

Add / Edit Product

A product is a combination of services that you provide to a customer for a price. The basic information for defining a product is as follows:

Field	Description
Product Name	The internal product name.
Product Name Visible to End User	A clear product name to be shown to end users on their Self-care interfaces (e.g. the internal product name is "Phone Book" while the name visible to end users is "Telefonbuch").
Product Type	<p>The product type can be the following:</p> <ul style="list-style-type: none"> • Main Product – A basic product that assigns all the basic services that are available to your customers. • Add-on Product with precedence level – An additional product by which you can increase or limit the services provided to your customers. <p>Add-on products have precedence over the main product, so no matter what is defined within the main product, it will be overridden by settings defined within add-on products (this applies only to the options that are supplied with add-on products).</p> <p>In order to differentiate the add-on products there is also a "precedence level" parameter for each add-on product. If there are more than one add-on products assigned to an account they will be sorted according to the specified precedence level.</p>
Managed By	Administrator only (default) means that this product will be used for your direct customers and is accessible only to your administrators. Select a PortaBilling® reseller to assign this product for use by a particular reseller.
Currency	The currency in which the product will be maintained. To edit a currency, delete all rating entries for this product.

Included Services Tab

You can define which service types are available for all accounts that this product is assigned to.

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Product Name: * <input type="text" value="EasyCall"/>	Currency: * <input type="text" value="USD - US Dollar"/>
Product Name visible to End User: * <input type="text" value="EasyCall residential"/>	Managed By: <input type="text" value="Administrator Only"/>
Product Type: <input checked="" type="radio"/> Main Product <input type="radio"/> Add-on Product	

Included Services	Service configuration	Usage Charges	Volume Discount	Recurring Charges	Additional info	Notepad
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Service type: Voice Calls	System built-in services: <input checked="" type="checkbox"/> Voice Calls
Service type: Data Service	System built-in services: <input type="checkbox"/> Data Service [KB] <input type="checkbox"/> Data Service [MB]
Service type: Internet Access	User-defined services: <input type="checkbox"/> Broadband
Service type: Quantity Based	System built-in services: <input type="checkbox"/> Quantity Based
Service type: Wi-Fi	System built-in services: <input type="checkbox"/> Wi-Fi
Service type: Dial-up Internet	System built-in services: <input type="checkbox"/> Dial-up

Service Configuration Tab

You can define the default values of service attributes for all accounts which this product will be assigned to (naturally, you can override them at the account level later on).

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Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services
Service configuration
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Services ↑
Voice Calls

- Voice Calls
- Fraud Detection
- Incoming Calls
- Outgoing Calls

Fair Usage Policy

Feature Status:

Feature can be edited by: Administrators End-users

Max number of incoming calls:

Max number of outgoing calls:

Max number of simultaneous calls:

Max number of forwarded calls:

Call Recording

Feature Status:

Feature can be edited by: Administrators End-users

Auto Record Outgoing Calls:

Auto Record Incoming Calls:

Auto Record Redirected Calls:

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Field	Description
	The <i>Voice Calls</i> service type
Fair Usage Policy	To prevent fraud and service abuse of products that provide your customers with free calls, you may define limits for simultaneous calls that can be applied to all accounts with this product. Select Enabled from the list to activate the Fair Usage Policy feature.
Max Number of Incoming Calls	Allow only a specific number of concurrent incoming calls for accounts with this product.
Max Number of Outgoing Calls	Allow only a specific number of concurrent outgoing calls for accounts with this product.
Max Number of Simultaneous Calls	Allow only a specific number of concurrent calls (regardless of their type, such as incoming or outgoing) for accounts with this product.
Max Number of Forwarded Calls	Allow only a specific number of concurrent forwarded calls for accounts with this product.
Call Recording	Enables the recording of calls made or received by accounts with this product. The user can start and stop recording a specific phone conversation after it has already started by using various phone controls.
Feature Status	Select Enabled from the list to activate the Call Recording feature.
Auto Record Outgoing Calls	Automatically records outgoing calls made by accounts with this product. Note that calls made to a voice mailbox to retrieve messages will not be auto-recorded.
Auto Record Incoming Calls	Automatically records calls received by accounts with this product.
Auto Record Redirected Calls	Automatically records calls redirected by accounts with this product. Note that:

