



## PortaBilling



Account  
Self-care  
Interface

Maintenance  
Release

49



Documentation



## **Copyright Notice & Disclaimers**

Copyright © 2000–2015 PortaOne, Inc. All rights reserved

**PortaSwitch® Account Self-care Interface, August 2015  
Maintenance Release 49  
V1.49.03**

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

Changes may be made periodically to the information in this publication. The changes will be incorporated in new editions of the guide. The software described in this document is furnished under a license agreement, and may be used or copied only in accordance with the terms thereof. It is against the law to copy the software on any other medium, except as specifically provided in the license agreement. The licensee may make one copy of the software for backup purposes. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopied, recorded or otherwise, without the prior written permission of PortaOne, Inc.

The software license and limited warranty for the accompanying products are set forth in the information packet supplied with the product, and are incorporated herein by this reference. If you cannot locate the software license, contact your PortaOne representative for a copy.

All product names mentioned in this manual are for identification purposes only, and are either trademarks or registered trademarks of their respective owners.



## Table of Contents

Preface .....	4
Hardware and Software Requirements .....	5
<b>1. Introduction .....</b>	<b>6</b>
Login to the Account Self-care Interface.....	7
Overview.....	7
Common Features.....	8
<b>2. Web Interface.....</b>	<b>9</b>
Dashboard.....	10
My Profile tab.....	11
IP Centrex Tab .....	12
<i>General</i> .....	12
<i>DIDs (External Numbers)</i> .....	12
<i>Phone Book</i> .....	13
<i>Dialing Rules</i> .....	14
<i>Incoming Calls</i> .....	16
<i>Call Forwarding</i> .....	16
<i>Call Screening</i> .....	21
<i>Call Logs</i> .....	23
<i>Conferences</i> .....	24
<i>Voicemail</i> .....	26
<i>Faxes</i> .....	30
<i>Auto Attendant</i> .....	30
<i>DISA</i> .....	36
<i>Call Barring</i> .....	36
<i>Identity</i> .....	37
<i>Music on Hold</i> .....	37
<i>Emergency Calls</i> .....	38
Products Configuration tab .....	38
Billing Information tab.....	39
<i>Billing Summary</i> .....	39
<i>Products and Services</i> .....	40
<i>Transactions</i> .....	41
<i>Volume Discounts</i> .....	43
<i>Top-up Account</i> .....	44
<i>Mobile Payment Transfer</i> .....	44
<i>Make a Payment</i> .....	45
<i>Payment Info</i> .....	46
<b>3. How to ... ..</b>	<b>49</b>
... define a time period using the wizard? .....	50
... configure call screening?.....	53
... transfer funds to mobile numbers? .....	56



## Preface

This document provides a general overview of the Account self-care interface and the configuration for your phone line.

### 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 occurs 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/](http://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 actions that must be taken for proper configuration.

**NOTE:** Notes contain additional information to supplement or accentuate important points in the text.



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



**Tips** provide information that might help you solve a problem.



**Gear** points out that this feature must be enabled on the Configuration server.

## Trademarks and Copyrights

PortaBilling®, PortaSIP®, PortaUM® and PortaSwitch® are registered trademarks of PortaOne, Inc.



# 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 Account Self-care Interface

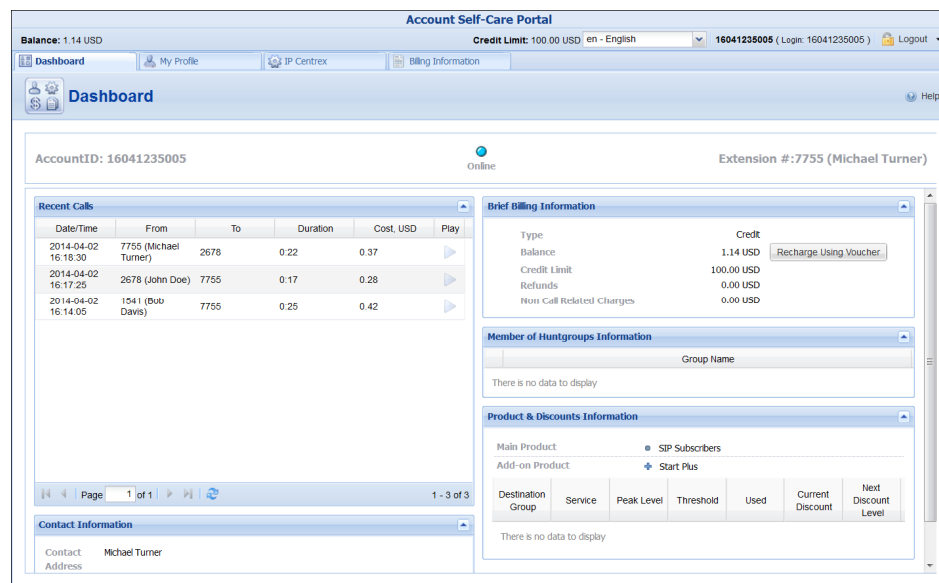
Your ITSP will provide you with a URL and credentials for logging in to the account self-care interface upon subscribing to their services.

## Overview

The account self-care interface was designed for end users to access their profile data, check billing information, make mobile payment transfers 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 account self-care interface is divided into four tabbed sections:

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



The screenshot displays the 'Account Self-Care Portal' interface. At the top, it shows the user's balance (1.14 USD), credit limit (100.00 USD), and language (en - English). The 'Dashboard' tab is selected, showing account details for AccountID: 16041235005 and Extension #: 7755 (Michael Turner). The interface is divided into several sections:


- Recent Calls:** A table with columns: Date/Time, From, To, Duration, Cost, USD, and Play. It lists three recent calls.
- Brief Billing Information:** A table with columns: Type, Credit, and a 'Recharge Using Voucher' button. It shows Balance (1.14 USD), Credit Limit (100.00 USD), Refunds (0.00 USD), and Non Call Related Charges (0.00 USD).
- Member of Huntgroups Information:** A section with a 'Group Name' field and a message 'There is no data to display'.
- Product & Discounts Information:** A section with 'Main Product' (SP Subscribers) and 'Add-on Product' (Start Plus). It includes a table with columns: Destination Group, Service, Peak Level, Threshold, Used, Current Discount, and Next Discount Level. A message 'There is no data to display' is shown below the table.
- Contact Information:** A section with fields for 'Contact' (Michael Turner) and 'Address'.

