the originally dialed number is present in the call information when forwarding a call to another phone line.
 - **Calling Party Display** Choose how to display the caller's info during forwarding:
 - Select **Caller Number and Name** to see the phone number and the name of the original caller.
 - Select **Caller Number and Forwarder Name** to see the caller's phone number and the forwarder's name (they will be displayed.)
 - Select **Forwarder Number and Name** to see the forwarder's phone number and name.
 - Transport Protocol This enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol

instead of UDP for SIP communications for PBXes that do not support UDP.

NON Edit Phone Line: 000999123		8)
🔝 Dashboard	My Profile 🔯 IP	Centrex Billing Information
Edit Advanc	ed Forwarding	
	**	
General Sector All Angels All All All All All All All All All A	Enable Rule	
Dialing Rules	Description	Forwarding to cell phone
A Incoming Calls	Number	35644890579
Advanced Forwarding	SIP Proxy	193.193.193.10
Call Recording	🔺 Hide Advand	ced Settings
Paxes Sector Attendant	Transport Protoc	col UDP 👻
🧏 DISA	Keep Original CLI	D 📝
Call Barring	Calling Party Disp	Day Caller Number and Name
Ap Identity	Ring for	15
Emergency Calls	Ring Schedule:	Always
		Only at the following time interval
	•	
	🜓 🔚 Save 🛛 🔵 Back	
	🖉 🕺 Edit Advanced I	Forwarding

5. Click the **Save** icon to save the results of your work.

Simple Forwarding

The simplest type of forwarding is when you specify a single phone number to which all calls will be sent.

- 1. In the IP Centrex section, choose Simple Forwarding.
- 2. Enter the following information:
 - Forward To The number you wish the calls to be forwarded to.

Image: Deskboard Image: Point Centrex Image: Deskboard Image: Point Centrex <th>Bill Phone Line: 000999123</th> <th></th> <th>e)</th>	Bill Phone Line: 000999123		e)
Convert Forward To 35644890579 Convert Sectorsal Numbers Dating Rules Dating Rules Sectorsal Numbers Sectorsal Numbers Call Recording Sectorsal Numbers Sectorsal Numbers Call Recording Sectorsal Numbers Sectorsal Numbers Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Numbers Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal Sectorsal Number Sectorsal	Dashboard 🕹 My Profi	le 🔯 IP Centrex	Billing Information
Ceneral Forward 10 35648905/9 Set External Numbers Dealing Rules Dealing Rules Stripte Forwarding So call Recording So call Recording Set Recording So cental Call Recording Cental Call Recording Cental Call Recording Cental	Simple Forwardi	ing	
Image: Image	Ceneral Cener	Forward To	35644890579
Emergency Calls	🦉 Linaiyency valis	E Save	

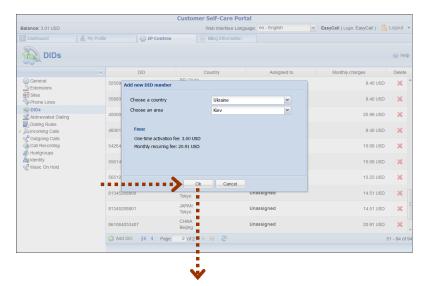
3. Click the 🗏 Save icon.

DIDs (External Numbers)

In addition to the user's main phone number, he/she can be assigned multiple alternate DID (direct inward dialing) phone numbers.

In this tab you can easily browse the complete inventory of available DID (or toll-free) numbers online, and select the numbers you want to use as alternates. To do this, click the **O** Add DID button located at the bottom of the page and specify a country and a city in which you want to purchase a DID. Once you have specified a country and a city you will see the applicable fees for using this DID number:

				Customer Self-	-Care Portal			
Balance: 3.01 USD				Web Ir	nterface Language:	en - English	👻 🛛 EasyCall (Login: EasyCall)	Logout -
Dashboard	🐣 My Profile		Different IP Centrex	🔡 Biling	Information			
DIDs								😡 Help
	**		DID	Country	y	Assigned to	Monthly charges	Delete
General Extensions		3250946019		BELGIUM Brugge	Un	assigned	9.40 USD	×
🛃 Sites 🥎 Phone Lines		35893158439	2	FINLAND Helsinki	Un	assigned	9.40 USD	×
DIDs		4500000001		DENMARK Virtual PRI	Un	assigned	20.99 USD	×
Dialing Rules		493011111113		GERMANY Berlin	Un	assigned	9.40 USD	×
Calls @ Calls @ Calls @ Call Recording # Huntgroups		54264466071	1	ARGENTINA San Juan	Un	assigned	10.68 USD	×
Music On Hold		55614040426	0	BRAZIL Brasilia	Un	assigned	10.68 USD	×
		56512472780		CHILE La Serena	Un	assigned	13.23 USD	×
		81345208900		JAPAN Tokyo	Un	assigned	14.51 USD	×
		81345208901		JAPAN Tokyo	Un	assigned	14.51 USD	×
		86108405340	7	CHINA Beijing	Un	assigned	20.91 USD	×
	>	🔾 Add DID	🚺 🖣 Page	2 of 2 🕨 🕅	2			51 - 94 of 9