	<ul style="list-style-type: none"> • 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
<i>The Incoming Calls section</i>	
UM Enabled	Allows the account users with this product to access the unified messaging system. See the PortaSIP® Media Server Administrator Guide for more details.
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.
Call Forwarding	Assigns call forwarding mode to the accounts with this product: <ul style="list-style-type: none"> • No Forwarding disables call forwarding entirely. • Follow-Me enables the standard follow-me forwarding. • Advanced Forwarding activates the advanced call forwarding mode. • With Forward to SIP URI forwarding your customers can enter a forwarding destination as a CLD@IP. • Simple Forwarding allows you to specify a single phone number to which all calls will be sent.
Call Screening	Enables selective call processing / conditional call forwarding features.
Auto-attendant	Activates the Auto-attendant functionality for accounts with this product.
<i>The Outgoing Calls service type</i>	
E911	Activates emergency services for accounts with this product.
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.
Call via IVR	This feature enables calls to be processed in an assigned IVR-capable voice application. For example, the Pass-through IVR application plays a “time left” warning when a specified number of seconds is left – before the call is disconnected – or it can announce the maximum allowed call duration to the destination and then connect the call.
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.
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.

	<p>This field can contain the following special symbols:</p> <ul style="list-style-type: none"> • '%' – wildcard for any number of symbols, and • '_' – equivalent wildcards for one symbol. <p>If this field is empty, then any number can be marked as a favorite.</p>
Call Barring	Activates the Call Barring feature for accounts with this product. Call barring allows your customers to prohibit outgoing calls to specific destinations.
The <i>Internet Access</i> service type	
Internet Access Policy	The most common option is Product default . In rare cases, for a certain account, you may need to set a special policy that will override the product's parameters. In such cases, select the appropriate internet access policy from the list, or select 'empty' if you do not want to limit the bandwidth on the account with this product.
Hotlining	Select Enabled if your NAS supports a hotline.
Static IP	Select Enabled if you want to assign a static IP address to accounts with this product.
Session Limit	Defines the maximum number of concurrent sessions that can be initiated.
Max Simultaneous Sessions	Specify the maximum allowable number of concurrent sessions (only available when the Session Limit feature is enabled).
The <i>IPTV</i> service type	
Channel Package	This feature defines a set of broadcast channels that are available to accounts with this product.
Activation PIN	Specifies a numeric code to be entered from end user's STB (Set-Top Box) remote controller to activate IPTV services.
The <i>Wi-Fi</i> service type	
Limit Bandwidth	The most common option is Product default . In rare cases, for a certain account, you may need to define special bandwidth values 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 the account with this product.
Max Upload Rate	Specifies the maximum upload rate for the accounts with this product.
Max Download Rate	Specifies the maximum download rate for the accounts with this product.

Fraud Detection section

Geo-IP Fraud Detection can be enabled for individual products, thereby allowing IP verification to be performed on all accounts using this product. This allows you to apply Geo-IP verification to specific business and residential VoIP products, and skip it for other products (for backward compatibility or simply because it does not fit the business model, for instance, for a service similar to Skype, where users can register and use the service anywhere in the world.)

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New Product

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Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services Service configuration Usage Charges Volume Discount Recurring Charges Additional info Notepad

Fraud Detection

Services ↑

- Voice Calls
- Fraud Detection
- Incoming Calls
- Outgoing Calls

Geo-IP Fraud Detection

Feature Status:

Feature can be edited by: Administrators End-users

Location change allowed every: * minute

After passing screening IVR, allow normal calls for: * minute

Geo/Risk Profile:

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Field	Description
Feature Status	Select Enabled if you want to apply IP verification to be performed for all accounts using this product.
Geo / Risk Profile	Assign a Geo / Risk Profile depending on the area where you sell the service and what type of service it is.
Location change allowed every:	Allows the end-user to change location once per specified time interval without inputting the PIN again.
After passing screening IVR, allow normal calls for:	Allows the end-user to make calls for a specified period of time after passing the screening IVR without inputting the PIN again.

Usage Charges Tab

Rating list on **Usage Charges** tab defines where users of this product can use the service, and how they will be charged for it.