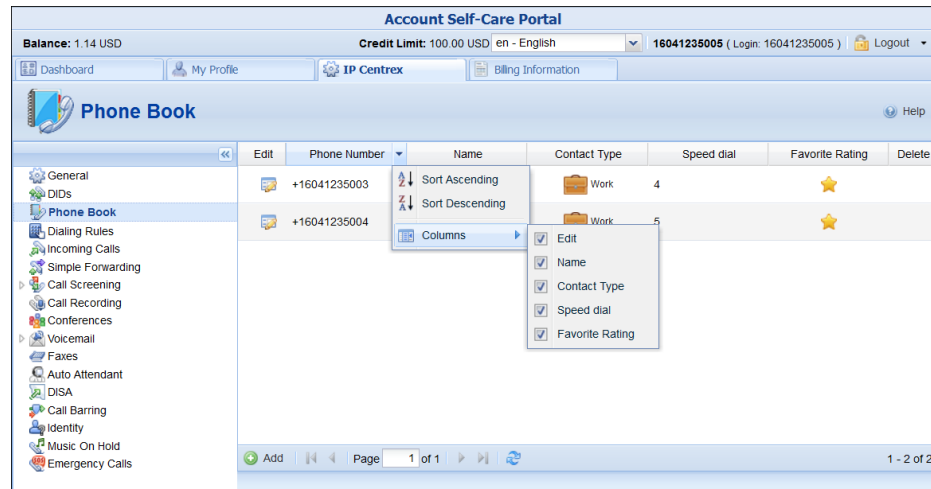
At the bottom, there is a pagination bar showing 'Page 1 of 1' and '1 - 3 of 3'.

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



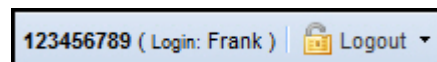
## Common Features

Most of the data on the self-care interface 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 menu will appear. You can choose how to sort your data and add or remove columns by selecting or clearing check boxes in the menu:




### Action buttons

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



- Your ID and a login name that was used to log in.
- 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 click **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 panels. In addition, these panels can be moved around, rearranged or minimized as you wish.

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

**Account Self-Care Portal**

Balance: 1.14 USD | Credit Limit: 100.00 USD | en - English | 16041235005 (Login: 16041235005) | Logout

**Dashboard** | My Profile | IP Centrex | Billing Information

AccountID: 16041235005 | Online | Extension #: 7755 (Michael Turner)

**Recent Calls**

Date/Time	From	To	Duration	Cost, USD	Play
2014-04-02 16:18:30	7755 (Michael Turner)	2678	0:22	0.37	<a href="#">Play</a>
2014-04-02 16:17:25	2678 (John Doe)	7755	0:17	0.28	<a href="#">Play</a>
2014-04-02 16:14:05	1541 (Bob Davis)	7755	0:25	0.42	<a href="#">Play</a>

**Brief Billing Information**

Type	Credit
Balance	1.14 USD <a href="#">Recharge Using Voucher</a>
Credit Limit	100.00 USD
Refunds	0.00 USD
Non Call Related Charges	0.00 USD

**Member of Huntgroups Information**

Group Name

There is no data to display

**Product & Discounts Information**

Main Product: SIP Subscribers

Add-on Product: Start Plus

Destination Group	Service	Peak Level	Threshold	Used	Current Discount	Next Discount Level
There is no data to display						

**Contact Information**

Contact: Michael Turner

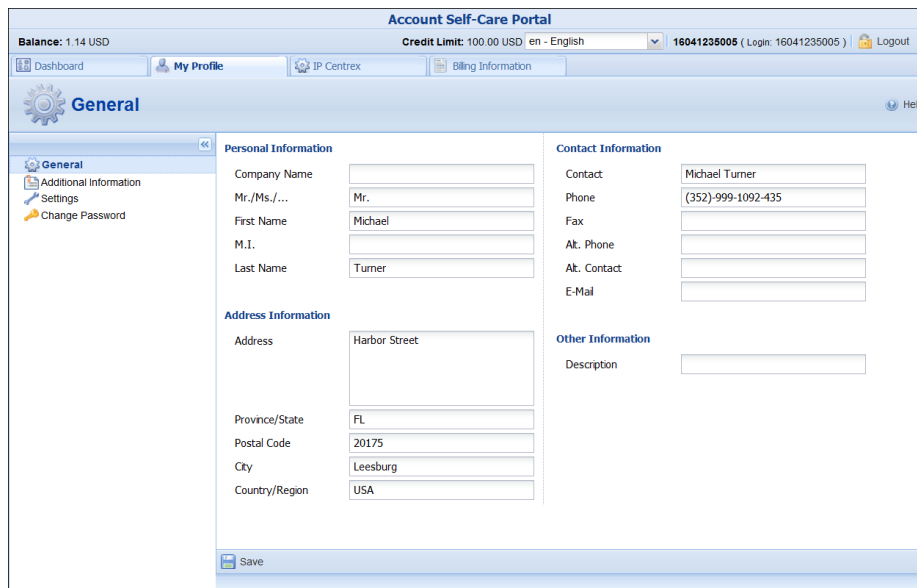
Address:

Panel	Description
<b>Brief Billing Information</b>	This reflects thumbnail billing information such as your available funds (or balance), refunds and charges information. Balance information will only be displayed for phone lines which have an individual balance control.
<b>Contact Information</b>	Here you can view your contact info such as address, email, etc.
<b>Member of Huntgroups Information</b>	This shows whether your extension belongs to any of the huntgroups.
<b>Product &amp; Discount Information</b>	Here you can find all the necessary information concerning your product and available discounts.
<b>Recent Calls</b>	This table lists the most recent calls and call details. It also gives you the ability to listen to recorded calls (if any were recorded).
<b>Status</b>	Indicates whether the phone is online or offline at the moment.



## My Profile tab

The **My Profile** tab allows you to view and change your personal details such as contact information, personal info, password, etc.



The screenshot shows the 'Account Self-Care Portal' interface. At the top, it displays the user's balance (1.14 USD), credit limit (100.00 USD), and login information (16041235005). The 'My Profile' tab is selected, showing a sidebar with options: General, Additional Information, Settings, and Change Password. The main content area is divided into sections: Personal Information (Company Name, Mr./Ms./..., First Name, M.I., Last Name), Address Information (Address, Province/State, Postal Code, City, Country/Region), Contact Information (Contact, Phone, Fax, Alt. Phone, Alt. Contact, E-Mail), and Other Information (Description). A 'Save' button is located at the bottom left of the form.

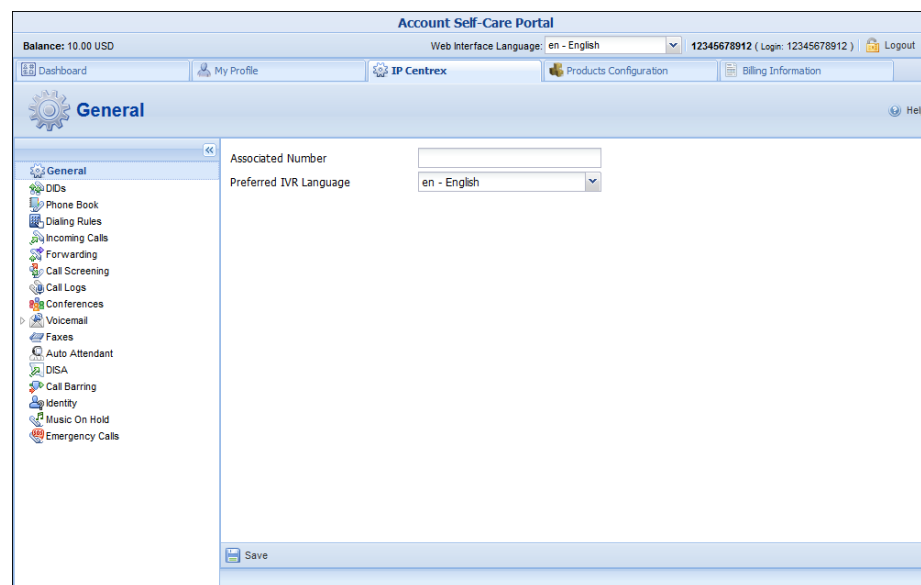
Tab	Description
General	Here you can enter general information such as company name, address, etc.
Additional Information	This is a list of additional fields. The fields for this tab are set by your provider.
Settings	Here you can choose the language to be used on your self-care interface.
Change Password	Here you can change your current password for the self-care interface.



