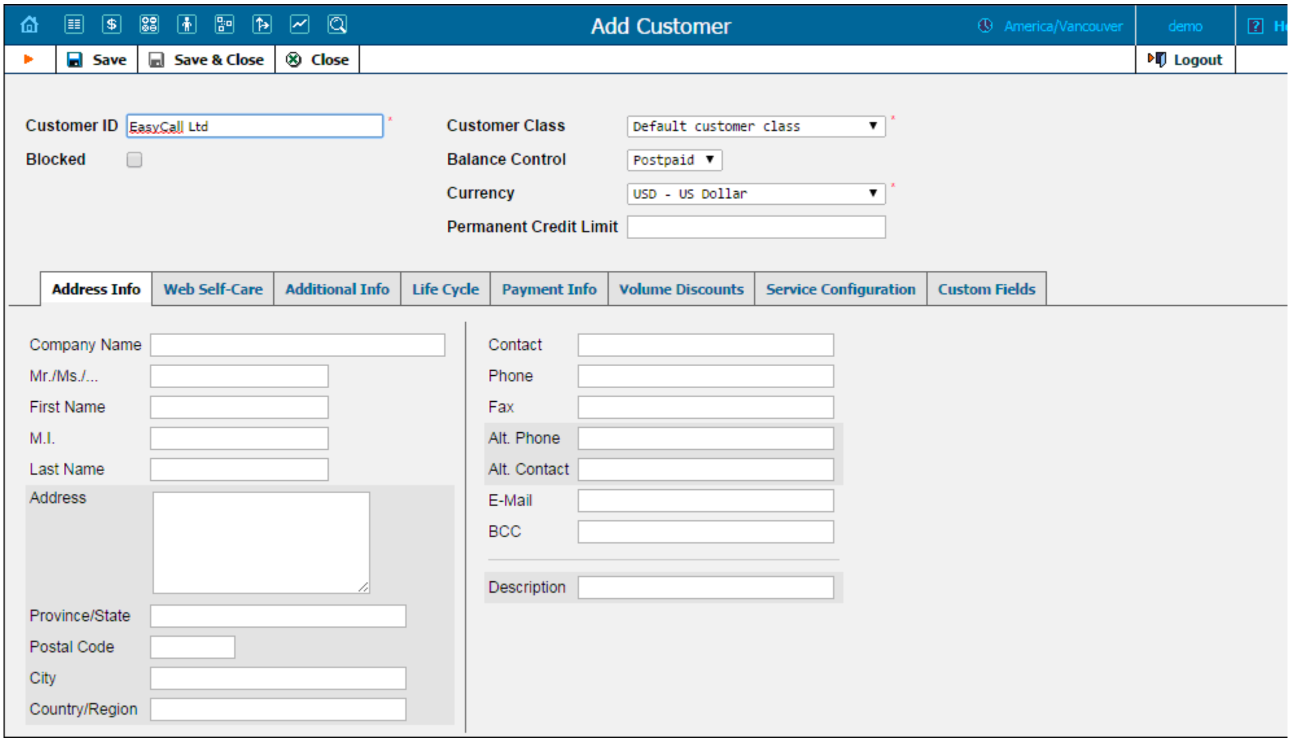
Add / Edit Customer

To add a new customer manually, select **Add** in the toolbar and then (if a quick form selection dialog – select **Manually** at the bottom of the list).

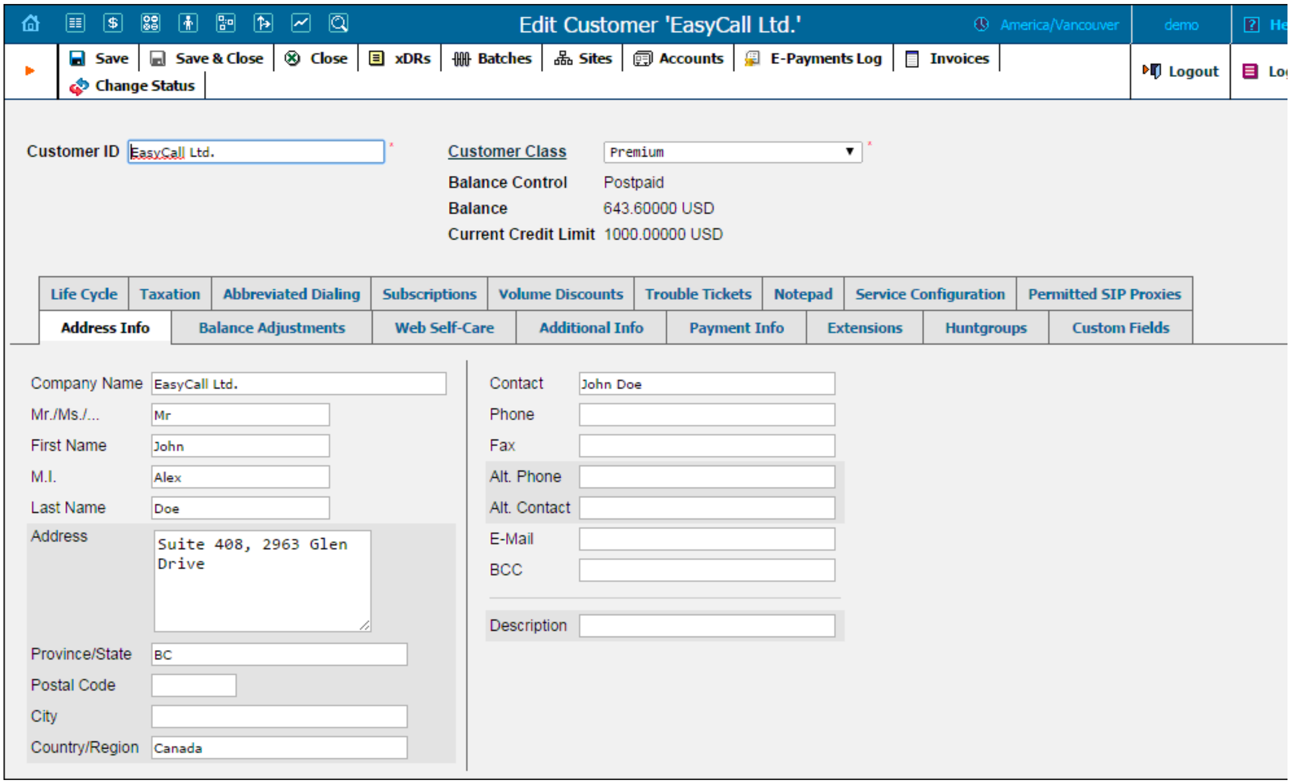
The Add Customer page allows you to define a new client entity within PortaBilling®. The information on the top of the form is required. Information on all the other tabs is optional, and need not be provided when creating the customer. Once created, the customer cannot be changed from a retailer to a reseller, or moved under another reseller.



Field	Description
Customer ID	Defines the customer name as it will appear in the PortaBilling® system. This is distinct from the **Company Name** field in the **Address Info** tab.
Blocked	Blocks all of this customer's accounts (i.e. if this is checked, all of this customer's accounts will become unusable).
Balance Control	The customer category: either prepaid (a customer who pays for services in advance) or postpaid.
Currency	The currency must be specified by selecting it from the drop-down list of available currencies. Once saved, the currency cannot be changed.
Permanent Credit Limit	If this field is left empty, there is no credit limit defined for this customer; we strongly recommend entering a value here. In the latter case, if **Radius authentication** is enabled, calls that exceed the limit will be denied (only for postpaid customers.)
Available Funds	The balance for this customer (only for prepaid customers.) While consuming the service, the amount of funds decreases. When it reaches zero value, no more services can be used.
Customer Class	The Customer Class assigned to this customer. In order to change any parameters of the particular Customer Class, click on the link "Customer Class". When *adding* a Customer, be aware that if you select a class with a defined currency, the field Currency will show the corresponding value and this cannot be modified; if the class without a predefined currency is selected, then a list of currencies will be available. When *editing* the Customer, the field Customer Class will only contain classes with the *same* currency, or classes with no defined currency.

Address Info

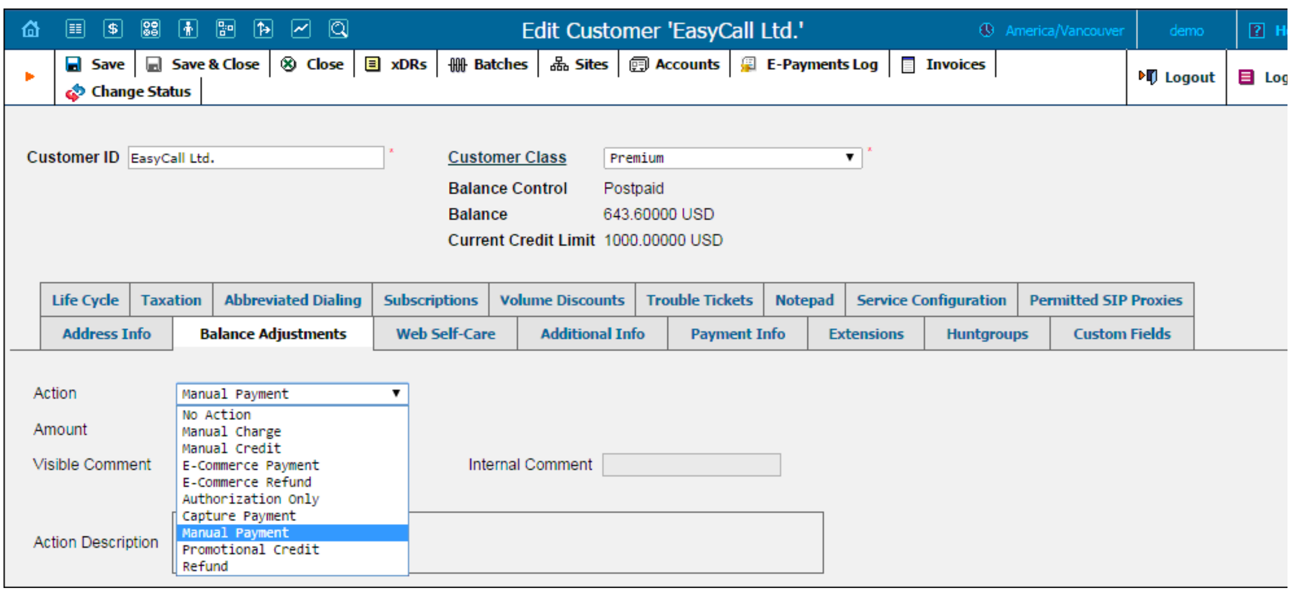
The Address Info tab provides most of the commonly required contact information. Also note that you may enable your account manager to receive a copy of every e-mail sent to the customer by entering his e-mail address in the **BCC** field.



Enter a customer's mobile number in the **Alt. Phone** field to send SMS notifications.