America/Vancouver demo ? Help
Edit Product "EasyCall"

Save Save & Close Close Rate Lookup Clone
Logout

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services Service configuration Usage Charges Volume Discount Recurring Charges Additional info Notepad

Edit	Log	Service Used At			Charges Applied			Delete
		Node	Access Code	Service	Tariff	Advanced Config		
<div style="text-align: center; padding-top: 20px;"> </div>								

Add
Help

Overdraft Protection:


Edit Product "EasyCall" America/Vancouver demo ? Help

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services | **Service configuration** | Usage Charges | Volume Discount | Recurring Charges | Additional info | Notepad

Edit	Log	Service Used At			Charges Applied			Dele
		Node	Access Code	Service	Tariff	Advanced Config		
Service type: Unknown								
<input type="button" value="Add"/>	<input type="button" value="Help"/>	<input type="text" value="PortaSip"/>	<input type="text"/>	<input type="text" value="Voice Calls"/>	<input type="text" value="EasyCall"/>	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>	<input type="button" value="X"/>
								
Overdraft Protection: <input type="text" value="All accounts"/>								

Edit Product "EasyCall" America/Vancouver demo ? Help

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services | **Service configuration** | Usage Charges | Volume Discount | Recurring Charges | Additional info | Notepad

Edit	Log	Service Used At			Charges Applied			Dele
		Node	Access Code	Service	Tariff	Advanced Config		
Service type: Voice Calls								
<input type="button" value="Add"/>	<input type="button" value="Help"/>	<input type="text" value="PortaSip"/>	<input type="text" value="Any code"/>	<input type="text" value="Voice Calls"/>	<input type="text" value="EasyCall"/>	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>	<input type="button" value="X"/>
Overdraft Protection: <input type="text" value="All accounts"/>								

Field	Description
Node	The node on which the service is provided to the end users.
Tariff	A tariff is applied to end users to charge for the provided service.
Access Code	Identification of the access code (method) on that node. This parameter allows you to use different rate plans for the same service. For example, you may choose a rate plan according to the PSTN access number (local or toll-free) that the customer has dialed. Or you may use different rate plans for outgoing, incoming and forwarded calls in your SIP calls service using the OUTGOING, INCOMING and FOLLOWME access codes, respectively. (While for services such as prepaid cards the access code is a number, for other services any string may be used, so long as it is one provided by the application handling the call).
<i>Advanced Config</i>	
Service Allowed to	This parameter allows / disallows end users to use certain services when their accounts are suspended:

Suspended Users	<ul style="list-style-type: none"> • None – No services are provided to suspended users; • Zero Charged Only – Allows your customers to continue using free services during suspension periods. For example, if their account is suspended and you want to allow them to continue receiving incoming calls (since they are free) select this option.
Originating line information	This parameter allows accounts to be billed depending on where the call originates from. Simply associate the corresponding tariff with any OLI in Usage Charges. Please note that the gateway should be configured to support OLI.
Rate Match Mode	This parameter allows you to rate calls either based on the destination or the caller's number: <ul style="list-style-type: none"> • Default – Rating based on the destination number • Calling number – Allows the use of the caller's number to calculate billing charges (e.g. for charging the owner of a toll-free number for incoming calls).
<i>Overdraft Protection</i>	
Remaining balance requirement	When set to Positive amount available , account should have some available funds to use the service, regardless of the service itself being provided for free (e.g. free calls). Switching this option to Positive amount greater than breakage allows you to set the minimum available funds required for using the service to the product's breakage value. The option No restriction allows a session to start without first verifying the account's available funds.
Lock at least	Select this to set the funds for each individual session to be locked when it reaches a certain amount (effective only if the specified amount is higher than the computed deposit amount required for the session authorization). If an account's available funds fall below a certain value, you can use this option together with the Remaining balance requirement option to restrict usage to only one session at a time (even for free sessions), thus providing additional overdraft protection. Or you can use this option together with the Each subsequent fund lock allocates no more than option to provide additional protection for simultaneous session use. (For example, select the Each subsequent fund lock allocates no more than option from the Lock at least list and more funds will be locked without changing the sessions' duration).
Limit maximum locked funds for each session to	Select to reduce the funds to be locked for each individual session but does not restrict the session itself (effective only if the specified value is lower than the computed funds required for session authorization). This option weakens the strictness of overdraft protection, so the user can use funds above the limit to initiate several simultaneous sessions. You can use this option to fine tune the strictness of overdraft protection for postpaid services where a certain overdraft can be allowed. In this case, the funds above the limit can be used for several simultaneous sessions.
Each subsequent fund lock allocates no more than	In the case of a single session, this determines the maximum amount of account funds to be used for the session, and in the case of dynamic reauthorization, this determines the extension (chunk) of already consumed funds. This option limits the maximum amount of funds requested by the NAS, thus allowing more strict protection. It may be used for static authorization in order to leave some account funds unlocked and accommodate simultaneous usage of other services. If dynamic reauthorization is unavailable and there is a big price difference in the tariff, this option can't be applied effectively (e.g. if this option has low value, expensive calls would be limited to very short durations; if it has high value, cheap calls would be authorized with overly long durations, unnecessarily blocking the account from