## IP Centrex Tab

This tab allows you to view your external numbers, and configure call screening, voice mail and other services.

### General



Field	Description
<b>Associated Number</b>	This field may be used for various purposes depending on the services offered by your provider. Ask your service provider about how to use this particular option.
<b>Preferred IVR Language</b>	Here you can select the language you prefer for interacting with an IVR application.

### DIDs (External Numbers)

In addition to being assigned your main phone number, you can have multiple alternate DID (direct inward dialing) phone numbers assigned.

Here you can find a list of available DID numbers (the numbers should initially be defined on the customer self-care interface or by your provider).



Account Self-Care Portal

Balance: 10.00 USD Web Interface Language: en - English 12345678912 (Login: 12345678912) Logout

Dashboard My Profile IP Centrex Products Configuration Billing Information Help

### DIDs

DID	Country	Assigned to	Monthly charges
16041225008	-	12345678912	10.00 USD

Page 1 of 1 1 - 1 of 1

## Phone Book

On the **Phone book** page you can maintain your own set of frequently dialed numbers, assign speed dial codes for them and define a list of favorite numbers.

Note, that this page is only active if your provider has enabled the **Phone Book** feature for you. Depending on your needs, you may activate / deactivate the **Phone Book** by selecting or clearing the check box on the top.

Account Self-Care Portal

Balance: 10.00 USD Web Interface Language: en - English 12345678912 (Login: 12345678912) Logout

Dashboard My Profile IP Centrex Products Configuration Billing Information Help

### Phone Book

☒ Phone Book, your phone book settings

Edit	Phone Number	Name	Contact Type	Speed dial	Favorite Rating	Delete
	+181812355	Jane	Work	5	★	
	+181812356	David	Work	3	★	

Add Page 1 of 1 1 - 2 of 2

Save



## Speed Dial

The **Speed Dial** option allows you to assign speed dial codes to numbers. Please contact your provider to inquire about the maximum speed dial length.

## Favorite Rating

If your provider makes the **Favorite Rating** service available, you have the option to mark which numbers will be charged according to a special rate. Ask your provider about the maximum amount of numbers that you can mark as favorite numbers and about the patterns to be used for favorite numbers.

## Dialing Rules

On this page you can define a way of dialing phone numbers that is convenient to you.

The screenshot displays the 'Account Self-Care Portal' interface. At the top, there's a header with the user's name '18003333333 (Login: 18003333333)' and a 'Logout' button. Below the header is a navigation bar with links to 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The main content area is titled 'Dialing Rules' and features a sidebar with a tree view of settings including General, DDIs, Phone Book, Incoming Calls, Forwarding, Call Screening, Caller's Groups, Own Number Group, Time Filters, Call Logs, Voicemail, Mode, Voice Menu, External E-mail, Greetings, MailBox Display Options, Message Display Options, Folder Preferences, Faxes, Auto Attendant, DISA, Call Barring, Identity, Music On Hold, and Emergency Calls. The 'Dialing Rules' section is active, showing a dropdown for 'Dialing Rules' set to 'North America'. It contains three main sections: 'Your location' with fields for 'Your country dial code' (1), 'Your area code(s)' (604,778), and 'Emergency numbers (e.g. 911, 112)' (911); 'Dialing Prefixes' with fields for 'Outside line dial prefix', 'Domestic long-distance dial prefix (outside of your area code)' (2), 'International dialing prefix' (011), and 'Exceptions (e.g. \*98)' (\*98); and 'Service Features Codes' with fields for 'Park Prefix' (\*70), 'Release Prefix' (\*71), 'Group Pickup Prefix' (\*40), 'Hide CLI Prefix' (\*67), and 'Show CLI Prefix' (\*68). A 'Check Yourself' section provides a summary of the dialing sequence: 'You are going to call: 555-1234', 'To call within your local area you dial: 555-1234', 'To call long distance (within your country, 123 code) you dial: 2 123-555-1234', and 'To call internationally you dial (to country with code 44 20): 011 44-20-555-1234'. A 'Save' button is located at the bottom of the form.

Your location	
Your country dial code:	1
Your area code(s):	604,778
Emergency numbers (e.g. 911, 112):	911

Dialing Prefixes	
Outside line dial prefix:	
Domestic long-distance dial prefix (outside of your area code):	2
International dialing prefix:	011
Exceptions (e.g. *98):	*98

Service Features Codes	
Park Prefix:	*70
Release Prefix:	*71
Group Pickup Prefix:	*40
Hide CLI Prefix:	*67
Show CLI Prefix:	*68

**Check Yourself**

You are going to call: 555-1234

To call within your local area you dial: 555-1234

To call long distance (within your country, 123 code) you dial: 2 123-555-1234

To call internationally you dial (to country with code 44 20): 011 44-20-555-1234


Save

© 2001-2015 PortaOne, Inc. All rights reserved.

By default, the Dialing Rules feature is disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If the Dialing Rules feature is enabled by your service provider, this will allow you to define various dial plan parameters such as an international dialing prefix or area code, feature access codes.



You can select one of the predefined dialing rules from the list.  
To define your own translation rule select **Custom Rule** from the list.

Verify that for all examples provided (domestic and international calls)  
this is how you want the numbers dialed and click  **Save**.

***Service features codes (also known as Feature access codes)***

Field	Description
<b>Park Prefix</b>	An end user can dial this access code to park a call.  The default value is *70.  This access code is available only if call parking is enabled for the customer.
<b>Release Prefix</b>	An end user can dial this access code to retrieve a call from the parked status.  The default value is *71.  This access code is available only if call parking is enabled for the customer.
<b>Group Pickup Prefix</b>	An end user can dial this access code to answer a call arriving to the other accounts of this customer.  The default value is *40.  This access code is available only if group call pickup is enabled for the customer.
<b>Hide CLI Prefix</b>	An end user can dial this code before dialing the phone number to prohibit the calling number from being displayed to the called party.  The default value is *67.  This access code is available only if <b>Hide CLI</b> is enabled for the account.
<b>Show CLI Prefix</b>	An end user can dial this access code before dialing the phone number to allow the calling number to be displayed to the called party.  The default value is *68.  This access code is available only if <b>Hide CLI</b> is enabled for the account.



## Incoming Calls

Here you can set the parameters for incoming calls.

