Rates

Managing rates online

Managing rates online is very convenient for maintaining existing rate tables and for reference purposes. In the case of new price lists or major updates, the offline method is better.

On the Tariff Management page, click the ▦ **Rates** icon for a tariff.

The filter at the top of the screen allows you to view rates depending on their Effective From date or Destination. The **Effective From** drop-down list allows you to define which rates to show:

- o　"All" shows all rates (used until now including current rates and　scheduled for the future).
- o　"->Now" shows rates used until now including current rates.
- o　"Now" shows only currently effective rates.
- o　"Now->" shows current rates and those that will become effective in the future.

To edit an existing rate, click the ▤ **Edit** icon next to it to copy rate details into the form. Note that if a tariff contains peak and off-peak rates there will be two rows of fields: the top one is for peak rates, and the bottom one is for off-peak rates.

Usually you will enter rate data for each destination separately. However, if the tariff has a **Destination Group Set** defined, by clicking on **G** in the Destination column header you can switch into Destination Group mode. Now you can enter a destination group name (e.g. UK-Mobile) instead of a prefix, and the system will automatically create rates for all of the destinations in that group.

The **Clean up Rates** button allows you to remove rates that have an 'effective from' date set in the future.

Customer rates

Field	Description
Destination	Destination prefix. May be entered directly, e.g. "47" for Norway; or you can access the destinations directory by clicking the Destination link. In the destinations directory pop-up window, you can search for the desired prefix by country name.

Set Inter/Intra State *(only for the US destinations)* / **Set Normal Rating**	Switches between normal and inter / intra state rates for US destinations. Click **Set Inter / Intra State** if price per minute depends not only on the actual destination (area code and exchange), but also on whether the caller resides in the same state as the called party.
Country	Country corresponding to the current destination.
Description	A short description of the specified destination.
Type	Specifies the off-peak period for this particular rate.
First interval	First billing unit in seconds.
Next interval	Next billing unit in seconds.
Price first	Per minute price for first interval.
Price next	Per minute price for next interval.
Off-peak First interval	First billing unit in seconds for off-peak time.
Off-peak Next interval	Next billing unit in seconds for off-peak time.
Off-peak Price first	Per minute price for first interval in off-peak time.
Off-peak Price next	Per minute price for next interval in off-peak time.
Second Off-peak Price first	Per minute price for the first interval during the second off-peak time.
Second Off-peak Price next	Per minute price for the next interval during the second off-peak time.
Effective Time	Exact time when the rate becomes effective. Click the ⏱ icon to make the rate effective immediately. Click the **DD-MM-YYYY** link to set up the desired date using the pop-up calendar.
🖋ƒₓ	Indicates if this rate uses a call rating formula. The ⬜ icon indicates that there is no formula, thus old-style rating is used. The ⬜ icon indicates that the rate already has a formula defined. Click on the icon to invoke the call rating formula wizard.
Rate Properties	🔄 **Payback Rate.** This means that the customer is credited for using certain services, rather than paying for them (e.g. the service provider receives the termination fee for his own subscribers and wants to encourage his users to receive more calls by passing on a certain portion of these savings). ⬜ **Hidden**. This means that the rate is excessive (e.g. there are usually more than 500 rates for Argentina mobile because of different prefixes). This flag does not affect usage of the rate by the billing engine. It simply indicates that this rate may be omitted when making a list of rates for the end user. 🗑 **Discontinued**. This means that the rate will stop being active immediately or from the specified time-stamped date. To deactivate the rate in the future, specify a certain date and time in the **Effective From** field. ⛔ **Forbidden**. This means that no calls are authorized for this particular destination.
Delete	Click the **Delete** icon to delete this rate. Only rates which are not yet active can be deleted.

Vendor rates

If you create a **Routing** type tariff, it will define the routing and termination costs for a connection to a vendor.

Field	Description
Route Category	You can split rates into categories such as "Premium", "Cheap", etc. and use these categories in routing plans. See the _Route Categories_ section for more info.
Preference	Routing priority (0-10), higher values mean higher priority, 0 means do not use this rate for routing at all. See the _Call Routing_ section of the **PortaBilling® Administrator Guide** for more info.
Huntstop	If one of the routes has hunstop enabled, then all routes with a lower route category or preference will be ignored.

US Inter- / Intra- state rates

PortaBilling® offers a simple solution for identifying and billing US Inter / Intra State VoIP traffic. In order to apply LCR properly and calcula[...] call costs in accordance to rates applied by vendors, PortaBilling® determines whether a call is intra- or inter- state and applies the correct rate.

In a new environment by default the option of setup of the US Inter- / Intra- State rates is off. To activate it you are to click **Enable US Intra-[...] State** on the tariff management web page.

In order for PortaBilling® to recognize whether the call is intra- / inter- state, you must specify whether the destination belongs to one of those [...] categories by clicking the **Set Inter / Intra State** button.

NOTE: The activation of Inter / Intra State is possible only when the destination number starts with "1."

Once the Inter / Intra option is set, you may specify the individual rates for these calls in the corresponding fields.

Managing rates offline

The rates table may be prepared using a spreadsheet processor (e.g. MS Excel) and easily imported into PortaBilling®. This is very convenient if you are going to make many changes. For example, you might increase all prices by 10%. To upload your rates file, proceed as follows:

1. On the **Tariff Management** page, click on the tariff name.
2. In the **Edit Tariff** window, click the ▲ **Upload .CSV** icon.
3. In the **Upload Rates** window, click **Browse…**
4. Locate the Tariff-sample.csv, then click Open.
5. In the **Upload Rates** window, click **Next** .
6. On the **Review File Parsing** page, verify whether the file was parsed correctly and, if necessary, change file parsing parameters such as delimiters.
7. On the **Review Data Fields Definition** page, specify where individual data fields (e.g. destination, price or payback rate) are located in the file.
8. On the **Review Rate Information** page, view information about rates, adjust the value of prices and mark the desired rates as Payback, then click **Next**. If there are new destinations in the uploaded file, assign a country and destination group to these destinations on the **Create New Destinations** page.
9. On the **Summary** page, view information about the number of rate records to be processed. You can also save the rate import options you have defined as a template, so that you can re-use them in the future.
10. In the **Rate Upload** window, click **Start Import**.
11. 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**.