PortaBilling

Customer Self-care Interface

Maintenance Release 47

Documentation

www.portaone.com

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Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam BC V3B 2P7 Canada.

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Preface

This document provides a general overview of the customer self-care interface.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only, and does not always contain the latest material on enhancements that occur in-between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at **www.portaone.com/support/documentation/**.

Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**.

Exclamation mark draws your attention to important information or actions.

NOTE: Notes contain helpful suggestions about or references to materials not contained in this manual.

Timesaver means that you can save time by taking the action described here.

Tips provide information that might help you solve a problem.

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Hardware and Software Requirements

Client System Recommendations

- **OS:** MS Windows XP or above, Linux/BSD or Mac OS X 10.6 or above.
- **Web browser:**
  - Internet Explorer 8.0 or above, Mozilla Firefox 24 or above.
  - JavaScript, Java and cookies must be enabled.
- **Spreadsheet processor:** MS Excel, OpenOffice Calc, LibreOffice Calc or Google Sheets.
- **Display settings:** A minimum screen resolution of 1024 × 768.

1. Introduction

Login to the Customer Self-care Interface

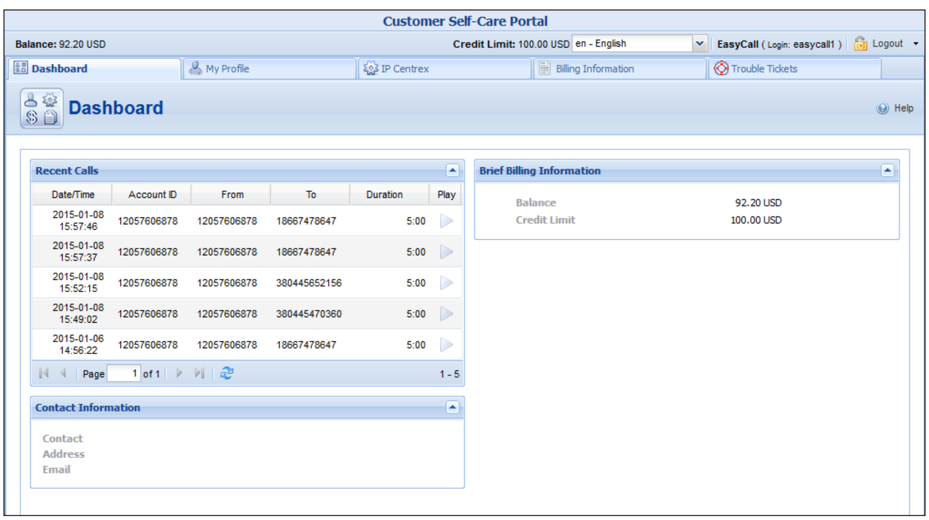
Your ITSP will provide you with a URL and credentials for logging in to the customer self-care portal upon subscribing to their services.

Overview

The customer self-care interface was designed for end users to access their profile data, check billing information, download invoices and, most importantly, manage their IP Centrex settings. The front-end design offers simple and intuitive navigation. This includes an easy-to-use structure of menus and controls, graphic icons and improved presentation of information.

For your convenience, the customer self-care interface is divided into four tabbed sections:

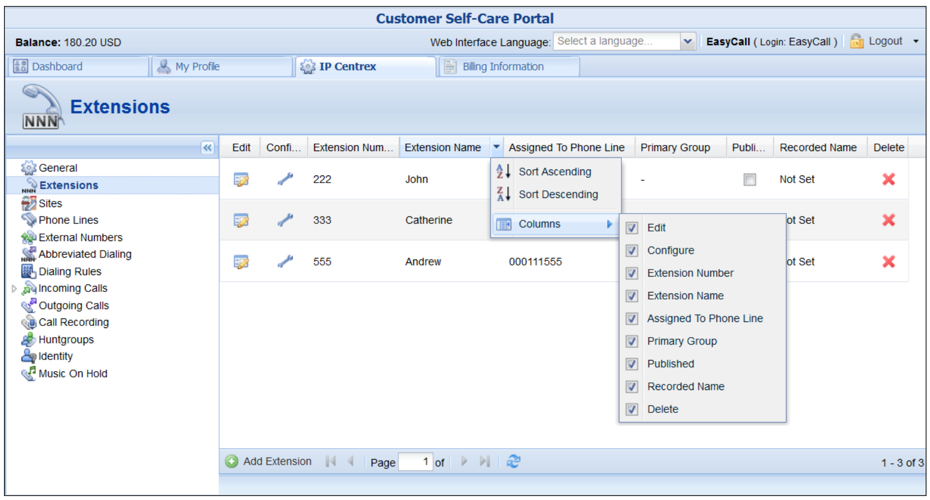
- Dashboard (your home page)
- My Profile
- IP Centrex
- Billing Information



At the top of the interface you can always view billing information such as your balance, credit limit, etc.

Common Features

Most of the data on the self-care portal is formatted like a page and sorted into columns. You can go to the next page or the previous page, jump to the first or last page, or use the **Refresh** icon to update any of the pages. You can also change the number of columns and sort them in ascending or descending order by clicking your mouse on the name field of any of these columns. If you point your mouse at the name field you will see a triangle; click on it and a drop-down menu will appear. You can choose how to sort your data and add or remove columns by ticking or unticking items in the drop-down menu:



Action Buttons

The top right hand side of the interface provides you with the following information and actions:

1. Your ID and a login name that was used to log in.
2. The **Logout** button that terminates your current session on the web interface. Also, you can change your password here if necessary.

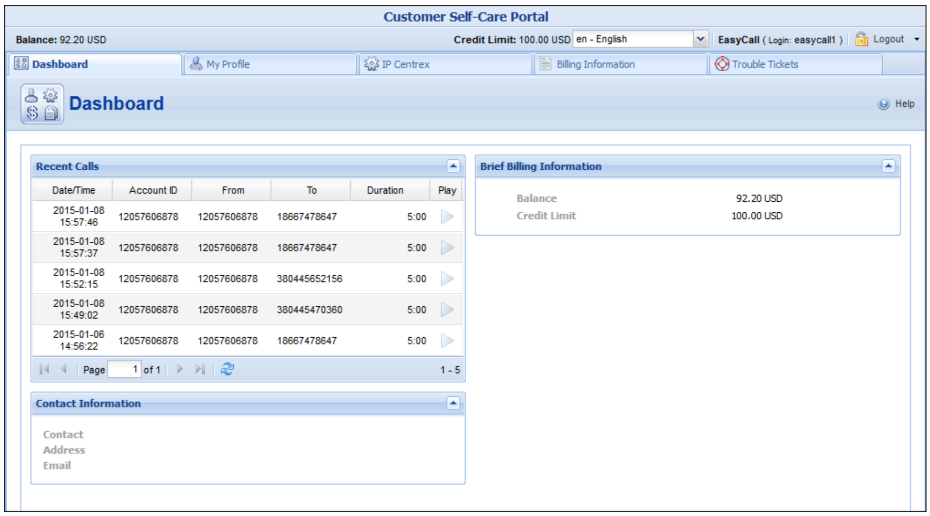
In order for changes to take effect when adding / editing information, you need to click the **Save** icon on the appropriate page. If you do not want to save the information entered – just press **Cancel**.

2. Web Interface

Dashboard

Your home page is organized like a dashboard so that you can easily view the most important information separated by category into different windows. In addition, these windows can be moved around, rearranged or minimized as you wish.

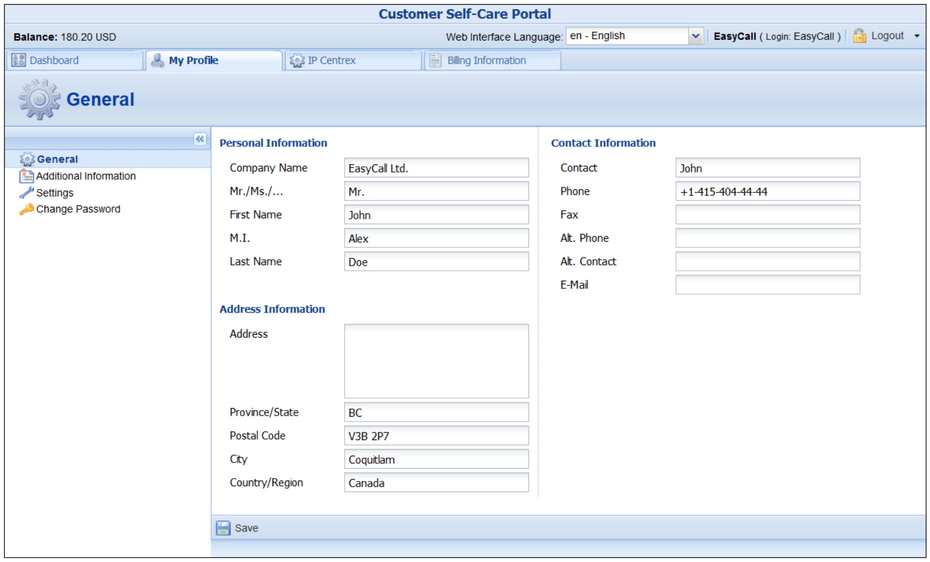
You will see three **information windows** on the Dashboard:



Column	Description
Contact Information	Here you can view your contact info such as address, email, etc.
Brief Billing Information	This reflects thumbnail billing information such as your current balance and credit limit.
Recent Calls	This table lists the most recent calls and call details generated by your phone lines (**account IDs** on the web interface).

My Profile tab

The **My Profile** tab allows you to view and change your personal (or your company's) details such as contact information, personal info, password, etc.



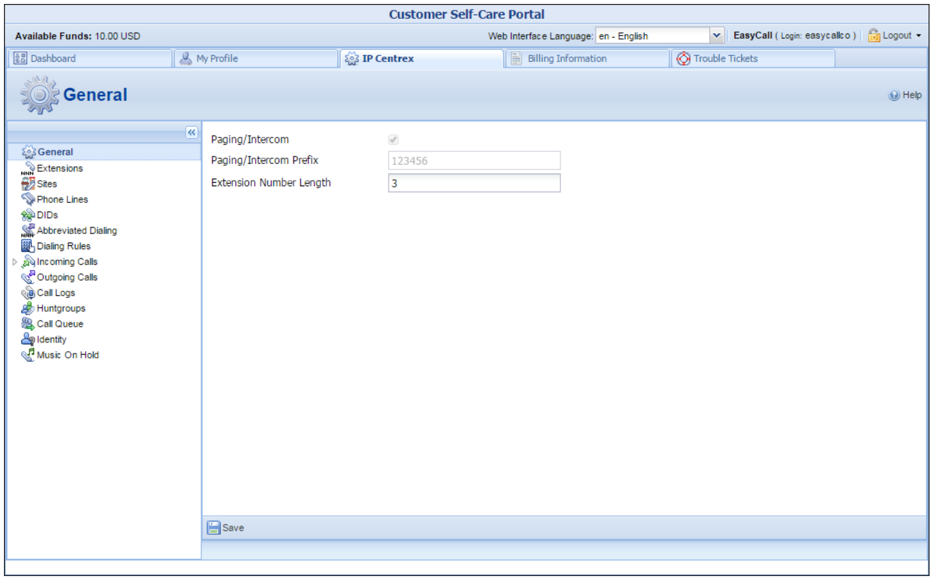
Tab	Description
General	Here you can enter general information such as company name, address, etc.
Additional Information	Here you can define extra information (such as driver's license ID or tax code) in addition to standard information. The fields for this tab are set by the Administrator.
Settings	Here you can choose the language to be used on your self-care web interface.
Change Password	Here you can change your current password for the self-care portal.

Enter your mobile number in the **Alt. Phone** field to receive SMS notifications.

IP Centrex tab

This tab allows you to manage phone lines, add extensions and huntgroups and configure other IP Centrex services. Here you can also modify the options for separate phone lines.

General

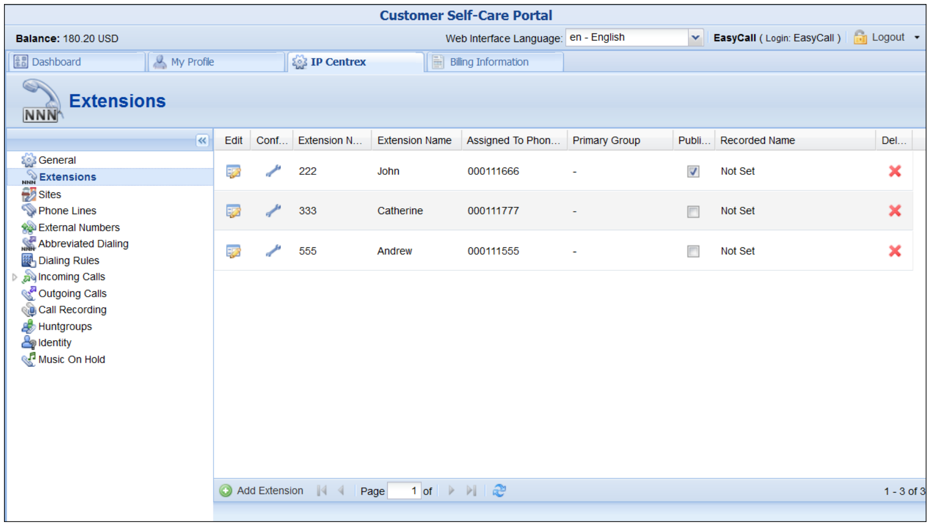


Field	Description
Paging / Intercom	Intercom calls enable users belonging to the same group to use two phones like on-door speakerphones. Here you can see whether this feature is enabled or not for your phone line.
Paging / Intercom Prefix	This appears only if **Paging / Intercom** is enabled; this is a special code that is dialed before the other extension number to automatically connect both extensions. When a two-way audio channel is established, speakerphone mode is immediately activated on the phone of the party being called.
Extension Number Length	Here you can see the number of digits for an extension number (e.g. 3, as per usual). Keep this in mind when adding extensions.

Extensions

Here you can define a list of extensions for phone lines within your IP Centrex environment. You can easily add new extensions or change existing ones without any actual reconfiguration of your phone.

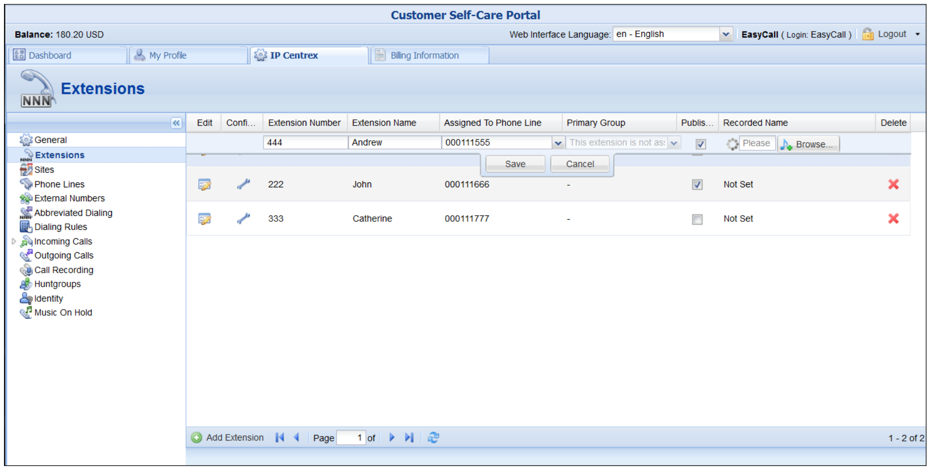
Branch Office extensions can only be added, deleted or modified on the Main Office self-care portal.