Account Self-Care Portal

Balance: 10.00 USD Web Interface Language: en - English 12345678912 (Login: 12345678912) Logout

Dashboard My Profile IP Centrex Products Configuration Billing Information

### Incoming Calls

Help

Default Answering Mode: Ring, Forward, Voicemail

Ext-to-Ext Call Distinctive Ring: Yes

Caller Info: ☒

Call Waiting: ☒

Endpoint Redirection: ☐

Save

Field	Description
<b>Default Answering Mode</b>	This option specifies the method for processing incoming calls.
<b>Ext-to-ext Call Distinctive Ring</b>	For incoming calls from phones within the IP Centrex environment, use a ring pattern that is different from the default tone.
<b>Caller Info</b>	This option displays caller info for incoming calls (set by provider).
<b>Call Waiting</b>	Indicates the status of the <b>Call Waiting</b> function (set by provider).
<b>Endpoint Redirection</b>	This allows you to configure call redirection on your SIP phones (if this feature is supported by the SIP phone).

## Call Forwarding

**Call Forwarding** allows you to redirect all calls to another telephone number. Note, that this page is only active if your provider has enabled the Call Forwarding service for you.

### What call forwarding does for you:

- Eliminates missed calls.
- Calls can follow you wherever you go.
- Eliminates waiting for important calls.



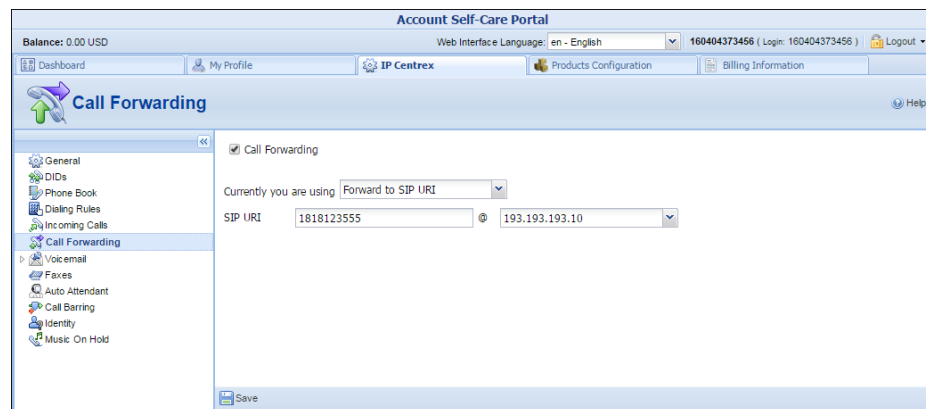
- Enhances home security when you are away.

There are several types of forwarding:

- Follow-Me
- Advanced Forwarding
- Forward to SIP URI
- Simple Forwarding.

## Forward to SIP URI

**Forward to SIP URI** allows to specify not only a destination phone number but also an IP address for calls to be forwarded to. This is useful when calls have to be routed directly to an external SIP proxy.



The screenshot shows the 'Account Self-Care Portal' interface. At the top, there's a header with 'Balance: 0.00 USD', 'Web Interface Language: en - English', and a user login '160404373456 ( Login: 160404373456 )' with a 'Logout' button. Below the header is a navigation bar with links: 'Dashboard', 'My Profile', 'IP Centrex', 'Products Configuration', and 'Billing Information'. The main content area is titled 'Call Forwarding' and features a left sidebar with a tree view containing: 'General', 'DIDs', 'Phone Book', 'Dialing Rules', 'Incoming Calls', 'Call Forwarding' (selected), 'Voicemail', 'Faxes', 'Auto Attendant', 'Call Barring', 'Identity', and 'Music On Hold'. The 'Call Forwarding' section has a checkbox 'Call Forwarding' which is checked. Below it, a dropdown menu 'Currently you are using' is set to 'Forward to SIP URI'. There are two input fields: 'SIP URI' with the value '1818123555' and a dropdown menu with the value '193.193.193.10'. A 'Save' button is at the bottom left of the configuration area.

## Follow-Me

**Follow-Me** allows to 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. On the **IP Centrex** tab, select **Call Forwarding** and choose **Follow-Me**.
2. Select the mode (**Order**, **Random** or **Simultaneous**) for your forwarded calls.





3. Click **Add New Number.**

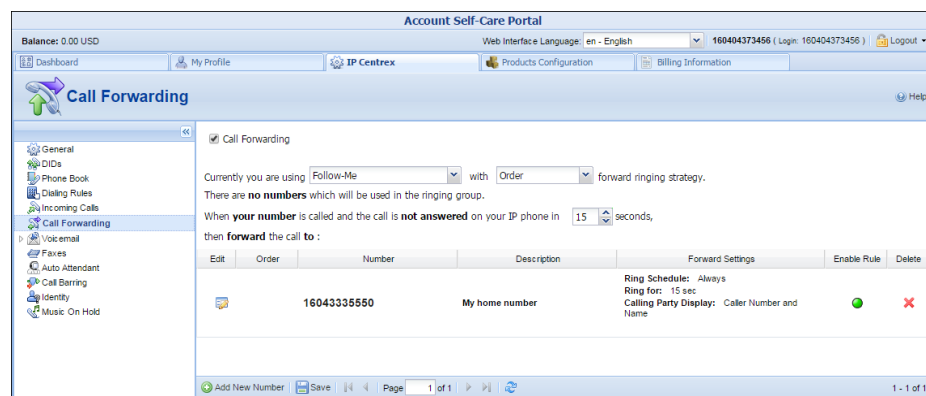
4. Enter the following information:

- **Number** – Enter a number for redirecting calls (e.g. 16043335550).
- **Description** – A short description for this number.
- **Ring for** – If a call is not answered, set the number of seconds that 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.
  - If you choose **Caller Number and Forwarder Name**, then the phone number of the caller and the forwarder's name will be displayed.



- To see the phone number and the name of the forwarder, select **Forwarder Number and Name**.
- **Ring Schedule** – Choose the period during which the number is used.
  - If you select the check box next to **Always**, the call will always be forwarded (e.g. to your cell phone).
  - If you want to forward calls to a cell phone only during a specific time period, select the check box next to **Only at the following time interval** field and click the  **Period Wizard** icon to define that interval. Please see the [How to define a time period using the wizard?](#) section for information about how to use the Period Wizard.

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



Account Self-Care Portal

Balance: 0.00 USD | Web Interface Language: en - English | 160404373456 (Login: 160404373456) | Logout

Dashboard | My Profile | IP Centrex | Products Configuration | Billing Information

### Call Forwarding




General | DIDs | Phone Book | Dialing Rules | Incoming Calls | **Call Forwarding** | Voicemail | Faxes | Auto Attendant | Call Barring | Identity | Music On Hold

Call Forwarding

Currently you are using Follow-Me with Order forward ringing strategy.

There are **no numbers** which will be used in the ringing group.

