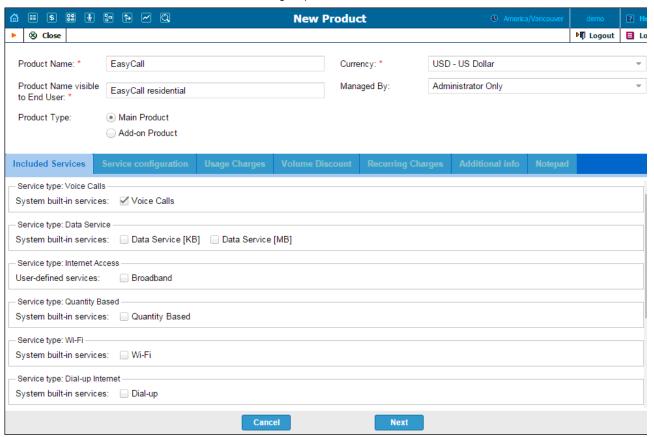
Add / Edit Product

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	A clear product name to be shown to end users on their
Visible to End	Self-care interfaces (e.g. the internal product name is
User	"Phone Book" while the name visible to end users is
	"Telefonbuch").
Product Type	The product type can be the following:
	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.
	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).
	with add-on products).
	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.
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.

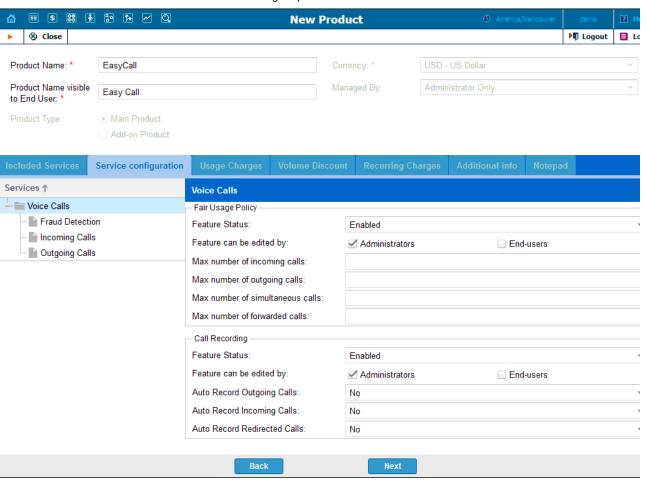
Included Services Tab

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



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).



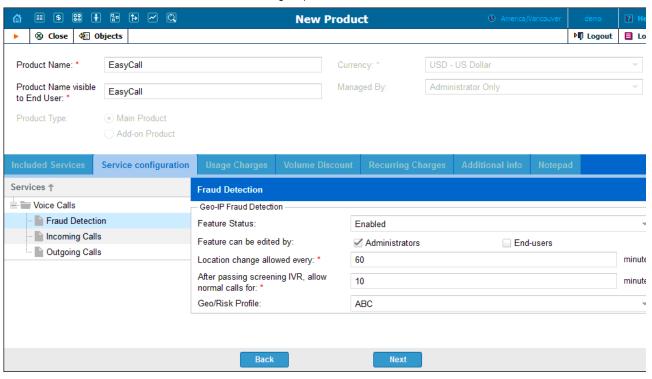
Field	Description
	The Voice Calls service type
Fair Usage Policy	To prevent fraud and service abuse of products that provide your customers with free calls, you may define limits for simultaneous calls that can be applied to all accounts with this product. Select Enabled from the list to activate the 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.
	Allow only a specific number of concurrent forwarded calls for accounts with this product.
	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.
•	Automatically records calls redirected by accounts with this product. Note that:

	PortaBilling Help - Edit f
	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 The Incoming Calls section
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: 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.
E011	The Outgoing Calls service type
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	You may allow an account user to define a list of favorite numbers. This field specifies the maximum amount of
Numbers	numbers that the account can mark as favorites.
Favorite Numbers	This defines the period in days during which the favorite numbers cannot be changed. Thus when a new favorite
Locking Interval	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	This is a comma-separated list of patterns for numbers
Numbers Allowed Patterns	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.

