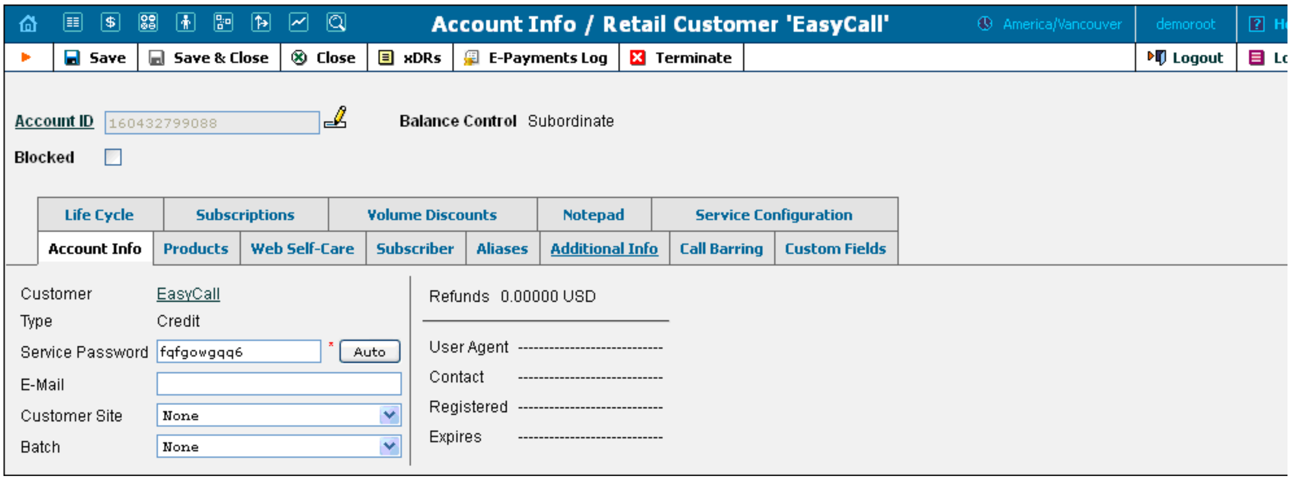
Add Account

To add a new account manually (this allows you to access all available properties of an account), select **Add** in the toolbar and then (if a quick form selection dialog – select **Manually** at the bottom of the list).
For bulk account generation, select **Account Generator**.

The Account Info page provided for the administrator is similar to the Add Account interface; however, some account details are read-only. Th administrator is unable to modify Type, Batch, Control Number and Opening Balance. When making changes, the administrator can use the Notepad tab to provide a comment detailing the reason for these changes (for example, "product changed, credited $50").

Changes can be confirmed by selecting **Save** or **Save&Close**.



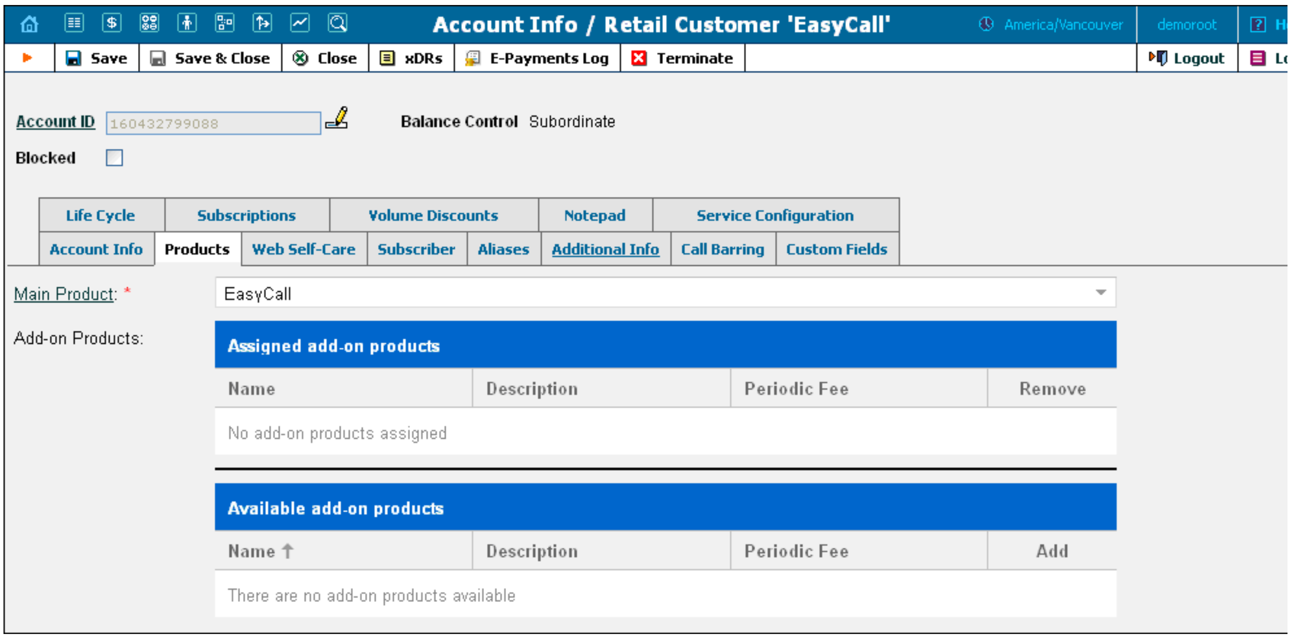
Field	Description
Account ID	The primary identification of this account. The ID is read-only by default; you can modify it by clicking the Edit ID icon. The maximum allowed ID length is 32 characters.
Blocked	Specifies whether the account is blocked or unblocked. If this is checked, the account will be unusable.
Balance Control	In most cases a customer makes a unified payment for all accounts and controls the credit limit at the customer level. Here you select whether to display the balance of individual accounts on a web interface: • Subordinate – no individual account balance and credit limit. Select this if balance management is done for a whole company (a customer). Consider the following example: a company has several phone lines (accounts). The users make calls, thus the balance of the whole company increases. At the end of the billing period the company receives a consolidated invoice for the activities of all the accounts and sends a single payment which is then applied for all accounts. The payment is made and the balance of the company decreases. • Individual Credit Limit – individual account balance and credit limit remain. Select this if you still want to operate with the balance of individual accounts.
Balance	The balance for this account.

Account Info

Type	The account type may be "Debit", "Credit", or "Voucher". Debit is usually associated with prepaid cards. Credit is an account that will be invoiced for incurred costs. Voucher accounts are "refill coupons" for other types of accounts.
Credit Limit	Only available when the account type is set to "Credit" and Balance Control to "Individual Credit Limit." Defines the credit allowance in the account's currency.
Service Password	The password used to authenticate any calls made using this account.
E-mail	If an account has e-mail info associated with it, the owner of the account can reset the password for self-care access, and the new password will be sent to this e-mail address.
Customer Site	Places this account (phone line) with a specific site so that the site parameters (e.g. number of simultaneous calls) will apply.

Batch	If a new batch name is provided in the text field, a new batch will be created when you add the account. Alternatively, an existing batch could be selected from the drop-down list. If you leave this field empty, the created account will not be tied to any specific batch.
Control Number	Read-only. The sequential number of the account in the current batch. Batch name and control number uniquely identify an account, and are often used for prepaid calling cards.
Zero Balance Date	Applicable only for debit accounts; specifies when the account has used up all of its available funds.
Opening Balance	The opening balance for this account.
Refunds	The amount refunded to the account owner.
User Agent	If this account is currently used by a SIP UA to register with the SIP server, the user agent identification info is displayed.
Contact	The URI of the user agent used by the SIP Proxy to contact the IP phone.
Registered	The timestamp when a SIP UA has been registered.
Expires	The timestamp when a SIP UA registration expires.

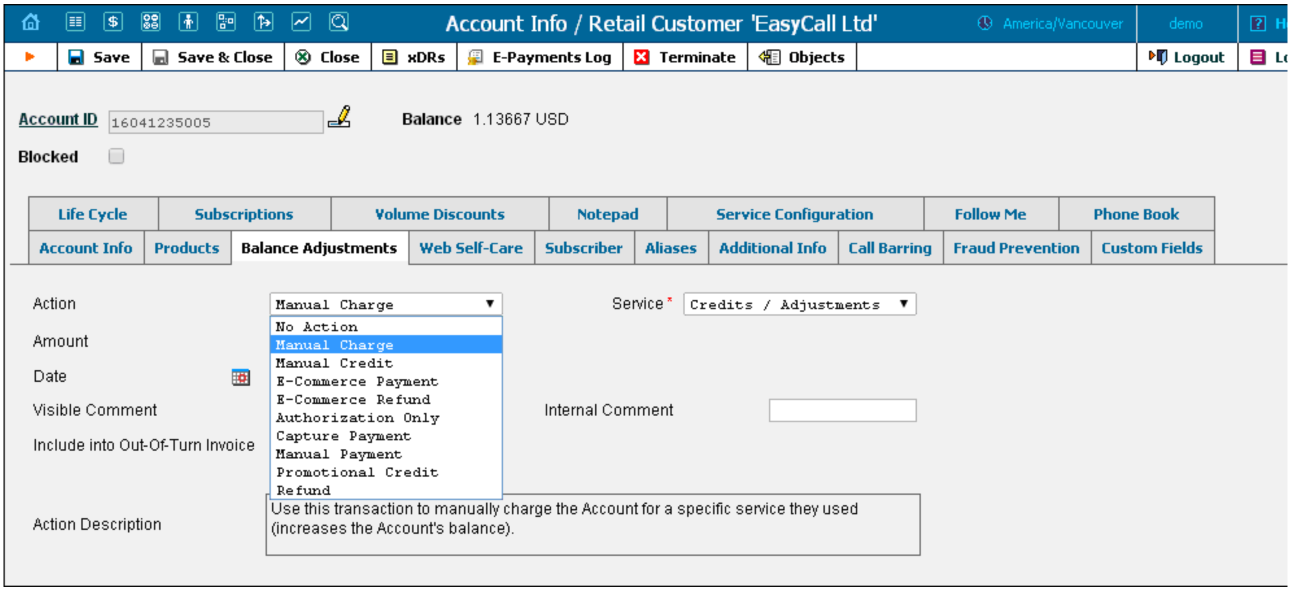
Products



Field	Description
Main Product	A basic product to which you assign all the basic services that can be available to your customers.
Add-on Products	An additional product by which you can increase or limit the services provided to your customers

