


## Rate Upload

The rates table may be prepared using a spreadsheet processor (e.g. MS Excel) and can then be easily imported into PortaBilling®.

This is very convenient if your termination partner sends you a file with rate updates that must be entered into PortaBilling® in order to calculate costs and route your customers' calls properly. This can be done with the help of the Rate Upload functionality. To upload your rates file, perform the following steps:

1. On the **Tariff Management** page, click on the tariff name.
2. In the **Edit Tariff** window, click the  **Upload** icon.
3. In the **Upload Rates** window, click **Browse ...**
4. Locate the Tariff-sample.csv file, then click **Open**.
5. On the **File Upload** page select all required options:
  - **Add rates from the file to existing rates** or
  - **Replace all of the existing rates with the rates from the file** – The default option is to **add** new rates. If there is at least one parameter that differentiates a new rate from the existent one then the new rate will override it. If a rate for a certain prefix exist in the tariff but is not present in the file you received from the carrier, it will remain unchanged. The **replace** mode uploads all the new rates from the file and marks all the existent rates as discontinued.
  - **Rates with 'effective from' date in the past should be uploaded as 'effective immediately'** – Sometimes you might receive file with rates later than expected, when the moment at which the rates were supposed to become effective has already passed. By default this check box is disabled and a rate that has an 'effective from' date that has passed will be rejected and not included in the tariff. Alternatively, you may choose to insert these rates into the tariff and make them effective from the current moment; to do so enable this check box.
  - **Skip rates with the same data** – Sometimes carriers will include all prefixes in a rate update file, even if no change in pricing has occurred for some of them. In order to prevent the creation of duplicated rate rows, simply enable this check box.
  - **Template** – Here you select an existent template or choose the **Create New Template** option to create a new template. For the latter case, the settings for this file format are stored in a template, so the next time you get a rate update from the carrier you simply upload this file into PortaBilling® using this template.
  - **Timezone** – Here you choose a time zone for which the rates from the uploaded file will become effective.
6. On the **Review File Parsing** page, verify whether the file was parsed properly and, if necessary, change file parsing parameters such as delimiters.
7. On the **Review Data Fields Definition** page, specify where the individual data elements, such as destination prefix, price, payback rate etc. are located in the file.  
On the **Review Rate Information** page, review the data for accuracy and view the results, comparing the new rates with the existent or Adjust the prices and mark the desired rates as Payback if necessary.  
In case there are new destinations in the uploaded file, approve the automatic creation of them and assign a country and destination group for these destinations on the next **Create New Destinations** page.
8. On the **Summary** page, view information about the number of rate records to be processed.  
**Save as template** – Here you specify a name for the template (if you previously selected the **Create New Template** option).  
**Send notification to** – Here you specify an email to which a notification about the result of the rate upload procedure will be delivered.
9. On the **Summary** page, click **Start Import**.
10. In the **Edit Tariff** window, click **Close**.

You can verify your work on the **Rates** page. For more details regarding rate upload, see the [PortaBilling Templates Guide](#).