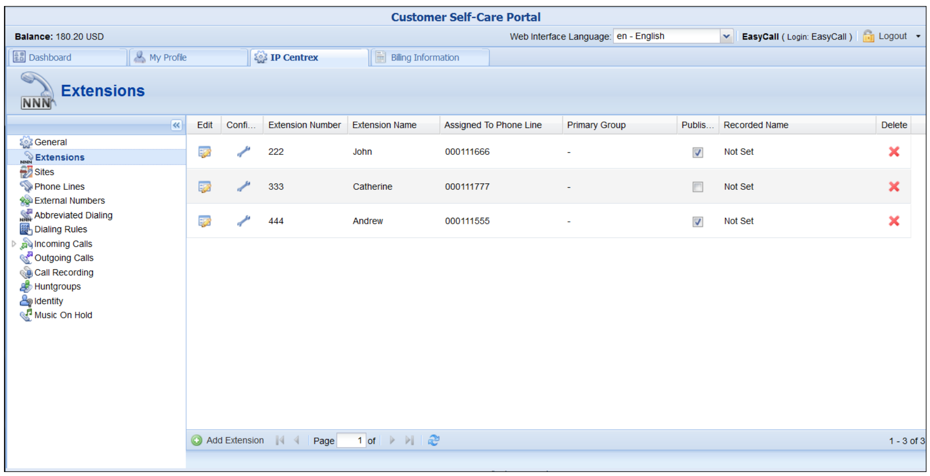


To add a new extension number, click the **Add Extension** button and enter the following information:

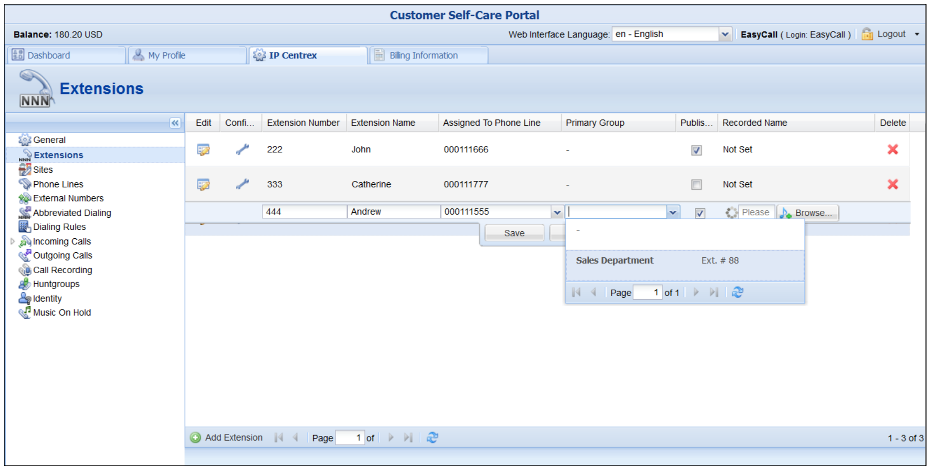
- **Extension Number** – Type in the number the end user will dial on his phone (an extension number should contain only digits).
- **Extension Name** – Enter the logical name for this extension (e.g. name of the person using this line: "John").
- **Branch Office** – Select a branch office to which the extension will be assigned. Leave this field empty for assigning the main office's phone extension. (Note that the **Branch Office** field is only available on the Main Office self-care portal).
- **Assigned To Phone Line** – This is the number that the extension is associated with. Here you should specify one of your phone lines by selecting it from the drop-down list. (Note that each phone line from the list can only be used once.
- **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). Make sure that you have assigned the extension to some huntgroup beforehand.

- **Published** – Clear this check box to exclude certain extensions from being accessible via dial-by-name (e.g. you do not want tele-marketers to directly reach your CEO or CFO because their names are publicly accessible).
- **Recorded Name** – You can record or upload a voice prompt with the actual person's name for each extension. This can be used in the **Dial-by-name Directory** feature. If a caller does not know the extension number of the person he is trying to reach, he may look up the called party using the first three letters of his surname.

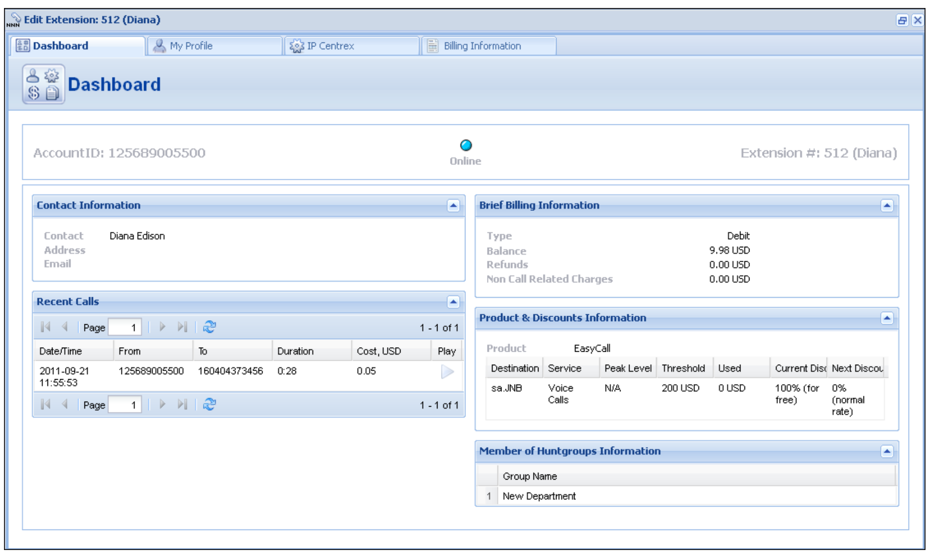




Once all the information is entered, click the **Save** button. You can easily change the number and extension name and manage phone line assignments by simply clicking on that extension number or on the **Edit** icon. To remove the extension from the list, click the **Delete** button. Having saved the new extension, you can choose **Primary Group** this extension will belong to by clicking the **Edit** icon:



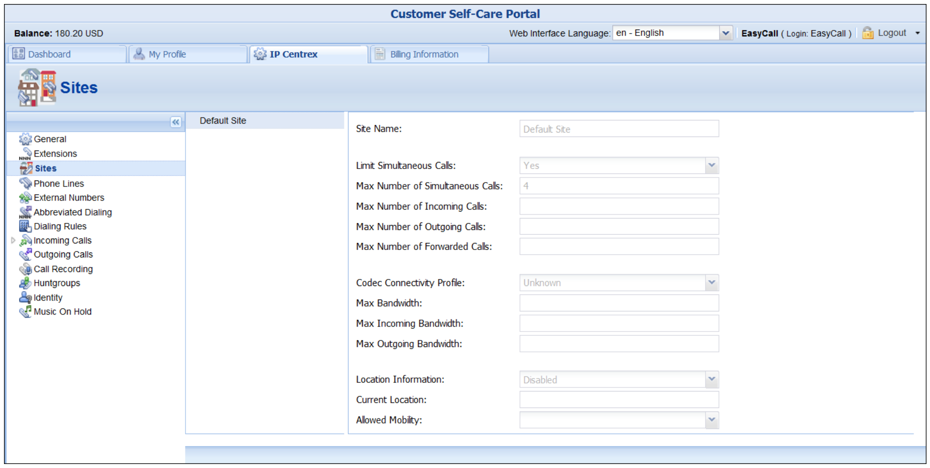
To view and edit information about the *extension*, press the **Configure** icon next to the extension number. You will see the **Edit Extensions** page (note that some details are read-only):



Sites

A site is a group of customer's accounts that can be conveniently managed as a single entity. For instance, all of the phone lines used in a sales department or in 'office building A' can be joined into a single group. This allows you to apply certain configuration parameters or service restrictions to the accounts in that group. You can limit the combined number of simultaneous calls for all accounts of a particular site. This is useful if, for instance, 'office building A' has limited bandwidth and can only support 30 calls – no more calls will be allowed in order to avoid severe degradation of the sound quality on all calls in progress.

Any account that is not assigned to a specific site will share the limitations of the Default site.

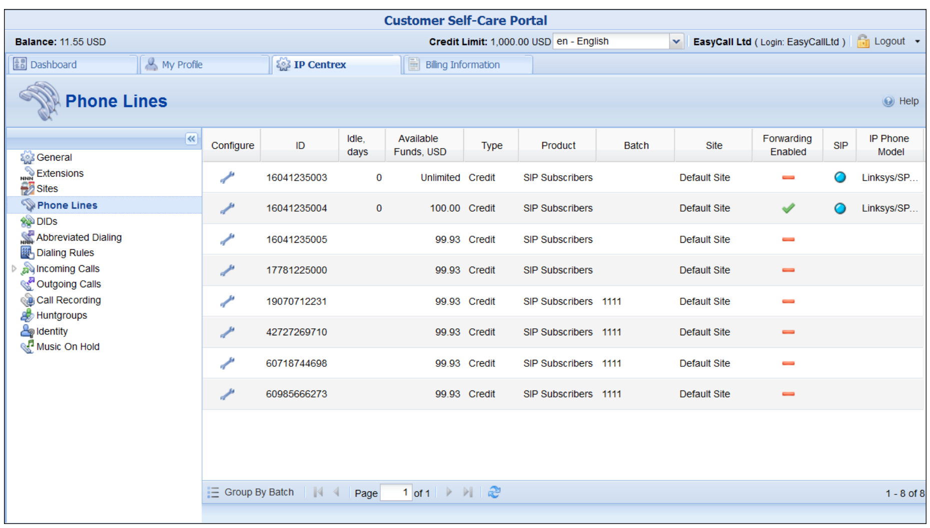


Field	Description
Site Name	Name for a group of accounts
Limit Simultaneous Calls	Engage real-time checks of the number of concurrent calls made by accounts that belong to this site. When the specified number of concurrent calls has already been established (calls are in a "connected" state) and the 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 accounts at this site.
Max Number of Incoming Calls	Allow only a specific number of concurrent incoming calls for accounts at this site.
Max Number of Outgoing Calls	Allow only a specific number of concurrent outgoing calls for accounts at this site.
Max Number of Forwarded Calls	Allow only a specific number of concurrent forwarded calls for accounts at this site.
Codec Connectivity Profile	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	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	Bandwidth utilization limitation for incoming calls.

Max Outgoing Bandwidth	Bandwidth utilization limitation for outgoing calls.
Location Information	Customer's permanent location for geo-IP fraud prevention.
Current Location	Customer's permanent location. It contains a country code top-level domain (in *iso_3166_1_a2* format, e.g. *fr* for France, *de* for Germany etc.)
Allowed Mobility	**Stationary user (constant location)** option can be used if the customer is not authorized to make calls from various countries (e.g. as a residential customer would make calls from his SIP phone). Calls made from any other country will be screened. The **Roaming user (frequent location)** option can be used for customers who travel frequently. In this case, a change in location would be considered acceptable.

Phone Lines

Here you can view the full list of phone lines and configure them if necessary:



Column	Description
Configure	Click the **Configure** icon to edit the settings for a particular phone line.
ID	The primary identification for this phone line.
Idle, days	The amount of days the phone line has not been in use.
Available Funds	The amount of funds available for the user to spend on services.

Type	The type of phone line. It may either be "Debit" or "Credit." "Debit" is usually associated with prepaid cards. "Credit" is a phone line that will be invoiced for costs incurred.
Product	The product assigned to a particular phone line.
Batch	Batch is a group of phone lines under the same logical name. Here you can see the name of the batch that a particular phone line belongs to.
Site	The name of the site the phone line belongs to.
Forwarding Enabled	The forwarding field shows whether this function is enabled or disabled for a particular phone line. When it is enabled, the icon is shown. The field with an icon indicates that forwarding is disabled.
SIP	When the phone line is used by a phone to register with the SIP server, the icon is shown.
IP Phone Model	Indicates the IP phone that is assigned to a particular phone line.

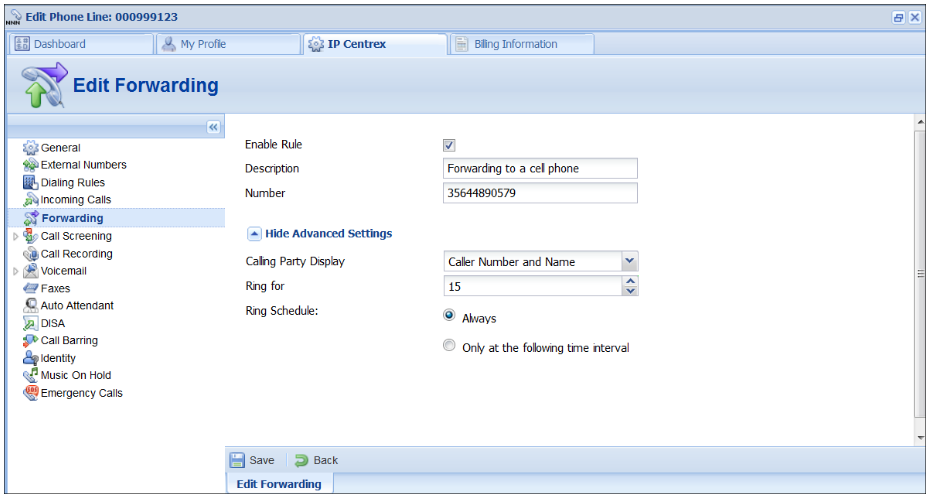
You can also view phone lines grouped by batch by clicking the **Group By Batch** button located at the top or bottom of the page.

You can configure forwarding when it is enabled for the phone line. Just click the **Configure** icon next to the phone line to go to the Edit Phone Line page. There are several call forwarding modes: **Follow-Me**, **Advanced Forwarding**, **Forward to SIP URI** and **Simple Forwarding**.