Balance Adjustments

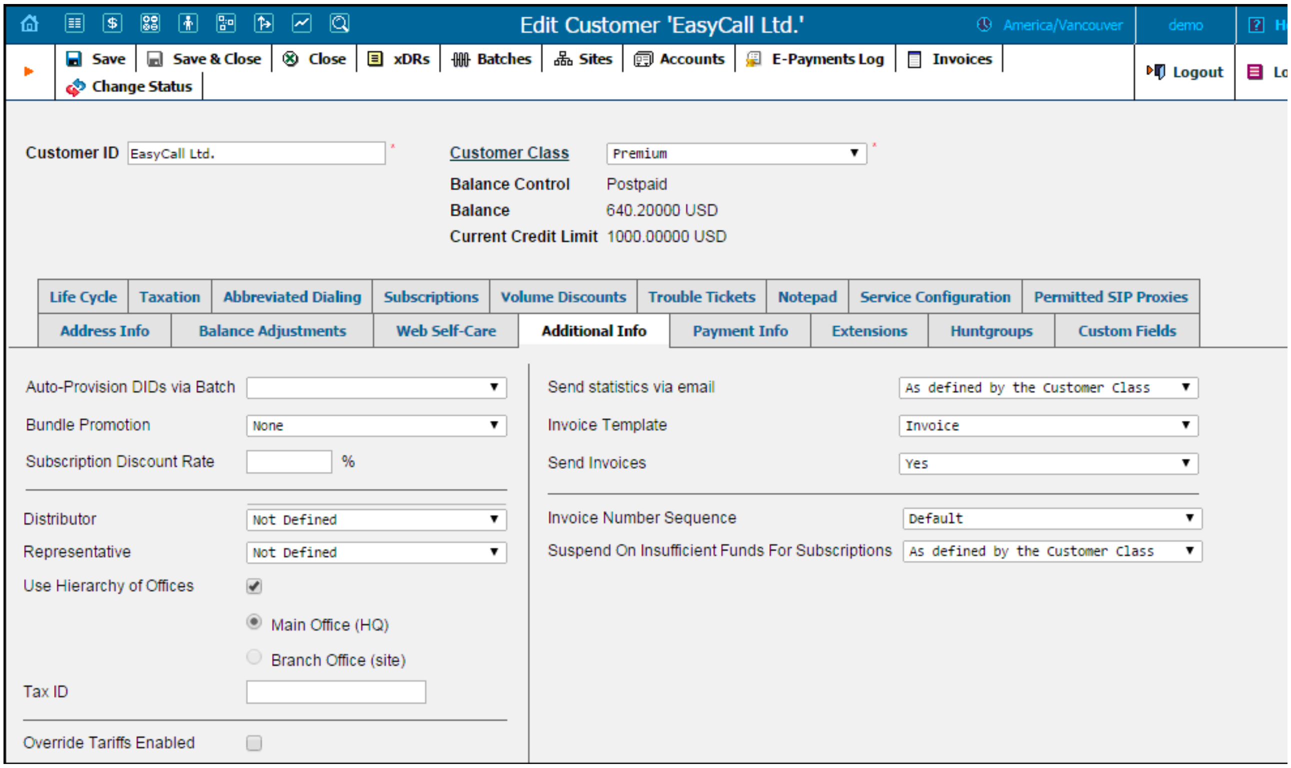
The **Balance Adjustments** tab allows the administrator to correct a customer's balance (this tab is only available in **Edit Customer** mode).



Field	Description
Action	**Manual charge:** Use this transaction to manually charge a customer for a specific service they used; for instance, if you are selling SIP phones to a customer. This means the balance will be changed so that the customer is able to make fewer calls. **Manual credit:** Use this transaction to manually give compensation related to a specific service; for instance, if the customer files a complaint and you agree to give him credit toward future service use. This means the balance will be changed so that the customer is able to make more calls. **E-Commerce Payment:** Use this transaction to charge the customer's credit card and apply the amount to the customer's 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 customer's credit card is valid and reserves a given amount. Returns a transaction ID to be used in a Capture Payment transaction. This does not affect the user's account balance in PortaBilling® or his credit card balance. Note: the transaction ID will be written to the customer's Notepad entry. **Capture Payment:** Charges the customer's credit card and applies the amount to his balance as a payment (decreases the customer's 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 customer. This means the balance will be changed so that the customer is able to make more calls. **Promotional credit:** Use this transaction to give the customer 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 customer 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 credit)*	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.
Tax Transaction Code *(only for Manual charges and credits)*	This is available for balance adjustments that are performed for customers with an assigned Billsoft taxation plugin. Here you can select a specific tax type to assign to this transaction, ensuring correct total tax calculations.
Date *(only for Manual charge and Manual credit)*	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.
Include into Out-Of-Turn Invoice *(only for Manual charge and Manual credit)*	This allows you to include a transaction on an out-of-turn invoice issued on demand. You can then generate the invoice with these transactions on the **Out-Of-Turn Invoice** page. For example, if your customer visits your office to buy a new IP phone, your clerk will locate the customer's account, issue an invoice covering the cost of the phone, take the money for the phone and give the phone and the invoice to the customer. Transactions included in an out-of-turn invoice won't be reflected in the regular invoice issued at the end of the customer's billing period.
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 administrator as well as the customer, in the xDR browser or on the invoice.
Internal Comment	An internal comment on this transaction; not visible in the xDR browser, and accessible only from the database directly.

Additional Info



Field	Description
Auto-Provision DIDs via Batch	This enables the customer to choose DID or toll-free numbers from the DID batch. You will charge the customer for the allocated numbers according to the prices specified in the assigned batch.
Bundle Promotion	Bundle promotion to be applied to this customer.
Subscription Discount Rate	Amount of discount applied by default to all subscriptions of this customer (assigned either directly to a customer or to one of his accounts). Discount rate affects *only* the subscription's periodic fees.
Distributor	Assigns a distributor to this customer. See the *Distributors* section for more information.
Representative	Assigns a representative to this customer. See the *Representatives* section for more information.
Use Hierarchy of Offices	This allows you to create two types of customers. The first are **Main Office (HQ)** customers, the rest are **Branch Office (site)** customers. **Main Office (HQ)** and **Branch Office (site)** customers are linked together into a group.
Main Office (HQ)	This defines the "main" customer in the group for which the basic service configuration is done. All extensions and huntgroups added for this customer become available for all of its **Branch Office (site)** customers.
Branch Office (site)	This defines the "subordinate" customer created under the **Main Office (HQ)** customer. This customer inherits all of the main customer's extensions and huntgroups.
Tax ID	Customer's tax ID.
Suspend On Insufficient Funds For Subscriptions	This option allows you to suspend a customer when his / her balance or available funds are insufficient to cover subscription charges of subscriptions assigned to them directly. If set to **Yes** – customers who have insufficient available funds are automatically suspended. When they are suspended, they no longer receive the service and therefore no subscription charges are generated. As soon as funds become available, the service is resumed and new charges are generated. If set to **No** – the full amount of subscription will be charged and the balance of the customer will exceed the credit limit or the amount of available funds (in this case the negative value will appear.)
Send Statistics via email	Defines what kind of xDR statistics should be delivered to the customer by email: • As defined by the Customer Class – 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.
Invoice Template	Defines the invoice template for this customer. Choose **As defined by the**

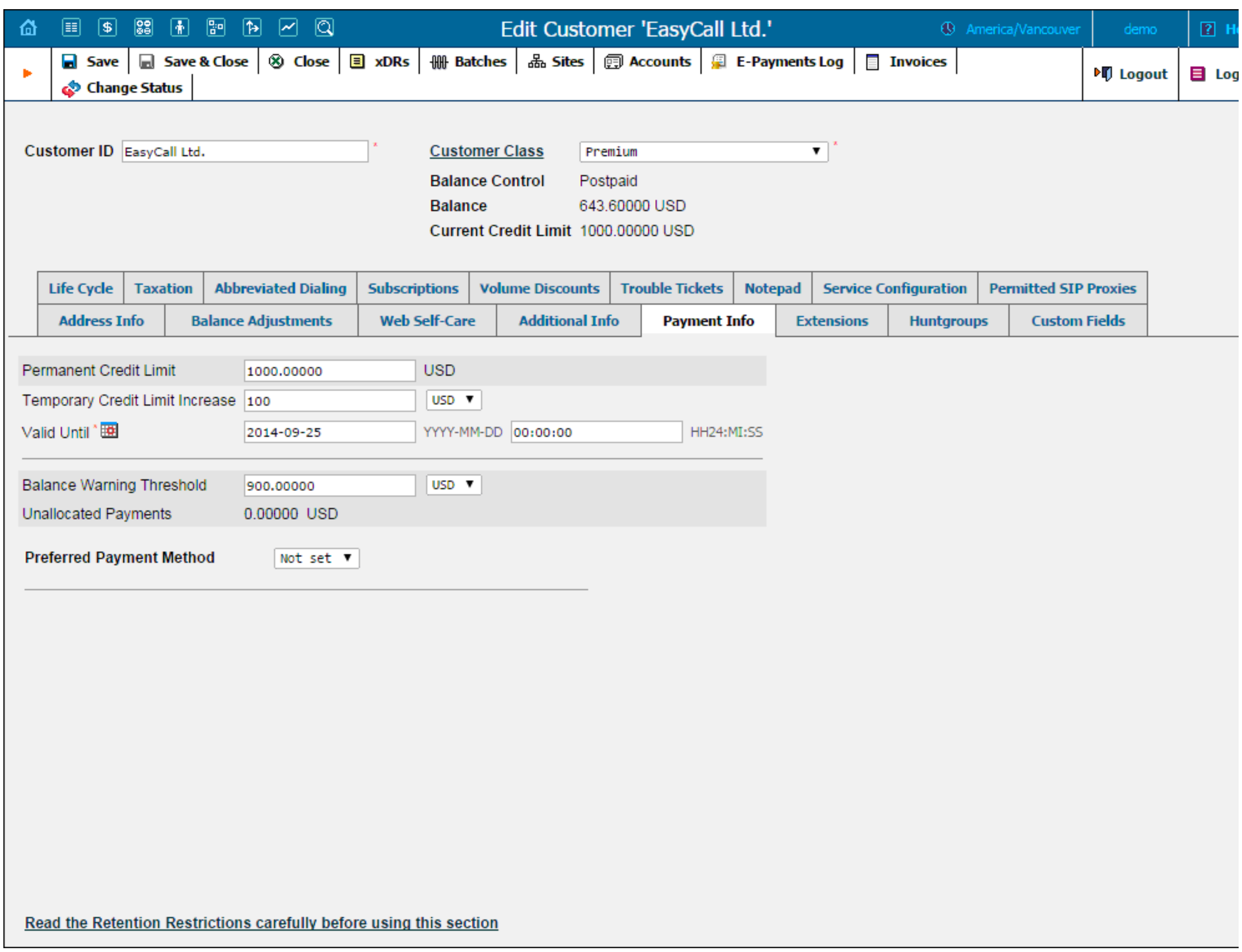
	Customer Class in order to apply the invoice template defined for this class, and so avoid defining an invoice template for each customer specifically. See the *Templates* section for more information.
Send Invoices	Defines whether new invoices should be delivered to the customer by email. As defined by the Customer Class – Use the settings for the customer class.
Override Tariffs Enabled	This defines whether the override tariff feature is enabled. Check the box next to this field and the **Override Tariffs** tab will appear.
Invoice Number Sequence	Select an invoice number sequence that will be used for this customer: • Default – the default numbering sequence will be selected for this customer's invoices • Individual for Environment – this customer's invoices will have *globally sequenced* invoice numbering (throughout the environment) • Individual for Customer – this customer's invoices will have their own sequential numbering

Regarding statistics, the default choice is **Full Statistics**, whereby the customer receives an e-mail after the billing period has closed, including a attached CSV file containing all the calls made by his accounts. If invoices are generated for this customer and invoice delivery is enabled, an invoice will also be attached to the e-mail. The CSV file containing all the calls may be rather large, so it is possible to use the **Summary Only** option. In this case, the customer receives only a brief summary of calls by e-mail. Finally, it is possible to disable e-mail statistics by choosing th **Do Not Send** option. Note that these options only affect the delivery of xDR files by email. The actual statistics files will always be generated a accessible for download from the administrator interface or customer self-care.