			Customer Self-Care Po	rtal			
Balance: 3.01 USD			Web Interface Lar	iguage: en - English 🗸	EasyCall (Login: EasyCall) 🔒	Logout 🝷	
10 Dashboard	🖁 🐣 My Profile	IP Centrex	Billing Information				
DIDs						😡 Help	
	«	DID	Country	Assigned to	Monthly charges	Delete	
General Extensions		3250946019	BELGIUM Brugge	Unassigned	9.40 USD	×	
Sites Phone Lines		358931584392	FINLAND Helsinki	Unassigned	9.40 USD	×	
Abbreviated Dialing		380442217221	UKRAINE Kiev	Unassigned	20.91 USD	×	
 Dialing Rules A Incoming Calls Outgoing Calls 		4500000001	DENMARK Virtual PRI	Unassigned	66.96 USD	×	
🝓 Call Recording		493011111113	GERMANY Berlin	Unassigned	9.40 USD	×	
🚑 Identity 🖑 Music On Hold		542644660711	ARGENTINA San Juan	Unassigned	10.68 USD	×	
		556140404260	BRAZIL Brasilia	Unassigned	10.68 USD	×	
			56512472780	CHILE La Serena	Unassigned	13.23 USD	×
		81345208900	JAPAN Tokyo	Unassigned	14.51 USD	×	
		81345208901	JAPAN Tokyo	Unassigned	14.51 USD	×	
		🔇 Add DID 🛛 🚺 🖣 Page	2 of 2 🕨 🕅			51 - 95 of 95	

As soon as you confirm the new DID number, your number will appear as unassigned. You can assign this number to the desired account (phone line) by simply double-clicking on it.

Abbreviated Dialing

Here you may define a list of phone extensions for your IP Centrex environment, plus create abbreviated dialing for external phone numbers. You can set up dialing rules as an international prefix, outside prefix, direct number (e.g. 911), or abbreviated dialing for your accounts.

NOTE: To be able to add extensions / abbreviated numbers, you should enter the maximum length of anticipated digits (e.g. 3 in the case of 123-like numbers) in the **Abbreviated Number Length** field.

			Customer Self-Ca	e Portal		
Balance: 9.46 USD				Web Interface Language: en - Er	nglish 🛛 👻 EasyCall (Log	in: EasyCall) 🔒 Logout 🔹
🔝 Dashboard 🛛 🐣 My	Profile	🙀 IP Centrex	Bling Information			
Abbreviated D	ialing					
🎡 General	Abbreviated	Number Length	3			
Extensions Sites	Edit	Abbreviated #	# To Di	al .	Description -	Delete
Sector Phone Lines Phone Lines Lin		188	777000	88	Amanda's office Lynksys	×
Monated Dialing		189	777000	89	Andrew's IP phone	×
Aniconing Calls Culgoing Calls Culgoing Calls Culgoing Calls Call	🚱 Add 👔	Page 1 of	×н æ			1 - 2 of 2
	Save					

To add a new abbreviated dialing number, click the ^(C) Add button and enter the following information:

Field	Description							
Abbreviated #	The number the end-user will dial on his phone							
	(extension number).							
# to Dial	The number that the call will be forwarded to. You							
	may enter the ID of one of your accounts or any							
	phone number. If you leave this field blank, then the							
	bbreviated number is considered to be a direct							
	umber, or "dial as is." This is useful for making sure							
	at special numbers (e.g. 112) are never converted by							
	other translation rules.							
	Note: Phone numbers must be entered in the E.164							
	format.							
Description	Description of this abbreviated number, e.g.							
	"Andrew's IP phone."							

Dialing Rules

Using this tab, you can define a way of dialing phone numbers that is convenient to you or your users.

		Customer Se	elf-Care Porta	il 👘			
Balance: 2,900.27 USD		Credit Lim	it: 10,000.00 USD	en - English	~	EasyCall Ltd. (Login: EasyCall)	🔒 Logout 🔹
🔝 Dashboard 🦀 My Profile	🙀 IP Centrex	📄 Bi	ing Information				
Dialing Rules							😡 Help
Call Recording Calling Rules Calling States Calling Rules Calling Rules Call Recording Call Reco	Daing Rules: Your location Your country dal code: You area code(s): Emergency numbers (e.g. 911, 112): Check Yoursef You are going to col: To cal within your local area To cal sign distance (within y To cal internationally you dial	our country, 123 c	Dialing Prefixes Outside Ine dial p Domestic Iong-dis (outside of your a International dialin Exceptions (e.g. 1	tance dial prefix area code): ig prefix:			
	<	Ш					Þ

By default, Dialing Rules are disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If Dialing Rules are enabled, this will allow you to choose various dial plan parameters such as an international dialing prefix or area code. You may change or type in your own number translation rules instead if you select the **Custom Rule** option.

Several sample settings are provided for your convenience. For instance, in order to load sample settings for "traditional" North American dialing,

select "North America, WA, 10 digit dialing" from the drop-down list and click 🗟 Save.

Confirm that you have described the numbering format correctly. Verify that for all examples provided (domestic and international calls) this is how you want the numbers dialed.

Incoming Calls

Here you can set the parameters for incoming calls:

	Cu	stomer Self-Care Portal			
Balance: 180.20 USD		Web Interface Language: en - Eng	jlish 👻	EasyCall (Login: EasyCall)	🔒 Logout 🕞
🔝 Dashboard 🦂 My Profi	e 🎲 IP Centrex	Biling Information			
Incoming Calls					
Coneral Cen	Ext-to-Ext Cal Distinctive Ring Group Pickup Group Pickup Prefix	Yes v			
Munitgroups dentity Music On Hold	Save				

Column	Description
Ext-to-ext call	For incoming calls from phones within the IP
distinctive ring	Centrex environment, use a ring pattern different
_	from the default one.
Group Pickup	Enable the Group Pickup feature, which enables
	phones within the same IP Centrex environment to
	answer each other's calls by dialing a Group Pickup
	Prefix.
Group Pickup	This is only available if Group Pickup is activated.
Prefix	Specify the special code for picking up calls here.

Call Parking

Call parking allows users to put a conversation on hold and then resume it from a different IP phone. If you enable this feature, you can set the required parameters for it here.