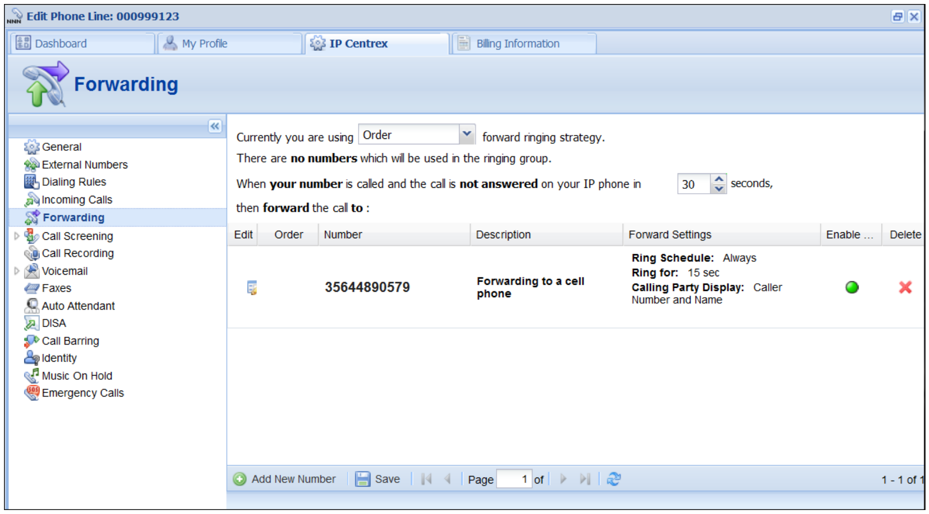
Follow-Me Forwarding Mode

Using follow-me you can forward calls to multiple destinations. You can also configure it so that each of these destinations will be used during its own time period.

1. In the **IP Centrex** section, choose **Forwarding**.
2. Click **Add New Number**.



3. Enter the following information:
   - **Number** – Enter a number for redirecting calls (e.g. 35644890078).
   - **Description –** A short description for this number.
   - **Ring for** – If a call is not answered, set the number of seconds it will ring for until it is forwarded to the next number on the list.
   - **Calling Party Display** – Choose how to display the caller's info during forwarding:
     - Select **Caller Number and Name** to see the phone number and the name of the original caller.
     - Select **Caller Number and Forwarder Name** to see the phone number of the caller and the forwarder's name (they will be displayed).
     - Select **Forwarder Number and Name** to see the phone number and the name of the forwarder.
   - **Ring Schedule** – Choose the period during which the number is used. If you check the box next to **Always,** the call will always be forwarded to your cell phone. If you want to forward calls to a cell phone only during a specific time period, check the box next to **Only at the following time interval** field and click the icon to define that interval. Please consult the *How* section for more information.



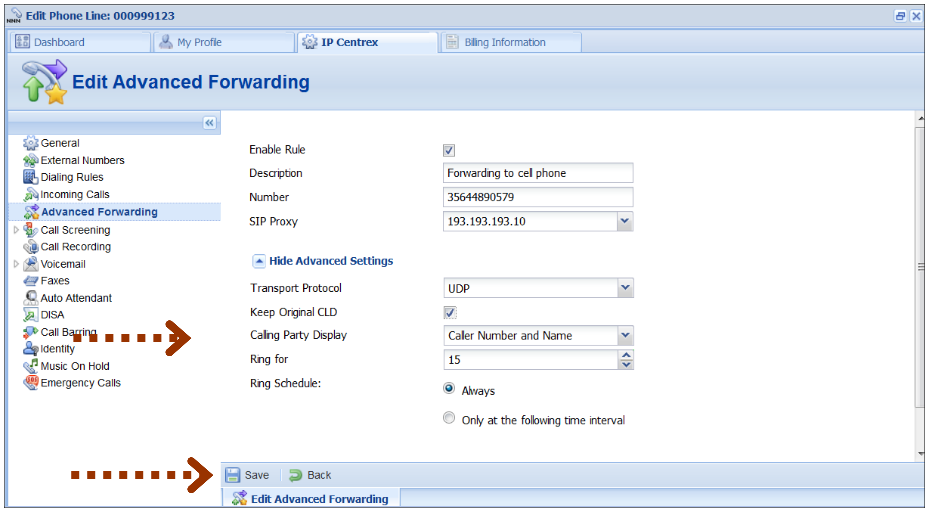
4. Click the **Save** icon to save the results of your work.
5. Repeat steps 2-4 until all the desired follow-me numbers have been added.

Advanced Forwarding Mode

This is similar to follow-me mode, but has a few extra options that allow you to route calls to SIP URI. To do this, follow the steps below:

1. In the **IP Centrex** section, choose **Advanced Forwarding**.
2. Click **Add New Number** to add the number on which you wish to receive forwarded calls.
3. Enter the information needed. The fields are very similar to those for adding a follow-me number as described above.
4. Below are additional fields that are not available when adding a follow-me number.
   - **SIP Proxy** – Select SIP proxy from the drop-down menu.
   - **Keep Original CLD** – Check this option to ensure that the originally dialed number is present in the call information when forwarding a call to another phone line.
   - **Calling Party Display** – Choose how to display the caller's info during forwarding:
     - Select **Caller Number and Name** to see the phone number and the name of the original caller.
     - Select **Caller Number and Forwarder Name** to see the caller's phone number and the forwarder's name (they will be displayed.)
     - Select **Forwarder Number and Name** to see the forwarder's phone number and name.
   - **Transport Protocol** – This enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol

instead of UDP for SIP communications for PBXes that do not support UDP.

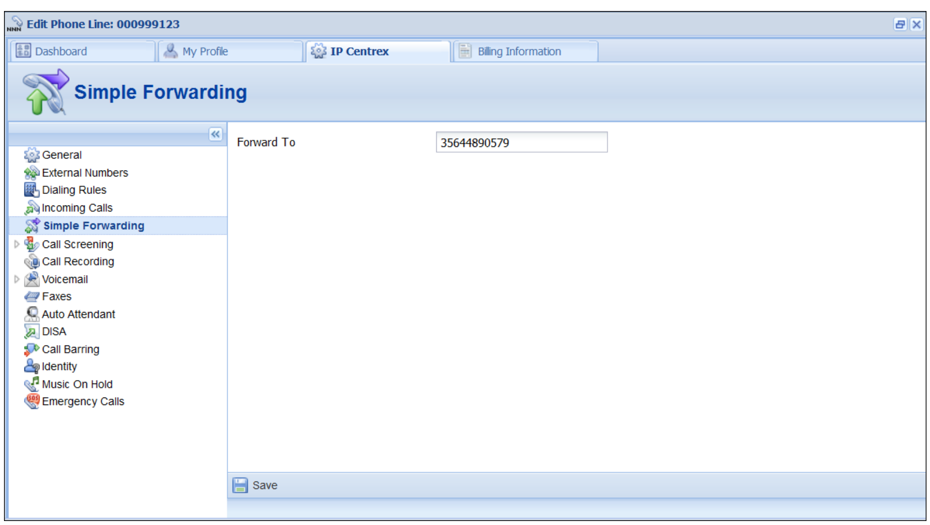


5. Click the Save icon to save the results of your work.

Simple Forwarding

The simplest type of forwarding is when you specify a single phone number to which all calls will be sent.

1. In the **IP Centrex** section, choose **Simple Forwarding**.
2. Enter the following information:
   - **Forward To** – The number you wish the calls to be forwarded to.

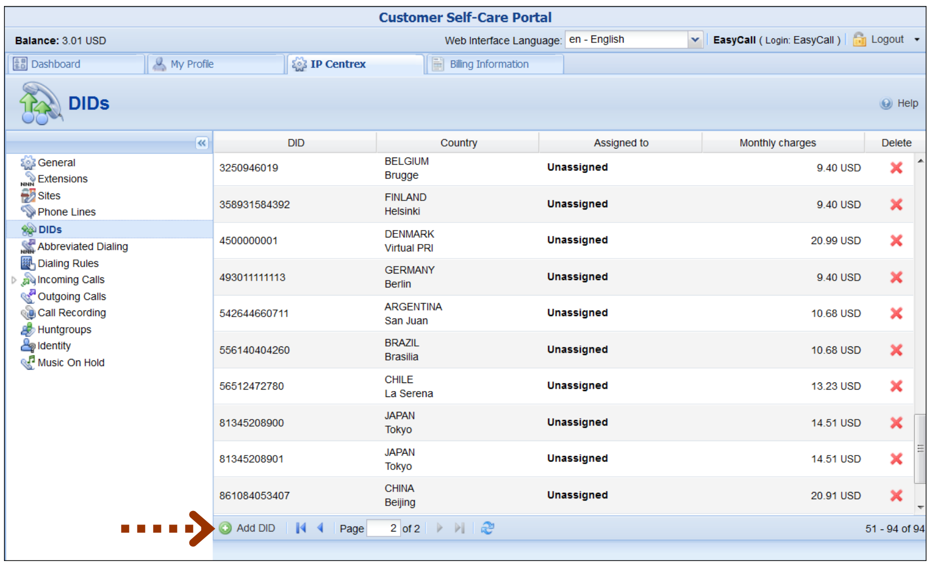


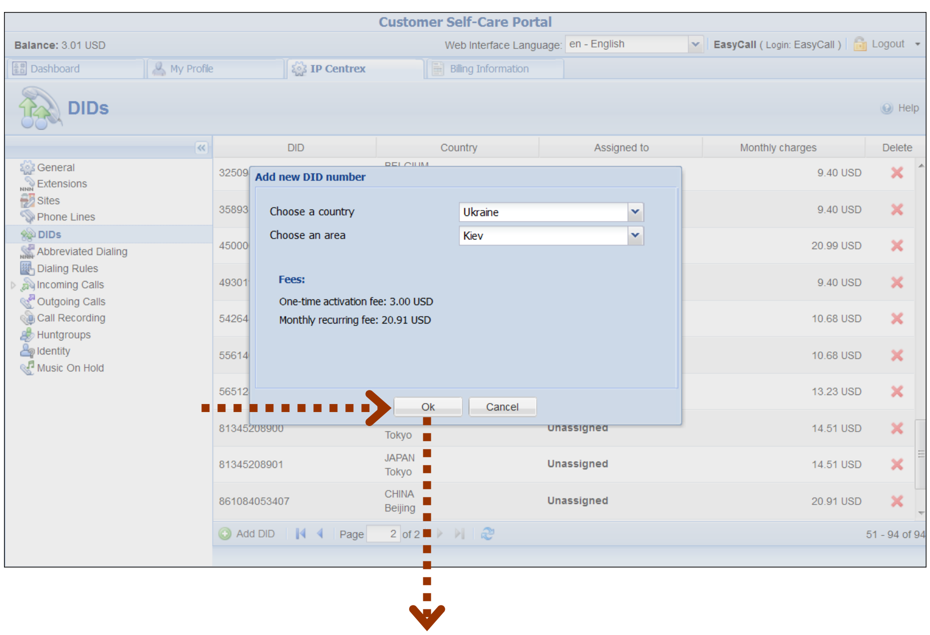
3. Click the **Save** icon.

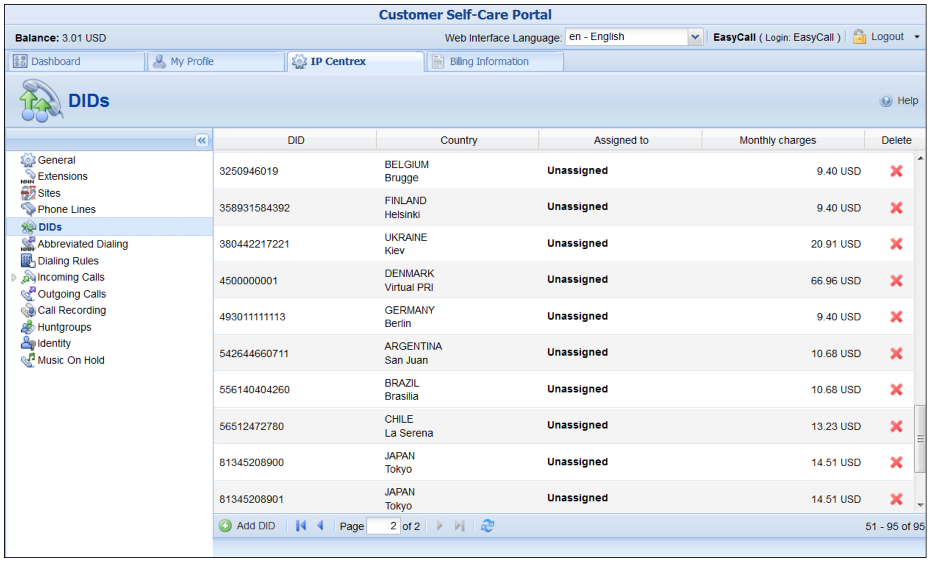
DIDs (External Numbers)

In addition to the user's main phone number, he/she can be assigned multiple alternate DID (direct inward dialing) phone numbers.

In this tab you can easily browse the complete inventory of available DID (or toll-free) numbers online, and select the numbers you want to use as alternates. To do this, click the **Add DID** button located at the bottom of the page and specify a country and a city in which you want to purchase a DID. Once you have specified a country and a city you will see the applicable fees for using this DID number:





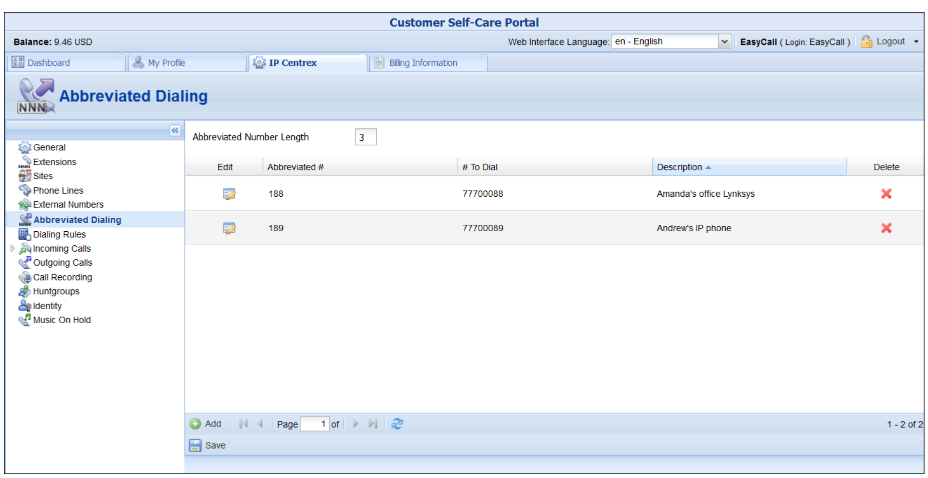


As soon as you confirm the new DID number, your number will appear as unassigned. You can assign this number to the desired account (phone line) by simply double-clicking on it.

Abbreviated Dialing

Here you may define a list of phone extensions for your IP Centrex environment, plus create abbreviated dialing for external phone numbers. You can set up dialing rules as an international prefix, outside prefix, direct number (e.g. 911), or abbreviated dialing for your 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.