Shifting the billing date may be required if, for instance, your customer has a monthly anniversary billing cycle in which his billing period closes the 3rd day of each month. Since this may be inconvenient either for customers or your administrators (who are busy with corporate reports during the first week of the month), it may be desirable to change the billing date to some other day of the month.In this case, you can specify a new date which is later than the next billing date. Upon reaching this date, an "intermediate" invoice will be created (covering the period from th end of the current billing period to that date), and subsequent billing will start from that date in the normal way.

Payment Info

The **Payment Info** screen defines customer payment characteristics. For example, customary payment information (e.g. preferred payment method, credit card number, etc.)



Field	Description
Current Credit Limit	Customer's current credit limit may differ from their **Permanent Credit Limit** if the **Temporary Credit Limit Increase** is set.

Permanent Credit Limit	If this field is left empty, there is no credit limit defined for this customer; we strongly recommend entering a value here. In the latter case, if **Radius authentication** is enabled, calls that exceed the limit will be denied.
Temporary Credit Limit Increase	Here you can temporarily increase a customer's credit limit (the value should be defined either as an amount or as a percentage of a positive **Credit Limit** value).
Valid Until	Specify the date and time for when an increased credit limit value will automatically be reverted to a permanent state.
Balance Warning Threshold	If a **Balance Warning Threshold** is defined and the customer balance reaches this value (defined either as an amount or as a percentage of a positive **Credit Limit** value), an alarm will be sent to the customer.
Delay Suspension Until *(only for suspended customers)*	Sometimes it is necessary to delay a customer's suspension for several days (e.g. allow the customer to use the service over the weekend *although* the overdue invoice must be paid in full early Monday morning, without exception) so that the customer's needs are attended to. To delay the customer's suspensionselect the next date slated for automatic suspension if the invoice remains unpaid.
Unallocated Payments	Unallocated payments show that the customer "overpaid" you sometime in the past, and are used to correct the paid/unpaid status of future invoices. **NOTE:** Unallocated payments do not represent a "cash reserve". When a payment is made, the amount is immediately applied to the customer's balance.

The **Preferred Payment Method** drop-down contains a list of available payment methods. Some of these, e.g. Cash and Cheque, are "virtual" methods that do not allow manual e-commerce transactions from the administrator interface, payments from customer self-care, or running periodic payments. Any other online methods will be available only if a payment system with such methods has been defined, and is assigned to the same currency as the customer's currency. Other Payment Info fields depend on the currently selected **Preferred Payment Method**, and m vary accordingly.

NOTE: There are a few payment systems which use external authorization. If such asystem has been chosen as a preferred method, no other payment information det may be entered. This is because the payment processor does not allow the system to store and reuse customer payment credentials. For example, if you add a paymer system with the Moneybookers payment processor and VISA payment method, and then assign it to the currency USD, customers defined in the USD currency and usin VISA as their preferred payment method will not be able to enter their payment credentials. Therefore, it will not be possible to run periodic payments for them or mak manual e-commerce transactions with them.

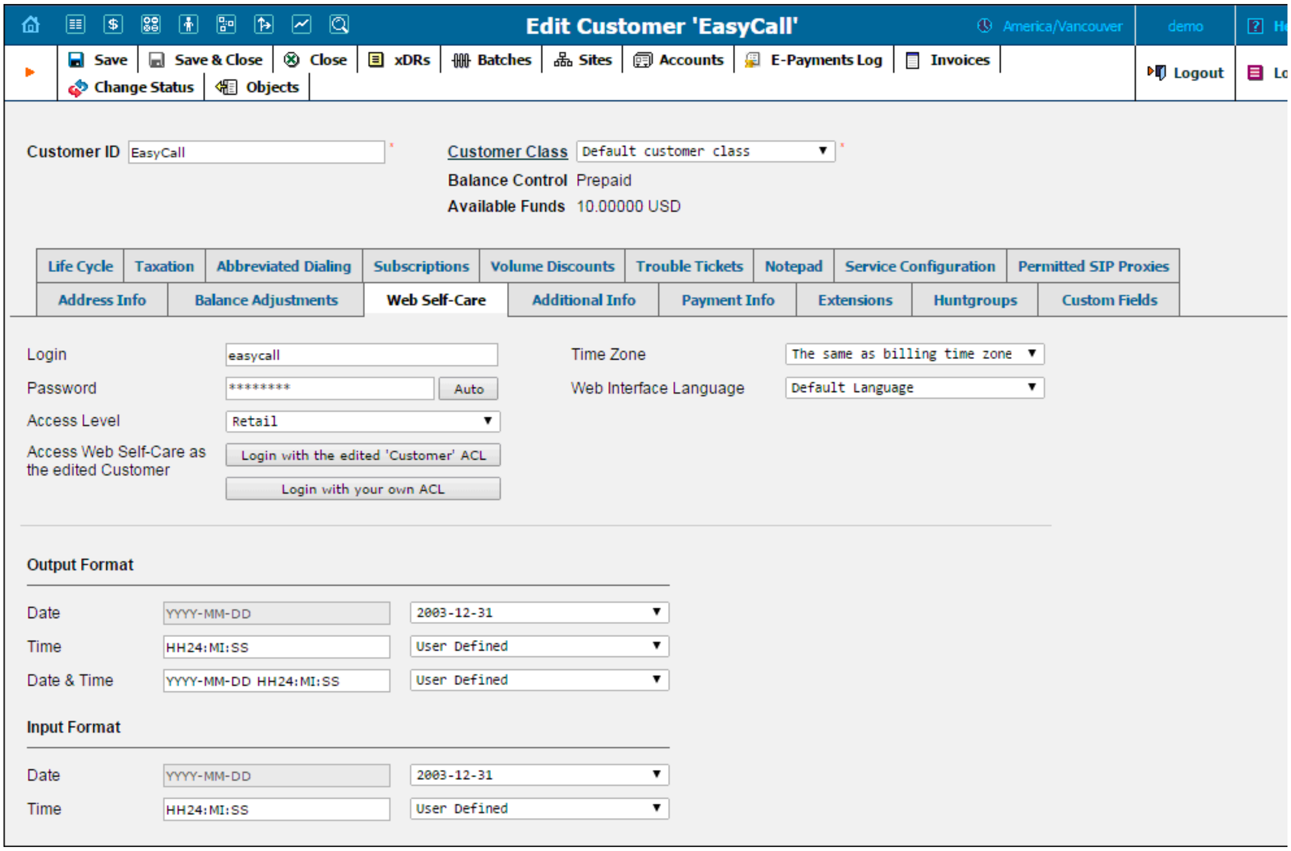
NOTE: Only resellers, direct retail customers, and their accounts are allowed to use a company's payment systems and payment methods for e-commerce payments, b manual and periodic. A reseller should define his own payment systems and assign these to the appropriate currencies in his self-care, so that those payment systems v be used by his sub-customers and their accounts.

Retention Restrictions

IMPORTANT! A merchant may not use account and transaction information for any purpose other than assisting completion of a payment card transaction, or as specifically required by law. Merchants may collect a payment card number and expiration date independently of a payment ca transaction only with the express consent of the cardholder. A merchant may only retain this information for the sole purpose of facilitating fut payment transactions. A merchant must not provide this information to any other person, except for the sole purpose of assisting completion o payment card transaction.

You may click the **Invoices** button in the toolbar to quickly access the list of all customer's invoices.

Web Self-Care



Field	Description
Login	Customer login for his web Self-care interface.
Password	Web Self-care interface password for the customer. A hard-to-guess password may be generated automatically by clicking the **Auto** button.
Access Level	Access level assigned to the customer.
Access Web Self-care as the edited Customer	In this section you can choose which ACL to use when you login to the customer self-care interface. • Click **Login with edited 'Customer' ACL** to login to the customer self-care interface with the access level currently assigned to the customer. • Click **Login with your own ACL** to login to the customer self-care interface with 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 customer web Self-care interface.
Web Interface Language	Displays the customer Self-care interface in a particular language.

Date & Time Format
PortaBilling® allows the administrator to define both input and output date and time formats for each customer registered in the system.

By making changes to the date and / or time format on this page, customers will be able to enter dates and times in the desired format througho the entire PortaBilling® Customer Self-Provisioning Interface, on invoices, and so on (see the screenshot below).

See the *User Management* section for examples of date and time format usage.

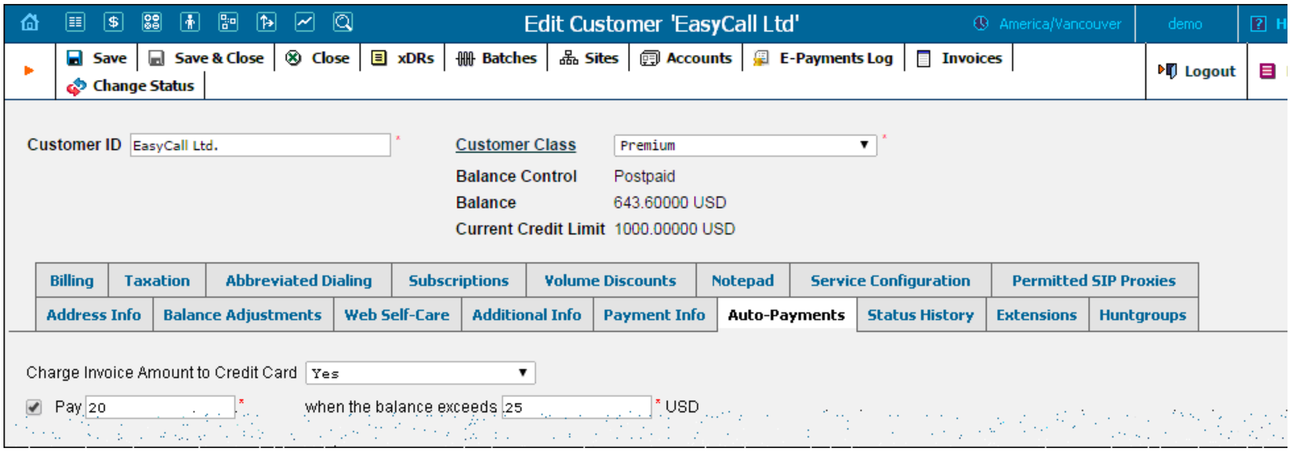
Auto-Payments

NOTE: The Auto-Payments tab will appear only if a suitable payment system has been set up (with **Recurring** enabled) for the customer's currency, and the appropria online payment method has been selected as the customer's preferred payment method.