When **your number** is called and the call is **not answered** on your IP phone in 15 seconds, then forward the call to:


Edit	Order	Number	Description	Forward Settings	Enable Rule	Delete
		1604333550	My home number	Ring Schedule: Always Ring for: 15 sec Calling Party Display: Caller Number and Name		

Add New Number | Save | Page 1 of 1 | 1 - 1 of 1

6. Repeat steps 2–4 until all the desired **Follow-Me** numbers have been added.

## Advanced Forwarding

**Advanced Forwarding** is similar to the **Follow-Me** mode, but has some extra options that allow you to route calls to SIP URI. To do this, follow the steps below:

1. In the **IP Centrex** section, select **Call Forwarding** and choose **Advanced Forwarding**.
2. Select the mode (**Order**, **Random** or **Simultaneous**) for your forwarded calls.
3. Click  **Add New Number** to add the number that you wish to receive forwarded calls.
4. Enter the necessary information. The fields are very similar to those for adding a **Follow-Me** number as described above, but additional fields that are not available when adding a **Follow-Me** number are located below:



- **SIP Proxy** – Select a proxy server from the list that forwarded calls can be routed to (the list of allowable SIP proxy addresses is managed by your provider).
- **Keep Original CLD** – Select this option to ensure that the originally dialed number is present in the call information when forwarding a call to SIP URI.
- **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.
  - If you choose **Caller Number and Forwarder Name**, then the phone number of the caller and the forwarder's name will be displayed.
  - To see the phone number and the name of the forwarder, select **Forwarder 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 with PBXs that do not support UDP.

The screenshot shows the 'Edit Advanced Forwarding' interface. On the left is a sidebar with a tree view containing: General, DIDs, Phone Book, Dialing Rules, Incoming Calls, Call Forwarding (selected), Voicemail, Faxes, Auto Attendant, Call Barring, Identity, and Music On Hold. The main panel is titled 'Edit Advanced Forwarding' and contains the following settings:

- Enable Rule:** ☒
- Description:** My home number
- Number:** 16043335550
- SIP Proxy:** 193.193.193.10
- Hide Advanced Settings:** ☐ (collapsed)
- Transport Protocol:** UDP
- Keep Original CLD:** ☒
- Calling Party Display:** Caller Number and Name
- Ring for:** 15
- Ring Schedule:** ☒ Always, ☐ Only at the following time interval

At the bottom of the main panel are 'Save' and 'Back' buttons. Below the main panel is a link to 'Edit Advanced Forwarding'.

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

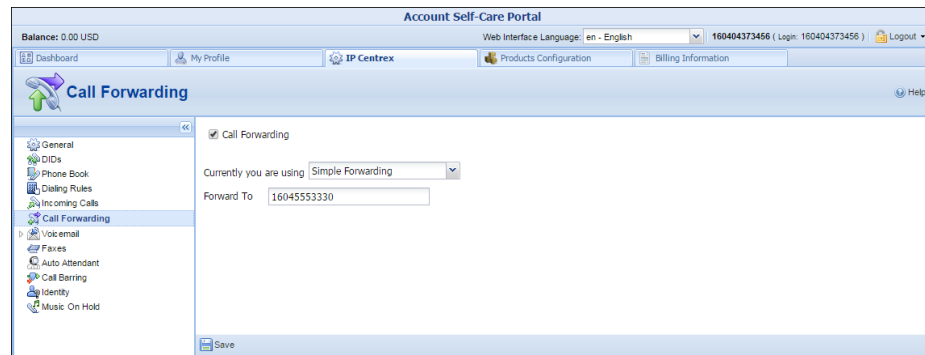
## Simple Forwarding

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

1. In the **IP Centrex** section, select **Call Forwarding** and 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.

## Call Screening

On the **Call Screening** page you can define and view a list of rules for handling incoming calls.



Note, that this page is only active if your provider has enabled the **Call Screening** feature for you. Depending on your needs, you may activate / deactivate **Call Screening** by selecting or clearing the check box on the top.



To add a new rule simply click the **Add new rule** button at the bottom of the page.

Field	Description
<b>Time Management and Action</b>	
<b>Enable Rule</b>	Allows you to temporarily disable a rule without actually deleting it (so it can be used later on).



<b>Action</b>	Specifies which actions should be taken if a particular phone call satisfies the conditions for this rule.
<b>Time Filter</b>	Allows you to select a condition applicable to the time when a call is made.
<b>Time Filter Name</b>	Enter the name for a new time filter. If you want to set specific parameters for your time filter, click the  <b>Period Wizard</b> icon to define the interval. Please see the <a href="#">How to define a time period using the wizard?</a> section for information about how to use the Period Wizard.
<b>Caller's Number Filter</b>	
<b>Caller's Number Filter Group</b>	Allows you to select a condition applicable to an incoming phone number (phone number of a person trying to contact you).
<b>Incoming Number Filter</b>	
<b>Incoming Number Filter Group</b>	Allows you to select a condition applicable to one of your phone numbers that a person tries to contact you.
<i>The following fields are similar to both <b>Caller's Number Filter</b> and <b>Incoming Number Filter</b></i>	
<b>Filter Group Name</b>	Enter the name for the new filter group.
<b>Number</b>	Add the number(s) to your filter group. First enter the number and then click the  <b>Add</b> button.
<b>Number List</b>	The numbers you have added to the group are displayed here.

**NOTE:** If a user modifies already created filter groups then the changes are applied for all other call screening rules where these filter groups are used.

## Call Logs

This page is only active if your provider has enabled the **Call Recording** feature for you. With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback. On the **Call Logs** page you can view a list of recorded calls, listen to recordings and filter them for / from a certain period.

Depending on your needs, you may activate / deactivate **Call Recording** by selecting or clearing the check box on the top.



Account Self-Care Portal

Web Interface Language: en - English 160493145871 ( Login: 160493145871 ) Logout

Dashboard My Profile IP Centrex Products Configuration Billing Information

### Call Logs

Call Logs, access to recorded calls

From: 2014-08-05 To: 2014-11-05 Search

Date/Time	Account ID	From	To	Duration	Play
2014-10-13 12:11:16	160493145871	18667478647	18667478647	0:02	▶
2014-09-30 12:55:47	160493145871	18667478647	18667478647	0:56	▶
2014-09-30 12:54:01	160493145871	18667478647	18667478647	0:43	▶
2014-09-30 12:52:22	160493145871	18667478647	18667478647	0:29	▶
2014-09-30 12:51:16	160493145871	18667478647	18667478647	1:06	▶
2014-09-24 14:58:16	160493145871	18667478647	18667478647	1:08	▶
2014-09-24 14:54:33	160493145871	18667478647	18667478647	0:34	▶
2014-09-24 14:50:27	160493145871	18667478647	18667478647	0:07	▶
2014-09-24 14:43:04	160493145871	18667478647	18667478647	0:26	▶

Page 1 of 1 1 - 9 of 9

Save

© 2001-2014 PortaOne, Inc. All rights reserved.

## Conferences

On the **Conferences** page you can create and manage your conferences (virtual conference rooms).

Note, that this page is only active if your provider has enabled the **Conferences** feature for you. Depending on your needs, you may activate / deactivate **Conferences** by selecting or clearing the check box on the top.

Account Self-Care Portal

Balance: 10.00 USD Web Interface Language: en - English 12345678913 ( Login: 12345678913 ) Logout

Dashboard My Profile IP Centrex Products Configuration Billing Information

### Conferences

Conferences, creating and managing your conferences

Show Conference: All Previous Current Future Show Advanced Filter

Edit	Name	Start Time	Duration	Maximum Participants	Video Conference	Moderator Access Code	User Access Code	Delete
There is no data to display								

Add Conference Page 1 of 1

Save

To add a conference, click the **Add Conference** button and then fill in the form for it; see the following table for a description of the available fields.