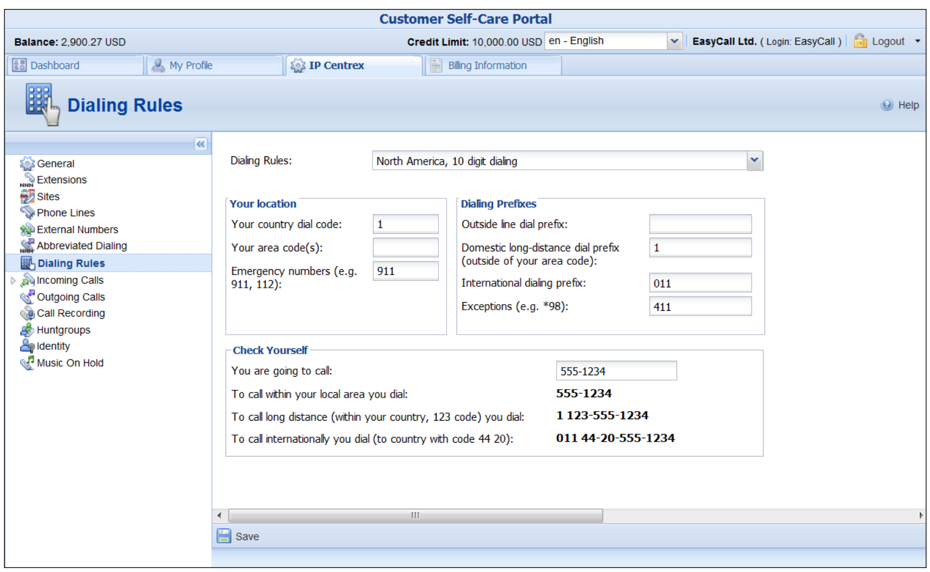


To add a new abbreviated dialing number, click the **Add** button and enter the following information:

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 your 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."

Dialing Rules

Using this tab, you can define a way of dialing phone numbers that is convenient to you or your users.



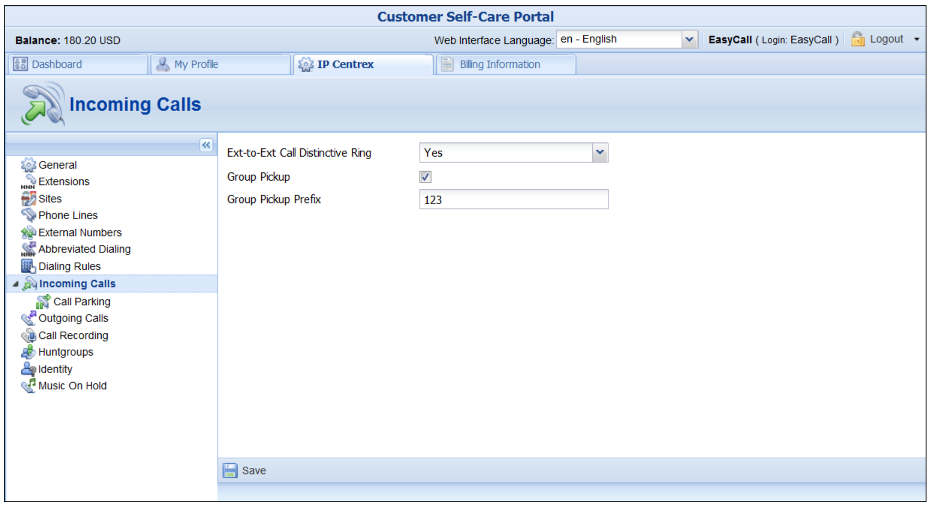
By default, Dialing Rules are disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If Dialing Rules are enabled, this will allow you to choose various dial plan parameters such as an international dialing prefix or area code. You may change or type in your own number translation rules instead if you select the **Custom Rule** option.

Several sample settings are provided for your convenience. For instance, in order to load sample settings for "traditional" North American dialing, select "North America, WA, 10 digit dialing" from the drop-down list and click **Save**.

Confirm that you have described the numbering format correctly. Verify that for all examples provided (domestic and international calls) this is how you want the numbers dialed.

Incoming Calls

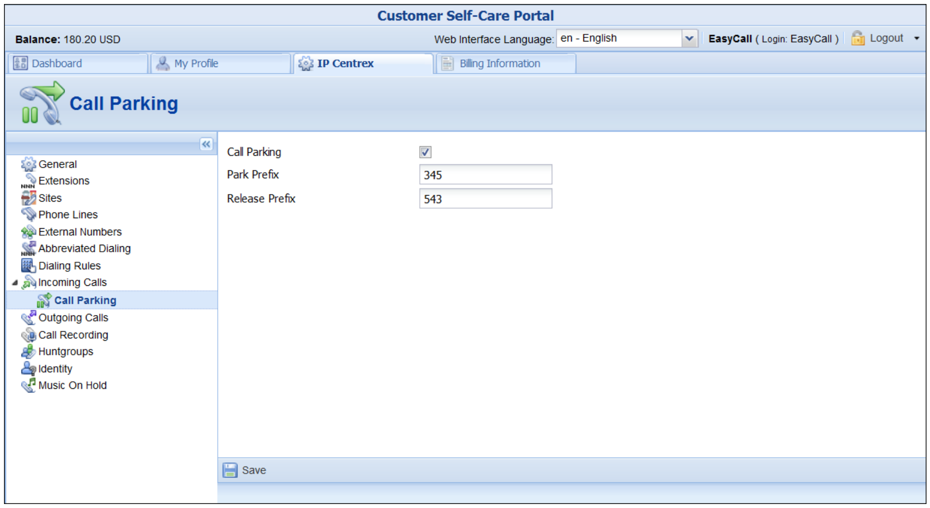
Here you can set the parameters for incoming calls:



Field	Description
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	Enable the **Group Pickup** feature, which enables phones within the same IP Centrex environment to answer each other's calls by dialing a **Group Pickup Prefix**.
Group Pickup Prefix	This is only available if **Group Pickup** is activated. Specify the special code for picking up calls here.

Call Parking

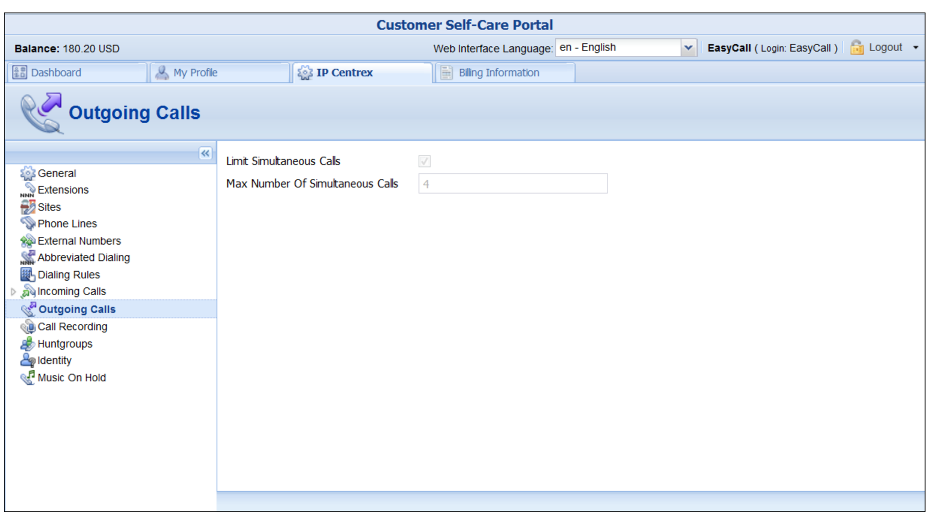
Call parking allows users to put a conversation on hold and then resume it from a different IP phone. If you enable this feature, you can set the required parameters for it here.



Field	Description
Call Parking	Enables the **Call Parking** feature.
Park Prefix	This is only available if **Call Parking** is activated; this allows you to specify a key combination for parking a call. Keep in mind that the "Park Prefix" value should only contain digits.
Release Prefix	This is only available if **Call Parking** is activated; this allows you to specify a code in order to quit the call parking status and resume the conversation. Keep in mind that the "Release Prefix" value should only contain digits.

Outgoing Calls

Here you can view different parameters for outgoing calls (note that this page is read-only):

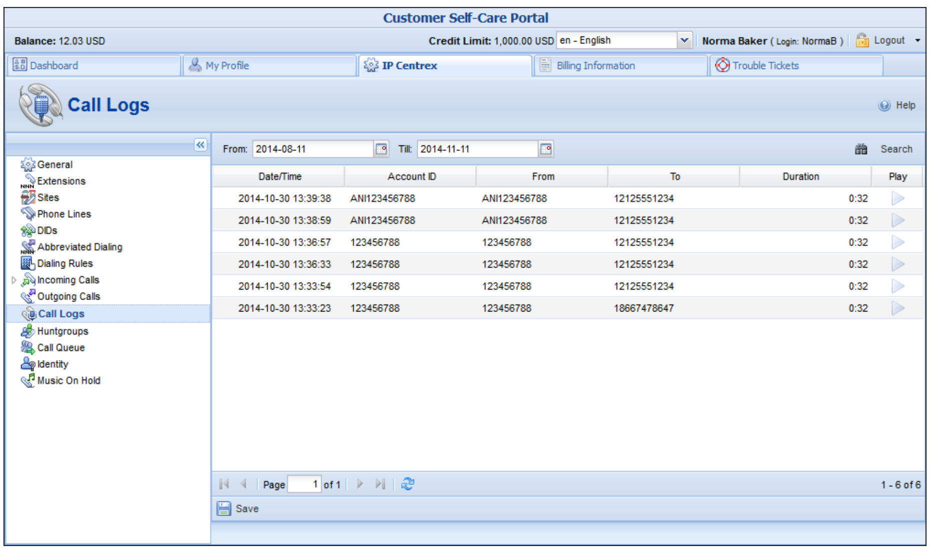


Field	Description
Limit Simultaneous Calls	This shows whether there is a limit on the number of concurrent calls that can be made by your phone lines.
Max Number of Simultaneous Calls	This shows the maximum number of concurrent calls permitted for your phone lines.

Call Logs

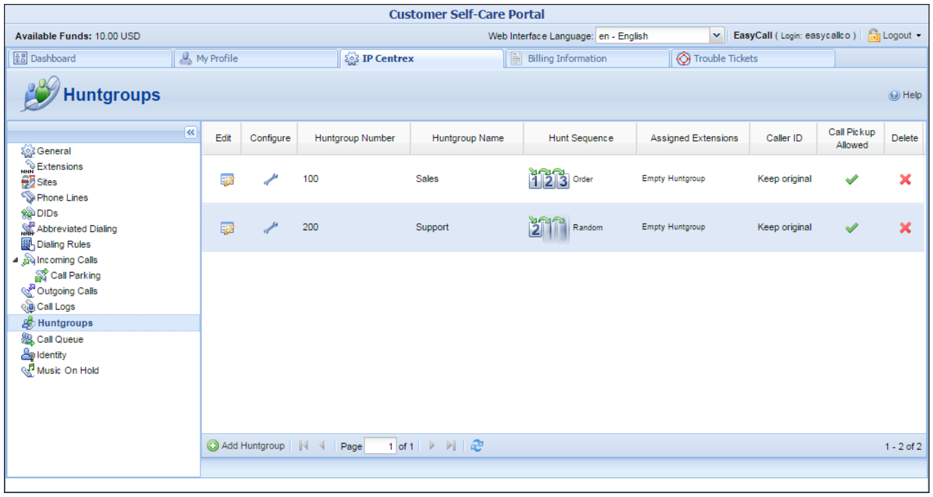
With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback.

Here you can check whether the **Call Recording** feature is enabled or not. When it is enabled, you can view information about calls, listen to recordings and filter them for / from a certain period.



Huntgroups

Sometimes there is a need for a call to be delivered to several extensions at once. With the **Huntgroup** function – you can easily configure a scheme for call distribution in such a way that incoming calls are delivered to one or more assigned extensions.

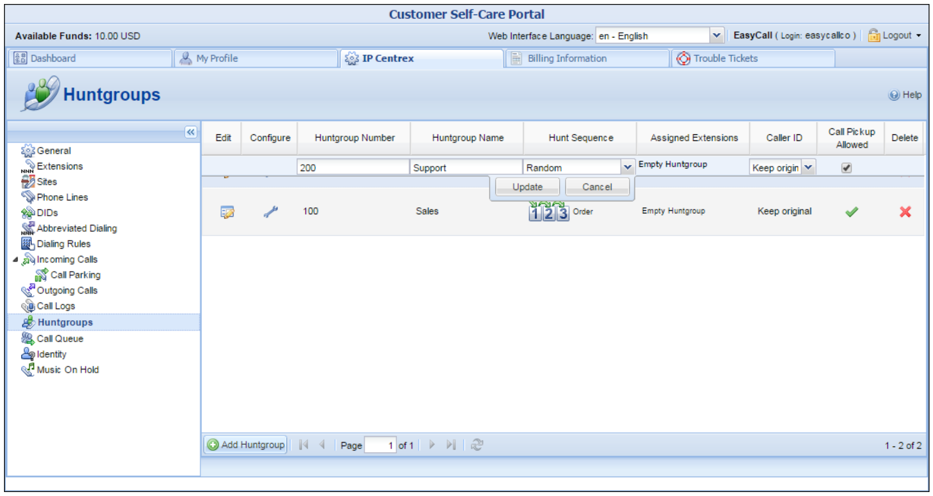


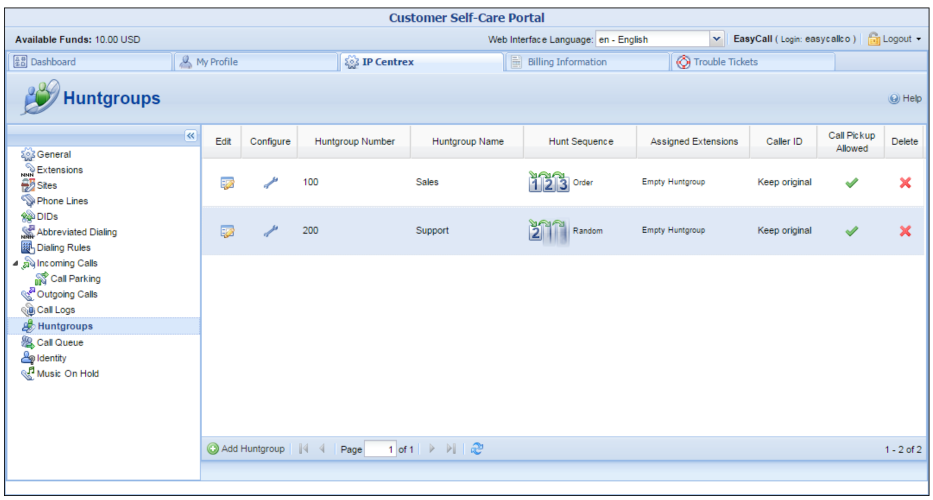
Branch Office huntgroups can only be added, deleted or modified on the Main Office self-care portal.