	simultaneous usage). In this case, you can use this option to fine tune the strictness of overdraft protection.
Send alerts when overdraft is detected	Attempts to use the services simultaneously while all funds are locked by a session can signal a fraud attempt (for services such as calling with prepaid cards). This can be the result of inaccurate overdraft protection constraints. Turn this option on in order to receive real-time email alerts about these attempts.

Tariff per access point

By default, you define different ways of charging for your service based on the way the service is accessed (a combination of parameters such as node, access code, etc.). For example, when a user calls your gateway via a toll-free access number, a different (more expensive) tariff will be applied than if he were calling via a local access number.

To add rating entry:

1. Click the **Add** button to access the **Add Usage Charges** screen.
2. Choose a **Service**.
3. Choose a **Node** where the service will be provided.
4. Type in the **Access Code** value (if required).
5. In the **Tariff** drop-down list, you can choose a specific tariff that should be applied to the customer. For the **Voice Calls** service type, you can also choose the special entry **Assign Tariff per Routing Plan**, in order to define additional tariff – routing plan combinations. A specific tariff will be applied based on which routing plan was used for a particular call.
6. Configure overdraft protection for this product. Use the **Advanced Config** button to define the overdraft protection settings.
7. Click the **Update** button.

Assign tariffs per routing plan

For a voice call service, you can also choose to apply a different tariff based on which routing plan (i.e. which set of vendors – cheaper or more expensive ones) was used to terminate the call. Thus if a customer chooses to use premium routes, he will be charged more, while if he uses a routing plan that includes low-cost carriers, he will be charged less.

The screenshot shows the 'Edit Product "EasyCall"' interface. The 'Usage Charges' tab is active. The 'Service Used At' section includes 'Node' (Any node) and 'Service' (Voice Calls). The 'Charges Applied' section has a dropdown menu with 'Assign Tariff per Routing Plan' selected. A red dashed arrow points to this option. The 'Advanced Config' button is visible next to the dropdown. The 'Overdraft Protection' field is set to 'All accounts'.

Product Name: * EasyCall Currency: * USD - US Dollar

Product Type: * Main Product Managed By: Administrator Only

Service type: Unknown

Any node

Overdraft Protection: Debit accounts only

Edit	Routing Plan	Tariff	Del...
	All Available Routes	ABC Shuttle - Incoming Calls	

Add Save Cancel

Product Name: * EasyCall Currency: * USD - US Dollar

Product Type: * Main Product Managed By: Administrator Only

Service type: Voice Calls

Any node

Overdraft Protection: Debit accounts only

Edit	Routing Plan	Tariff	Del...
	All Available Routes	ABC Shuttle - Incoming Calls	
	Retail	ABC Shuttle Prepaid Cards	
	Business	ABC Shuttle - Outgoing Calls	

Add Save Cancel

Switching from the “simple” use of one tariff for outgoing calls, regardless of the routing plan, is a step that requires attention to detail. You are already able to assign any routing plan to any customer; and all accounts will automatically be assigned the same routing plan that was previously assigned to their customer. If the administrator now reconfigures the product to use “tariff per routing plan”, but does not take into consideration that some customers had a particular routing plan assigned to them, and thus omits that routing plan from the rating list, an unpleasant situation may arise. Now when a customer with an account whose routing plan has been omitted tries to make a phone call without specifying a selection code, the call will be rejected, since the product’s rating list effectively says: “We don’t want customers of this product to use this routing plan!” In order to prevent this happening through an operator error, PortaBilling® pre-populates the table for routing plan / tariff mapping with **all** the routing plans currently assigned to accounts of this product. You then have a clear overview of all the routing plans that are being used, and can decide which tariff should be applied to each of them.