**Account Self-Care Portal**

Balance: 10.00 USD Web Interface Language: en - English 12345678913 (Login: 12345678913) Logout


Dashboard My Profile IP Centrex Products Configuration Billing Information Help

### Edit Conference

**General**

Name: Sales Meeting

Maximum Participants: 3

Announced Conference Name: Please upload conference name 

**Schedule**

☒ Schedule the Conference at Specific Time


Time Zone: Europe/Prague

Start Time: 2014-11-06 Y-m-d 14 : 30 HH24:MI

Duration: 30 minutes

☐ Create a Permanently Active Conference

**Access Codes**

Moderator: 24072 

User: 02074

**Options**

☐ Video Conference

☒ Wait for Moderator

☐ Announce Joining or Leaving Participants

☐ Enable Music on Hold


Save Back

Edit Conference

Field	Description
<b>Name</b>	A description of your conference.
<b>Maximum Participants</b>	You can limit the maximum allowed number of concurrent connections to the meeting room. Note that you may not specify a higher value here than the Number of Simultaneous Participants assigned by your administrator to your account.
<b>Announced Conference Name</b>	Upload a sound file with the name of the conference as it will be announced to people joining it.
<b>Schedule</b>	Specify the date and time when the conference will start.
<b>Duration</b>	In order to prevent service abuse, you must specify the maximum allowed conference duration (in minutes).
<b>Create a Permanently Active Conference</b>	<b>Maximum Session Time:</b> If you are creating a “meeting room” (a permanently active conference), specify the maximum time that a single participant can stay in the conference. This is also done to prevent potential service abuse.
<b>Access Codes</b>	Access codes are created automatically, but you can generate a new set of codes by clicking the <b>Generate</b> button.



<i>Options</i>	
<b>Video Conference</b>	Enable it, if you want to have a Video Conference.
<b>Wait for Moderator</b>	If activated, conference participants will not be able to communicate with each other until the host (moderator) arrives.
<b>Announce Joining or Leaving Participants</b>	If activated, each participant will be asked to record his or her name initially. When he or she enters the conference, all the other participants will hear "... has joined the conference"; and when he or she leaves, the other participants will be informed of this as well.
<b>Enable Music on Hold</b>	Upload a sound file first if you want to use this option. When activated, the first conference participant will hear music while on hold until the second conference participant arrives and joins the conference.

Click the  **Save** icon. Now you can start the conference at the scheduled time. For this dial the conference access number from a phone and enter your access code. The same should be done by other participants from their phones.

When the conference is over, you can review the charges for the conferencing service on the **Transactions** page of the **Billing Information** page.

On the **Conferencing** page you may choose which conferences to display – current, future, etc. You may also make an extensible search using **Show Advanced Filter** in the top right-hand corner via:

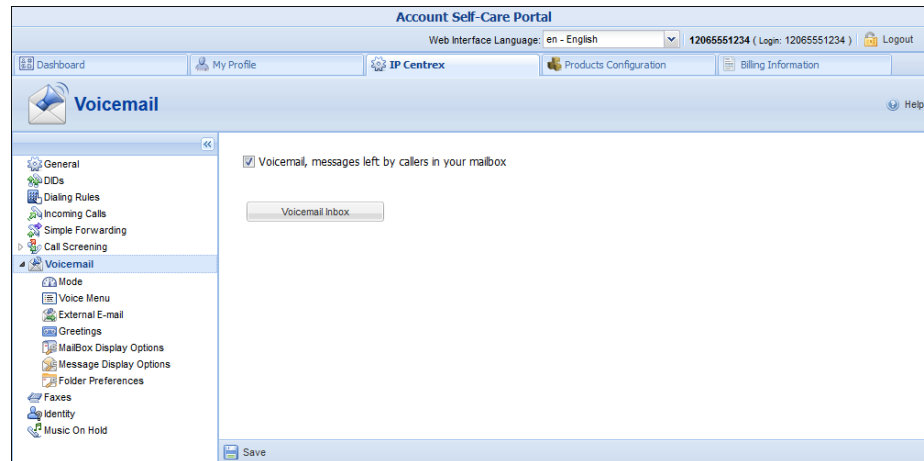
- name of the conference,
- conference **Start** and **End** time.

## **Voicemail**

On the **Voicemail** page you can configure your voice mailbox.

Note, that this page is only active if your provider has enabled the **Unified Messaging** services for you. Depending on your needs, you may activate / deactivate **Voicemail** by selecting or clearing the check box on the top.



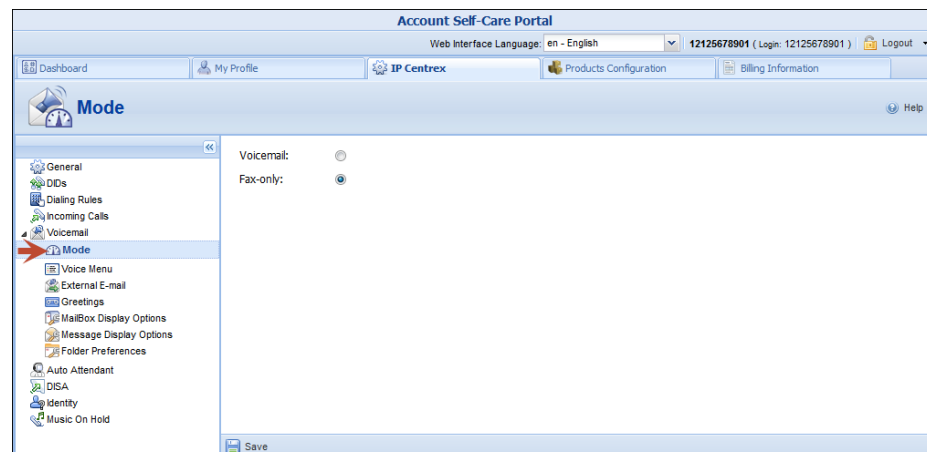


To check your mailbox, click the **Voicemail Inbox** button.

You will also find these tabs under **Voicemail**:

- **Mode**
- **Voice Menu**
- **External E-mail**
- **Greetings**
- **Mailbox Display Options**
- **Message Display Options**
- **Folder Preferences**


The **Mode** tab allows you to select the **Fax-only** or **Voicemail** mode for your phone line. When the **Fax-only** mode is selected (e.g. for a phone line that represents a DID number), every incoming call to this number will be answered with “start fax” tones, indicating that it will only receive fax messages. Thus the phone line will serve as a dedicated fax line, emulating the behavior of a legacy fax machine. When the **Voicemail** mode is selected for the phone line, this allows a caller to leave a voice message which can be listened to later.