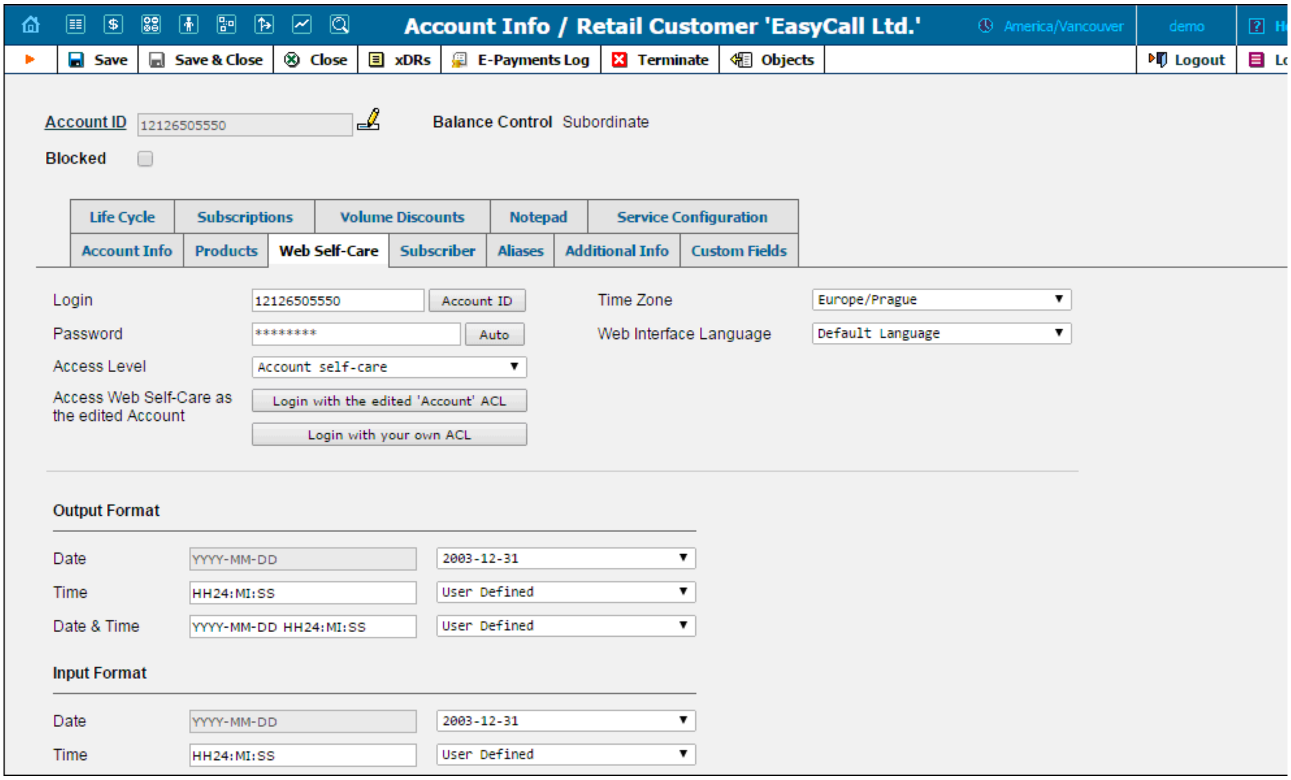
Balance Adjustments

The **Balance Adjustments** tab allows the administrator to correct an account's balance (this tab is only available in **Edit Account** mode).



Field	Description
Action	**Manual charge:** Use this transaction to manually charge an account for a specific service they used; for instance, if you are selling a SIP phone to a user. This means the balance will be changed so that the user is able to make fewer calls. **Manual credit:** Use this transaction to manually give compensation related to a specific service; for instance, if the user files a complaint and you agree to give him credit toward future service use. This means the balance will be changed so that the user is able to make more calls. **E-Commerce payment:** Use this transaction to charge the user's credit card and apply the amount to the user's account balance as payment. **E-Commerce refund:** Use this transaction to reverse a previous E-commerce payment. It withdraws funds from your company's merchant account and applies them as credit to the user's credit card. The amount is added to the user's account balance. **Authorization only:** Verifies that the user's credit card is valid and reserves a given amount. Returns a transaction ID to be used in a Capture Payment transaction. Does not affect the user's account balance in PortaBilling® or his credit card balance. Note: the transaction ID will be written to the user's account Notepad entry. **Capture payment:** Charges the user's credit card and applies the amount to his balance as a payment (decreases the user's account balance). Requires a transaction ID from the Authorization Only transaction. The amount must be less than or equal to the amount of the corresponding Authorization Only transaction. **Manual payment:** Use this transaction when receiving a payment (e.g. cash or check) directly from the user. This means the balance will be changed so that the user is able to make more calls. **Promotional credit:** Use this transaction to give the user a credit, for example, as a sales promotion. The difference between this and "Manual Credit" is that this transaction applies to a special "Credits / Promotions" service, and not to any actual service. Basically, it provides some "virtual" funds to the user for future use. **Refund:** Use this transaction to refund an earlier payment received from the customer (e.g. a check returned by the bank). This means the balance will be changed so that the customer is able to make fewer calls.
Service *(only for Manual charge and Manual refund)*	A service for which the manual charge / credit is made. The charged / credited amount will be included in the selected service section on the next invoice.
Amount	Amount to charge / refund.
Date *(only for Manual charge and Manual refund)*	A date associated with the manual charge / credit. For example, you can specify a date for manual credit action for when an item is credited. Note that if the selected date falls within a previous (closed) billing period the transaction will be included in the next invoice.
Transaction ID *(only for E-Commerce Refund and Capture Payment)*	The transaction ID obtained via the *Authorization Only* transaction. This is required to use the reserved earlier amount for a current transaction.
Visible Comment	A comment on this transaction visible to the customer in the xDR browser.
Internal Comment	An internal comment on this transaction; not visible in the xDR browser, and accessible only from the database directly.

Web Self-Care tab

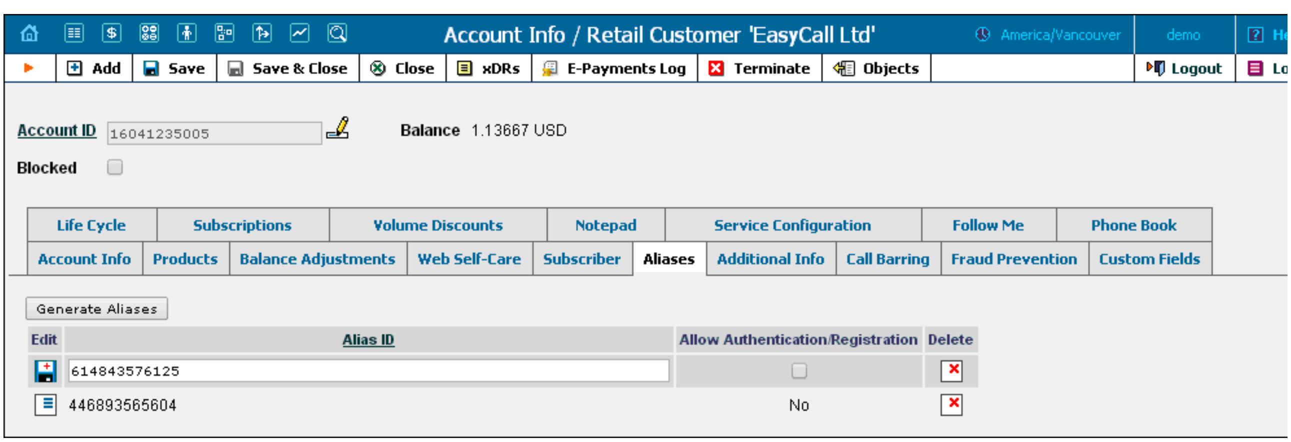


Login	Account login for the account self-care interface. Click the Account ID button to make the login identical to the Account ID.
Password	Self-care interface password for the account.
Access Level	Access level assigned to the account.
Access Web Self-care as the edited Account	In this section you can choose which ACL to use when you login to the account self-care interface. • Click **Login with edited 'Account' ACL** to login to the account's self-care interface using the access level currently assigned to the account. • Click **Login with your own ACL** to login to the account's self-care interface using your own ACL settings. Note that this button is visible only to those users whose ACLs include *corresponding permission*.
Time Zone	Time zone for the account.
Web Interface Language	Displays the account self-care interface in a particular language.

Subscriber

The Subscriber tab provides most of the commonly required contact information for the account's owner.