Auto-Payment management allows the administrator and customers to set up the following parameters for automated periodic payments.

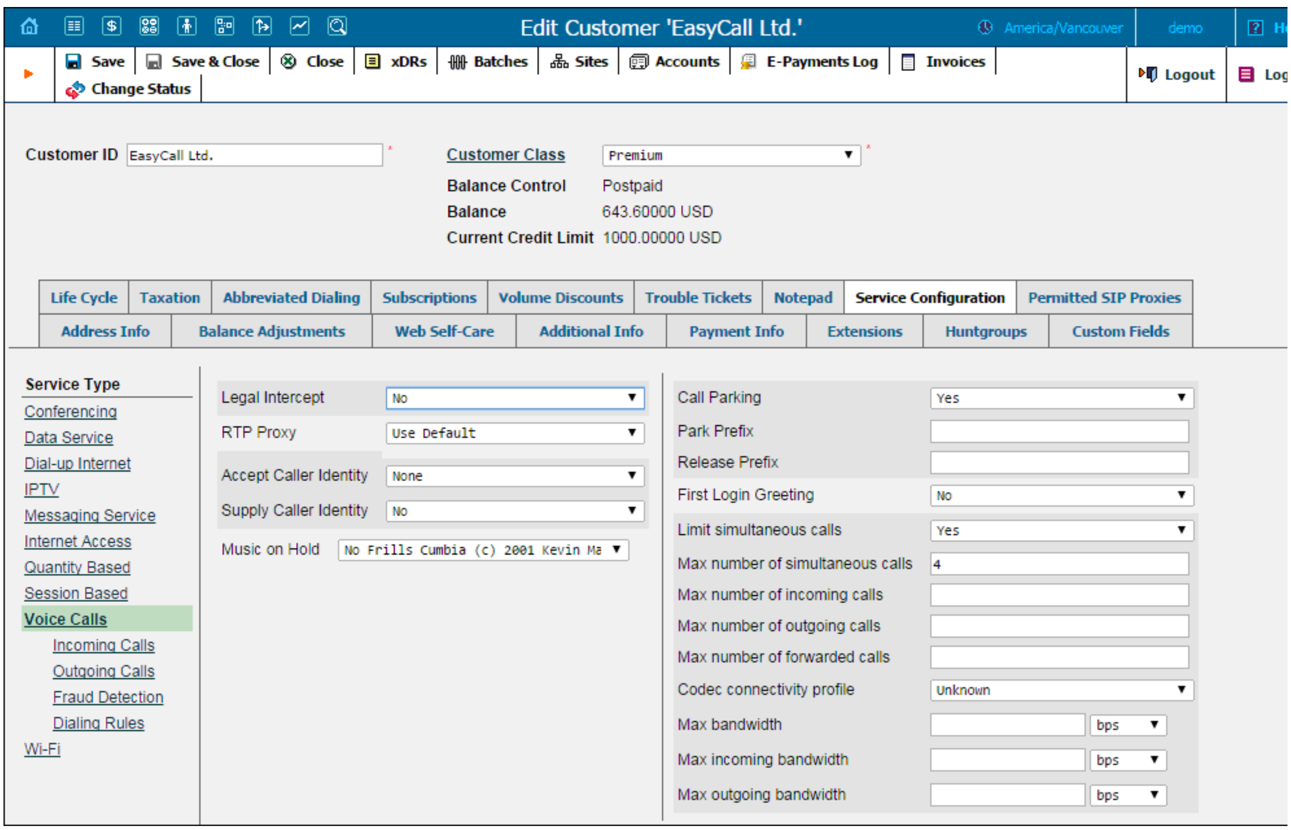
The **Charge Invoice Amount to Credit Card** list allows you to define whether a customer's credit card should be charged when the billing period is closed.

If you want to charge a customer's credit card whenever his balance crosses a specified threshold, select the **When the balance exceeds** check box, and when the customer's balance crosses this threshold their credit card will be charged for the amount specified in the **Pay** field.



Service Configuration

Using this tab, the administrator can activate / deactivate various features of the services provided to customers. Note that features are defined *service type* (the physical service provided to the user) rather than per *service* (the name used in the billing configuration and “visible” to the end-us Thus if you decide tomorrow to bundle your VoIP services under a different name, and create a new service called “Internet Telephony” rather than the old name, “Voice Call”, you do not actually have to change the configuration settings for any of your customers.



The **Service Type** links on the left allow you to specify for which service type you would like to define parameters.

Field	Description
	The *Voice Calls* service type
Legal Intercept	Intercepts all incoming and outgoing calls of this customer for law enforcement purposes.
RTP Proxy	This specifies the RTP proxy policy for this customer. 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.
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.
Music On Hold	Defines the music on hold to be used with the IP Centrex environment. Choose **None** to disable this feature, or select the default setting for the 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.
Call Parking	Enables call parking for this customer's IP Centrex.
Park Prefix	Only appears if **Call Parking** is activated; allows you to specify a key combination to park a call. Keep in mind that the "Park Prefix" value should only contain digits.
Release Prefix	Only appears if **Call Parking** is activated; allows you to specify a key combination to dial from the original phone which parked a call in order to remove the call from parked status and continue the conversation. Keep in mind that the "Release Prefix" value should only contain digits.
First Login Greeting	When a new account (phone number) in this IP Centrex environment is provisioned and registers for the first time, call this phone back and play a pre-recorded voice message confirming service activation, giving information about various available options, and so on.
Limit simultaneous calls	Engage real-time checks of the number of concurrent calls made by this customer's accounts. 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 simultaneous calls	Allow only a specific number of concurrent calls (regardless of their type, such as incoming or outgoing) for this customer's accounts.
Max number of incoming calls	Allow only a specific number of concurrent incoming calls for this customer's accounts.
Max number of outgoing calls	Allow only a specific number of concurrent outgoing calls for this customer's accounts.
Max number of forwarded calls	Allow only a specific number of concurrent forwarded calls for this customer's accounts.
Codec connectivity profile	Select a suitable codec connectivity profile that will be used for bandwidth allocation calculation. Every new call's 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	This allows you to configure the 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	This allows you to configure the bandwidth utilization limitation for incoming calls.
Max outgoing bandwidth	This allows you to configure the bandwidth utilization limitation for outgoing calls.
The *Incoming Calls* section	
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.
Group Pickup	Activates the **Group Pickup** feature, which allows phones in the same IP Centrex environment (all accounts under the same customer) to answer each other's calls by dialing a **Group Pickup Prefix** on their phones.
Group Pickup Prefix	Only appears if **Group Pickup** is activated. Specify the special code for picking up calls here.
Endpoint Redirection	This allows the end-user to configure call redirection on their SIP phones (if this feature is supported by the SIP phone).
The *Outgoing Calls* section	
Override Identity	Here you can set the following options for overriding identity information: **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	Here you can 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.
Override Display Name	This allows you to override the caller name used by the calling account. The possible values are: • **Never** – The display name supplied by the remote party is not restricted therefore it will not be modified. This allows the remote IP phone or IP PBX to supply any display name • **Always** – The display name supplied by the remote party will always be overridden
Hide CLI	This allows you to remove CLI (ANI) information for outgoing calls. The following options are available: • **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".)
Paging / Intercom	This allows you to enable the intercom feature for accounts under this customer.
Paging / Intercom Prefix	Only appears if **Paging / Intercom** has been activated; allows you to specify a key combination to answer a call on someone else's extension.
The *Dialing Rules* section	
Dialing Rules	This permits you to enable / disable the dialing rules for this customer.

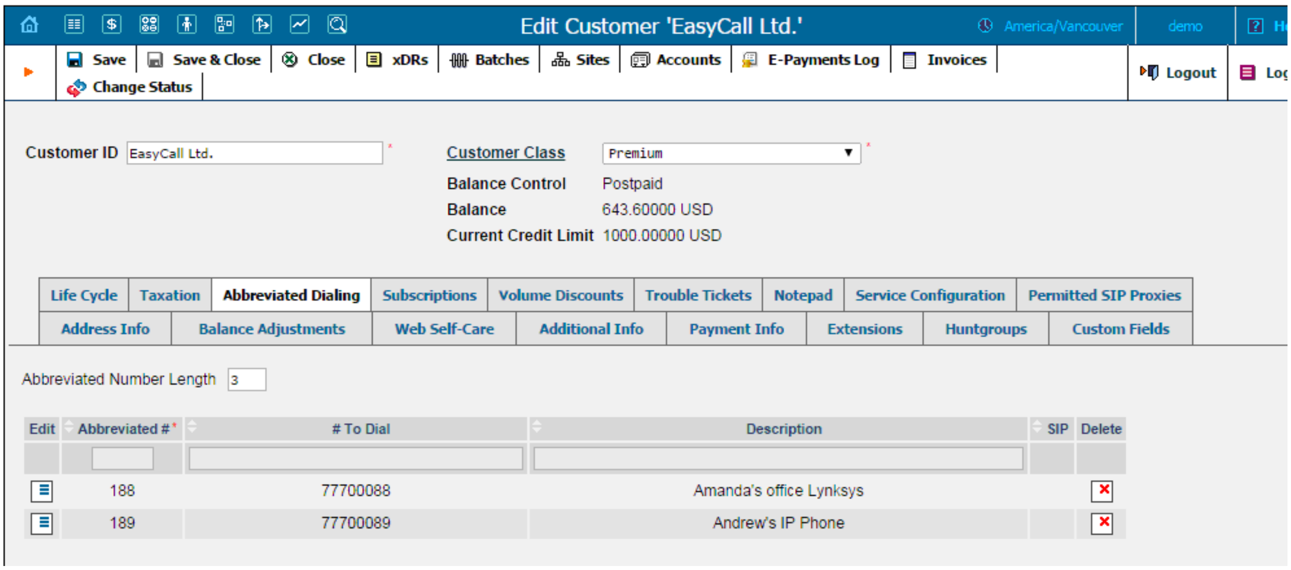
Dialing Format	Select one of the existent dialing rule formats.
Translate CLI on outgoing calls	This permits you to translate the CLI number in outgoing calls based on the selected dialing format.
Translate CLI on incoming calls	This permits you to translate the CLI number in incoming calls based on the selected dialing format.

Abbreviated Dialing

Here the customer may define a list of phone extensions for his IP Centrex environment, plus create abbreviated dialing for external phone numbers. The **Abbreviated Dialing** feature works with both SIP and H.323, with adequate support from either the SIP Server or Cisco TCL IVR.

A PortaBilling® customer can set up dialing rules as an international prefix, outside prefix, direct number (e.g. 911), or abbreviated dialing for h accounts.