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	This field can contain the following special symbols: • '%' – wildcard for any number of symbols, and • '_' – equivalent wildcards for one symbol. If this field is empty, then any number can be marked as a favorite.
	Activates the Call Barring feature for accounts with this product. Call barring allows your customers to prohibit outgoing calls to specific destinations.
	The Internet Access service type
	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.
	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.
Simultaneous	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.
	Specifies a numeric code to be entered from end user's STB (Set-Top Box) remote controller to activate IPTV services.
	The Wi-Fi service type
	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

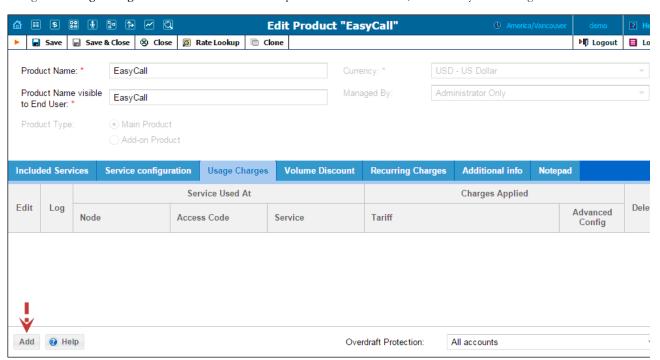
Geo-IP Fraud Detection can be enabled for individual products, thereby allowing IP verification to be performed on all accounts using this product. This allows you to apply Geo-IP verification to specific business and residential VoIP products, and skip it for other products (for backward compatibility 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.)

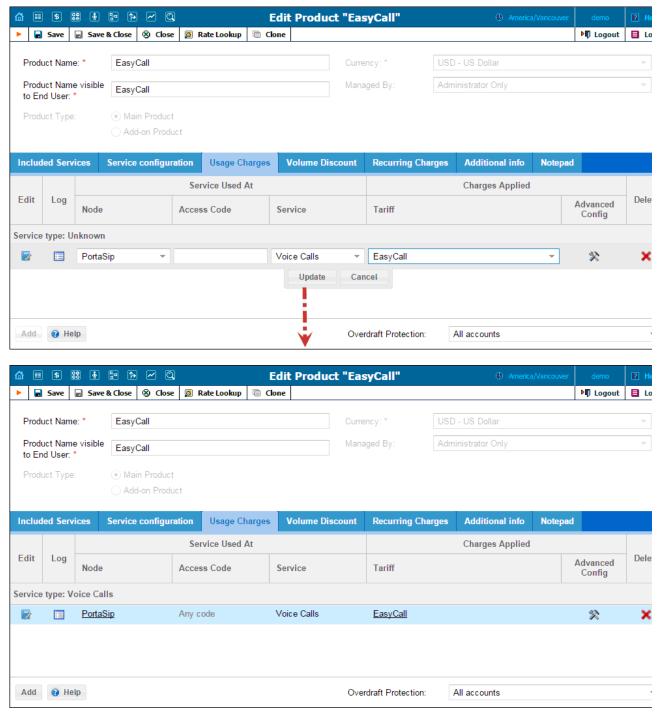


Field	Description
Feature Status	Select Enabled if you want to apply IP verification to
	be performed for all accounts using this product.
Geo / Risk	Assign a Geo / Risk Profile depending on the area
Profile	where you sell the service and what type of service it is.
Location change	Allows the end-user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

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.