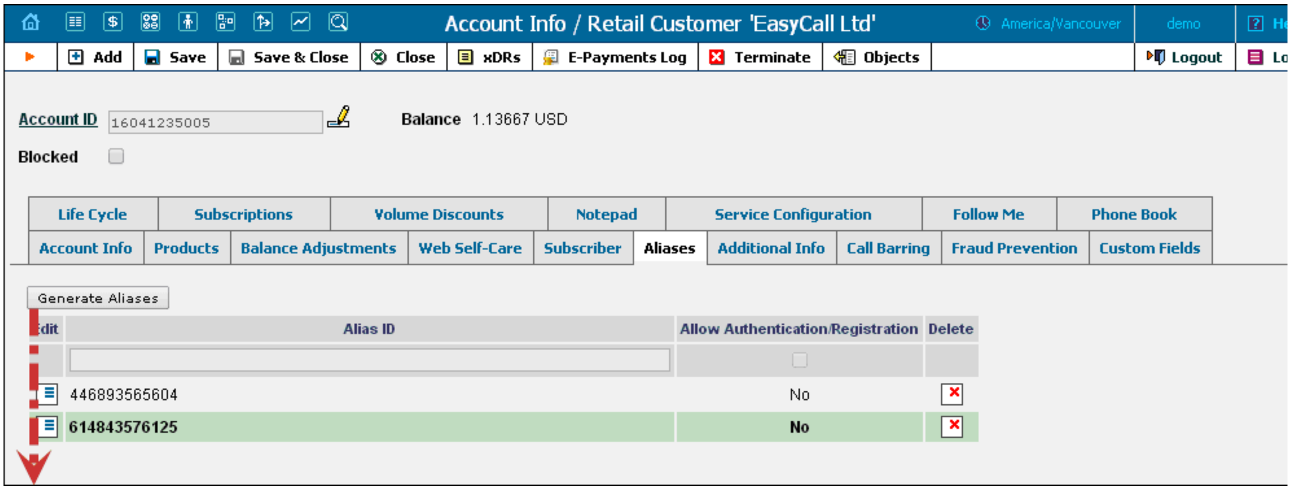
Aliases

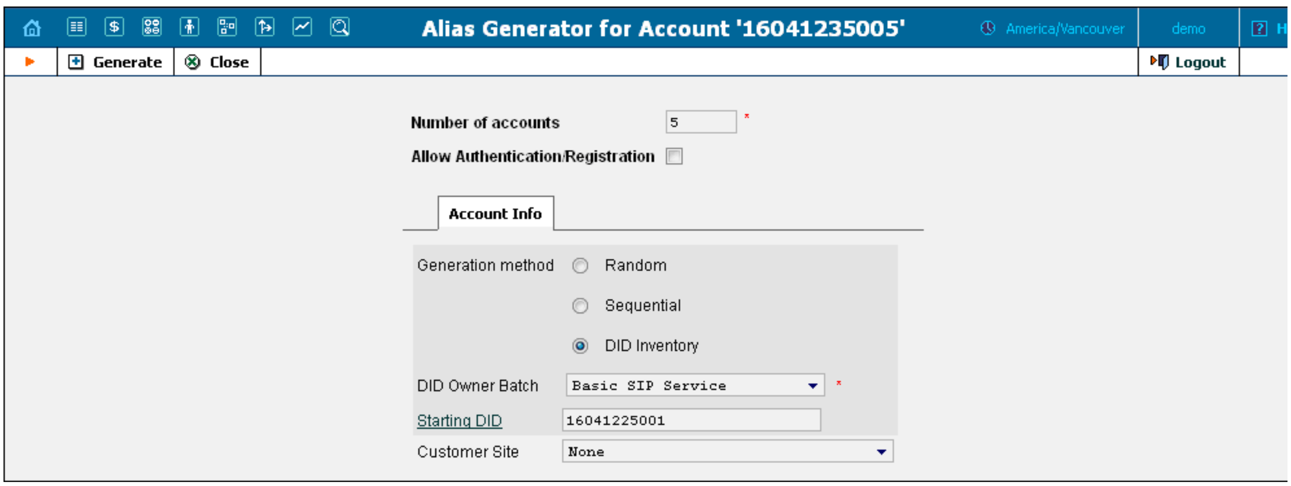


Alias ID	Contains alternative IDs for this account.

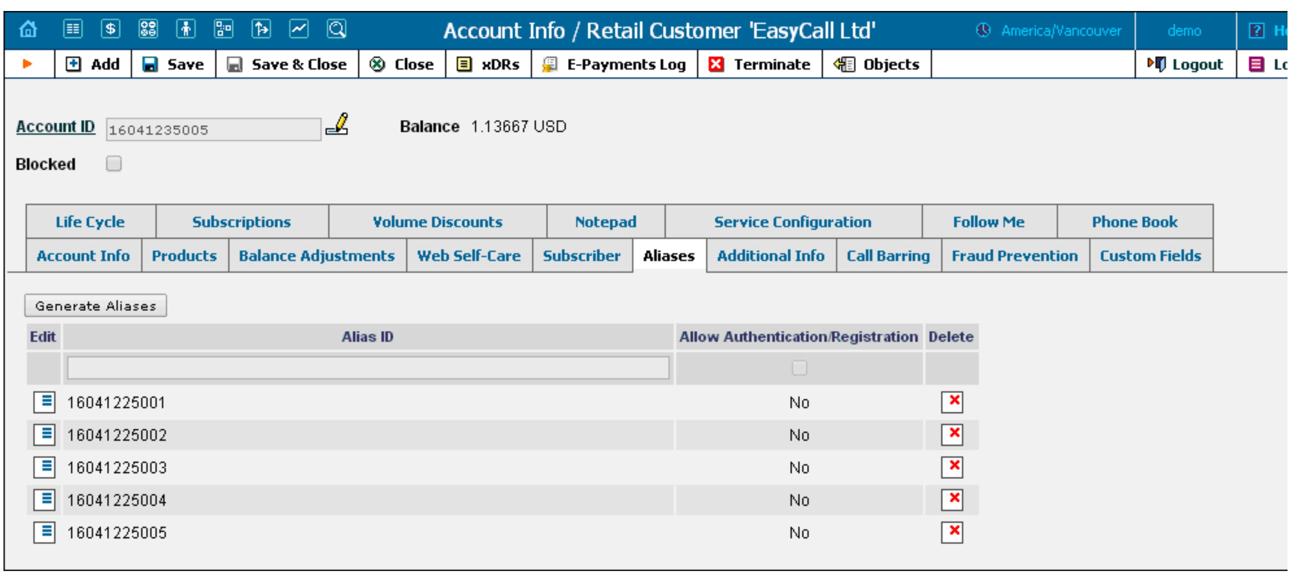
Allow authentication / registration	Defines whether this ID can be used independently for authentication and registration (e.g. having two IP phones concurrently registered to PortaSwitch®, one using the main account ID and the other using an alias) or, alternatively, it can only be used to forward calls to the main account (since only it can register).

If you need to create multiple aliases (e.g. a customer with his own IP PBX who buys a range of DIDs to be forwarded there) you can use the Alias Generator to produce aliases in a similar way as with the Account Generator.

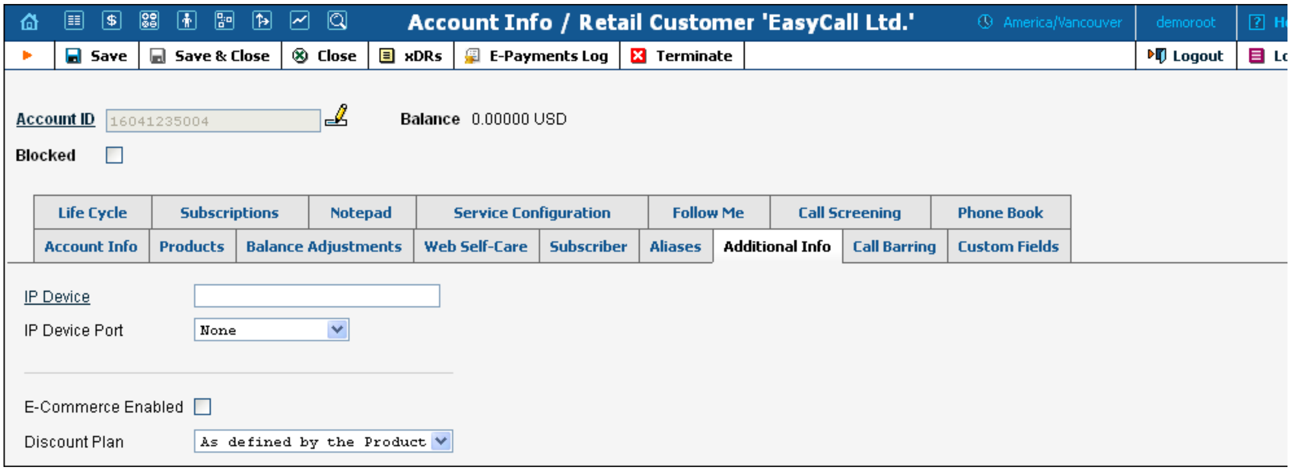




NOTE: Aliases are generated as a background task, so it may take a few minutes before they appear in Account Info.