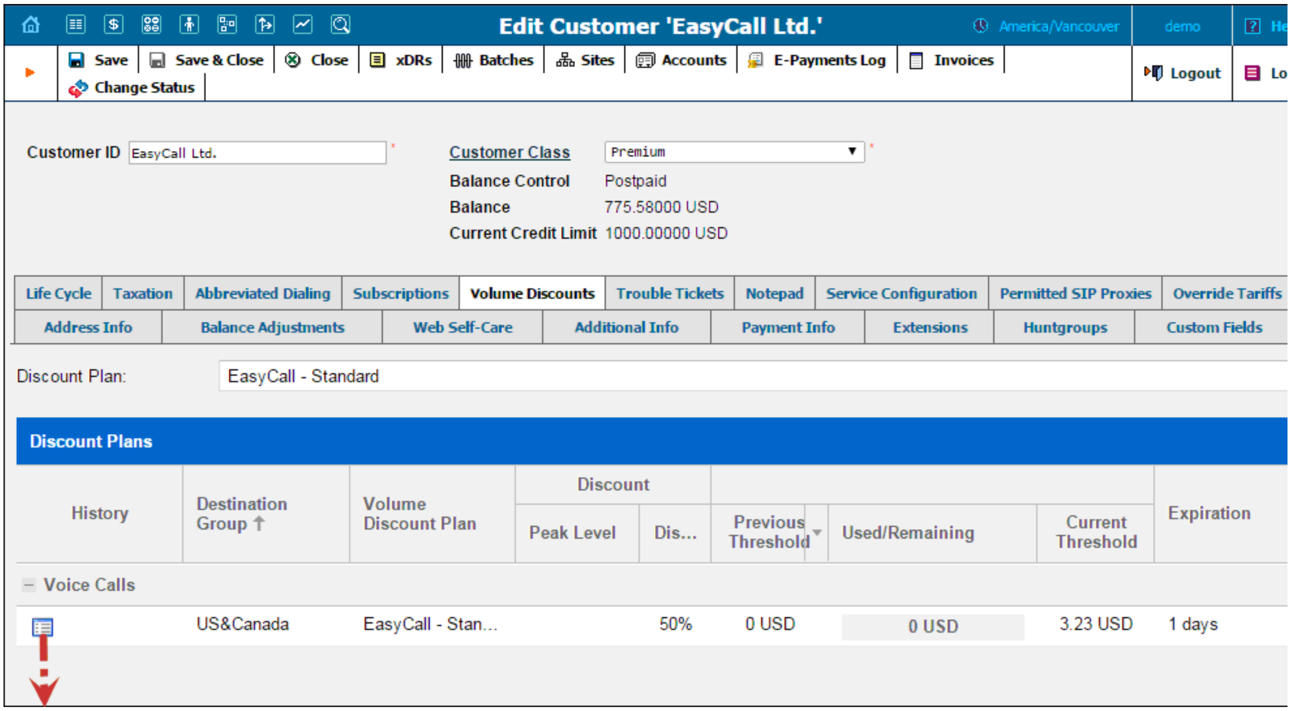
NOTE: To be able to add extensions / abbreviated numbers, you should enter the maximum length of anticipated digits (e.g. 3 in the case of 123-like numbers) in the **Abbreviated Number Length** field.

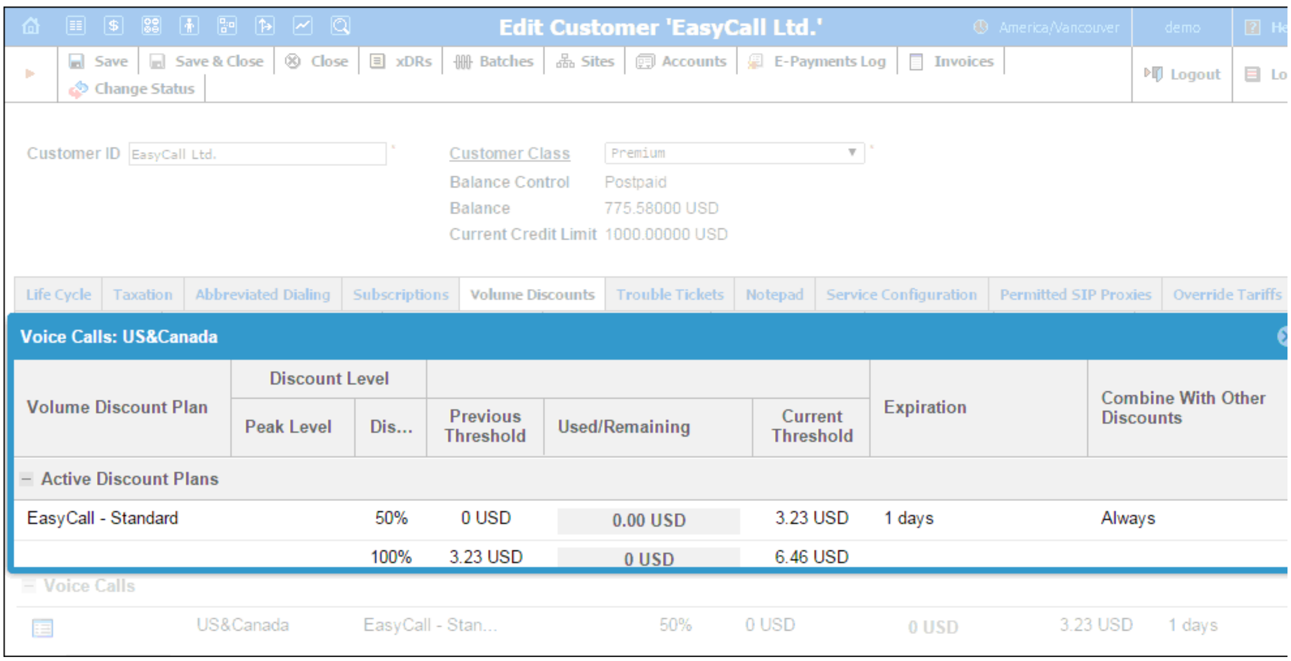


To add a new abbreviated dialing number, click the **Add** button and enter the following information:

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 the customer's accounts or any phone number. If you leave this field blank, then the abbreviated number is considered to be a direct number, or "dial as is". This is useful for making sure that 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".
SIP	If # to Dial represents the ID of one of the customer's accounts, you will see the SIP "lamp" icon here. It will light up if the account is currently being used by a SIP UA to register with the SIP server; otherwise it will be gray.

Volume Discounts





Discount Plan	Permits the selection of which Discount Plan to be used with this customer.
History	Opens a popup window that shows extended information about the discount plan.
Destination Group	Destination groups included in the customer's volume discount plan.
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 customer.
Discount	The value of the discount currently applied to the customer.
Previous Threshold	The threshold value for the last used discount level.
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 a customer's internal counter reaches this value, the next level discount will start being applied according to the discount scheme.

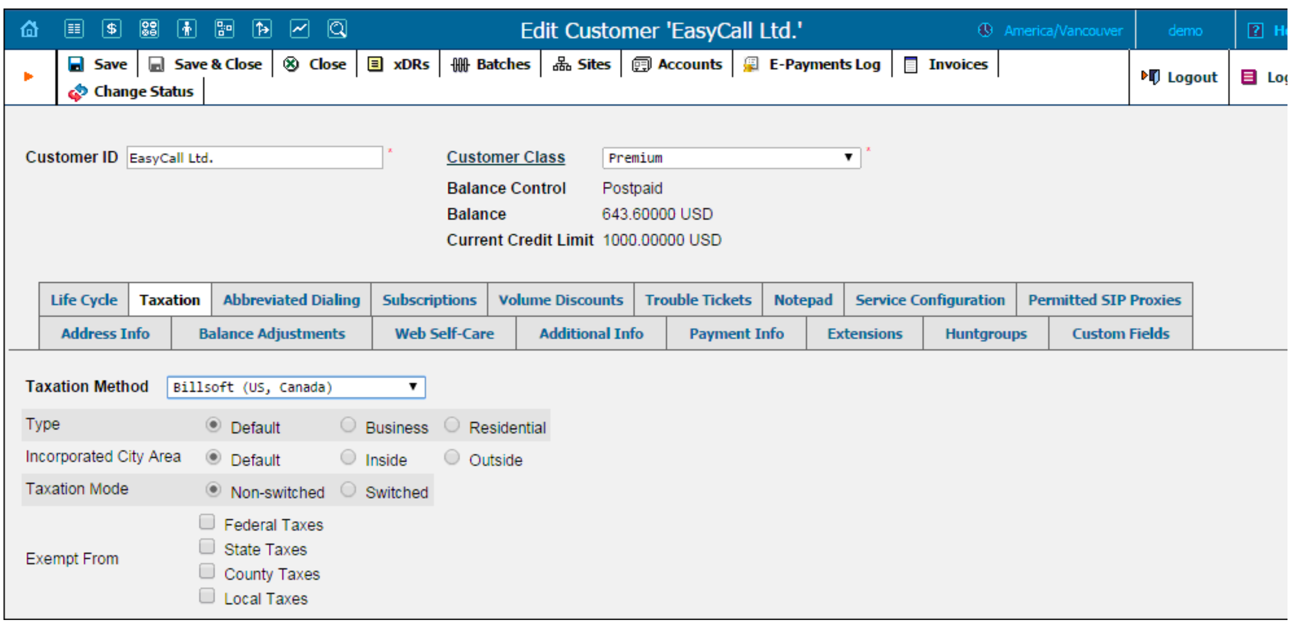
Expiration	Shows the time left for the discount to be reapplied to the customer. If **Never** is defined, it means that this discount is for one-time use and will not be reapplied to the customer.
Discount History window	
Status	The current status of the discount plan: • **Active Discount Plans** – are the discount plans currently in use • **Consumed** – are the discount plans that have 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 peak or off-peak periods. Otherwise, this column contains the period names.
Discount Level	The value of the discount currently applied to the customer during peak and / or off-peak periods.
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.
Combine With Other Discounts	Shows the way this discount plan is combined with other discount plans that apply 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.)

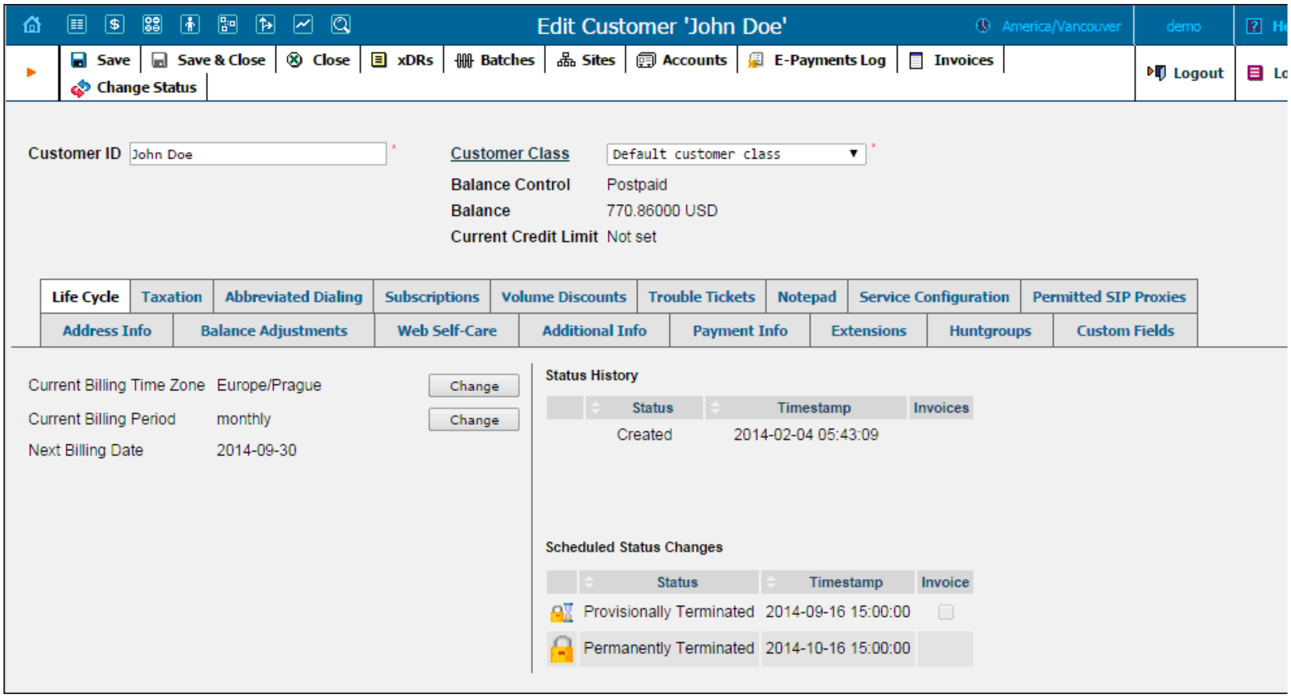
Taxation

On this tab you can choose which plug-in module will be used to make tax calculations and set up parameters that affect taxation.