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).
	Advanced Config
Service	This parameter allows / disallows end users to use certain
Allowed to	services when their accounts are suspended:

	PortaBilling Help - Edit Prod
Suspended	None – No services are provided to suspended
Users	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	This parameter allows accounts to be billed depending on
line	where the call originates from. Simply associate the
information	corresponding tariff with any OLI in Usage Charges.
	Please note that the gateway should be configured to
	support OLI.
Rate Match	This parameter allows you to rate calls either based on the
Mode	destination or the caller's number:
	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).
Danastatas	Overdraft Protection
Remaining	When set to Positive amount available , account should
balance	have some available funds to use the service, regardless of
requirement	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	Select to reduce the funds to be locked for each individual
maximum	session but does not restrict the session itself (effective
locked funds	only if the specified value is lower than the computed
for each	funds required for session authorization). This option
session to	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	In the case of a single session, this determines the
subsequent	maximum amount of account funds to be used for the
fund lock	session, and in the case of dynamic reauthorization, this
allocates no	determines the extension (chunk) of already consumed
more than	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.
	and the second s
	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
	value, cheap cans would be authorized with overly long
	durations unnecessarily blocking the account from
	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	Attempts to use the services simultaneously while all funds
when overdraft	are locked by a session can signal a fraud attempt (for
is detected	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

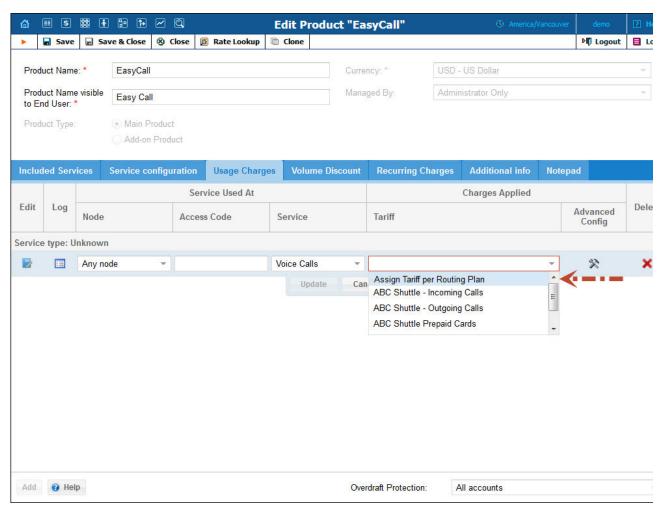
By default, you define different ways of charging for your service based on the way the service is accessed (a combination of parameters such as node, access code, etc.). For example, when a user calls your gateway via a toll-free access number, a different (more expensive) tariff will be applied than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

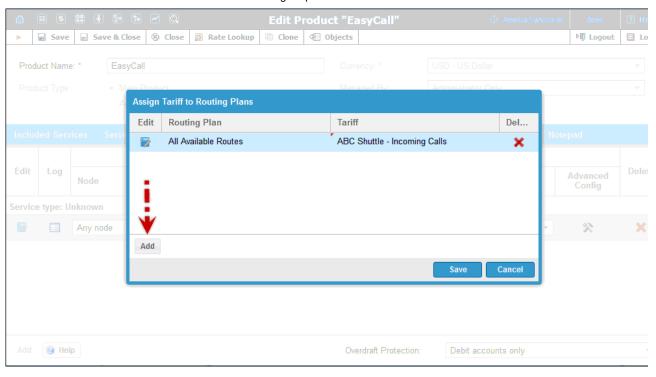
To add rating entry:

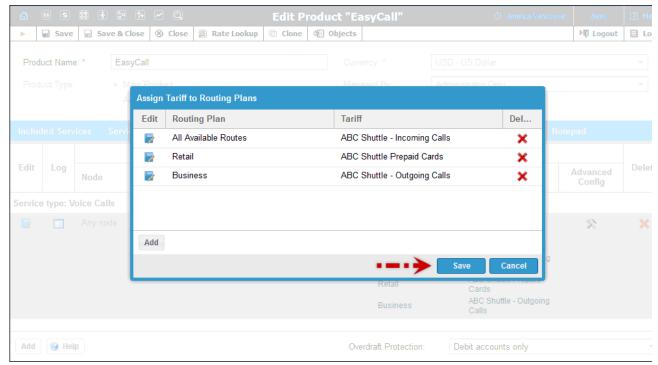
- 1. Click the Add button to access the Add Usage Charges screen.
- 2. Choose a Service.
- 3. Choose a **Node** where the service will be provided.
- 4. Type in the **Access Code** value (if required).
- 5. In the **Tariff** drop-down list, you can choose a specific tariff that should be applied to the customer. For the **Voice Calls** service type, y 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.