Web Interface

	C	Customer Self-Care Portal			
Balance: 180.20 USD		Web Interface Language:	en - English	EasyCall (Login: EasyCall)	🔒 🛅 Logout 📼
🔠 Dashboard 🦂 My Profi	e 🔯 IP Centrex	Billing Information			
Call Parking					
«	Call Parking	V			
General	Park Prefix	345			
Sites	Release Prefix	543			
External Numbers Abbreviated Dialing					
An Incoming Calls Call Parking					
Calls Call Recording					
legitative and the second sec					
	E Save				

Column	Description
Call Parking	Enables the Call Parking feature.
Park Prefix	This is only available if Call Parking is activated; this
	allows you to specify a key combination for parking a
	call.
Release Prefix	This is only available if Call Parking is activated; this
	allows you to specify a code in order to quit the call
	parking status and resume the conversation.

Outgoing Calls

Here you can view different parameters for outgoing calls (note that this page is read-only):

			Cust	omer Self-Care Portal					_
Balance: 180.20 USD				Web Interface Language:	en - Englis	h 👻	EasyCall (Login: EasyCall)	🔒 Logout	•
Dashboard	🔏 My Profile		iP Centrex	Biling Information					
Outgoing	g Calls								
Ceneral Cetensions Stess Fronce Lines Ceteral Numbers Construction Aborevalated Dating Dating Rules Dating Rules Catigoing Calls Construction Catigoing Calls Construction Construction Catigoing Calls Construction Construction Construction Construction Construction Catigoing Calls Construction Constructio	8	Limt Simultar Max Number	eous Cals Of Smukaneous Cals	2					

Column	Description
Limit	This shows whether there is a limit on the number of
Simultaneous	concurrent calls that can be made by your phone

Calls	lines.
Max Number	This shows the maximum number of concurrent calls
of	permitted for your phone lines.
Simultaneous	
Calls	

Call Logs

With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback.

Here you can check whether the **Call Recording** feature is enabled or not. When it is enabled, you can view information about calls, listen to recordings and filter them for / from a certain period.

			Customer Self	-Care Portal			
Balance: 12.03 USD			Credit Li	mit: 1,000.00 USD en -	English 👻 I	Norma Baker (Login: NormaB) 🛛 🔓	Logout
호쿱 Dashboard	4	4y Profile	IP Centrex	📄 Bilin	g Information	O Trouble Tickets	
Call Logs							😡 Hel
	*	From: 2014-08-11	Til: 2014-11-11			â	Search
Seneral Extensions		Date/Time	Account ID	From	То	Duration	Play
Extensions Sites		2014-10-30 13:39:38	ANI123456788	ANI123456788	12125551234	0:3	2 🕨
Phone Lines		2014-10-30 13:38:59	ANI123456788	ANI123456788	12125551234	0:3	2 🕨
Abbreviated Dialing		2014-10-30 13:36:57	123456788	123456788	12125551234	0:3	2 🕨
Dialing Rules		2014-10-30 13:36:33	123456788	123456788	12125551234	0:3	2 🕨
A Incoming Calls		2014-10-30 13:33:54	123456788	123456788	12125551234	0:3	2 🕨
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Huntgroups Cal Queue Stentty Music On Hold							
		4 4 Page 1 of 1	I ▶ N I @				1 - 6 0
		🔚 Save					

Huntgroups

Sometimes there is a need for a call to be delivered to several extensions at once. With the **Huntgroup** function – you can easily configure a scheme for call distribution in such a way that incoming calls are delivered to one or more assigned extensions.

				Custon	ner Self-Care Porta	al				
Balance: 180.20 USD					Web Interface Lang	uage: en - English	✓ EasyCa	II (Login: Eas	yCall) 🛛 🔓 Li	ogout
B Dashboard	A My Profile		ip C	entrex	Biling Information					
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	«	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delet
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External Numbers Abbreviated Dialing Dialing Rules			1	112	Support	Random	Empty Huntgroup	Keep original	~	×
A Incoming Calls										
A Huntgroups										
An Identity										
		🔾 Add Hur	itgroup	4 4 Page 1	of 🕨 🕅 🤓					1 - 2 (



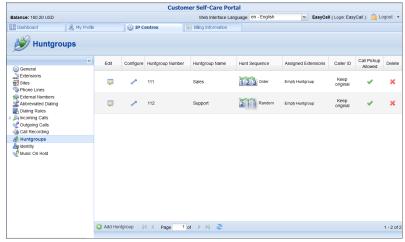
Branch Office huntgroups can only be added, deleted or modified on the Main Office self-care portal.

To add a new huntgroup, click the **O** Add Huntgroup button and enter the following information:

- Huntgroup Number The number the end-user must dial on his phone to reach one or more assigned extensions.
- Huntgroup Name Logical name for this group of extensions, e.g. "New department."
- Hunt Sequence Specifies the order for delivering a call to one or more extensions.
 - If **Order** is chosen, extensions will be called one by one from the first (topmost) to the last number until the call is answered.
 - o Choose Random if you want to use a random order.
 - **Simultaneous** enables simultaneous calls to every extension from the list.
 - If you choose **Least Used**: This sorts the phone lines in descending order beginning with their last usage, and delivers a call to their extensions, accordingly. (For example, phone line 777111 with extension 111 was last used on 2010-12-11, and phone line 777222 with extension 222 was last used on 2010-12-12, so the call goes to extension 111 and if it is not answered, it goes to extension 222.)
- Caller ID:
 - Keep original
 - Set to name and CLI of the huntgroup
 - Replace Caller Info with Huntgroup Name, keep Caller CLI

• Call Pickup Allowed – enable this option to allow extensions to pick up calls made to the members of this huntgroup

				Custon	er Self-Care Po	rtal				
Balance: 180.20 USD					Web Interface La	nguage: en - English	👻 EasyCa	III (Login: Easy	Call) 🔒 Lo	ogout
B Dashboard	🔏 My Profile		ip C	entrex	Biling Information					
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🍪 General	**	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Dele
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Sites Phone Lines		· ·			Upd	late Cancel				
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Dialing Rules Incoming Calls Cutgoing Calls Call Recording										
tuntgroups										
Ag identity v∰ Music On Hold										
		🗿 Add Hu	ntgroup	4 4 Page 1	or 🕨 🕅 🥹					1 - 1



Once all the information is entered, click the **Update** button. Then specify one or several extensions that calls should be delivered to. Click the icon *I* next to **Huntgroup Number** to add one or several extensions that calls should be delivered to. Click the **Add Extension** button, then choose the extension from the drop-down list of the **Extension Number** and set the parameters:

- **Ringing Delay, sec** Delay (in seconds) before the extension starts to ring.
- Ringing Time, sec Duration (in seconds) of ring.