To edit the rating list:

1. Click the (Edit) button.
2. Choose the service, node, and tariff from the drop-down lists.
3. Type in the Access Code value, if any.
4. Change the overdraft protection parameters, if necessary.
5. Click the Update button.

Volume Discounts Tab

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Edit Product "EasyCall"

Save Save & Close Close Rate Lookup Clone Logout

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services Service configuration Usage Charges Volume Discount Recurring Charges Additional info Notepad

Default Discount Plan:

Field	Description
Default Discount Plan	Specifies a discount plan to be applied to all accounts by default.

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 end 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 free 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 new discount plan has the same discount entry (same destination group, service and thresholds.)

Recurring Charges Tab

This tab allows you to define a list of subscription plans which are mandatory for this product, so that these subscriptions will be automatically applied to every account to which this product will be assigned.

America/Vancouver demo
Edit Product "IP Centrex"

Save Save & Close Close Rate Lookup Clone Objects Logout

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services Service configuration Usage Charges Volume Discount Recurring Charges Additional info Notepad

Subscription:

Conditions

Subscription Is Activated At the given start date

Minimum Subscription Period: 0 Month

Subscription Charges Applied: At the end of the billing period

Fees



Activation Fee	0.00 US
Recurring Fee	9.99 US
Cancellation Fee	0.00 US

Promotions

Promotional Periods	No
Multi-Periods	No

Field	Description
Subscription	The name of the subscription plan.
Conditions	This shows the main parameters of a subscription plan. This field contains the information about the activation period, minimum duration period and charging pattern of a subscription plan.
Fees	This shows an overview of the fees defined within a subscription plan: <ul style="list-style-type: none"> • Activation fee – a one-time fee applied when the subscription is activated • Recurring fee – fees that are applied while a subscription is active. • Cancellation fee – if the subscription is cancelled before the end of the minimum subscription period, a one-time fee is applied.
Promotions	This shows information about promotional periods and discounts defined within a subscription plan: <ul style="list-style-type: none"> • Promotional Periods – indicates if any promotional periods have been defined within a subscription plan • Multi-Periods – indicates whether a subscription plan contains bulk discounts.

To add a new Subscription entry:

1. Click the  **Add** button.
2. Choose a subscription plan from the list.
3. Click the  **Save** button.

NOTE: To define a flat rate for provided service(s) and avoid discrepancies that may arise between subscription plans with different configuration parameters – only on subscription plan per product is allowed (for both main and add-on ones.)

Additional Info Tab

America/Vancouver demo ? Help
Edit Product "EasyCall"

Save Save & Close Close Rate Lookup Clone Logout

Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on Product

Included Services Service configuration Usage Charges Volume Discount Recurring Charges Additional info Notepad

Breakage:

Account Default ACL:

Allow Self-care Sign-up:

Description visible to End User:

Info URL:

Description:

Field	Description
Breakage	This value should be set by the administrator based on the currency and minimum price per minute. It is used in Account Management to obtain a summary of “depleted” (practically unusable) accounts. How it works: An account user could have a very small balance, e.g. 0.015. This is not enough to make calls to most destinations, except perhaps calls to technical support and certain local calls. Thus, even though the

	account's balance is not yet zero, the account is basically unusable (and the customer will probably never use it). The administrator is interested in how many accounts are in this state, i.e. how many accounts are depleted.
Account Default ACL	Specifies an ACL to be assigned to new accounts created with this product.
Allow Self-care Sign-up	Takes effect only to add-on products. When enabled, this allows end users to sign up for the add-on product by themselves on their Account self-care interface.
Description visible to End User	Description to be shown to end users on their Account self-care interface.
Info URL	URL to an external website describing product features. Customers can access it by clicking on the Product Info link in the main menu of their self-care interface.
Description	Product description.

Allowed With Tab

Every add-on product has a list of allowable main products that are compatible with it, and can be assigned to an account together with this main product.

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Save & Close
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Product Name: * Currency: *

Product Name visible to End User: * Managed By:

Product Type: Main Product Add-on product, precedence level

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Allow	Name	Description
<input type="checkbox"/>	Siptrunking	
<input checked="" type="checkbox"/>	SmartCall	
<input type="checkbox"/>	Smartnet Termination	

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