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

- **Huntgroup Number** – The number the end user must dial on his phone to reach one or more assigned extensions.
- **Huntgroup Name** – Logical name for this group of extensions, e.g. “New department.”
- **Hunt Sequence** – Specifies the order for delivering a call to one or more extensions.
  - If **Order** is chosen, extensions will be called one by one from the first (topmost) to the last number until the call is answered.
  - Choose **Random** if you want to use a random order.
  - **Simultaneous** enables simultaneous calls to every extension from the list.
  - If you choose **Least Used:** This sorts the phone lines in descending order beginning with their last usage, and delivers a call to their extensions, accordingly. (For example, phone line 777111 with extension 111 was last used on 2010-12-11, and phone line 777222 with extension 222 was last used on 2010-12-12, so the call goes to extension 111 and if it is not answered, it goes to extension 222.)
- **Caller ID**:
  - **Keep original**
  - **Set to name and CLI of the huntgroup**
  - **Replace Caller Info with Huntgroup Name, keep Caller CLI**

- **Call Pickup Allowed** – enable this option to allow extensions to pick up calls made to the members of this huntgroup

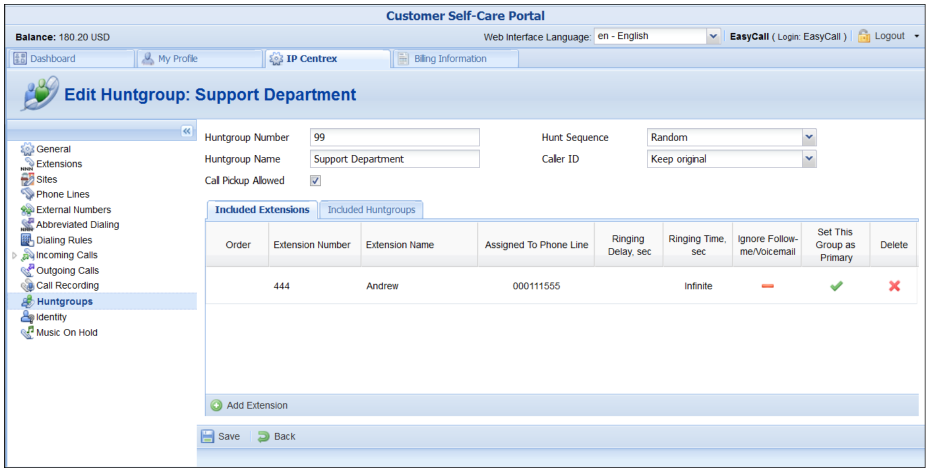


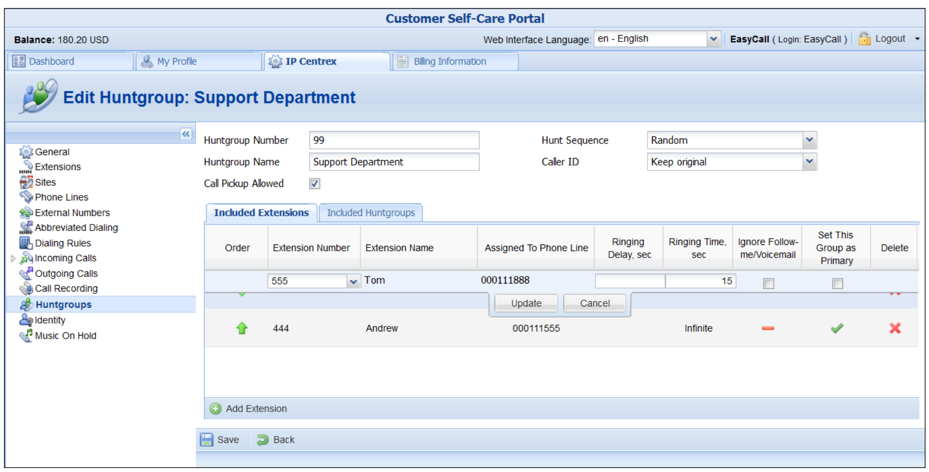


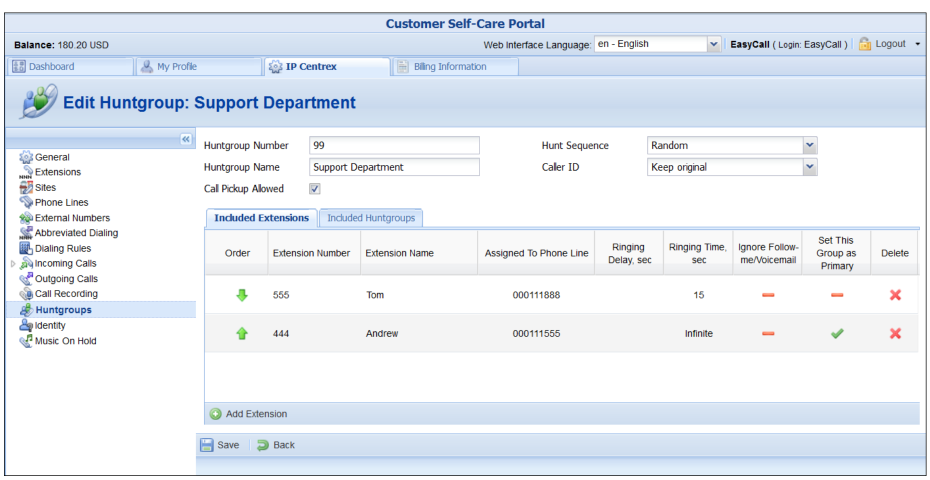
Once all the information is entered, click the **Update** button. Then specify one or several extensions that calls should be delivered to. Click the icon next to **Huntgroup Number** to add one or several extensions that calls should be delivered to. Click the **Add Extension** button, then choose the extension from the drop-down list of the **Extension Number** and set the parameters:

- **Ringing Delay, sec** – Delay (in seconds) before the extension starts to ring.
- **Ringing Time, sec** – Duration (in seconds) of ring.
- **Ignore Follow-me/Voicemail** – Select this check box to disable forwarding (voicemail, follow-me) on the specific extension for calls made to this huntgroup.

- **Set This Group as Primary** – Select this check box to allow the extension owner to pick up calls within that group by merely dialing the group pickup prefix.

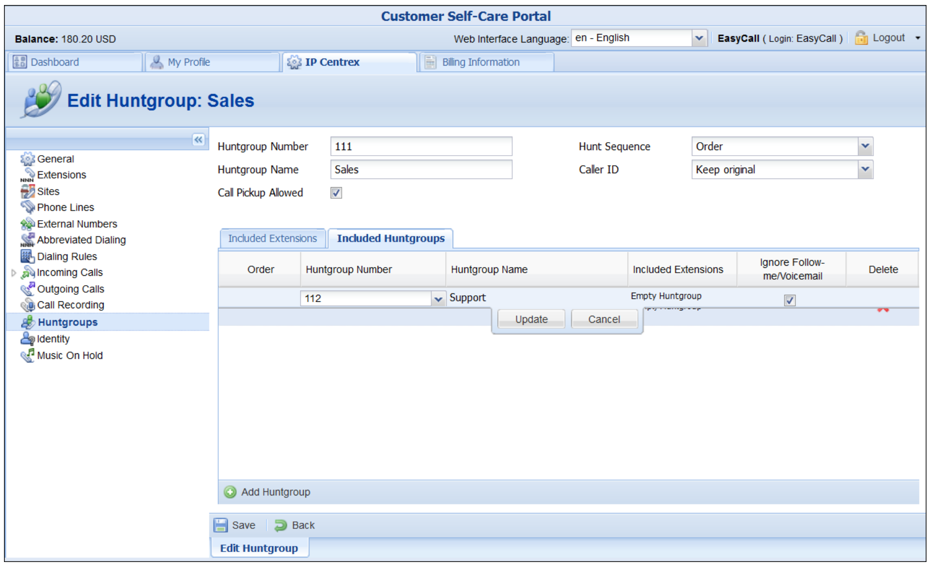


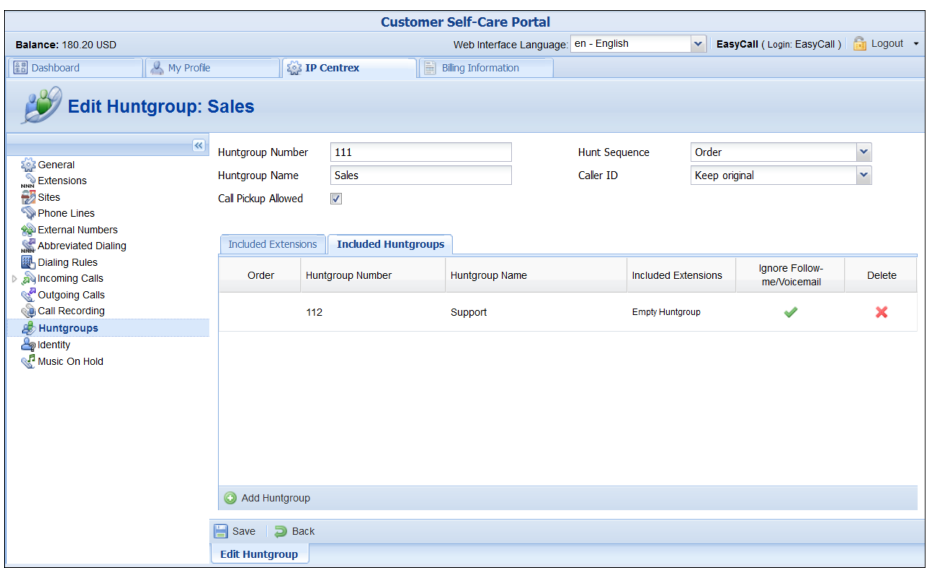




In order for changes to take effect you need to click the **Save** icon at the bottom of the page; you can also use the **Back** button to return to the previous menu.

Several huntgroups can be combined into one huntgroup. Go to the **Included Huntgroups** tab and choose the required huntgroups to add from the list of Huntgroup Number. Select the **Ignore Follow-me/Voicemail** check box to disable forwarding for calls made to this huntgroup. Then click **Save**.



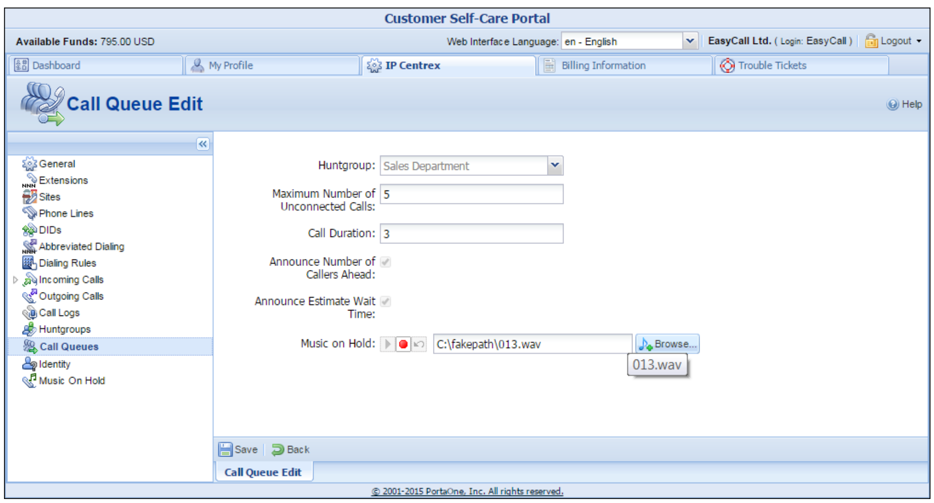


NOTE: Extension and huntgroup numbers must be different.

Call Queue

This feature allows you to provide a "call center" functionality to your IP Centrex customers. When a large number of incoming calls from customers arrive to the auto attendant, PortaSIP® can forward these calls to the actual agents within a huntgroup (customer service representatives) in a regulated fashion.

Each call queue contains a pool of incoming calls (users trying to get connected) and a number of connected outgoing calls (calls that have already been connected to agents). When a new incoming call arrives, it is assigned a position in the queue. The caller will hear an announcement about his position in the queue and the estimated waiting time, which is calculated as (average call duration) / (maximum number of connected calls) * (total number of users before him in the queue). After that, the specified "music on hold" is played, and every minute the caller is updated as to his current position in the queue and the estimated waiting time.



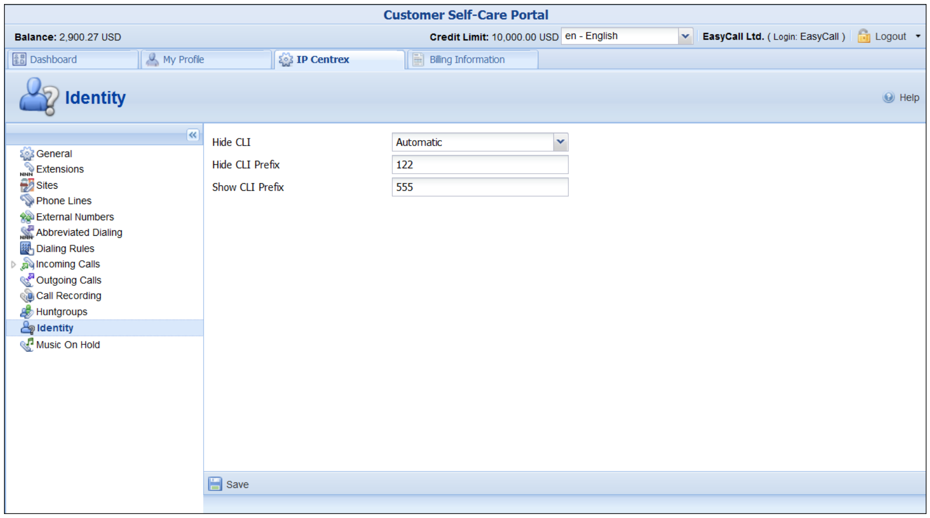
Every call queue contains several configuration parameters:

Field	Description
Huntgroup	When creating a new call queue, a customer must select a huntgroup so that when a call arrives to the call queue, it is transferred to the corresponding huntgroup.
Maximum Number of Unconnected Calls	The maximum number of calls that can be placed on hold within this queue.
Call Duration	The average expected processing time for each call (used to calculate the estimated waiting time).

Music on Hold	A melody (or announcement) which is played to users waiting to be connected.