Since these parameters depend on the specific taxation module and your local tax laws, please consult your tax attorney for details regarding the use.

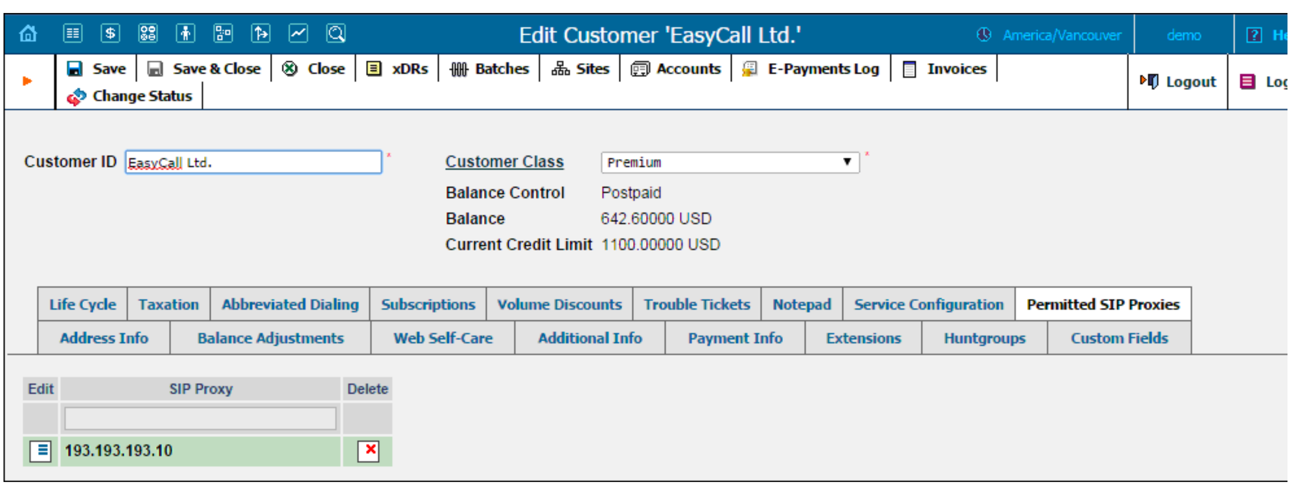
Life Cycle



Field	Description
Billing Time Zone / Current Billing Time Zone	Defines / shows time zone in which customer's billing period will be closed and invoices will be generated.
Billing Period / Current Billing Period	Defines / shows the frequency of invoicing for this customer.
Next Billing Date	Read-only field; displays the date when the customer's current billing will be closed (and invoice and statistics generated). If you shift the billing date, than this field will show you a billing date which was actual before the shift. Note that this date is shown in customer's time zone.
Last Day of the Period	Read-only field available only during customer creation; shows the last date of the customer's first billing period. Note that this date is shown in customer's time zone.
Invoiced On	Read-only field available only during customer creation; shows a date when customer's invoice will be generated. Note that this date is shown in customer's time zone.
Status History	Read-only field; allows you to track important events in a customer's lifecycle, such as when the customer was created, blocked / unblocked or provisionally terminated / opened.
Scheduled Status Changes	Read-only field; displays the scheduled events for this customer, such as provisional / permanent termination.

Permitted SIP Proxies

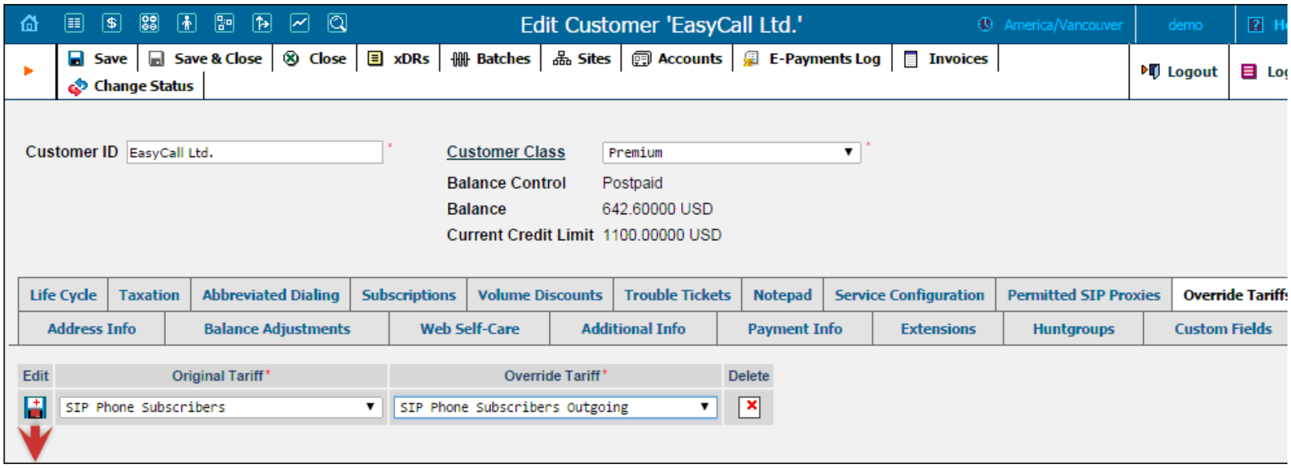
On this tab you can choose to which external SIP proxies customer can forward calls using "SIP URI forward" feature.

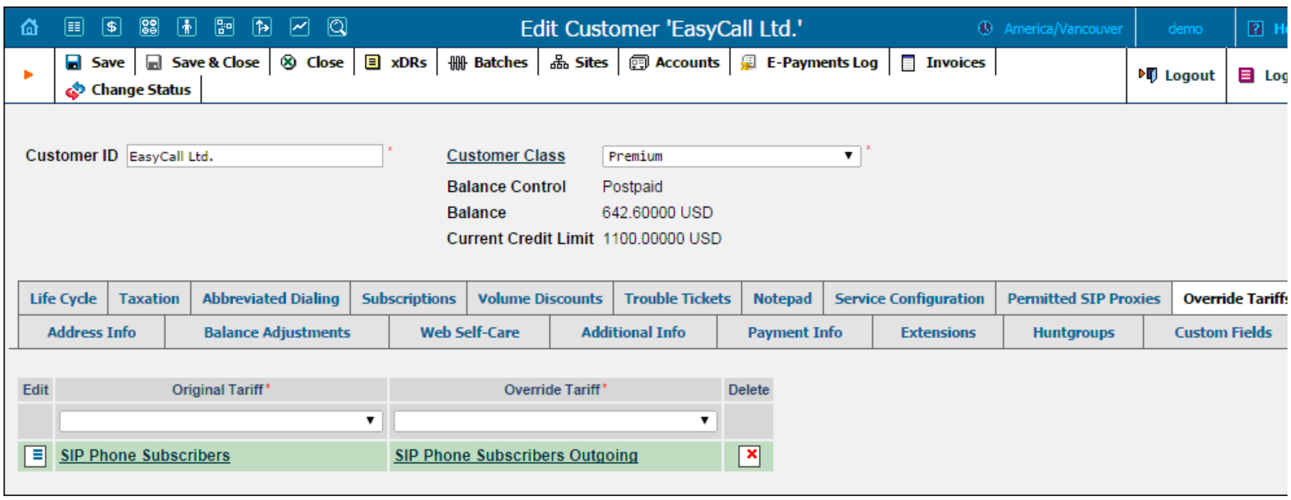


Override Tariffs tab

When you have the same tariff for several customers you may need to adjust the specific rates for a particular customer. To avoid creating anotl tariff with a complete set of rates for this customer (using a large portion of the same data) you can use the **Override Tariffs** feature. Create a n tariff using only the rates that are specific to a current customer and associate it with an original tariff on the **Override Tariffs** tab.

Note: The **Override Tariffs** tab will only appear if the **Override Tariffs Enabled** check-box is enabled on the Additional Info tab.



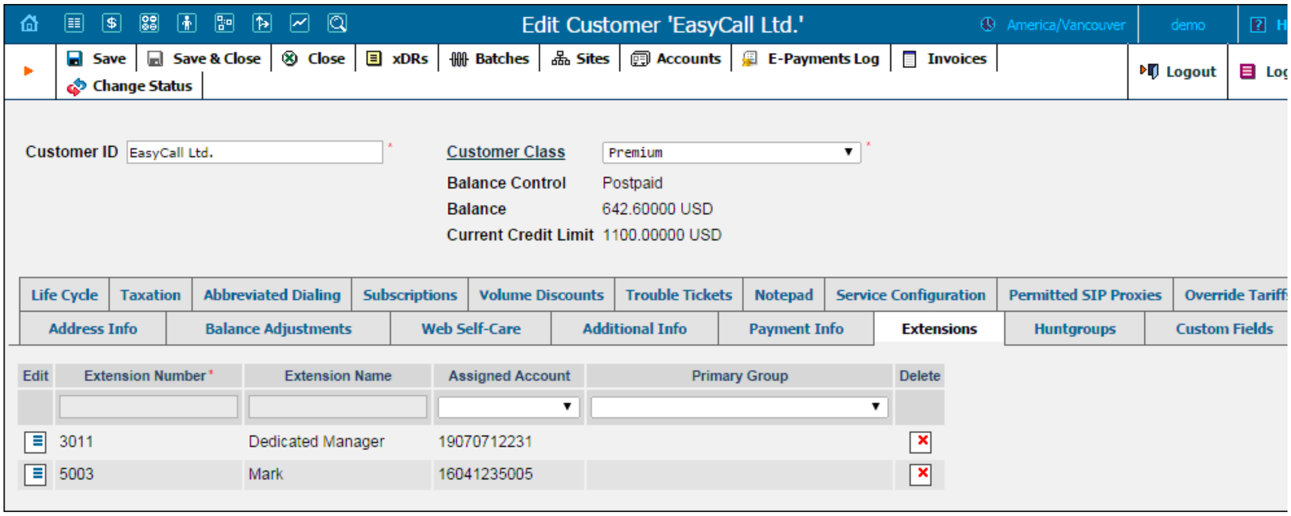


Field	Description
Original Tariff	This specifies the original tariff that contains the majority of the rates. Choose the tariff from the drop-down list.
Override Tariff	Choose the tariff that contains a handful of rates that are specific to the current customer. Rate lookup is done in both original and override tariffs and the rate for the closest destination is chosen (and its corresponding tariff is used). If there are different rates for the same destinations in both tariffs the one from the override tariff will be chosen.