The **Voice Menu** tab allows you to set options for your mailbox, such as:

- **Password**
- **Always Ask for Password**
- **Prompt Levels (Standard, Extended, Rapid)**
- **Announce Date & Time**
- **Auto Play**

The **External E-mail** tab allows you to forward messages to an external email box. When a new message arrives to your mailbox, a full copy of the message or simply a short notification can be sent to your other email address. To do this, specify an email address, define one of the actions (**Forward, Forward as Attachment, Copy, or Notify**), choose an appropriate voice message audio format and click  **Save**.

The **Greetings** tab allows you to customize your personal greetings for your voicemail. The **Standard** option is set by default. You may upload or record greetings specifically for **Extended Absence, Personal** and **Name**.

The **Mailbox Display Options** tab supplies with the following options:

- **Number of Messages per Page** – This defines the number of messages that will be shown in a given folder on a single page. If the folder contains more than this number, you will see “Previous” and “Next” links above and below the list, taking you directly to the previous or next message.
- **Enable Page Selector** – When you check this box, page numbers will be shown above and below the message list, allowing you to quickly jump to a specific message page.
- **Maximum Number of Pages to Show** – Defines the number of pages to be displayed above and below a message list.
- **Length of From / To Field** – Defines the number of characters that will be displayed in the **From / To** field. If you enter 0, then the full name will be visible.
- **Length of Subject Field** – Defines the number of characters that will be displayed in the subject field. If you input 0, then the full subject will be visible.

The **Message Display Options** tab:

- **Wrap Incoming Text At** – Defines how many characters to allow before wrapping text. This prevents messages from scrolling far off the screen. 86 is usually a good number to enter here, but you may change this as you desire.
- **Width and Height of Editor Window** – Defines how wide and high your message box will be. This indicates the number of characters per line you will be able to type before wrapping occurs in Compose.



- **Show HTML Version by Default** – If a message you receive is in both text and HTML format, you can choose to see the HTML version (Yes) or the text version (No) by default.
- **Include Me in CC when I Reply All** – “Reply All” sends a reply to all recipients of the original message, including yourself. To leave your own email address out, clear this check box.
- **Enable Mailer Display** – When viewing a message, this option displays which email service or client was used by the sender.
- **Display Attached Images with Message** – Displays the images attached to a message right as you view the message.
- **Enable Printer Friendly Clean Display** – Cleans up the message so the printed version looks nicer.
- **Enable Mail Delivery Notification** – Enables (or disables) automatic notification that a message has been delivered.
- **Prepend Signature before Reply / Forward Text** – Attaches the signature you defined under the Signature tab in Personal Information.
- **Sort by Received Date** – Sorts all the messages by the order they were received.

The **Folder Preferences** tab:

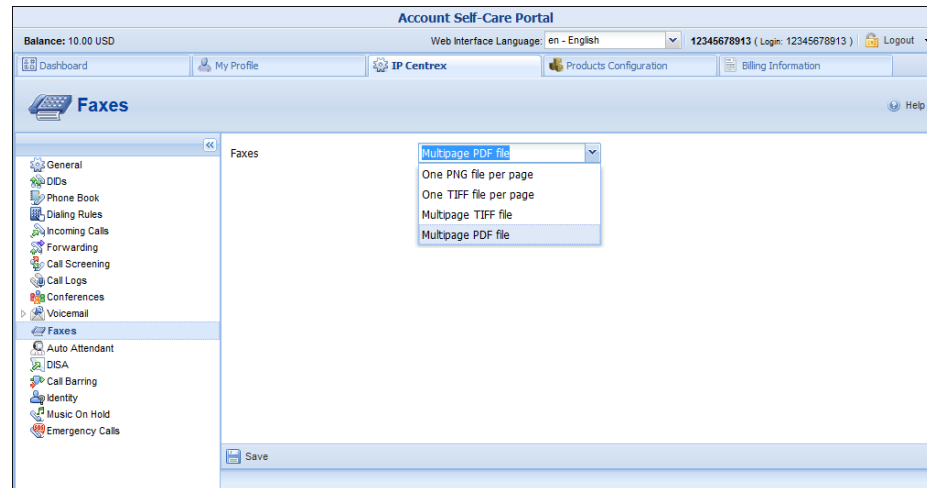
- **Trash Folder** – Specifies which folder messages will go to when you delete them.
- **Draft Folder** – Specifies which folder messages you save as drafts will go to.
- **Sent Folder** – Specifies the folder where sent items are saved.
- **Enable Unread Message Notification** – This option specifies how to display unseen (unread) messages in the folder list in your browser window. If you set this to **No Notification**, you will not be notified of unseen messages. If you set it to **Only INBOX**, the inbox heading will become bold when you have new messages, and a number will appear to the right of it indicating how many new messages are in it. If you set this to **All Folders**, the same will happen in all folders. If you notice that the folder list is loading very slowly, setting this to **Only INBOX** or **No Notification** should speed it up.
- **Unread Message Notification Type** – When new messages are in a folder, this option indicates whether to display the number of new messages only, or the total number of messages in that folder as well.
- **Enable Cumulative Unread Message Notification** – This controls the behavior of the message counter that is displayed next to each folder in the folder list. If the check box is selected and the folder contains sub-folders, then once it is collapsed, the message count will include all of the messages within all of the sub-folders of that folder.



- **Memory Search** – If you search a mailbox, the search can be saved for quick access later. This option defines how many mailbox searches will be saved.

## Faxes

The **Faxes** tab gives you an opportunity to choose one of the output formats (**One PNG file per page**, **One TIFF file per page**, **Multipage TIFF file** or **Multipage PDF file**).



## Auto Attendant

On the **Auto Attendant** page you can program your own set of menus for auto attendant, from a simple message such as “I am on vacation right now, press 1 to connect to my assistant” to a complex menu system with various options for small or medium-sized businesses. You can program the voice dialog from your web browser, record voice prompts using a microphone on your PC or upload professionally recorded prompts, create multiple sub-menus and define an activity period for each of them, program your company’s dial-by-name directory, construct multiple call queues, and so on.

Note, that this page is only active if your provider has enabled the **Auto Attendant** service for you (otherwise it will be grayed out). Depending on your needs, you may activate / deactivate the **Auto Attendant** by selecting or clearing the check box on the top.


## Basic Concept

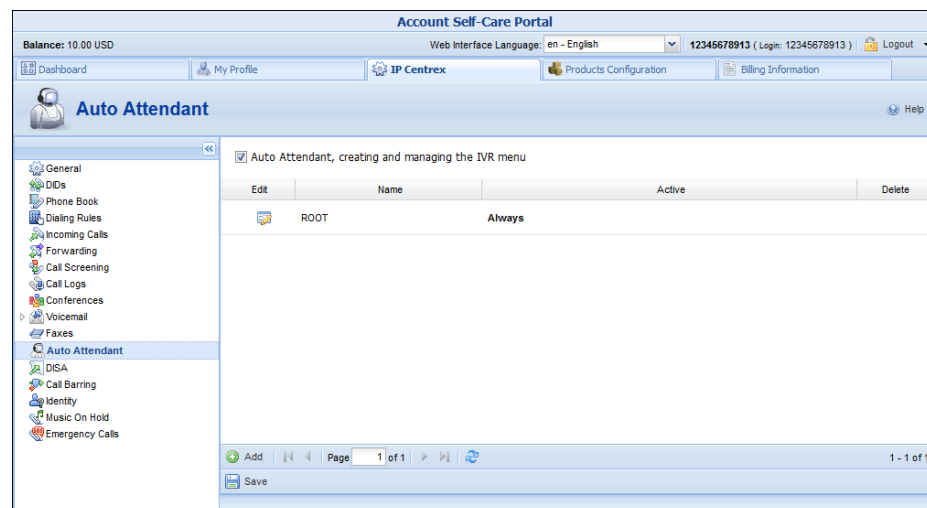
- The Media Server’s auto attendant is composed of a set of menus.