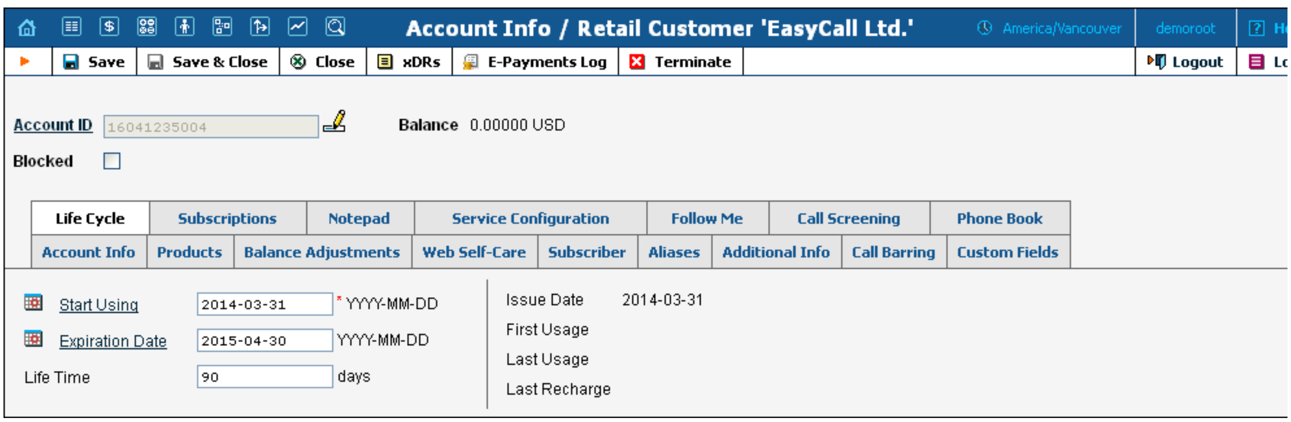


Additional Info



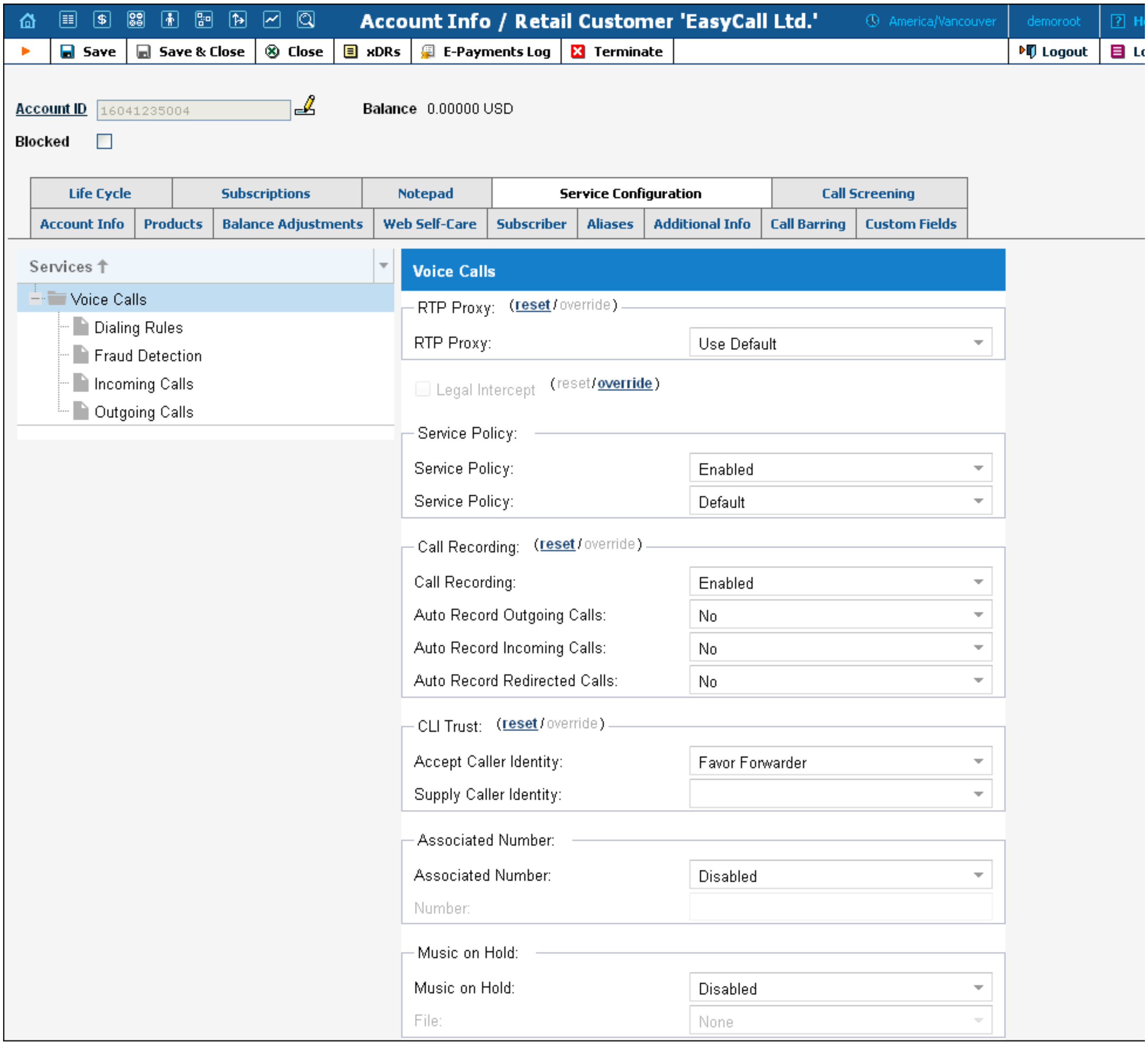
IP Device, IP Device Port	Indicates the IP phone and associated port assigned to the account. Default – not set.
Download PortaPhone Profile	The link to download the profile for PortaOne Softphone (only available when this account is assigned to an entry from the IP Device inventory, provisioned with PortaPhone profile type).
E-commerce Enabled	Allows the account's owner to make online payments or set up periodic payments on the account self-care page. Note: Configuring the account to enable online payments (both manual and periodic) is done in exactly the same way as for customers. First you should set up a suitable payment system.
Discount Plan	Assign a discount plan to this account. When a new account is created, it will be assigned by default a discount plan associated with the account's product.

Life Cycle



Start Using	The date from which the account is usable.
Expiration Date	The date from which the account will be unusable. If you do not want the account to expire, leave this field blank. Note: This date is assumed to be in the billing server's time zone, not the account's one.
Lifetime	Defines the number of days the account remains active after the date of its first use. The account will expire on the first usage date + lifetime days. If you do not want to use this feature, leave the field blank.
Issue Date	The date when the account was created.
First Usage, Last Usage	The time stamp when the account was in use for the first / last time.
Last Recharge	Specifies the last time the account was recharged using a voucher (either via the self-care page or IVR).

Service Configuration



You have the option of expressly specifying the value of a given parameter or using the "Customer default" option. In the latter case, this parameter is assumed to be the value defined in the customer's configuration (the global value for this IP Centrex).

Field	Description
	The *Voice Calls* service type
Associated Number	Specifies the number to be sent back to the IVR in an authorization confirmation. For example, this might be a redirect to a technical support number in an IVR application. Another example might be a quick-dial number for prepaid accounts. (In this case, the redirect number may be maintained via web self-provisioning.)
Legal Intercept	Intercept all incoming and outgoing calls of this specific account for law enforcement purposes.
Call Recording	Enables the recording of calls made or received by this specific account. The user can start and stop recording a specific phone conversation after it has already started by using various phone controls.
Auto Record Outgoing Calls	Automatically record outgoing calls made by this specific account. Note that calls made to the voice mailbox to retrieve messages will not be auto-recorded.
Auto Record Incoming Calls	Automatically record calls received by this specific account.
Auto Record Redirected Calls	Automatically record calls redirected by this specific account. Note that:

	• redirected (transferred or forwarded) calls are only recorded if the XDR for this call is created for the redirecting party • calls diverted to voicemail will not be auto-recorded
RTP Proxy	This specifies the RTP proxy policy for this account. For a description of possible values, refer to the *Calls to / from Vendor connections with Voice Calls service type* section. • **Use Default** – This uses Optimal RTP proxy • **As defined by the Customer** – This assumes the value defined in the customer's settings
Accept Caller Identity	This option indicates acceptance. • **Favor forwarder** – use the redirector provided ID for caller identification • **Caller only** – use the caller provided ID for caller identification • **None** – do not accept caller provided ID for caller identification
Supply Caller Identity	This option indicates acceptance. • **Yes** – accept the remote network and maintain caller ID on outgoing headers (even for private calls) • **No** – do not accept the remote network and strip any private caller's ID
Service Policy	This specifies a predefined set of options for this account. The **Default** option means that no service policy is currently assigned.
Music on Hold	Defines the music on hold to be used with the account. Choose None to disable this feature, or select the default setting for the account's customer. To upload your own music, select a file on your local file system using the Browse button. To rename the music, 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 is usually enabled within 10 minutes. For a list of supported audio file formats, see the *Audio File Formats Supported by Music on Hold Feature* chapter.
The *Incoming Calls* section	
UM Enabled	Allows the account user to access the unified messaging system. See the **PortaUM Administrator Guide** for more details. Please note that if an account has **UM Enabled** activated, there will be an additional link next to it on the administrator interface: **Voicemail Inbox**. By clicking on this you will automatically go to the account's UM administration pages. This is extremely useful for helpdesk people, since they can quickly check the configuration of an account's auto-attendant, call queues, and the like. Also note that it may take a few minutes before an account is fully provisioned in PortaUM®. Thus if you click on the link immediately after activating **UM Enabled**, it most likely will not work yet.
Mailbox Limit, MB	Allows you to define / change mailbox limit.
Call Forwarding	Assigns a call forwarding mode to this account: • **No Forwarding**: Disables call forwarding entirely. • **Follow-Me**: Enables standard follow-me forwarding. • **Advanced Forwarding**: Activates advanced call forwarding mode. • **Forward to SIP URI**: Replaces the **Follow-me** tab with a simplified **Forward** tab, where you can enter a forwarding destination as a CLD@IP. • **Simple Forwarding**: A simplified type of forwarding where you specify a single phone number to which calls will be sent.