Identity

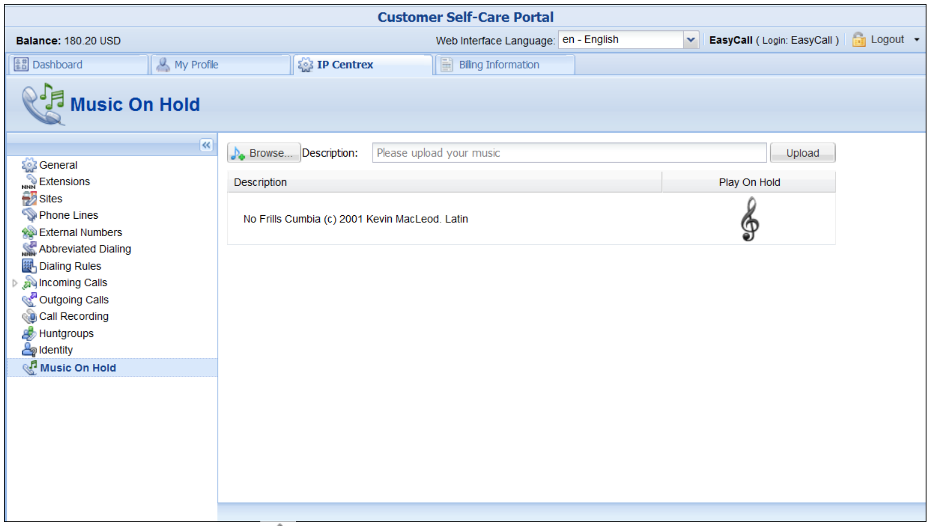
It is possible to set up the following options for handling **Identity** information:



Field	Description
Hide CLI	Removes CLI (ANI) information for outgoing calls. You can choose one of the following options: • **Never** – Always show CLI. Privacy service is not permitted. • **Always** – Always hide CLI. Privacy service is permitted and in effect (all calls are private). • **Automatic** – Allows flexible configuration for CLI hiding. It depends on the prefix number dialed and the privacy headers provided by an IP phone device.
Hide CLI Prefix	Enter the prefix to be dialed before the 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	Enter the prefix to be dialed before the outgoing number in order to allow the called party to see your phone number (Only available when **Hide CLI** option is set to “Automatic”).

Music on Hold

Here you can define which music will be used for calls on hold within your IP Centrex environment.



Click the treble clef to enable / disable this feature. To upload your own music, select a file from your local file system using the **Browse** button.

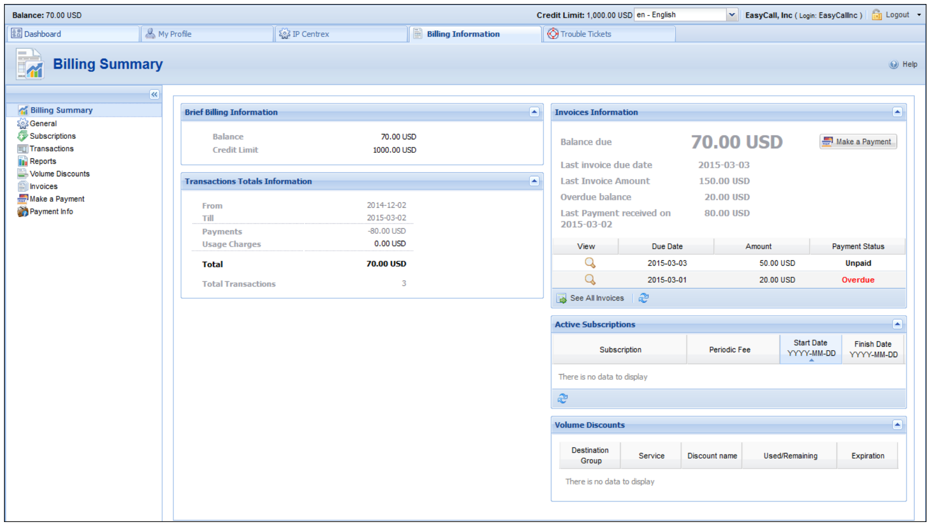
To rename the music file, enter the desired name in the **Music Name** field; otherwise the local file name will be used. The uploaded music will replace the previous entry in the list, and will usually be enabled within 10 minutes of performing this action.

Billing Information tab

Billing Summary

On this page you can view your billing information arranged in five information windows:

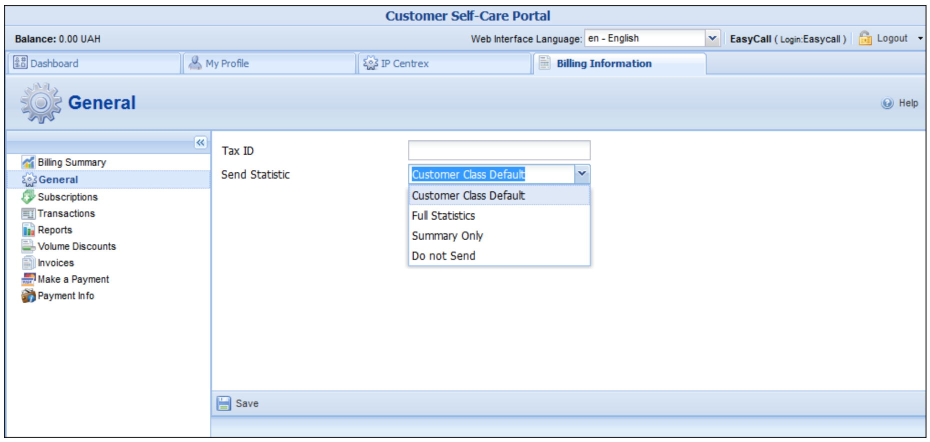
- Brief Billing Information
- Transactions Totals Information
- Invoices Information
- Active Subscriptions
- Volume Discounts



Field	Description
Brief Billing Information	This reflects your billing info such as current balance, etc.
Transactions Totals Information	This reflects your total transactions (calls, payments, refunds, subscription charges, etc.)
Invoices Information	This section is intended to help you better understand your invoice status and other billing-related details – a thumbnail sketch, so to speak, of how much money is owed, the due date, is there any amount overdue, etc. The available information fields are: • **Balance Due** – This represents the remaining amount you must pay for your invoice. • **Last Invoice Due Date** – This shows the date by which the last invoice should be paid. If no payment is received for this invoice or the invoice is only partially paid and the due date has passed, the invoice is considered overdue. • **Last Invoice Amount** – This represents the last invoice total plus whatever unpaid amount from any and all previous invoices owed by the customer at the time of invoice generation. • **Overdue Balance** – This represents the total remaining balance for all overdue invoices. The overdue balance decreases as payments are received. • **Last Payment Received on** – This shows the amount of the last payment and the date when this transaction took place.

	To view all of the invoices use the **See All Invoices** button.
Active Subscriptions	Subscription plans that currently apply to you.
Volume Discounts	Volume discount plans that currently apply to you.

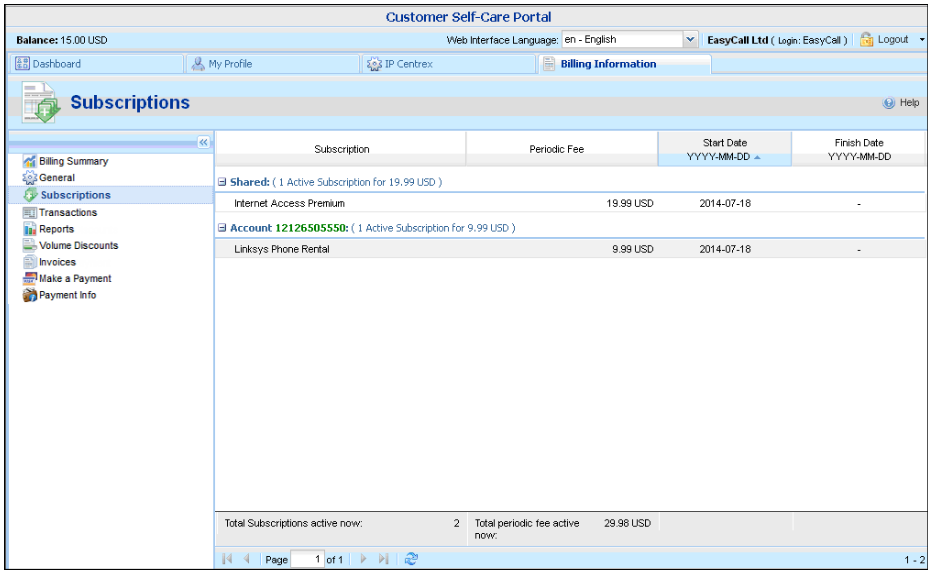
General



Field	Description
Tax ID	Your tax ID.
Send Statistic	Defines what kind of xDR statistics should be delivered to you by email: • **Customer class default** – 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.

Subscriptions

This tab displays the subscription plans currently being applied to you and your phone lines. Pending (not yet active) subscriptions are always on the bottom of the list and highlighted in grey.



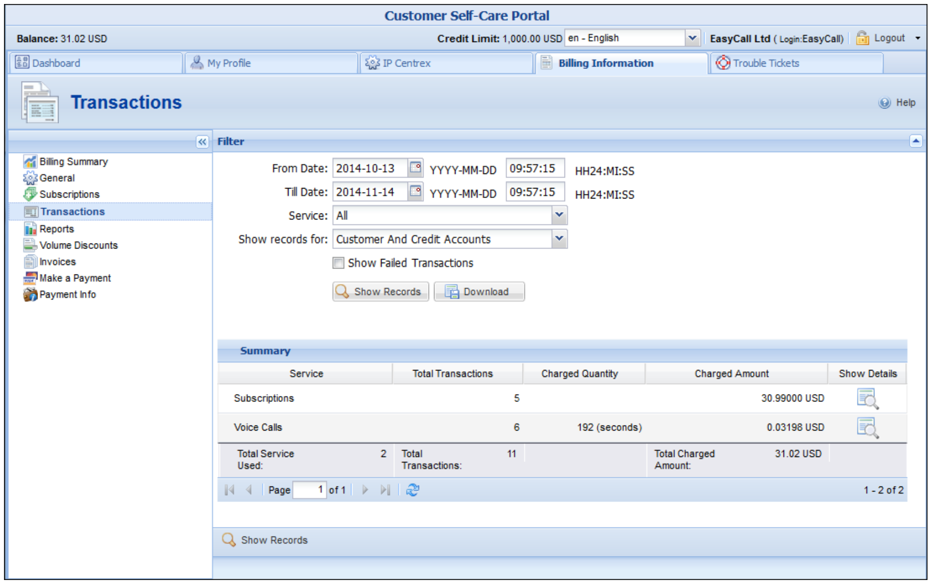
Field	Description
Subscription	Subscription plans being applied to you.
Periodic Fee	This is a recurring fee for a particular subscription.
Start Date	Subscription activation date.
Finish Date	This shows the date on which this subscription will be automatically canceled.

* Default fee and the amount of discount applied for this subscription.

Transactions

Transactions (calls, payments, refunds, subscription charges, etc.) serve as the primary record of services provided to you.

This screen allows you to view and download transaction records – for any desired time period and service.



On the **Transactions Filter** page you can make an extensible search via:

- A date and time range by clicking the icon
- A certain service type
- The type of required phone lines (accounts)
- If you want failed transactions to be included in the list, select the **Show Failed Transactions** check box.

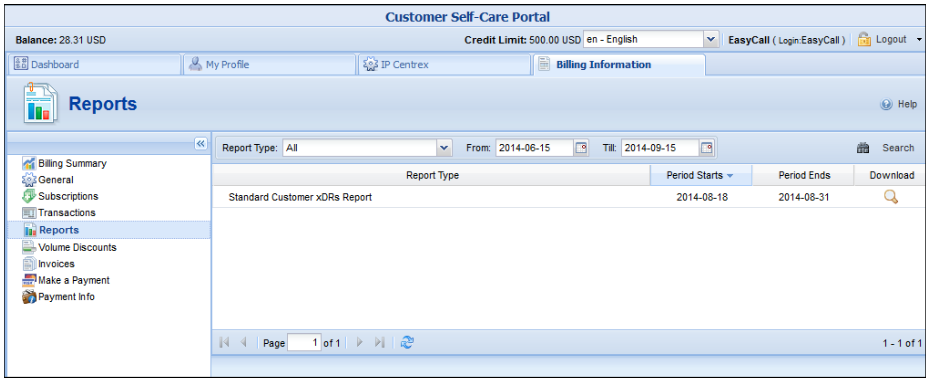
Set the from / to dates by clicking the icon and press the **Show Records** button. The result page contains a summary and tables list all calls and accompanying charges during a specified time period. If you want to view additional information (charged quantity and amounts due) for the chosen service(s), click the **Show Details** icon.

Click the Download **Download** button to download Transaction Detail Records in the .csv format.

Reports

The **Reports** screen allows you to download xDR reports for any desired time period either in .csv or .pdf formats.

Set the from / to dates by clicking the icon and press the **Search** button. The resulting page contains a list of xDR reports generated within a specified time period. Each report is available in .csv and / or .pdf formats.

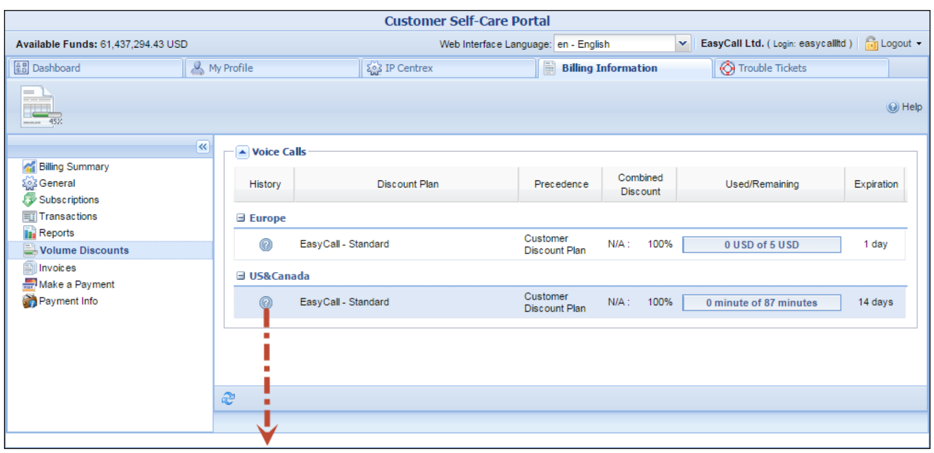


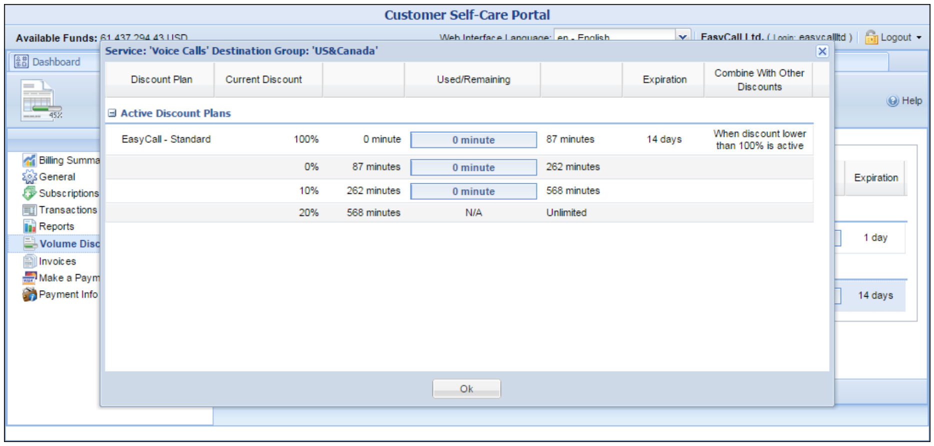
Click the Download button to download an xDRs report in the desired format.