- **Ignore Follow-me/Voicemail** Select this check box to disable forwarding (voicemail, follow-me) on the specific extension for calls made to this huntgroup.
- Set This Group as Primary Select this check box to allow the extension owner to pick up calls within that group by merely dialing the group pickup prefix.

			Customer Self-	-Care Portal					
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🔠 Dashboard 🛛 🐣 My	/ Profile	🎡 IP Centrex	📑 Biling Informat	tion					
🤔 Edit Huntgrou	up: Support	Department							
	Huntaroup Nu	mber 99		Hunt Seque	nce R	andom		~	
General	Huntgroup Na	me Support D	epartment	Caller ID	к	eep original		~	
Extensions	Call Pickup Allo								
Second Phone Lines									
Sector Content August 2015 Sector 2015 Sec	Included E	xtensions Include	d Huntgroups						
Dialing Rules	Order	Extension Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow- me/Voicemail	Set This Group as Primary	Delete
Calls 🚱 Calls		444	Andrew	000111555		Infinite	_	~	×
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ldentity ≪ [®] Music On Hold									
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🔝 Dashboard 🛛 🕹 My Pro	fle	👔 IP Ce	ıtrex	🔡 Billing Infor	rmation					
🥩 Edit Huntgroup	: Support	Depar	tment							
	Huntgroup N	lumber	99		Hunt Seque	nce F	Random		*	
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Calls Calls		555	~	Tom	000111888		15	5		
& Huntgroups	Ť				Update Ca	ncel				
Augulation Hold	•	444		Andrew	000111555		Infinite	-	×	×
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				Customer Self	-Care Portal					
Balance: 180.20 USD					Web Interface Language:	en - English	× 1	EasyCall (Login:	EasyCall) 🧯	👌 Logout 🔹
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Edit Huntgroup:	Support	Depart	ment							
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i General	Huntgroup N			lepartment	Caler ID		Keep original		*	
Extensions				eparament	Cale 10		ceep original		•	
Sites	Call Pickup A	lowed 5	/							
A External Numbers	Included	Extensions	Include	d Huntgroups						
Abbreviated Dialing	-								Set This	
Dialing Rules	Order	Extension	Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow- me/Voicemail	Group as Primary	Delete
Outgoing Calls Outgoing Call Recording	+	555		Tom	000111888		15	_	-	×
at Huntgroups										
and Identity	•	444		Andrew	000111555		Infinite	-	×	×
	Add Ext	ension								
	-									
	🔚 Save 🛛	Back								

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In order for changes to take effect you need to click the \blacksquare Save icon at the bottom of the page; you can also use the **Back** button to return to the previous menu.

Several huntgroups can be combined into one huntgroup. Go to the **Included Huntgroups** tab and choose the required huntgroups to add from the list of Huntgroup Number. Select the **Ignore Follow-me/Voicemail** check box to disable forwarding for calls made to this huntgroup. Then click **Save**.

alance: 180.20 USD				Custom	er Self-Care Portal					
			10.00		Web Interface Languag	e: en - Englis	h	Y Easy	Call (Login: EasyCall)	🔒 Log
Dashboard	🐣 My Profile		in c	Centrex	Biling Information					
💕 Edit Hunt	group: S	Sales								
	~	Huntgroup N	umber	111		Hunt Seq	lence	Order		~
General		Huntgroup N		Sales		Caller ID		Keep origi	inal	~
Extensions Sites Phone Lines		Call Pickup All		V						
External Numbers		Included Ex	tensions	Included Huntgro	ups					
Dialing Rules		Order	Hun	tgroup Number	Huntgroup Name		Included Ext	ensions	Ignore Follow- me/Voicemail	Delet
Call Recording			112		- Support		Empty Huntgr	oup	V	
Huntgroups					Update	Cancel				
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	group: §	Sales			Web Interface Languag	e: en - Englis	h		Call (Login: EasyCall)	Cog
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Dashboard Edit Hunt Edit Hunt Edit Hunt Stensions Sites Phone Lines Abbreviated Dialing Abbreviated Dialing Dialing Rules	group: §	Sales Huntgroup N Huntgroup N Cal Pickup Al	umber ame lowed ctensions	111 Sales Sales Included Huntgroot tgroup Number	Web Interface Language	Hunt Sequ	uence	Order Keep orgi	inal	×
General Extensions States Phone Lines Extensional Numbers Abbreviated Dialing Dialing Rules a incoming Calls	group: §	Sales Huntgroup N Huntgroup N Cal Pickup Al	umber ame lowed ctensions	111 Sales V	Web Interface Language	Hunt Sequ	uence	Order Keep origi	inal	~

NOTE: Extension and huntgroup numbers must be different.

Add Huntgroup
 Save D Back
 Edit Huntgroup

Call Queue

This feature allows you to provide a "call center" functionality to your IP Centrex customers. When a large number of incoming calls from customers arrive to the auto attendant, PortaSIP® can forward these calls to the actual agents within a huntgroup (customer service representatives) in a regulated fashion.

Each call queue contains a pool of incoming calls (users trying to get connected) and a number of connected outgoing calls (calls that have already been connected to agents). When a new incoming call arrives, it is assigned a position in the queue. The caller will hear an announcement about his position in the queue and the estimated waiting time, which is calculated as (average call duration) / (maximum number of connected calls) * (total number of users before him in the queue). After that, the specified "music on hold" is played, and every minute the caller is updated as to his current position in the queue and the estimated waiting time.