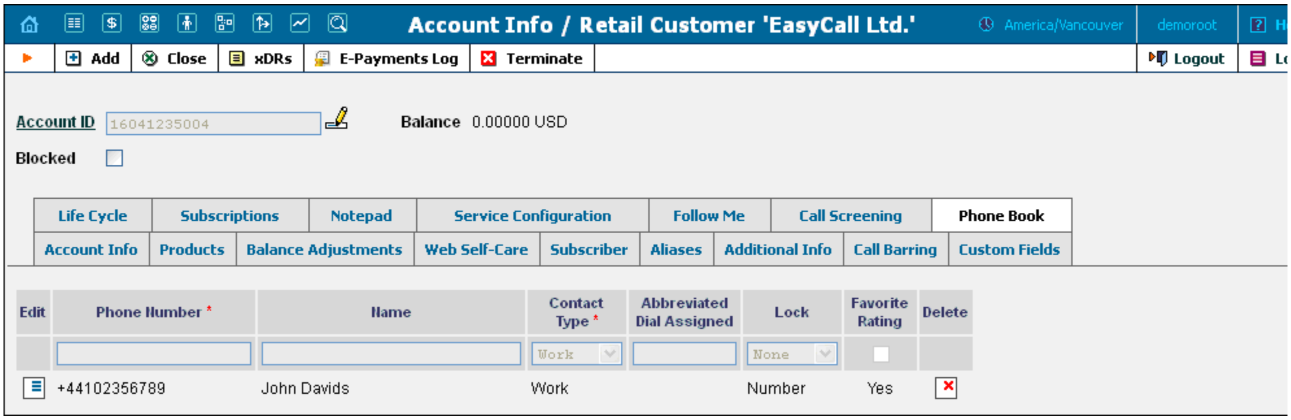
Maximum Forwards	When you select follow-me or advanced call forwarding, you must also provide a value for the **Maximum Forwards** parameter, so as to limit the number of concurrently active forwarding destinations allowed. Please note that you do not have to limit the total number of phone numbers entered, but rather the number of phone numbers active at any given moment of time. For instance, a user may have a list of 20 numbers, each active in its own time period, some temporarily turned off, and so on. When call forwarding is done, PortaBilling® will compute a list of numbers which may be used at that moment, and choose only the first N in the list, where N is the number specified in **Maximum Forwards**.
Timeout, sec	How long the IP phone will ring before a call goes to follow-me numbers (if any) or voicemail.
Call Screening	Enables selective call processing / conditional call forwarding features.
Endpoint Redirection	This allows the end user to configure call redirection on their SIP phones (if this feature is supported by the SIP phone).
Default Answering Mode	Specifies the method of processing incoming calls to this account if selective call screening has been disabled, or if none of the selective call screening rules apply.
Ext-to-Ext Call Distinctive Ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
Present Caller Info	Display caller info on incoming calls.
Call Waiting	This activates the Call Waiting functionality.
Caller ID (CNAM) Lookup	This option shows the actual name of the caller retrieved from the database of the CNAM provider for incoming calls.
Sip Static Contact	Enable this feature if customer's IP PBX can't perform SIP registration to PortaSwitch®.
Host	This contains a valid IP address of customer's IP PBX (four numbers separated by points, e.g. 12.34.56.78).
Port	The port to connect to on the remote end. Default port 5060 is used where no value is provided.
Use TCP	Enables you to choose the TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications for PBXs that do not support UDP.
The *Outgoing Calls* section	
Override Identity	This allows you to set the following options for overriding identity information: • **As defined by the Customer** – This assumes the values defined in the customer's configuration. • **Never** – The caller's identity information supplied by the remote party will neither be screened nor overridden. This implies that the remote party is trusted and takes full responsibility for the supplied display number and display name. • **If Different from Account ID and Aliases** – The identity will be overridden if it differs from the ID of the account that is authorized for the call and any of the aliases assigned to this account. • **If Different from All Customer Accounts** – The identity will be overridden if it doesn't match an account ID (or account alias) of any account belonging to this customer. • **If Different from All Accounts in the Specified Batch** – This is a more restrictive option than the one above; it overrides the identity if the account placing the call and the account matching the supplied identity do not belong under the same batch. This allows you to create "groups" under the same customer (within the same IP Centrex environment). • **Always** – The identity value supplied by the remote party will always be overridden. This allows you to manually specify the display number and / or the display name for an account.

Batch	This allows you to specify the batch (this field is only available when **If Different From All Accounts In The Specified Batch** has been selected).
Identity	Specify a default value that will replace the account identity (or display number) when the identity used for the call in the RPID / PAI headers (or From header) is invalid. If not specified, the account ID will be used instead.
Override Display Number	This allows you to control the "Caller number" value that will be placed in the `From:` header and typically displayed on the called party's phone display. The possible values are: • **Never** – The display number supplied by the remote party is not restricted and therefore will not be modified. This allows the remote IP phone or IP PBX to supply any CLI / ANI number. • **If Ruled Out by the Identity Constraint** – The validity of a display number supplied by a remote party is verified according to a rule set for identity. For example, when the *If Different From Account ID And Aliases* option is selected in the **Override Identity** list, and the display number supplied by the remote party doesn't match the ID of the account that is authorized for the call or any of the aliases assigned to this account, the display number will be overridden. • **If Different from the Used Identity** – The display number supplied by the remote party (in the `From:` header) will be overridden if it is different from the used (already checked and / or overridden according to the **Override Identity** constraint) caller identity. • **Always** – The display number supplied by the remote party will always be overridden. This allows you to manually specify the display number for an account.
Display Number	Specify a value that will override and replace the account's original display number. If no value is specified, it defaults to the account's **Identity.**
Override Display Name	Replace the original account number with the desired name.
Display Name	This allows you to specify the desired name for the account.
Preferred IVR Language	This feature enables or disables the selection of languages from the "Language" list.
Language	Allows user to choose the preferred language for interacting with an IVR application.
E911	Activate emergency services for this account.
Hide CLI	Remove CLI (ANI) information for outgoing calls. The following options are available: • **As defined by the Customer** – Assumes the value defined in the customer's configuration • **Never** – Always show CLI. Privacy service is not even permitted for an account • **Always** – Always hide CLI. Privacy service is permitted and in effect (all calls private)

	• **Automatic** – Allows flexible configuration for CLI hiding. It depends on the prefix number dialed and the privacy headers provided by the UA
Hide CLI Prefix	Prefix to be dialed before an 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	Prefix to be dialed before an outgoing number in order to allow the called party to see your phone number. (Only available when **Hide CLI** option is set to "Automatic".)
Call Barring	Activates the Call Barring feature (a new **Call Barring** tab will appear, where you can configure destinations which this user is not allowed to call).
Individual Routing Plan	This feature enables or disables the selection of the routing plan from the **Routing Plan** list.
Routing Plan	This enables the selection of the routing plan to be used for outgoing calls when the end-user dials a number without using a specific selection code.
Phone Book	Activates the Phone Book feature. This allows an account user to maintain its own set of frequently dialed numbers, assign speed dial codes to them and define a list of favorite numbers.
Maximum Abbreviated Dial Length	The maximum allowed length (0-10) of speed dial codes. Zero means that although the account will still have the capability for adding frequently dialed numbers, the customer will not be able to assign speed dial codes to them.
Maximum Favorite Numbers	You may allow an account user to define a list of favorite numbers. This field specifies the maximum amount of numbers that the account can mark as favorites.
Favorite Numbers Locking Interval	This defines the period in days during which the favorite numbers cannot be changed. Thus when a new favorite number is added (or an existent one is changed) by an account user, the number will be locked for a specified period of days. When this period ends, the favorite number can be either changed or deleted.
Favorite Numbers Allowed Patterns	This is a comma-separated list of patterns for numbers which an account user can mark as favorites. For example, to allow an account user to mark Moscow, Russia destinations as favorites, input "`7495, 7499`" here. This field can contain the following special symbols: • '%' – wildcard for any number of symbols, and • '_' – equivalent wildcard for one symbol. If this field is empty, then any number can be marked as a favorite.
Call via IVR	Allows the call to be processed in an assigned IVR- capable voice application. The most common option is **Product's default**. In rare cases, you may need to define special call processing for an account in order to override the product's parameters. In such cases, select **Enabled** to activate the feature, or **Disabled** if you do not want to activate it for this account.
Voice Application	If a call via the IVR feature is enabled, select a voice application for processing the calls. Typically this is a special pass-through IVR application for voiceover announcements during the call, but any standard IVR application can be selected to intercept the outgoing call.
The *Fraud Detection* section	
Location Information	This defines the user location for geo-IP fraud prevention. The most common option is **Product's default**. In rare cases, you may need to disable fraud prevention for a specific account (in this case select **Disabled**) or define a different location for this specific account (select **Account has its own**).
Current Location	Type in the user's permanent location. It should contain an *iso_3166_1_a2* country code (e.g. au).
Allowed Mobility	Only available when **Geo-IP Fraud Detection Enabled** is set to **Yes** and a profile is selected in the **Geo / Risk Profile** option of the account's product. Select **Stationary user (constant location)** if this account 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 countries will be screened. The **Roaming user (frequent location)** option can be used for