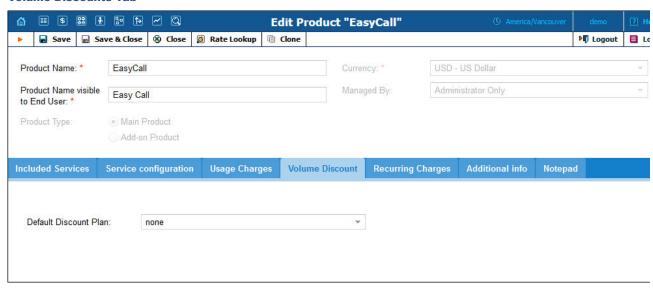


Switching from the "simple" use of one tariff for outgoing calls, regardless of the routing plan, is a step that requires attention to detail. You are already able to assign any routing plan to any customer; and all accounts will automatically be assigned the same routing plan that was previously assigned 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!" 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.
- Click the Update button.

Volume Discounts Tab



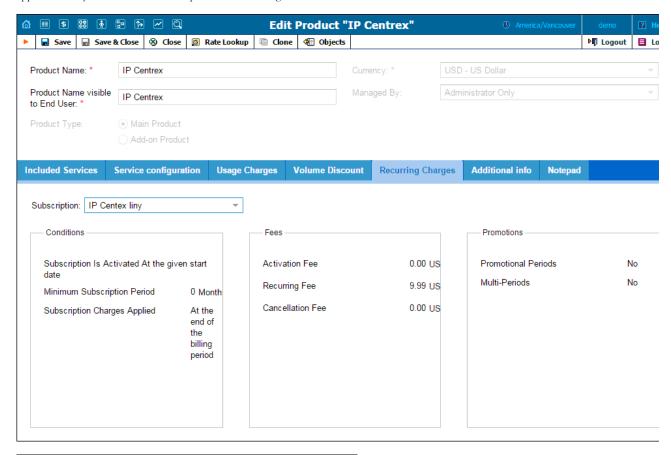
Field	Description
Default	Specifies a discount plan to be applied to all accounts by
Discount Plan	default.

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 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 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 ne 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.



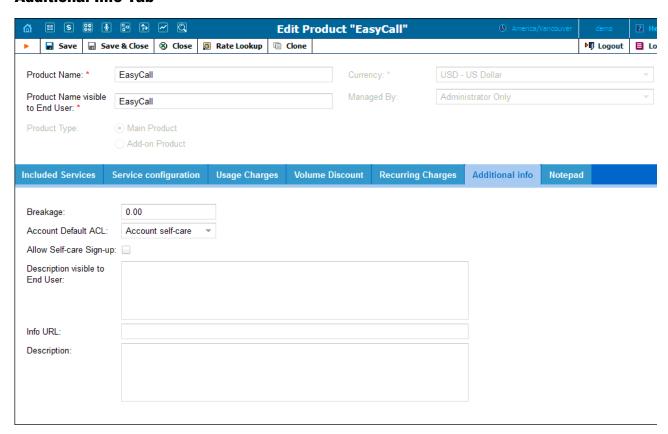
Field	Description
Subscription	The name of the subscription plan.
Conditions	This shows the main parameters of a subscription plan. This field contains the information about the activation period, minimum duration period and charging pattern of a subscription plan.
Fees	This shows an overview of the fees defined within a subscription plan: • 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: • 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



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	Specifies an ACL to be assigned to new accounts
Default ACL	created with this product.
Allow Self-care	Takes effect only to add-on products. When enabled,
Sign-up	this allows end users to sign up for the add-on product
	by themselves on their Account self-care interface.
Description	Description to be shown to end users on their Account
visible to End	self-care interface.
User	
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 mai product.