		Customer Self-Care Portal			
Balance: 179.72 USD		Web Interface Language	en - English 💌	EasyCall Ltd (Login: EasyCall)	🔓 Logout 👻
🔝 Dashboard 🔏	My Profile	IP Centrex	Billing Information	🚫 Trouble Tickets	
Call Queue Edit					😡 Help
«					
🙀 General	Call Queue Name:	Support			
Extensions		l en en			
Sites	Huntgroup Number:	12345			
Phone Lines wo DIDs	Maximum Number of	5			
Abbreviated Dialing	Unconnected Calls:				
Dialing Rules	Call Duration:	3			
> an Incoming Calls					
Cutgoing Calls	Announce Number of Callers Ahead:	e.			
🔞 Call Logs	Callers Arleau.				
tuntgroups	Announce Estimate Wait				
Scall Queue	Time:				
A ldentty	Music on Hold:	C:\fakepath\13Lyudvig_van	Bethove Browse		
Music On Hold			-		
	🔄 Save 💭 Back				
		R 2001-2014 Deduces Tes All sinkle service	1		

Every call queue contains several configuration parameters:

Column	Description
Call Queue	Objective name of the call queue
Name	
Huntgroup	When creating a new call queue, a customer will need
Number	to select a huntgroup number (i.e. a common dialing
	code for multiple extensions). When a call arrives at
	the call queue, it is transferred to the corresponding
	huntgroup.
Maximum	The maximum number of calls that can be placed on
Number of	hold within this queue.

Unconnected	
Calls	
Call Duration	The average expected processing time for each call
	(used to calculate the estimated waiting time).
Music on Hold	A melody (or announcement) which is played to
	users waiting to be connected.

Identity

It is possible to set up the following options for handling **Identity** information:

				Customer Self-Care Po	ortal			
Balance: 2,900.27 USD				Credit Limit: 10,000	.00 USD en - English	👻 EasyCal	Ltd. (Login: EasyCall)	🔓 Logout 🔹
E Dashboard	🔏 My Profile		IP Centrex	Biling Information				
ldentity								😡 Help
	«	Hide CLI		Automatic	~			
General Extensions		Hide CLI Prefi	x	122				
📆 Sites		Show CLI Prel	fix	555				
Phone Lines External Numbers								
Abbreviated Dialing								
Dialing Rules								
Incoming Calls Outgoing Calls								
Call Recording								
Huntgroups								
Music On Hold								
~								
		🔚 Save						
		eve 📄						

Column	Description
Hide CLI	 Removes CLI (ANI) information for outgoing calls. You can choose one of the following options: Never – Always show CLI. Privacy service is not permitted. Always – Always hide CLI. Privacy service is permitted and in effect (all calls are private). Automatic – Allows flexible configuration for CLI hiding. It depends on the prefix number dialed and the privacy headers provided by an IP phone device.
Hide CLI Prefix	Enter the prefix to be dialed before the outgoing number in order to prevent the called party from seeing your phone number (Only available when Hide CLI option is set to "Automatic").
Show CLI Prefix	Enter the prefix to be dialed before the outgoing number in order to allow the called party to see your phone number (Only available when Hide CLI

option is set to "Automatic").

Music on Hold

Here you can define which music will be used for calls on hold within your IP Centrex environment.

				Custom	er Self-Care Porta					
Balance: 180.20 USD					Web Interface Language	en en	- English	*	EasyCall (Login: EasyCall)	🔓 Logout
B Dashboard	🐣 My Profile		🎡 IP Centrex		Biling Information					
Music On	Hold									
General	«	Browse	Description:	Please uplo	ad your music				Upload	
Extensions Sites		Description							Play On Hold	
Sites Phone Lines External Numbers		No Frills Cu	mbia (c) 2001 K	evin MacLeo	d. Latin				Ş	
Daling Rules Daling Rules Calls Courgoing Calls Call Recording Call Recording Call Recording Call Recording Call Recording Call Recording Calls Call Recording Calls										

To rename the music file, enter the desired name in the **Music Name** field; otherwise the local file name will be used. The uploaded music will replace the previous entry in the list, and will usually be enabled within 10 minutes of performing this action.

Billing Information tab

Billing Summary

On this page you can view your billing information arranged in five information windows:

- Brief Billing Information
- Transactions Totals Information
- Invoices Information
- Active Subscriptions
- Volume Discounts

				Customer Self-Car	e Portal								
Balance: 13.71 USD				Credit L	mit: 1,000.00	USD en - E	English		✓ Eas	yCall Ltd	(Login: Ea	syCallLto	1) 🔒 La
Dashboard	🔏 My Profile		🙀 IP Centrex	📄 Billing Information									
Billing S	Summary												
🐔 Billing Summary	(K)	Brief	Billing Information			Involces	informa	tion					
General Subscriptions Transactions Reports			Balance Credit Limit	13.71 USD 1000.00 USD		Amour Due or 2014			0.0	0 US	D 🔳	Make a I	Payment
Volume Discounts		Trans	actions Totals Information			Viev		Due Da	te	Amour	vt	Payme	nt Status
Make a Payment			From	2014-01-03		There is	no data ti	o display					
Payment Info		H	Till Total usage charges	2014-04-03 2.16 USD		🐻 See	All Invoice	s 2					
			Subscriptions	1.55 USD		Active S	ubscripti	ons					
			Total Total Transactions	13.71 USD 21			Subscripti	on	Peric	dic Fee	Start		inish Date
						Equipme	ent Rental		5.0	0 USD	2014-0	04-02	
							ent Rental			0 USD	2014-0		
						IP Phone	e Rental		9.0	0 USD	2014-0	04-03	
						2							
						Volume	Discount	s					
						Desti Group	Service	Peak Level	Thre	Used	Rem	Curre Disco	Next Disco Level
						Local	Voice Calls	N/A	92.00 minutes	0.00 minutes	92.00 minutes	15.00%	N/A