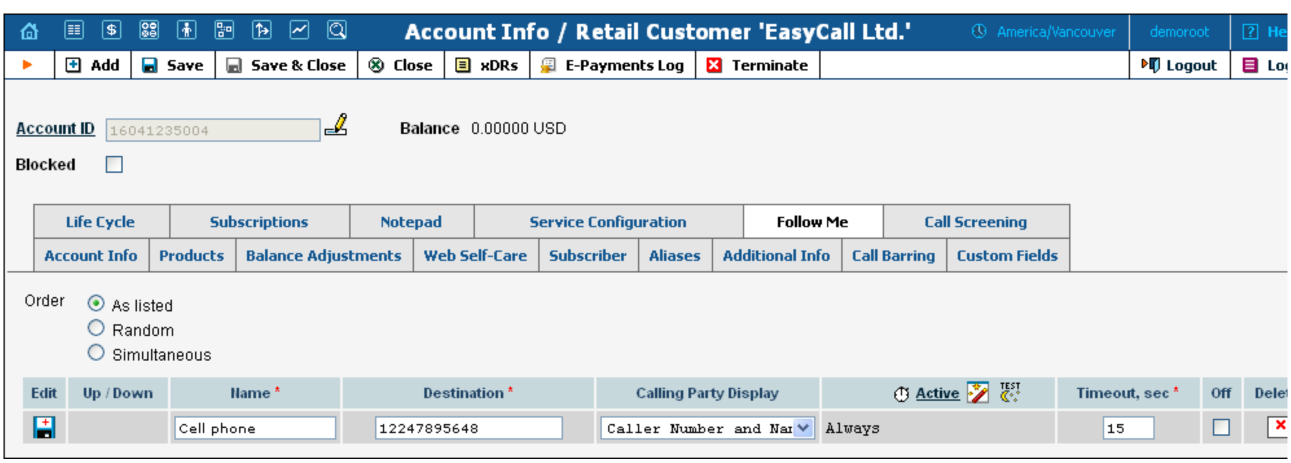
	customers who travel frequently. In this case, a location change would be considered acceptable.
Voice Authentication	If the call has been made from a “suspicious” location, this feature will enable or disable a customer’s authentication when a legitimate customer attempts to make a call.
Service Unblock Code	The account’s unique code that is usually provided upon sign-up and can be used later to confirm that a legitimate customer is attempting to make a call, if the call was made from a “suspicious” location.
The *Dialing Rules* section	
Dialing Rules	The following options are available: • **Disabled** – This deactivates the dialing rules for this account. • **Enabled** – This activates the dialing rules for this account. • **Custom** – This allows a user to create and use their own set of dialing rules.
Dialing Format	Select existing dialing format defined earlier or create a new one by clicking the wizard icon. You can define new dialing rule settings on the IP Centrex page.
Translate CLI on outgoing calls	Allows outgoing calls to be translated based on the selected dialing format.
Translate CLI on incoming calls	Allows incoming calls to be translated based on the selected dialing format.
The *Internet Access* service type	
Internet Access Policy	The most common option is **Product default**. In rare cases, you may need to set a special policy for an account that will override the product’s parameters. In such cases, select the appropriate internet access policy from the drop-down list, or select ‘empty’ if you do not want to limit the bandwidth for this account.
Static IP Enabled	Select **Yes** if you want to assign a static IP to this account (the default setting is **No**).
Static IP	If you have selected **Yes** for the previous field, type in an IP.
Static IP Netmask	Type in a netmask, or leave the default value: **255.255.255.255**
Session Limit Enabled	Allows you to define a specific number of concurrent sessions initiated by the account.
Max Simultaneous Sessions	Specify the maximum allowed number of concurrent sessions from one account (Only available when the **Session Limit Enabled** is checked).
Hotlining Support	Select **Yes** if your NAS supports hotline (default setting is **Product default**).
Hotline to Portal on Connect	By default this value is set to **Yes**. This means that the account is hotlined.
The *Conferencing* service type	
Conferencing Enabled	Allows the account user to use voice-conferencing services. Note that if an account has **Conferencing Enabled** activated, an additional link will appear next to it on the administrator interface: Manage Conferences. By clicking on it you will automatically go to the account’s Conferences page where multiple conferences can be managed.
Number of Simultaneous Participants	Specify the maximum number of concurrent connections allowed for the conference. Note that you may also limit the Number of Simultaneous Participants for a particular account (in the Service Configuration tab).
The *Wi-Fi* service type	
Limit Bandwidth	The most common option is **Product default**. In rare cases, you may need to define special bandwidth values for an account that would override the product’s parameters. In such cases, select **Yes** to define these values, or **No** if you do not want to limit the bandwidth for this account.
Max Upload Rate	Specify the maximum upload rate for this account.
Max Download Rate	Specify the maximum download rate for this account.
The *IPTV* service type	
Channel Package	This feature defines a set of broadcast channels that are available to this account.
Activation PIN	Specifies a numeric code to be entered from end user’s STB (Set-Top Box) remote controller to activate IPTV services.

Phone Book



Field	Description
Phone number	Phone number in E.164 format. Note: Phone numbers must be entered in either the E.164 format (e.g. +12065551234) or the customer's local format. The latter will be translated into an E.164 format according to the customer dialing rules, upon saving.
Name	Contact name
Contact type	Contact type can be one of the following: • Work • Home • Mobile • Other
Abbreviated Dial Assigned	This is the speed dial number that the end-user can dial on his phone to place a call to an external phone number. Note that the length of this number is limited by the **Maximum Abbreviated Dial Length** option on the **Service Configuration** tab.
Lock	This allows you to lock a phone book contact: • **None** – Contacts are not locked in the phonebook, allowing the end-user to add, edit or remove contacts. **NOTE:** The end-user is also able to select contacts to which a special "favorite" rate applies. • **Full** – Fully lock the contact in the phonebook (makes it impossible for the end-user to edit or remove the locked contact) • **Number** – Partially locks the contact in the phonebook (allowing the end-user to change only the name).
Favorite Rating	Select this checkbox to provide a "call friends & family cheaper" service to the end-user. The end-user's call to this specific number is rated according to a special rate for the FAV destination, defined in the end-user's tariff.
Delete	Click the **Delete** icon to remove a contact from the user's phone book.

Follow Me

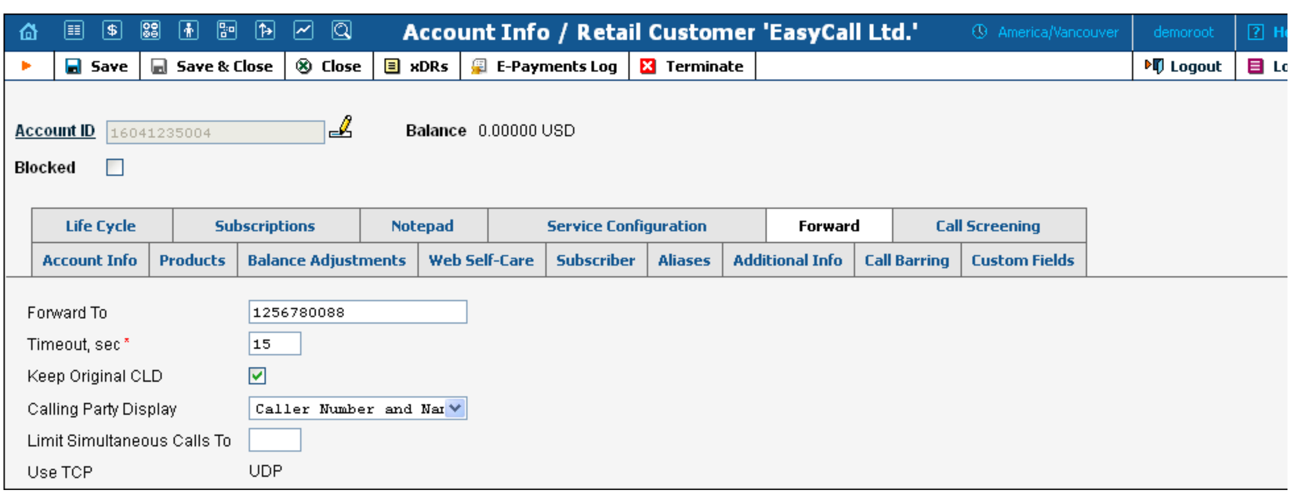


This tab is only available when **Forward Mode** on **Service Configuration** tab is set to **Follow-me** or **Advanced Forwarding**.

Order	Specifies the order for redirecting a call.

	As listed: call every active follow-me number from the first (topmost) number to the last, until the call is answered. **Simultaneous**: call every active follow-me number from the list at the same time until the call is answered. **Random:** use a random order.
Edit	Click the **Edit** icon to edit the follow-me number details. To add a new number to the list, click the **Add** button.
Up / Down	Click these buttons to move a row before the previous one or after the next one in the list.
Name	The name of the follow-me number (e.g. "Mobile Phone").
Destination	Specify a number for redirecting calls, formatted according to the customer dialing rules.
Calling Party Display	Allows you to choose how to display the caller's info during forwarding. The following options are available: • **Caller Number and Name** – The call is forwarded with the phone number and the name of the original caller (e.g. if A calls B, but the call is forwarded to C, C will see that it is A who is calling). • **Caller Number and Forwarder Name** – The phone number of the caller and the forwarder name are put in the CLI of the forwarded call (e.g. if A calls B, but the call is forwarded to C, C will see A's phone number and B's name). • **Forwarder Number and Name** – The call is forwarded with the phone number and the name of the forwarder (if A calls B, but the call is forwarded to C, C will see that it is B who is calling).
SIP Proxy	(This field is only available in **Advanced Forwarding** mode.) Enables you to choose one of the SIP proxies defined in the **Permitted SIP Proxies** properties for the customer.
Transport Protocol	(This field is only available in **Advanced Forwarding** mode.) Enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications for PBXes which do not support UDP.
Active	Defines the period when the number is active, i.e. is allowed to receive a forwarded call. Click the **Active** link or wizard icon to create the first period definition or add the next one using the Period Wizard (this is virtually the same as the Off-peak Period Wizard in Edit Tariff). Click the **Always** button in the wizard to make the follow-me number active permanently. Click the Test Period icon to run a period test.
Timeout	Specify the amount of seconds to wait until a call is answered. Following timeout, the call will be redirected to the next follow-me number or disconnected.
Off	Check this option to temporarily disable forwarding to a follow-me number.

Forward

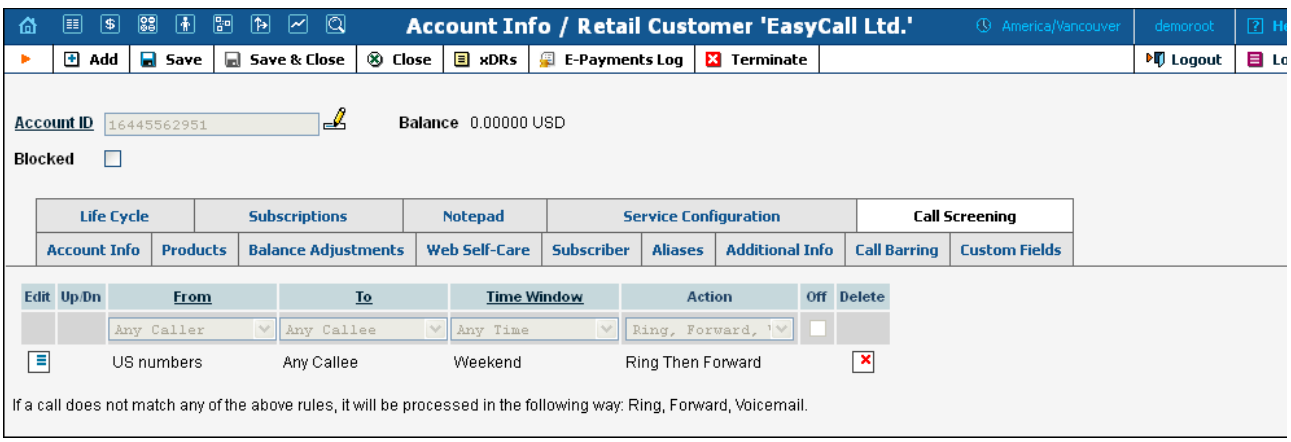


This tab is only available when **Forward Mode** on **Service Configuration** tab is set to **Forward to SIP URI** or **Simple Forwarding**.