Volume Discounts

The **Volume Discounts** screen displays all *Active* discounts that apply to you.

Information about *Consumed / Used up* and *Not Yet Active* volume discounts and volume discounts' usage history can be obtained (if available) in the **Discount History** window, which is visible by pressing the **History** button.



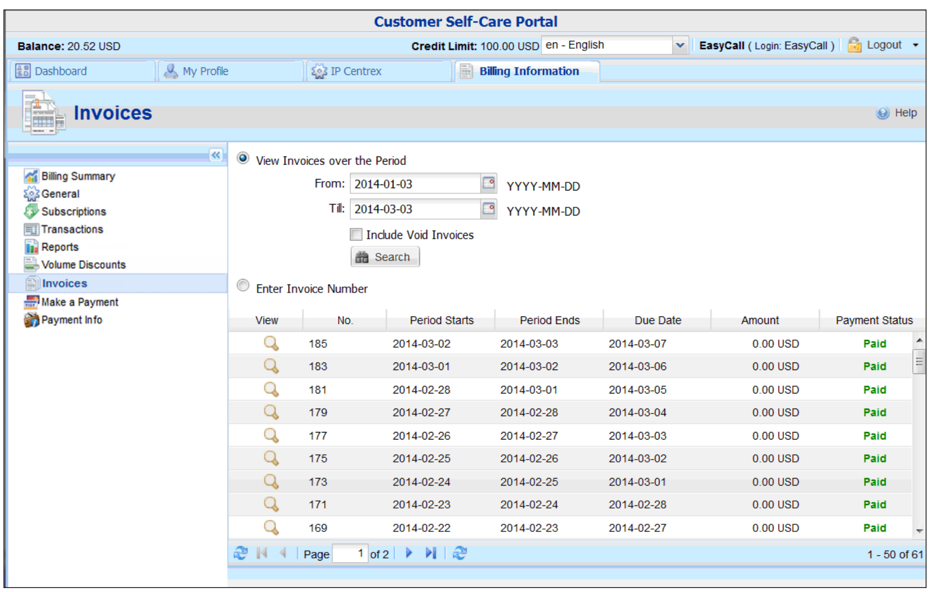


Field	Description
Service	A specific service (voice calls, messaging, data transfer, etc.) that this volume discount will apply to.
Destination Group	Information about discounts used and remaining is shown, grouped by Destination Group names. Each name represents one group included in the volume discount plan assigned to you.
History	Invokes a pop up window which shows extended information about the discount plan.
Discount Plan	The name of the volume discount plan applicable for this customer.
Precedence	This is the priority level for the currently used discount plan that specifies the order in which certain discounts are to be applied. Discounts with higher priority take precedence over discounts with low priority.
Combined Discount	Shows the total discount value currently applied to the customer that resulted in the discounts' combination.
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.
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** – The discount plans that are currently in use. • **Consumed** – The discount plans that have already been used up. • **Not Yet Active** – Currently inactive discount plans.
Current Discount	The value of the discount currently applied to the customer.
Expiration	The time left for the discount plan counters to be reset.
Combine With Other Discounts	Shows the way this discount plan is combined with other discount plans applicable to a session.

Invoices

The invoices screen allows you to view all your invoices. A particular invoice can be found either by entering its number or by selecting a date range and clicking the icon. If you want to include void invoices, just select the corresponding check box and then press **Search**.



Invoices cover these parameters:

- **No. (invoice number)** – The unique identifier for an invoice.
- **Date** – The date that the invoice was issued.
- **Payment status** – This specifies one of the following:
  - Do Not Pay – the invoice amount is 0, therefore no payment is required

  - Unpaid –payment has not yet been received
  - Partially Paid – payment has been received but in an amount less than the amount due
  - Paid – invoice has been paid in full
  - Overdue – invoice is unpaid and past due
  - N/A – payment status is not applicable for this invoice
- **Period Starts / Ends** – The period for which an invoice is generated.
- **Due date** – The date by which payment should be received.
- **Amount** – Sum of all charges for this period minus credits / refunds.

Select the **View** icon in the result list to view or print a particular invoice.

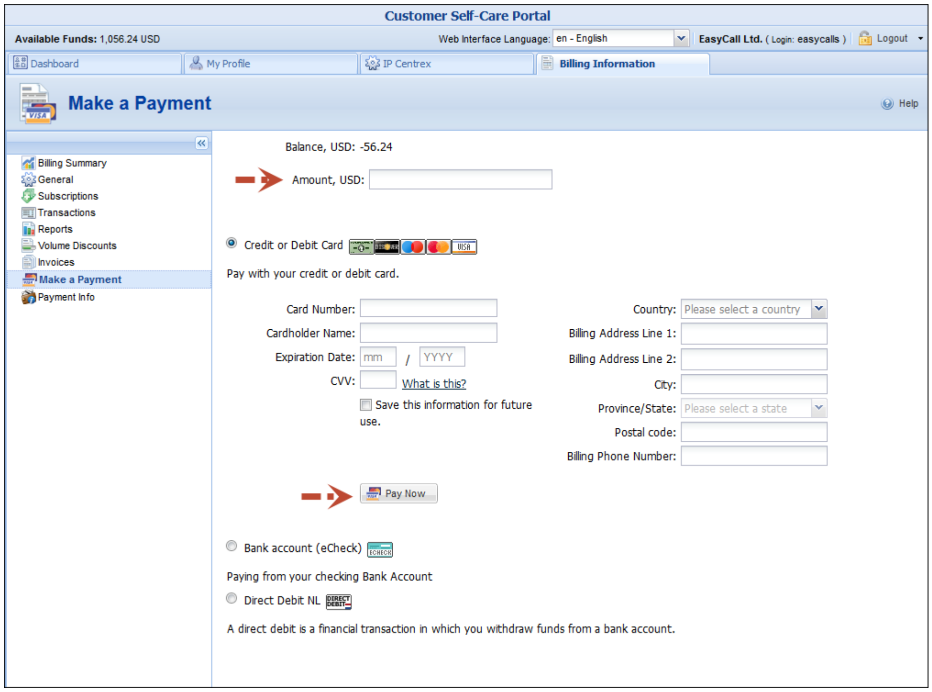
Make a Payment

This page allows you to see your current balance and top it up by choosing one of the available payment methods.

The list of currently supported payment methods is the following:

- **Credit or Debit Cards** – Allows you to pay using your credit or debit card. If you have a credit card whose payment characteristics are recorded in the system, it will be used by default.
- **Bank account (eCheck)** – Allows paying from your checking bank account.
- **Direct Debit NL** – Allows you to perform financial transaction in which you withdraws funds from a bank account.
- **PayNearMe** – Allows you to pay for services in cash at any 7-Eleven or ACE Cash Express store across the United States. You need to specify your email to get a PayNearMe payment slip via email and then print it. The payment slip contains the bar code to be scanned at a 7-Eleven or ACE Cash Express location. You pay cash to the store clerk, who then records the transaction – the payment information is immediately delivered to the service provider via the PayNearMe network. PortaBilling® records the transaction and updates your balance so you can immediately start using the service.

To make a payment, select the desired payment method (one of the listed above), specify the amount you wish to pay and click the **Pay Now** button to proceed with the payment.

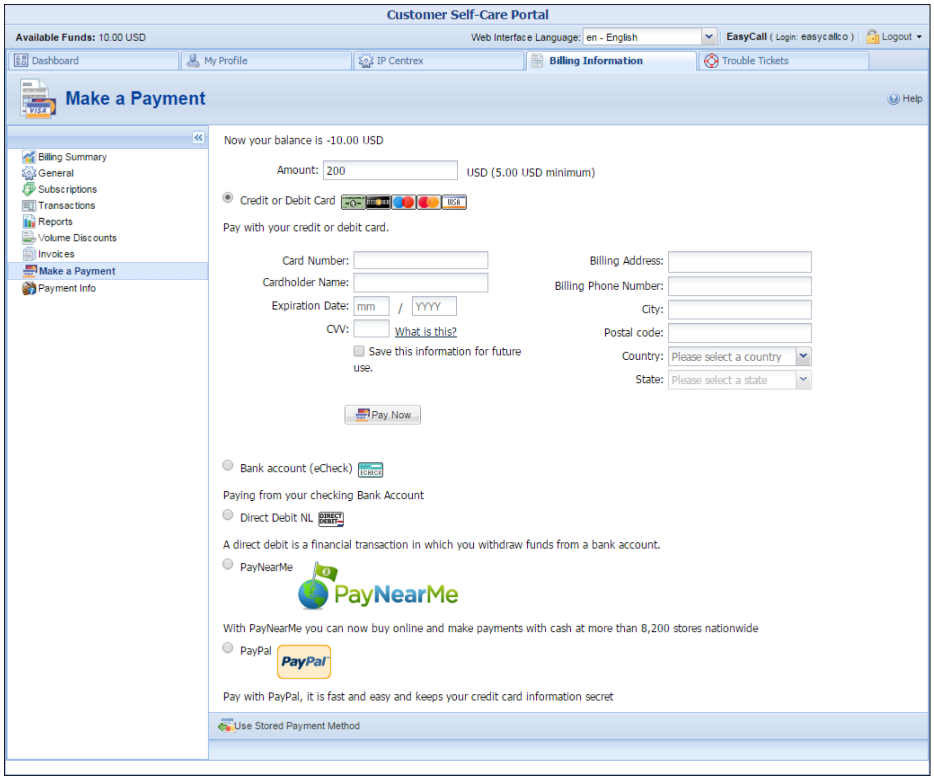


Taxes upon payment

If you use prepaid services, the taxes for such services are calculated and added to the amount you are topping up your account by. After you confirm your payment, your balance is topped up to reflect that actual amount.

Payment Info

This page allows you to set up the following parameters for periodic automated payments.



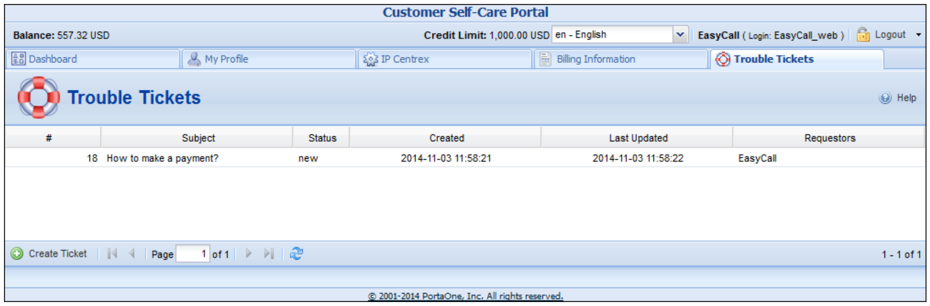
In the **Preferred Payment Method** block you can choose which type of payment method to use.

The **Auto-pay invoices using this payment method** allows you to define whether a credit card should be charged at the end of the billing period.

To set up automatic payment with a debit or credit card when the balance crosses a specified threshold, select the **Pay** check box and specify the threshold in the second field. When the balance crosses this threshold the credit card will be charged for the amount specified in the **Pay** field.

Trouble Tickets tab

Using the **Trouble Tickets** tab, you can view a list of recent tickets and create new tickets within the RT (Request Tracking) system.



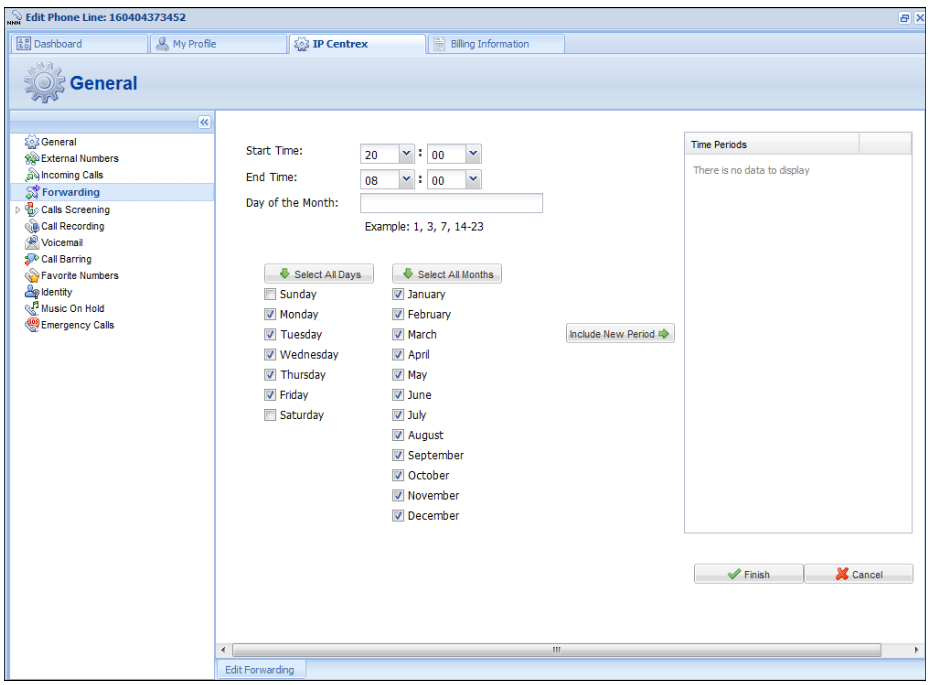
To create a new ticket, simply click the **Create Ticket** button at the bottom of the page.

3. How to...

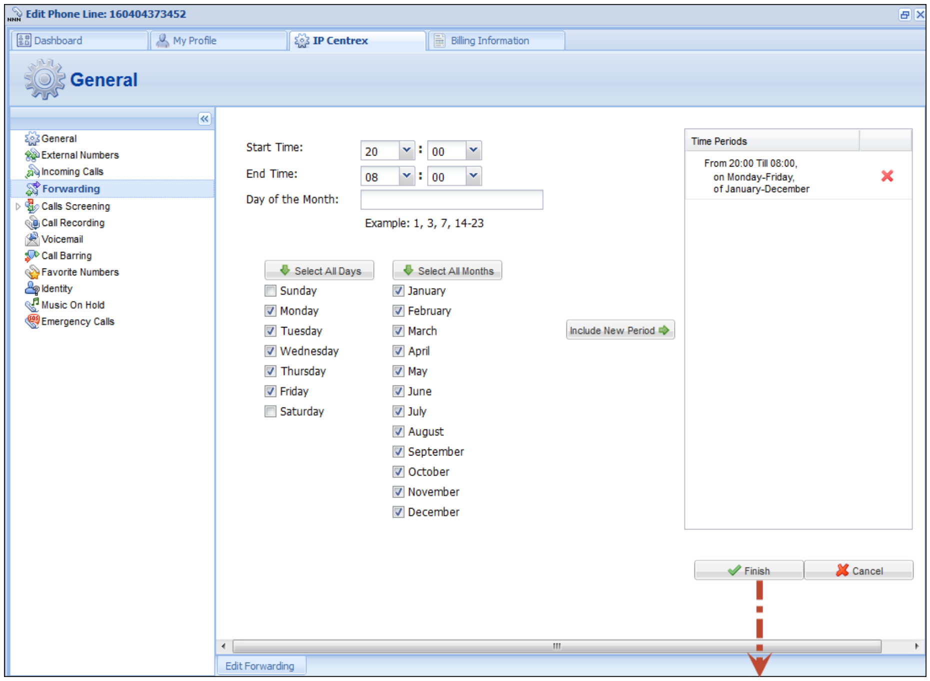
… define a time period using the wizard?