	1			
Brief Billing	This reflects your billing info such as current balance,			
Information	etc.			
Transactions	This reflects your total transactions (calls, payments,			
Totals	refunds, subscription charges, etc.)			
Information				
Invoices	This displays information for your most recent invoice			
Information	along with its status (due / unpaid). To view all of the			
	invoices use the See All Invoices button. You can also			
	view the amounts due for the present day and make			
	payments at the same time.			
Active	Subscription plans that currently apply to you.			
Subscriptions				
Volume	Volume discount plans that currently apply to you.			
Discounts				

General

Customer Self-Care Portal						
Balance: 0.00 UAH		Web Interface Language: en - English 🛛 🖌 EasyCall (Login:EasyCall) 🔒 Lo				
호텔 Dashboard	🐣 My Profile	월 IP Centrex	Billing Information			
General				🛞 Help		
Bing Summary Ceneral Subscriptions Transactions Popota Volume Discurits Volume Discurits Invoices Proynett Info	Tax ID Send Statistic	Customer Class Default Customer Class Default Ful Statetics Summary Only Do not Send	×			
	E Save					

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Tax ID	Your tax ID.
Send Statistic	 Defines what kind of xDR statistics should be delivered to the you by email: Customer class default – Use the settings for the customer class. Full Statistics – Send a CSV file with a complete list of xDRs. Summary Only – Do not send a full list of xDRs, only a brief summary Do Not Send – This option prevents the delivery of event statistics to the customer via email.

Subscriptions

This tab displays the subscription plans currently being applied to you and your phone lines. Pending (not yet active) subscriptions are always on the bottom of the list and highlighted in grey.

		Cu	stomer Sel	f-Care Portal			
alance: 15.00 USD			Web	Interface Language:	en - English	EasyCall Ltd (L	ogin: EasyCall) 🛛 🔒 Logout
🗄 Dashboard	🐣 My Profile	ip g	entrex		Billing Information		
Subscript	ions						+ @
🚰 Billing Summary	«	Subscription		Periodi	Fee	Start Date	Finish Date YYYY-MM-DD
General	∃ Shared: (1 A	tive Subscription for 19.	99 USD)				
Subscriptions Transactions	Internet Acce	ss Premium			19.99 USD	2014-07-18	-
Reports	G Account 121	26505550: (1 Active Su	bscription for 9	9.99 USD)			
Volume Discounts	Linksys Phon	e Rental			9.99 USD	2014-07-18	-
₩Ake a Payment Payment Info	Totel Subscripts	ns active now.	2	Total periodic fee an	tive 29.98 USD		
				now:			
	14 4 Page	1 of 1 🕨 🕅 🗌	æ				

Subscription	Subscription plans being applied to you.
Periodic Fee	This is a recurring fee for a particular subscription.
Start Date	Subscription activation date.
Finish Date	This shows the date on which this subscription will be
	automatically canceled.

* Default fee and the amount of discount applied for this subscription.

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Transactions

Transactions (calls, payments, refunds, subscription charges, etc.) serve as the primary record of services provided to you.

This screen allows you to view and download transaction records – for any desired time period and service.

		Customer Self-C	are Portal			
Balance: 31.02 USD		Credit Lin	nit: 1,000.00 USD en - English	~	EasyCall Ltd (Login:EasyC	all) 🔒 Logout 👻
🔠 Dashboard 🔏	My Profile	월 IP Centrex	🔋 Billing Informat	tion	🚫 Trouble Tickets	
Transactions						😡 Help
	Filter					
Ceneral Conceral Subscriptons Transactions Volume Discounts Invoices Make a Payment Make a Payment	S		09:57:15 HH24:MI:SS			
	Summary					
	Service	Total Transaction	s Charged Quantity	С	harged Amount	Show Details
	Subscriptions		5		30.99000 USD	EQ.
	Voice Calls		6 192 (seconds	5)	0.03198 USD	EQ.
	Total Service Used:	2 Total Transactions:	11	Total Charg Amount:	ged 31.02 USD	
	14 4 Page 1 of 1	▶ N 2				1 - 2 of 2
	Q Show Records					

On the Transactions Filter page you can make an extensible search via:

- A date and time range by clicking the icon
- A certain service type
- The type of required phone lines (accounts)
- If you want failed transactions to be included in the list, select the **Show Failed Transactions** check box.

Set the from / to dates by clicking the 🔝 icon and press the **Show Records** button. The result page contains a summary and tables list all calls and accompanying charges during a specified time period. If you want to view additional information (charged quantity and amounts due)

for the chosen service(s), click the Show Details 🖾 icon.

Click the **Download** icon to download Transaction Detail Records in the .CSV format.

Reports

The **Reports** screen allows you to download xDR reports for any desired time period either in .csv or .pdf formats.

Set the from / to dates by clicking the eiticon and press the Eiserch button. The resulting page contains a list of xDR reports generated within a specified time period. Each report is available in .csv and / or .pdf formats.

			Customer Se	lf-Care Portal				
Balance: 28.31 USD				Credit Limit: 500.00 I	JSD en - English	*	EasyCall (Login:EasyCal	I) 🔓 Logout ·
ashboard Dashboard	<u></u> В м	ly Profile	🔯 IP Centrex	B	lling Information			
Reports								😡 Help
	~	Report Type: All	~	From: 2014-06-15	Tit: 2014-	09-15 🖪		🛗 Search
General			Report Type			Period Start	s 👻 Period Ends	Download
Subscriptions		Standard Customer xDRs R	leport			2014-08-	18 2014-08-31	Q
Transactions								
Volume Discounts								
Invoices Make a Payment								
Payment Info								
		4 Page 1 of 1	N 2					1 - 1 of

Click the **Download** button to download an xDRs report in the desired format.