Forward To / SIP URI	Here you will enter CLD or two parts of the SIP URI: • The CLD part may contain only digits, the letters a-d and A-D, the signs # and * and may end with the ! sign. • The SIP Proxy part should contain a valid IP address (four numbers separated by dots, e.g. 12.34.56.78)

	Calls will be forwarded to a local account if the SIP Proxy has not been specified.
Timeout	Specify the amount of seconds to wait until a call is answered. Following timeout, the call will be redirected to the next follow-me number or disconnected.
Keep Original CLD	Allows you to preserve the originally dialed number during forwarding. This is useful when forwarding a call to a remote IP PBX. For more details, see the *PortaSIP Administrator Guide*.
Calling Party Display	Allows you to choose how to display the caller's info during forwarding. The following options are available: • **Caller Number and Name** – The call is forwarded with the phone number and the name of the original caller (e.g. if A calls B, but the call is forwarded to C, C will see that it is A who is calling). • **Caller Number and Forwarder Name** – The phone number of the caller and the forwarder name are put in the CLI of the forwarded call (e.g. if A calls B, but the call is forwarded to C, C will see A's phone number and B's name). • **Forwarder Number and Name** – The call is forwarded with the phone number and the name of the forwarder (if A calls B, but the call is forwarded to C, C will see that it is B who is calling).
Limit Simultaneous Calls to	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.
Transport Protocol	Choose the UDP or TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications for PBXes which do not support UDP.

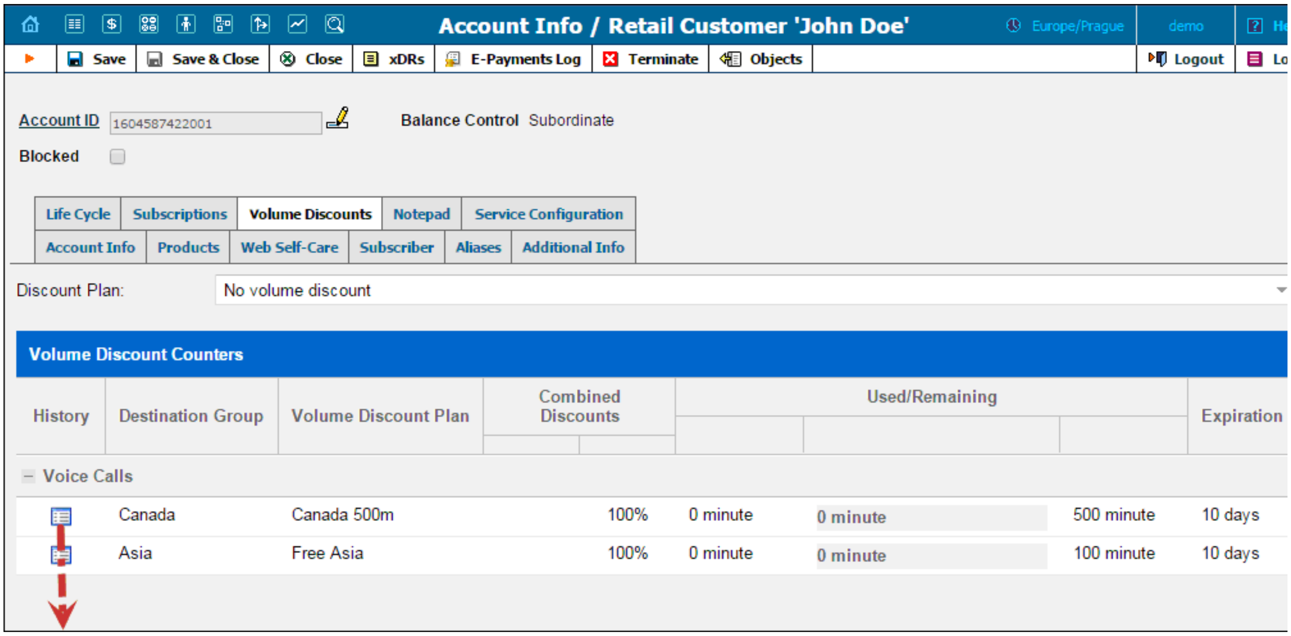
Call Screening

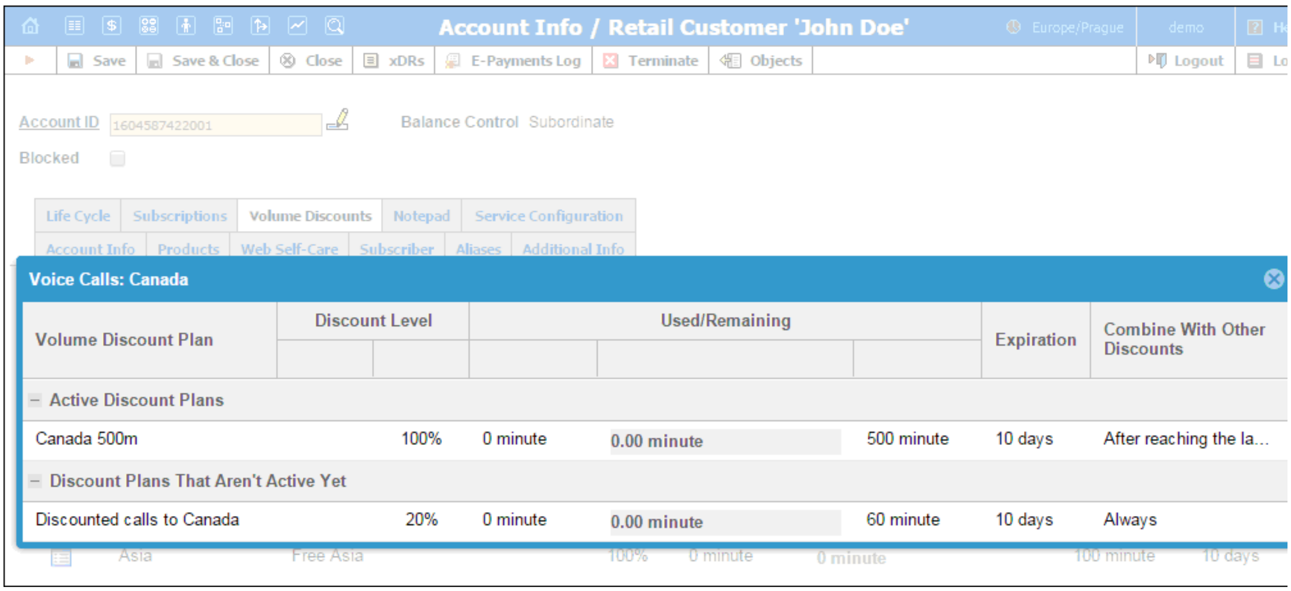


This tab allows you to define a list of rules for handling incoming calls to this account. It is only available when **Call Screening** check box is selected on the **Service Configuration** tab.

From	Allows you to select a condition applicable to an incoming phone number (phone number of a person trying to contact you). Click on the column header with the corresponding rule to invoke the wizard, which will enable you to define a new rule or change an existing one.
To	Allows you to select a condition applicable to a dialed phone number (one of your phone numbers that a person trying to contact you).
Time Window	Allows you to select a condition applicable to the time when a call is made.
Action	Specifies which actions should be taken if a particular phone call satisfies the conditions for this rule.
Off	Allows you to temporarily disable a rule without actually deleting it (so it can be used later on).

Volume Discounts





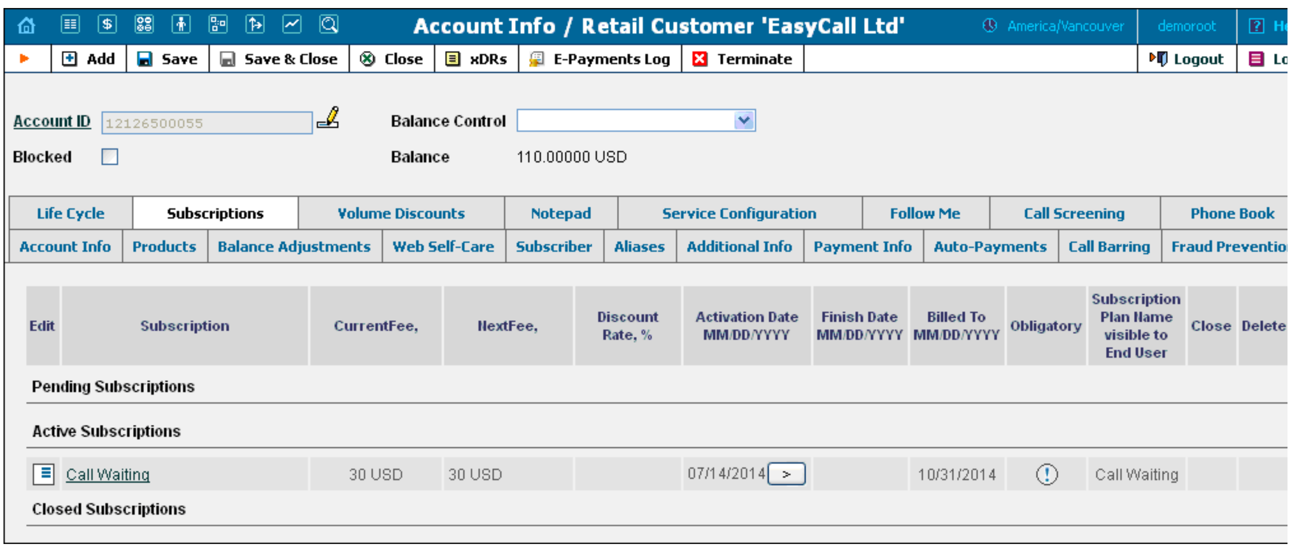
Discount Plan	Permits the selection of which Discount Plan to be used with this account.
History	Opens a popup window that shows extended information about the discount plan.
Destination Group	Destination groups included in volume discount plans that apply to this account.
Service	Shows the service type for which the discount is valid.
Volume Discount Plan	The name of the *active* volume discount plan that applies to this account.
Precedence	This is the priority level for the current discount plan that specifies the order in which certain discounts are to be applied. Discounts with high priority take precedence over discounts with low priority.
Combined Discounts	Shows the total discount value currently applied to the account for different periods (peak and off-peak).
Peak Level	The blank field indicates that the discount is provided regardless of whether the service is used during a peak or off-peak period. Otherwise, this column contains the period names.
Discount	The total discount value currently applied to the account. It is a result of the combined discounts.
Previous Threshold	The total discount value currently applied to the account. It is a result of the combined discounts.
Used / Remaining	Shows the current value of both consumed and remaining discount volume (in minutes or funds). The progress bar graphically reflects how much of the discounted service has been consumed.