With the period definition wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based on a 24-hour clock, i.e. 8pm is the same as 20:00.) The Period Wizard is intuitive and lets you configure multiple time intervals from a single page in just a few mouse clicks. The following example illustrates the process of creating a period within the Monday-Friday workweek that starts at 8pm and lasts until 8am the next morning:

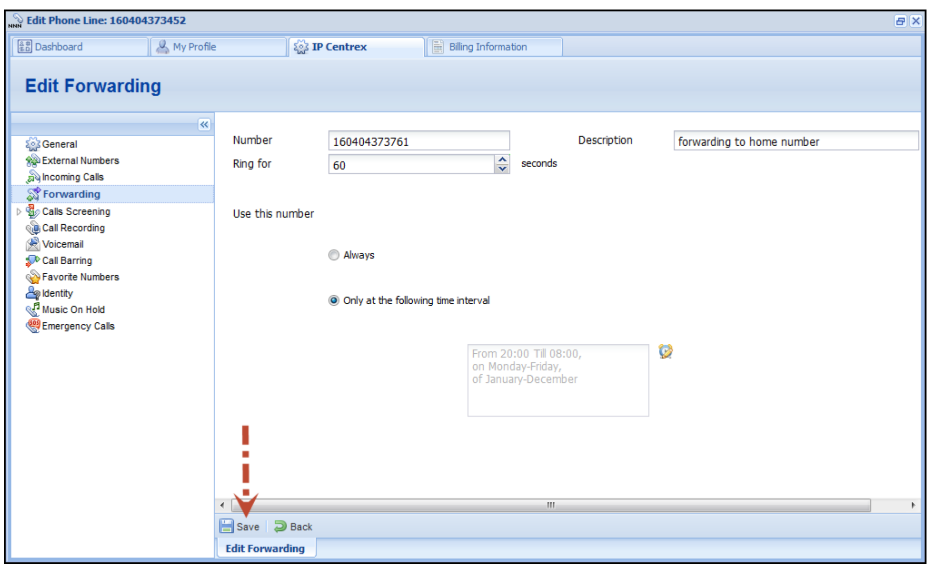
1. On the **Period Wizard** page, select *20:00* in the **Start Time** box and *08:00* in the **End Time** box. In the block containing days of the week select *Monday, Tuesday, Wednesday, Thursday, Friday*. In the block containing months click the **Select All Months** button. Then click the **Include New Period** button and this time period will appear in the **Time Periods** window on the right side of the page.

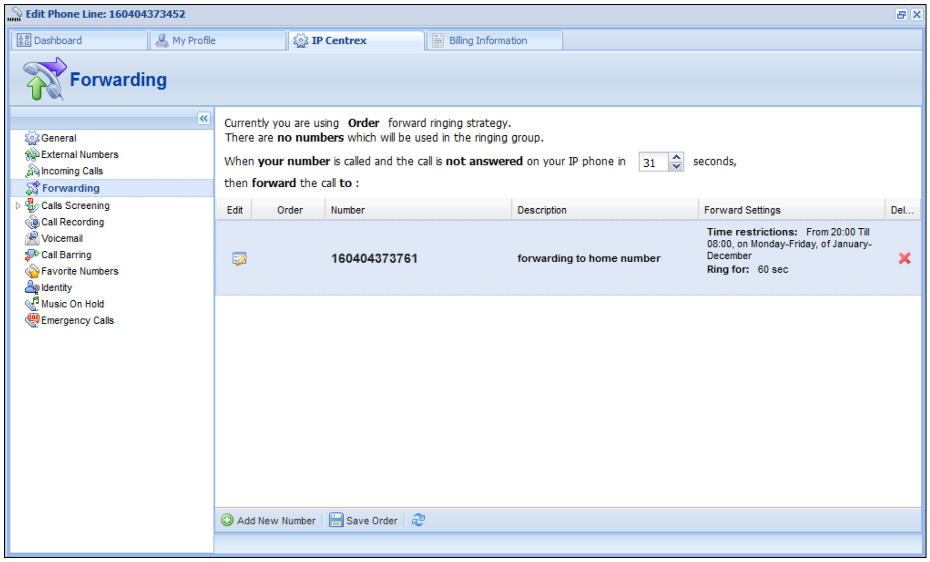


2. Click **Finish** to complete the period definition. If you wish to set another definition for this period, repeat step 1.



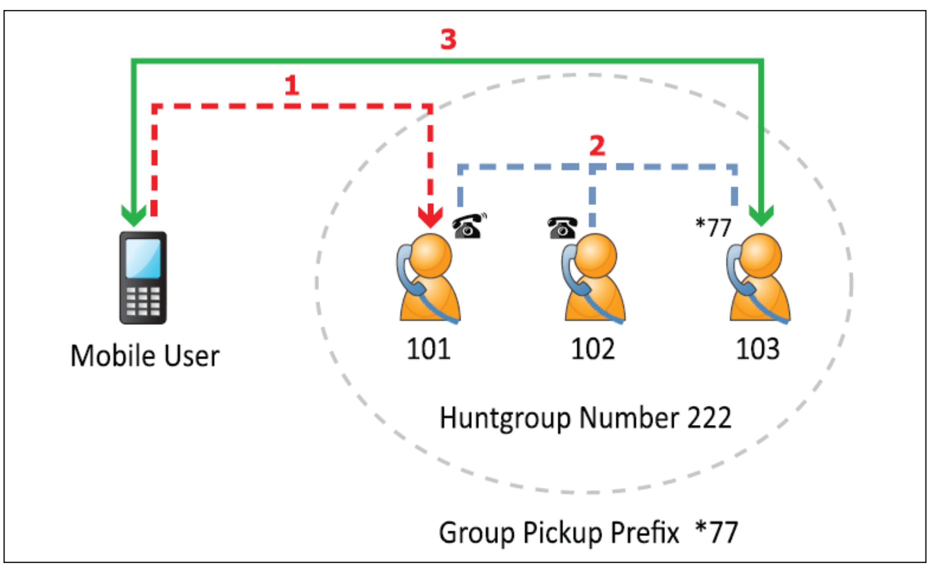
3. Click **Save** to add a specified time period for the current forwarding number.





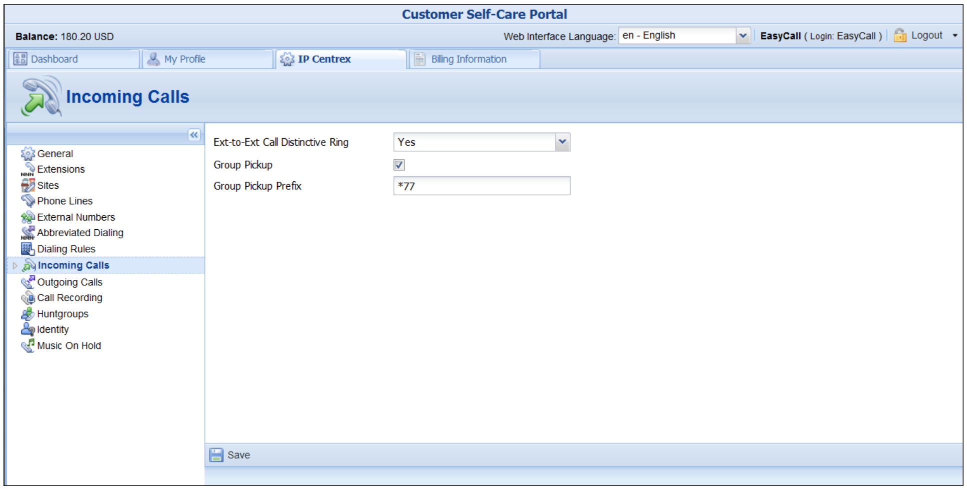
… configure multiple pickup groups?

The multiple pickup groups functionality allows phone lines in the same IP Centrex environment to be grouped so that phone line owners within the group may answer each other’s calls by merely dialing a Group Pickup Prefix on their phones.

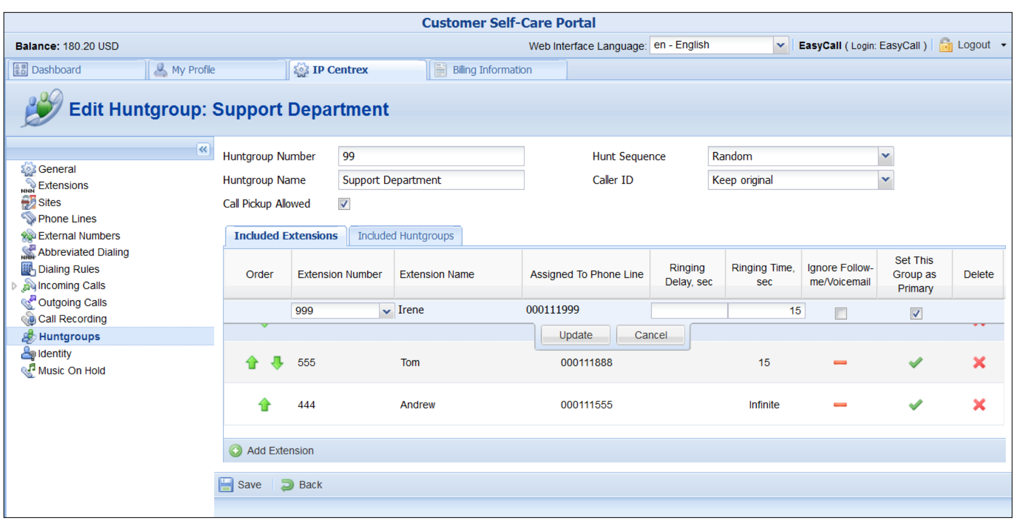


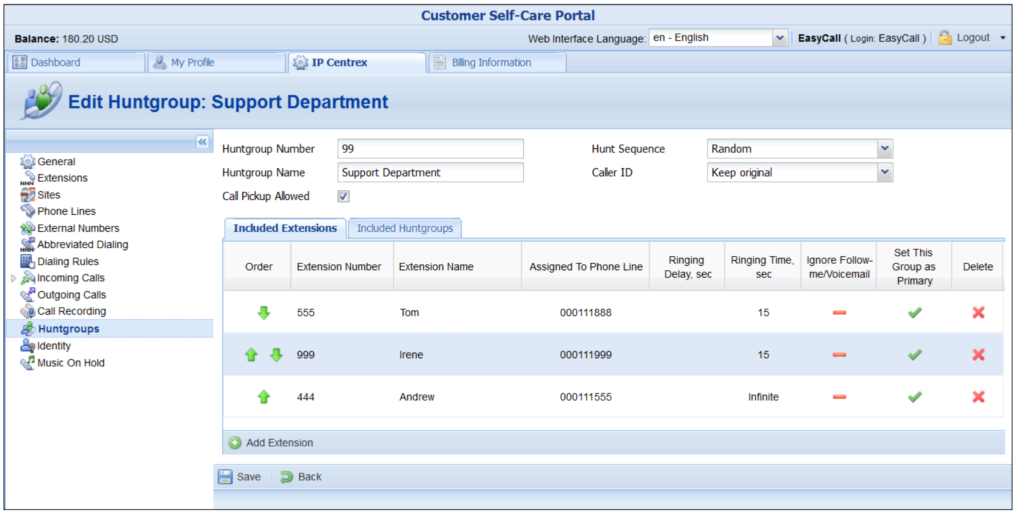
Let’s assume that there are two offices working with shared secretarial services. First you must enable a Group Pickup feature, then configure two huntgroups and lastly configure the pickup groups within them:

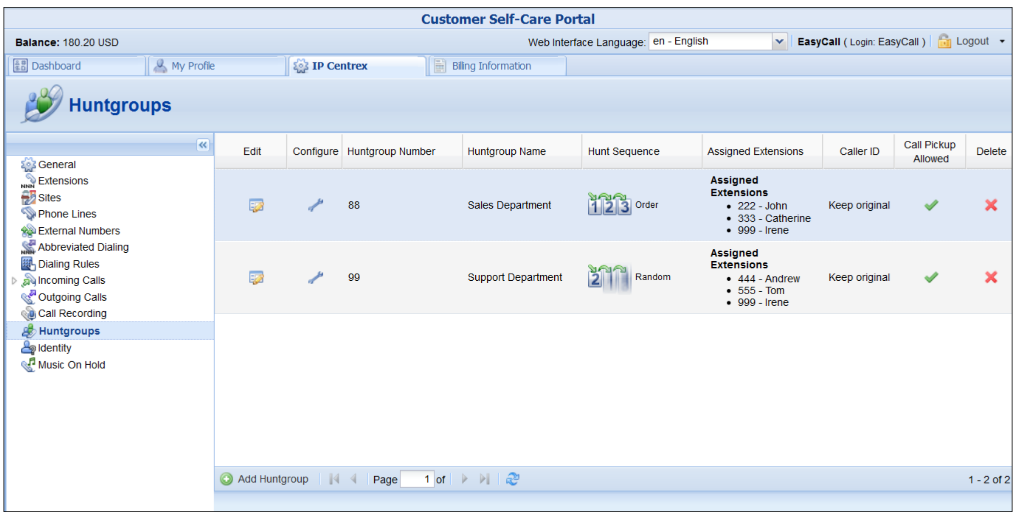
1. Go to the **Incoming Calls** page:
   - Enable the **Group Pickup** feature
   - In the **Group Pickup Prefix** field specify *77.



2. Go to the **IP Centrex** tab.
3. On the **Huntgroups** page of the IP Centrex tab add two huntgroups (for how to add huntgroups, see the section titled **Huntgroups**):
   - To the first huntgroup 88 (e.g. Sales Department) add the required extensions: 222, 333 and the secretary's 999 extension. Define huntgroup 88 as primary for extensions 222 and 333. Make sure the **Call Pickup Allowed** feature is enabled for the huntgroup.
   - To the second huntgroup 99 (e.g. Support Department) add extensions 444, 555 and the secretary's 999 extension. **Define huntgroup 99 as primary for all these extensions – 444, 555 and 999.** Make sure the **Call Pickup Allowed** feature is enabled for the huntgroup.







With these settings the following scenario is possible: There is an incoming call to extension *444*. The secretary (extension *999*) can dial **7788* to pick up the call (because *444* is in their non-primary group, thus **77* won't work. They have to dial the group pickup prefix and the number of huntgroup). To pick up an incoming call to the extension *222* the secretary can dial **77* because extension *222* is in their primary group.