Volume Discounts

The **Volume Discounts** screen allows you to view discounts that apply to you.

		Main Customer	Self-Care Portal		
Balance: 179.72 USD		1	Web Interface Language: en - Engli	sh 👻 EasyCall Ltd (L	ogin: EasyCall) 🛛 🔂 Logout
호쿱 Dashboard	🐣 My Profile	🔯 IP Centrex	📄 Billing Informat	ion	
Transactio	ons				() He
Idam a	« _•v	oice Calls			
Constant Section Summary Constant Constant Cons	Hist	Discount Plan	Combined Discount	Used/Remaining	Expiration
Transactions	BG	inada			
Reports	Q) Discounted calls to Canada	20%	0 minute of 60 minutes	30 days
Make a Payment					
Payment Info					
		© 2001-2014 PortaOne,	Inc. All rights reserved.		

Field	Description
Service	A specific service (voice calls, messaging, data
	transfer, etc.) that this volume discount will apply to.
Destination	Information about discounts used and remaining is
Group	shown, grouped by Destination Group names. Each
	name represents one group included in the volume
	discount plan assigned to you.
History	Invokes a pop up window which shows extended
_	information about the discount plan.
Discount Plan	The name of the volume discount plan applicable for

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	this customer.
Combined	Shows the total discount value currently applied to
Discount	the customer that resulted in the discounts'
	combination.
Used /	Shows the current value of both consumed and
Remaining	remaining discount volume (in minutes or funds).
	The progress bar graphically reflects how much of
	the discounted service has been consumed.
Expiration	Shows the time left for the discount to be reapplied
	to the customer.
	If Never is defined, it means that this discount is for
	one-time use and will not be reapplied to the
	customer.
	Discount History window
Status	The current status of the discount plan:
	• Active Discount Plans – the discount plans
	that are currently in use
	• Consumed – the discount plans that have
	already been used up
	• Not Yet Active – currently inactive discount
	plans
Current	The value of the discount currently applied to the
Discount	customer.
Expiration	The time left for the discount plan counters to be
	reset.
Combine With	Shows the way this discount plan is combined with
Other	other discount plans applicable to a session.
Discounts	other encount plans applicable to a session.
210004110	

Comment [A1]: Check on web interface

Invoices

The invoices screen allows you to view all your invoices. A particular invoice can be found either by entering its number or by selecting a date range and clicking the icon . If you want to include void invoices, just select the corresponding check box and then press **Search**.

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Invoices	5							9	Help
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Invoices		C Enter In	voice Number						
🚟 Make a Payment 🎲 Payment Info		View	No.	Period Starts	Period Ends	Due Date	Amount	Payment Sta	atus
		Q	185	2014-03-02	2014-03-03	2014-03-07	0.00 USD	Paid	
		Q	183	2014-03-01	2014-03-02	2014-03-06	0.00 USD	Paid	
		Q	181	2014-02-28	2014-03-01	2014-03-05	0.00 USD	Paid	
		Q	179	2014-02-27	2014-02-28	2014-03-04	0.00 USD	Paid	
		Q	177	2014-02-26	2014-02-27	2014-03-03	0.00 USD	Paid	
		Q	175	2014-02-25	2014-02-26	2014-03-02	0.00 USD	Paid	
		Q	173	2014-02-24	2014-02-25	2014-03-01	0.00 USD	Paid	
		Q	171	2014-02-23	2014-02-24	2014-02-28	0.00 USD	Paid	
		Q	169	2014-02-22	2014-02-23	2014-02-27	0.00 USD	Paid	
		2 14 4 1	Page 1	of 2 🕨 🕅 🖓				1 - 50) of

Invoices cover these parameters:

- No. (invoice number) the unique identifier for an invoice
- **Date** the date that the invoice was issued
- **Payment status** this specifies one of the following:
 - Do Not Pay the invoice amount is 0, therefore no payment is required
 - Unpaid –payment has not yet been received
 - Partially Paid payment has been received but in an amount less than the amount due
 - o Paid invoice has been paid in full
 - o Overdue invoice is unpaid and past due
 - \circ N/A payment status is not applicable for this invoice.
- **Period Starts / Ends** the period for which an invoice is generated
- **Due date** date by which payment should be received
- Amount sum of all charges for this period minus credits / refunds

Select the View icon in the result list to view or print a particular invoice.

Make a Payment

This screen allows you to see your current balance and top it up by choosing one of the available payment methods.

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Make a	Payment							
	~	Now your balance is 180.20 USD						
General Constructions Constructions Constructions Constructions Constructions		Amount: 200						
Volume Discounts		Pay with your credit or debit card.						
Make a Payment		Bank account (eCheck)						
Payment Info		Paying from your checking Bank Acc						
		A direct debit is a financial transactio	in in which you withdraw funds from	a bank account.				

When the screen is loaded, the **Amount** field will show the amount necessary in order to equalize the balance. If you have a credit card whose payment characteristics are recorded in the system, it will be used by default. Change the amount if needed and click the **Pay Now** button to proceed with the payment.

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Biling Summary General Subscriptions Reports Volume Discounts Wrycles Make a Payment Payment Info	6	Expration Date: Payment Method:	200.00 11115xxxxxxxxx 2015-01-31 American Expres		USD (1.00 USD m				
		See Other Paymen	it Methods						

An alternative payment method can be used by clicking the

Use Other Payment Methods icon. The list of currently supported payment methods is the following:

- Credit or Debit Cards allows you to pay using your credit or debit card
- Bank account (eCheck) allows paying from your checking Bank Account
- **Direct Debit NL** allows you to perform financial transaction in which you withdraws funds from a bank account
- **PayNearMe** allows you to pay for services in cash at any 7-Eleven or ACE Cash Express store across the United States. You

need to specify your email to get a PayNearMe payment slip via email and then print it. The payment slip contains the bar code to be scanned at a 7-Eleven or ACE Cash Express location. You pay cash to the store clerk, who then records the transaction – the payment information is immediately delivered to the service provider via the PayNearMe network. PortaBilling® records the transaction and updates your balance so you can immediately start using the service.