Current Threshold	The threshold value for the currently used discount level. When an account's internal counter reaches this value, the next level discount starts being applied according to the discount scheme. **Unlimited** means that a special "unlimited" threshold has been defined within a volume discount plan.
Expiration	Shows the time remaining for the discount to be reapplied to the account. If **Never** is defined, it means that this discount is for one-time use and will not be reapplied to the account.
Discount History window	
Status	The current status of the discount plan: • **Active Discount Plans** – are discount plans that are currently in use • **Consumed** – are discount plans that have already been used up • **Not Yet Active** – are currently inactive discount plans
Peak Level	The empty field indicates that the discount is provided regardless of whether the service is used during a peak or off-peak period. Otherwise, this column contains the period names.
Discount Level	The level of the discount currently applied to the account.
Combine with Other Discounts	Shows the way this discount plan is combined with other discount plans applicable to a session.

If at the end of the usage period (e.g. at the end of the month) there is unused traffic left (i.e. minutes, Internet traffic, messages, etc.), it can be rolled over to the next usage period. For example, a customer has signed up for 100 bundled monthly minutes of free calls to Canada. By the en of the month, only 90 minutes have been used up. The 10 minutes remaining are rolled over to the next month, so during the next month 110 f minutes will be available for the customer.

Please note that if you change the customer's discount plan (e.g. change an add-on product), then the unused minutes will transfer only if the ne discount plan has the same discount entry (same destination group, service and thresholds.)

Subscriptions



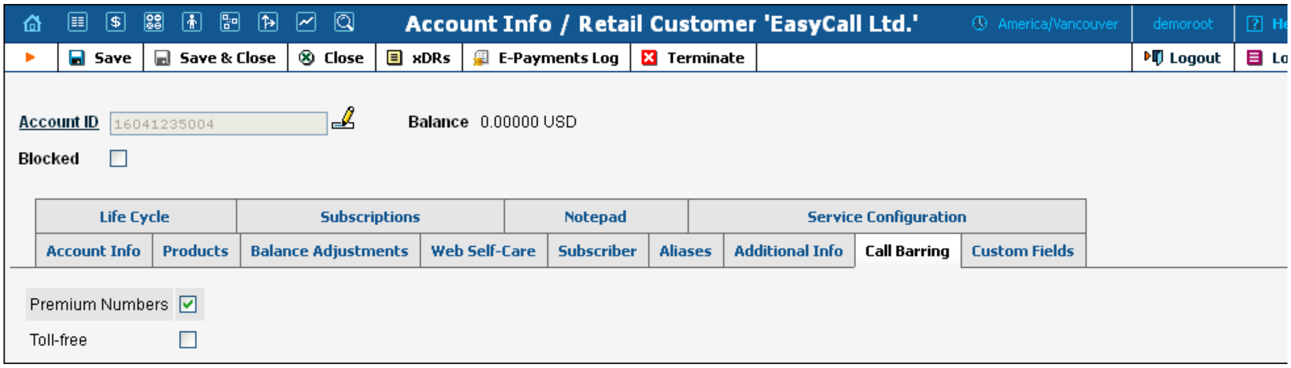
This tab displays the subscription plans currently applied to this account. Subscriptions are divided into three groups

- **Pending Subscriptions** displays subscriptions which are not active yet (i.e. they will be activated sometime in the future).
- **Active Subscriptions** displays currently activated (and billed) subscription plans.
- **Closed Subscriptions** displays subscriptions which have already been closed.

Subscription	Choose one of the available subscription plans from the list.
Current Fee	Shows the amount of the subscription fee currently applied to the account for the defined period.
Next Fee	Shows the amount of the subscription fee that will be applied to the account for the next defined period.
Discount Rate, %	Enter a discount rate to be applied to the periodic fees for this subscription. If you leave this field empty, it means that the discount rate defined in the customer information should be applied. If you enter any value, it will override the customer discount rate. 0 means no discount (i.e. the rate defined in the subscription plan is applied).
Start Date	Enter the desired subscription activation date: immediately, or sometime in the future.
Activation Date	(Read-only) Displays the date when the subscription was activated.
Finish Date	Enter the date when this subscription should be automatically canceled.
Billed To	(Read-only) The date to which subscription charges have already been applied.
Obligatory	A flag indicating that this subscription comes from the account's product, and

	so cannot be closed until the account has this product assigned to it.
Subscription Plan Name Visible to End User	The subscription plan name as the end-user will see it on their Self-care interface and their invoice.
Close	Allows you to close one of the optional subscriptions.
Delete	Allows you to delete subscriptions that were assigned to the account by mistake. This option is available for pending subscriptions only.

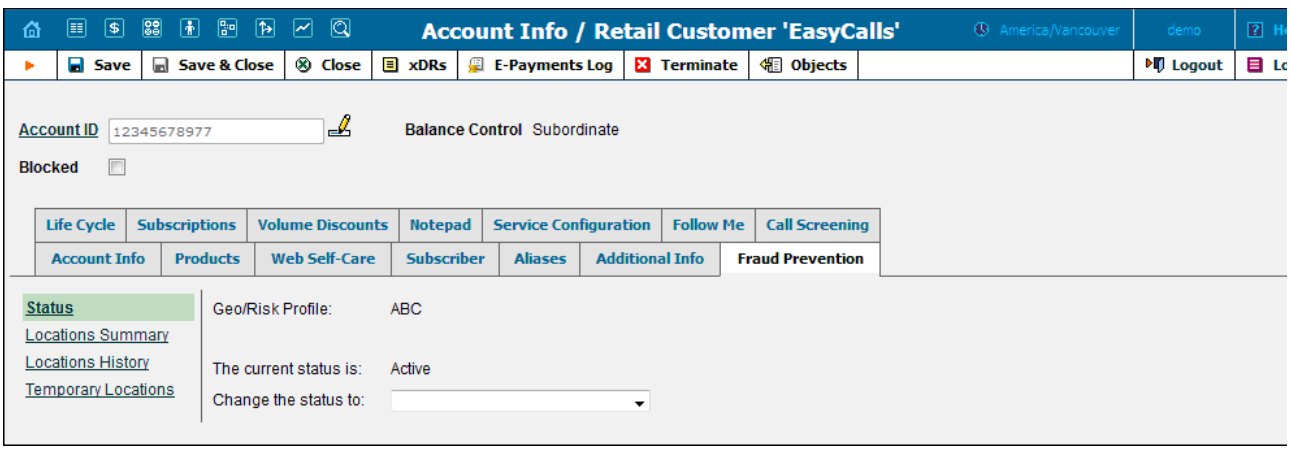
Call Barring



This tab is only available when the **Call Barring** feature for **Voice Calls / Outgoing** has been activated on the **Service Configuration** tab. He you can bar specific classes of phone numbers from being dialed.

Fraud Prevention

The **Fraud Prevention** tab will only appear if **Geo-IP Fraud Detection Enabled** is set to **Yes** in the account's product.



Field	Description
	The *Status* section
Geo / Risk Profile	This shows the account's assigned Geo / Risk Profile as defined in its product.
The current status	This shows the account's current condition: • **Active** – This means that the account is able to use the service as usual. • **Screened** – This means that some unusual activity has been detected for this user, thus he will be prompted to enter his "service unblock" code upon attempting to make a new call. • **Quarantined** – This means that after being screened, this account was unable to supply valid credentials while continuing to attempt to make a large number of calls. All such call attempts are automatically blocked to reduce the load on the network.
Change the status to	Here you can manually change the account's status: • **Active (allow normal calling)** – If the account had been screened or quarantined for some reason and the situation was regulated, you can change the account's status back to active here. • **Screened (authenticate before calling)** – If some unusual activity has been detected for this account you can screen its calls to prevent a potential security breach.

	• **Quarantined (reject all calls)** – If you want to temporarily block all call attempts from the account, change its status to quarantined here. Note that neither a **Screened** nor a **Quarantined** status influences on-net calls.
The *Locations Summary* section	
IP	Shows the IP address used for account registration.
Usage Counter	Shows the number of call attempts made from this specific location.
Last Used	This column shows the timestamp of the last call attempt.
Verified Until	If an account's product is configured to allow normal calls (without repeated screenings) for a certain period after passing the initial screening IVR, the time of expiration will be reflected in this column.
The *Locations History* section	
IP	Shows the IP address used for account registration.
Country	Shows the country where the account was registered.
Usage Counter	Shows the number of call attempts made from this specific location.
Restriction Level	Shows the restriction levels as configured in the **Geo / Risk Profile.**
Last Used	This column shows the timestamp of the last call attempt.
Verified Until	If an account's product is configured to allow normal calls (without repeated screenings) for a certain period after passing the initial screening IVR, the time of expiration will be reflected in this column.
The *Temporary Locations* section	
IP	This allows service usage without restriction in unusual locations. Enter the IP address from which the user intends to use the service here.
Country	If the user intends to use services outside of the default country for some time, you can specify the receiving country, therefore temporarily allowing calls without restriction from that location.
Verified Until	Enter the date when verification for a temporary location should be automatically canceled.
Delete	Click the **Delete** icon to remove the temporary location.