Let's take an example in order to see how this works. You assign a standard tariff to several customers that contains a rate for destination numb 12 at $0.02/minute and a rate for destination number 420 at $0.2/minute. Then you decide to adjust the 1204 destination rate to $0.01/minute a specific customer So you create a new tariff using this rate and assign it as the override tariff for that customer. In this case, a call to 12033768900 will be charged according to the rates in the original tariff (0.02/minute), a call to 120456777844 will be charged according to the rate in the override tariff ($0.01/minute), and a call to 420998764456 will be charged according to the original tariff.

Extensions

Using this tab, the customer can define a list of extensions for phone lines within his IP Centrex environment. The customer can add new extensions or change existing ones without any actual phone configuration.



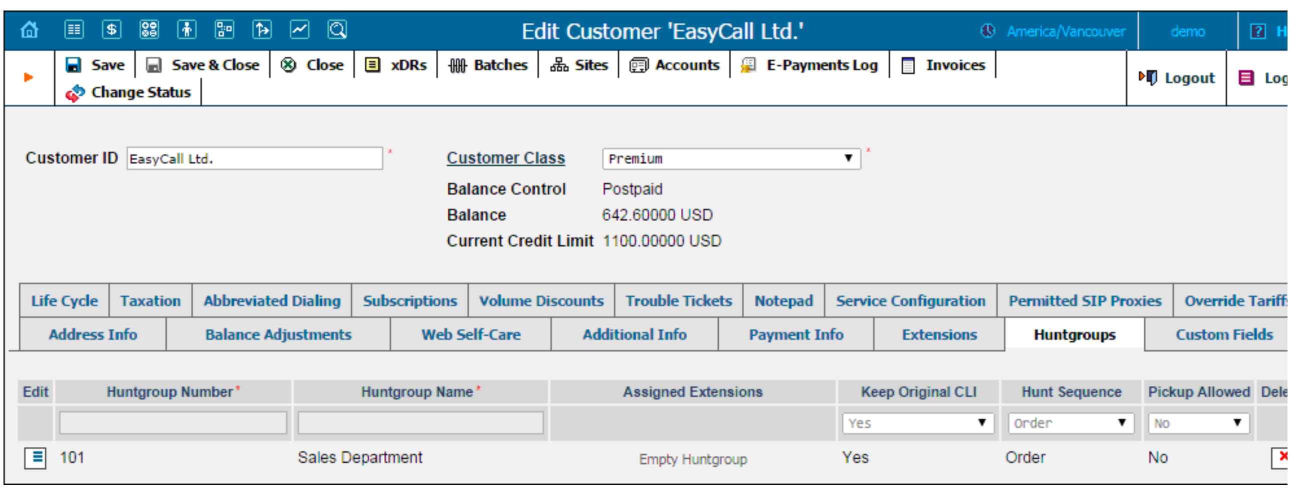
To add a new extension number, click the **Add** button and enter the following information:

Field	Description
Extension Number	The number the end-user will dial on his phone (an extension number should contain only digits).
Extension Name	Logical name for this extension (e.g. name of the person using this line: “John”).
Assigned Account	The number that calls will be forwarded to. Here you should specify the ID of one of the customer’s accounts (this can be selected from the drop-down list). **NOTE:** Each account should have only one extension; thus it is possible to add an extension only if an unassigned account exists.
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).
Delete	Click the **Delete** icon to remove the extension from the list.

NOTE: The account assigned to the extension should have the VOICEONNET or VOICEONNETRX rate in its tariff, otherwise calls cannot be made.

Huntgroups

On this tab, the customer can configure a scheme for call distribution in such a way that incoming calls are delivered to one or more assigned extensions.



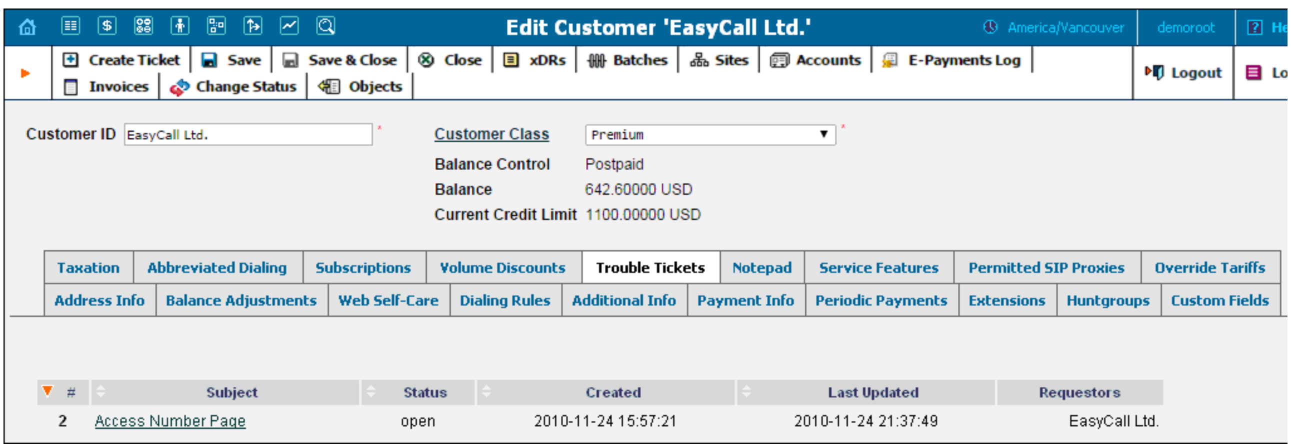
To add a new huntgroup, click the **Add** button and enter the following information:

Field	Description
Huntgroup Number	The number that the end-user dials on his phone to reach one or more assigned extensions. Note that a huntgroup number should contain no more than five digits.
Huntgroup Name	Logical name for this group of extensions, e.g. “Sales department.”
Assigned Extension	Specify one or several extensions that calls will be delivered to. Click the **Assigned Extensions** link to invoke the window for extensions selection, and check the boxes on the left of the desired extensions; select the

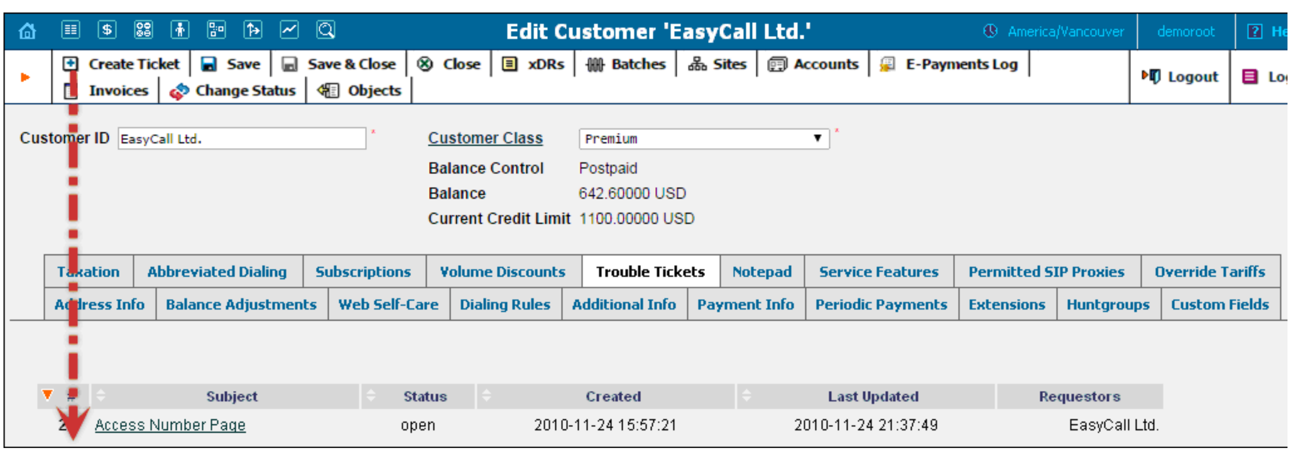
	Huntstop check box to disable forwarding for calls made to this huntgroup. **Ringing Delay** (for assigned extensions only) – Delay (in seconds) before the extension starts ringing. **Ringing Time** (for assigned extensions only) – Duration of ringing (in seconds).
Keep Original CLI	• **Yes** – The call is redirected with the phone number and name of the original caller. • **No** – The call is redirected with the phone number and name of the huntgroup. • **Id Only** – The call is redirected with the phone number of the original caller and name of the huntgroup.
Hunt Sequence	Specifies the order for delivering a call to one or more extensions. **Order**: Call every extension one by one from the first (topmost) number to the last until the call is answered. **Random**: Use a random order. **Simultaneous**: The call goes to every extension from the list simultaneously until the call is answered. **Least Used**: Sort the accounts in descending order of their last usage, and deliver the call to their extensions accordingly. For example, account 777111 with extension 111 was last used on 2010-12-11, and account 777222 with extension 222 was last used on 2010-12-12; in this case the call goes to extension 111 and then, if not answered, to extension 222.
Pickup Allowed	Set the **Pickup Allowed** option to *Yes* for a huntgroup to allow extensions to pick up calls made to the members of this huntgroup.
Delete	Click the **Delete** icon to remove the huntgroup from the list.

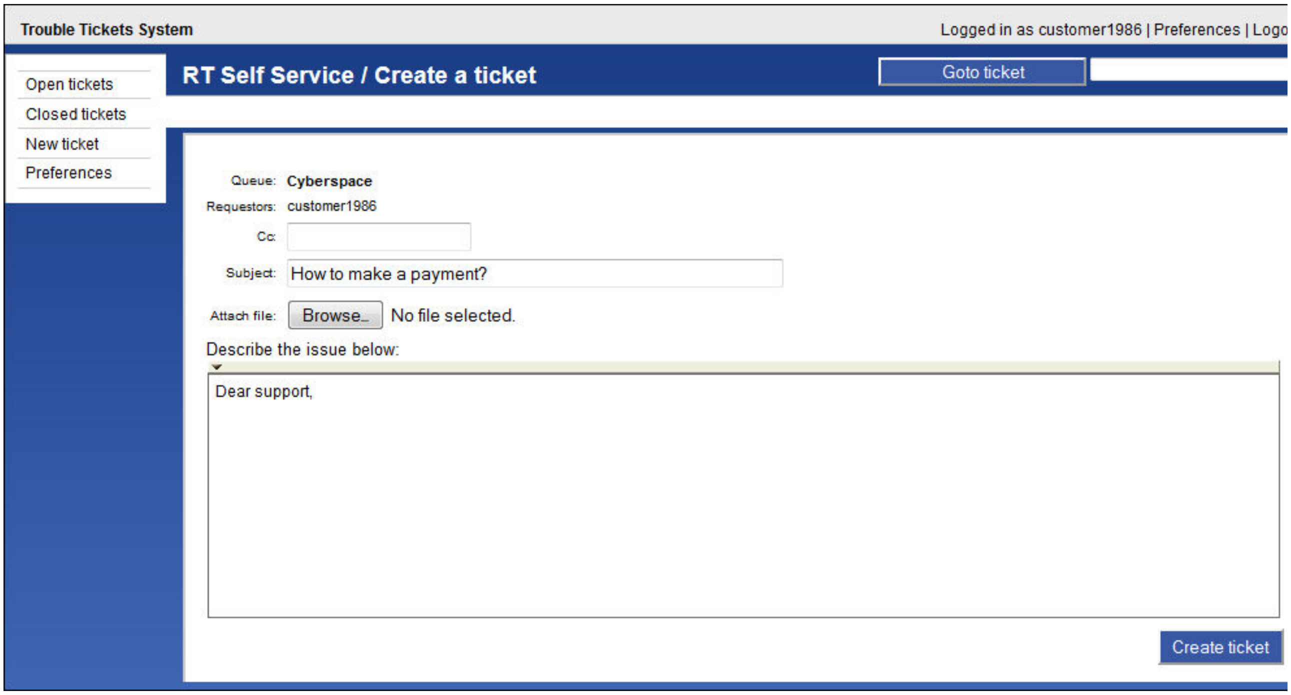
Trouble Tickets

Using this tab you can view the list of recent tickets and automatically open a specific ticket in RT interface by just clicking on it.