You can return from that screen by clicking the will be stored Payment Method icon.

NOTE: If the card information has not been stored, only the Alternative Payment screen will be displayed.

Payment Info

This screen allows you to set up the following parameters for periodic automated payments.

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		ing the payment method	Remove Stored Card.				

In the **Preferred Payment Method** block you can choose which type of payment method to use.

The **Auto-pay invoices using this payment method** allows you to define whether a credit card should be charged at the end of the billing period.

To set up automatic payment with a debit or credit card when the balance crosses a specified threshold, select the **Pay** check box and specify the threshold in the second field. When the balance crosses this threshold the credit card will be charged for the amount specified in the **Pay** field.

Trouble Tickets tab

Using the **Trouble Tickets** tab, you can view a list of recent tickets and create new tickets within the RT (Request Tracking) system.

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To create a new ticket, simply click the ^③ **Create Ticket** button at the bottom of the page.

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3. How to...

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... define a time period using the wizard?

With the period definition wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based on a 24-hour clock, i.e. 8pm is the same as 20:00.) The Period Wizard is intuitive and lets you configure multiple time intervals from a single page in just a few mouse clicks. The following example illustrates the process of creating a period within the Monday-Friday workweek that starts at 8pm and lasts until 8am the next morning:

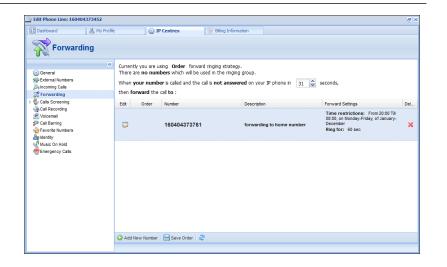
 On the Period Wizard page, select 20:00 in the Start Time box and 08:00 in the End Time box. In the block containing days of the week select Monday, Tuesday, Wednesday, Thursday, Friday. In the block containing months click the Select All Months button. Then click the Include New Period button and this time period will appear in the Time Periods window on the right side of the page.

2. Click **Finish** to complete the period definition. If you wish to set another definition for this period, repeat step 1.

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General External Numbers Incoming Calls		Start Time: End Time:	20 * :	00 ¥ 00 ¥		Time Periods From 20:00 Till 08:00, on Monday-Friday, of January-December	3
Calls Screening Call Recording Voicemail Call Barring		Day of the Month:	Example: 1, 3				
Favorite Numbers Sidentity Music On Hold		Select All Day Sunday	ys 🕹 Se V Janu V Febr				
Emergency Calls		V Tuesday V Wednesday	Marce April	ch	Include New Period 🔶		
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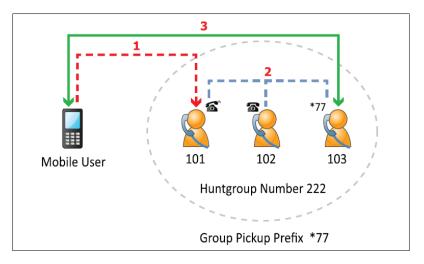
3. Click **Save** to add a specified time period for the current forwarding number.

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... configure multiple pickup groups?

The multiple pickup groups functionality allows phone lines in the same IP Centrex environment to be grouped so that phone line owners within the group may answer each other's calls by merely dialing a Group Pickup Prefix on their phones.



Let's assume that there are two offices working with shared secretarial services. First you must enable a Group Pickup feature, then configure two huntgroups and lastly configure the pickup groups within them:

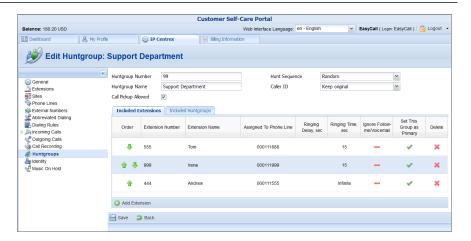
- 1. Go to the **Incoming Calls** page:
 - Enable the Group Pickup feature

• In the **Group Pickup Prefix** field specify *77.

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- 2. Go to the **IP Centrex** tab.
- 3. On the **Huntgroups** page of the IP Centrex tab add two huntgroups (for how to add huntgroups, see the section titled **Huntgroups**):
- To the first huntgroup 88 (e.g. Sales Department) add the required extensions: 222, 333 and the secretary's 999 extension. Define huntgroup 88 as primary for extensions 222 and 333. Make sure the **Call Pickup Allowed** feature is enabled for the huntgroup.
- To the second huntgroup 99 (e.g. Support Department) add extensions 444, 555 and the secretary's 999 extension. **Define huntgroup 99 as primary for all these extensions 444, 555 and 999.** Make sure the **Call Pickup Allowed** feature is enabled for the huntgroup.

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General	~	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete		
Extensions Sites Phone Lines External Numbers		7	1	88	Sales Department	123 Order	Assigned Extensions • 222 - John • 333 - Catherine • 999 - Irene	Keep original	*	×		
Abbreviated Dialing Dialing Rules Dialing Rules Dialing Calls Call Recording		-	1	99	Support Department	Random	Assigned Extensions • 444 - Andrew • 555 - Tom • 999 - Irene	Keep original	*	×		
Huntgroups												
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		🗿 Add Huntç	group 4	4 Page 1 c	π ▶ № 2 2					1 - 2 of 3		

With these settings the following scenario is possible: There is an incoming call to extension 444. The secretary (extension 999) can dial *7788 to pick up the call (because 444 is in their non-primary group, thus *77 won't work. They have to dial the group pickup prefix and the number of huntgroup). To pick up an incoming call to the extension 222 the secretary can dial *77 because extension 222 is in their primary group.

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