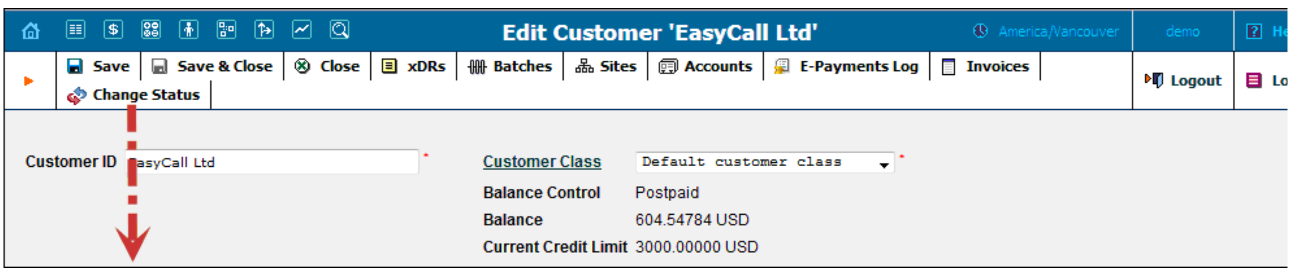
To create a new ticket, click **Create Ticket** in the toolbar.

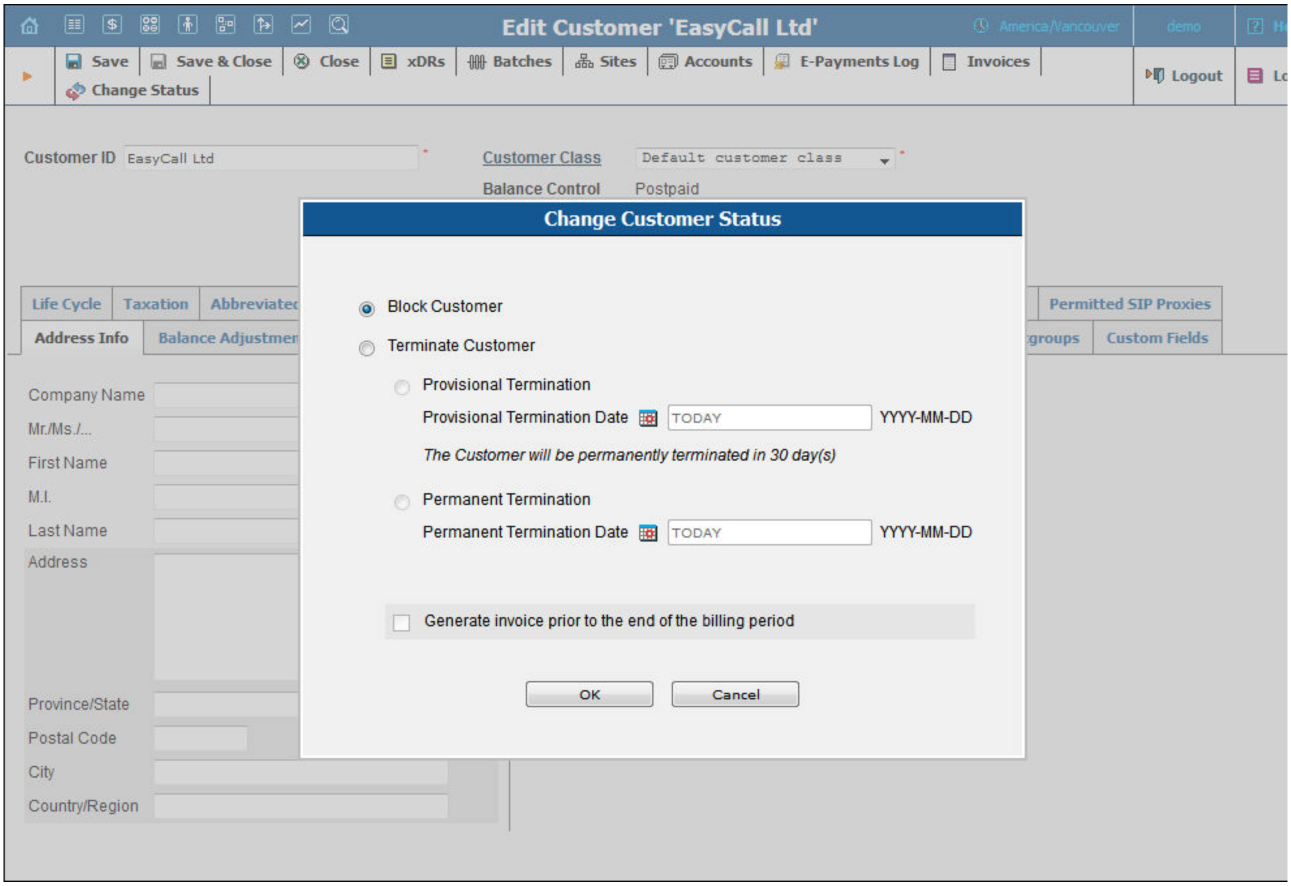




Change Customer Status

In the **Change Customer Status** window you can block / unblock the customer, terminate the customer (provisionally or permanently) a restore the customer after having provisionally terminated them.





Block / Unblock a Customer

Select the **Block Customer** option to block *all* of this customer's accounts. Once this option is selected, all of this customer's accounts will become unusable.

Select the **Unblock Customer** option to unblock all of this customer's accounts. Once unblocked, all of this customer's accounts will become operable again. Note, that the **Unblock Customer** option is only available for blocked customers.

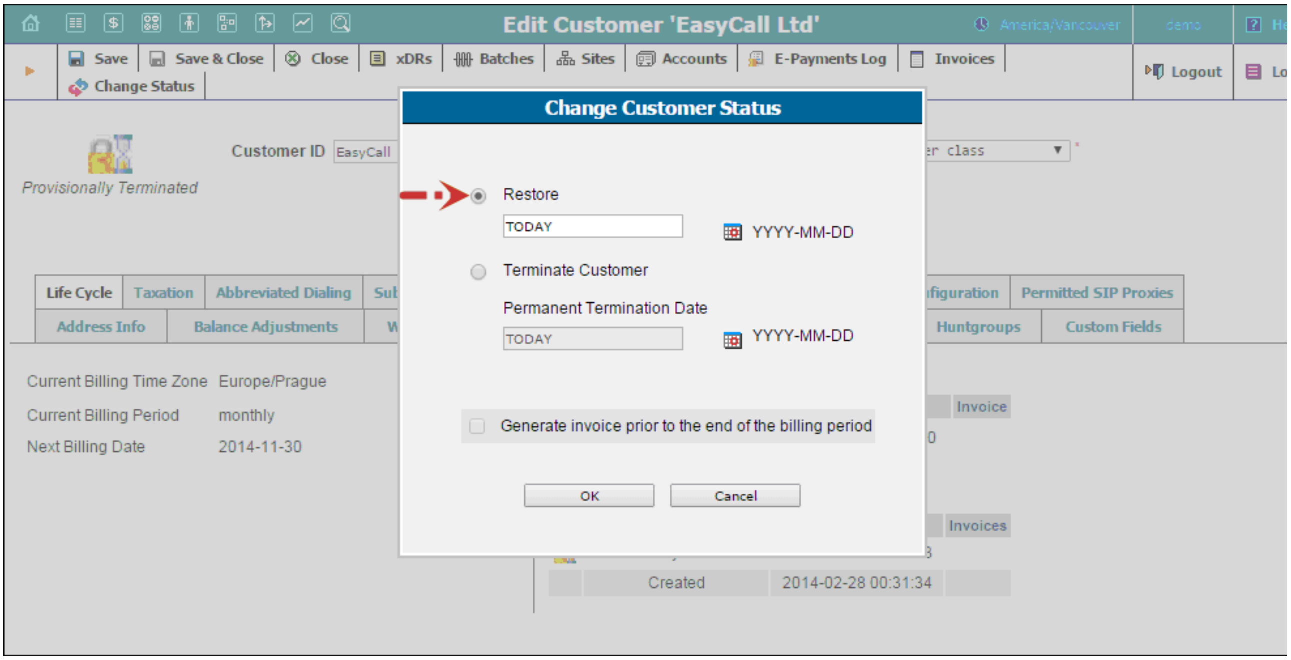
Permanent Customer Termination

You may terminate a customer, including all his accounts. If for some reason you do not want a customer to remain in your PortaBilling® environment any longer, select the **Permanent Termination** option and choose the **Permanent Termination Date**.

The **Permanent Termination** option allows you to stop all the customer's activities, and later to remove him and all his accounts. When terminated, the customer is no longer available for any operations. The only way to trace such a customer is by using Advanced Search with the "closed status" filter.

Provisional Customer Termination

In addition to permanent termination you can use the *provisional termination* functionality. To provisionally terminate a customer, select the **Provisional Termination** option and choose the **Provisional Termination Date**.
Once a customer is provisionally terminated, all their services are closed (that is, no services can be used). But there is still an option to reactivat services that were disconnected if the customer should change their mind later on. Select the **Restore** option to restore this customer's services that they can be used exactly as before. Note that the **Restore** option is only available for provisionally terminated customers.



If a customer ultimately decides to discontinue services, the administrator can permanently terminate this customer in the system. In case permanent termination, all customers' services are closed and cannot be restored.

You may also generate a midterm invoice for the customer you are going to terminate (provisionally or permanently). For this, click to select **Generate invoice prior to the end of the billing period** check-box. The invoice will be generated within the hour.

NOTE: Please keep in mind that if you are going to provisionally terminate a customer, this customer won't be charged for any DID numbers assigned to him / her. At same time, the DID provider will still charge you a fee (e.g. $5/month) because these DID numbers remain allocated to your network until the customer is permane terminated.