- All the menus are identical in every respect, except for the **ROOT** menu, which is always present and cannot be deleted, and whose name cannot be changed.
- When a caller dials the system, auto attendant will answer (connect) the call and proceed to the **ROOT** menu.
- If a user tries to access a menu which is not currently active, the action specified in the **Not Active** configuration parameter will be performed; for instance, the user may be automatically forwarded to an “after hours” menu.

## Add / Edit menu

The auto attendant is composed of a set of menus. The main screen lists all the menus available. You can modify one of the existing menus by clicking the  **Edit** icon or by simply double-clicking the required menu item in the list.



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

- **Name** – A descriptive name for the menu, i.e. ‘Sales’ for a sales department.
- **Active** – Time definition when the current menu is active.
  - To set the menu as always active, select the **Always** option.
  - To set the other time period, select **Only at the following time interval** and click the  **Period Wizard** icon. Please see the **How to define a time period using the wizard?** section for information about how to use the Period Wizard.



## Prompts

After you have saved a menu, you can define the **Intro** and **Menu** prompts for it.

- The **Intro** prompt (e.g. “Welcome to PortaOne, a VoIP solutions company!”) is played when a user enters a menu for the first time.
- After this, the **Menu** prompt will be played, listing all the available options (e.g. “Press 1 for sales, press 2 for technical support”), and auto attendant will collect the digits dialed by the user on his phone touchpad.
- If no input is received, the **Timeout** prompt is played as many times as specified and the dialog reverts to the previous step (i.e. plays the **Menu** prompt and collects the user’s input).



To upload a prompt, click the **Browse...** button. The native audio file format for the system is the following:







**Type:** NeXT/Sun (Java) file .au  
**Format:** G.711 u-Law  
**Attributes:** 8,000 Hz, 8-bit, Mono

**Type:** NeXT/Sun (Java) file .au  
**Format:** G.711 u-Law  
**Attributes:** 8,000 Hz, 8-bit, Mono

Here's a short list of supported audio file formats:

Type	Description
.aiff	AIFF files used on Apple IIc/IIgs and SGI
.au	SUN Microsystems AU files
.gsm	GSM 06.10 Lossy Speech Compression
.mp3	MP3 Compressed Audio
.ogg	Ogg Vorbis Compressed Audio
.raw	Raw files (no header)
.wav	Microsoft .WAV RIFF files

To record a prompt, use the following buttons:

-  – **Record**. Select to start recording your voice prompt. (You will need to connect a microphone to your computer's sound card to use this feature.)
-  – **Stop**. Select this button to stop recording.
-  – **Play**. Select to play back the recorded prompt. When selected, this icon will turn into the  – **Pause** button.
-  – **Undo**. This becomes available when the existing prompt has been recorded over, allowing a rollback to the previous state.
-  – **Blinking play**. Indicates that the existing prompt is being overwritten, but changes have not yet been saved.

Each of the icons above may appear in grayscale, meaning it cannot be accessed because some other task is active.

To give your auto attendant a professional sound, we recommend using a professional speaker and a digital recording studio when recording voice prompts.



## Actions

Edit	User Input	Action	Play Before Action	Play/Record Prompt
	1	Directory Announce Extension Numbers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	2	Menu 'ROOT'	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Field	Description
<b>Edit</b>	Click the <b>Edit</b> icon to make changes in the action.
<b>User Input</b>	<ul style="list-style-type: none"> <li>• <b>Not Active</b> – When the current menu is not active.</li> <li>• <b>0 – 9, #, *</b> – User selection on telephone keypad.</li> <li>• <b>Timeout</b> – No selection received from user.</li> <li>• <b>Fax</b> – Fax CNG tone detected.</li> </ul>
<b>Action</b>	See the description of available actions below, under the table.
	Provides additional information.
<b>Play Before Action</b>	Select this check box if the corresponding prompt is to be played before an action is performed.
<b>Play / Record Prompt</b>	File name and path for the prompt file.

The user's input will be matched with the corresponding menu items, and the action associated with this item will be performed. The following **actions** are possible:

- **Default** – Plays the **Default** prompt from the current menu and returns to the “Play Menu prompt” step (this is the action used for all menu items where the initial value has not been modified).
- **Transfer** – Transfers the call to a given telephone number or extension. The phone number should be entered in the same format as the customer would use to dial it from an IP phone in his IP Centrex environment; for example, to transfer a call to extension 123, simply enter 123.
- **Transfer to E.164 Number** – Transfers the call to a given number. The number should be specified in E.164 format: the country code, followed by the area code, and then the number (e.g. 16045551234 for Canada).



- **Dial extension directly** – Transfers the call to an extension number entered by the caller from his phone. The extension number should start with the same digit as the “Dial extension directly” option. To prevent abuse (e.g. someone attempting to enter a long-distance number in this way), you can specify the maximum allowed number of digits in an extension (**Max Size**).
- **Prompt for extension #** – You will hear the prompt to enter the extension number. You can specify the maximum allowed number of digits in an extension (**Max Size**).
- **Transfer to Voicemail** – Switches to voicemail mode. This should be designated as an action for the “Fax” event, in order to allow storage of received faxes.
- **Menu “ROOT”** – Transfers the user to the selected menu.
- **Directory** – Launches this company’s dial-by-name directory.
- **Disabled** – Cancels the action that was previously used for the current user input.

You may select whether the corresponding **Before Action** prompt is to be played prior to the action.

## Input errors

On the **Input Errors** page you can record / upload the **Timeout** and **Unavailable Selection** prompts. For detailed instructions on how to do this, please refer to the Prompts section of this document.

You may also specify how many times the auto attendant menu should be played when there is no input. The default value is 3.

The screenshot displays the 'Account Self-Care Portal' interface. At the top, it shows the user's balance (10.00 USD), language (en - English), and login information (12345678913). The main navigation bar includes links for Dashboard, My Profile, IP Centrex, Products Configuration, Billing Information, and Help. The left sidebar lists various system settings like DIDs, Phone Book, Dialing Rules, Incoming Calls, Forwarding, Call Screening, Call Logs, Conferences, Voicemail, Faxes, Auto Attendant, DISA, Call Barring, Identity, Music On Hold, and Emergency Calls. The 'Auto Attendant' section is expanded, showing sub-options for General, Prompts, Actions, and Input Errors. The 'Input Errors' tab is active, displaying two sections: 'On Timeout' and 'On Unavailable Selection'. Each section has radio buttons for 'Custom' and 'None'. The 'On Timeout' section also includes a 'Replay Menu, Times' dropdown set to 3. Both sections have a 'Please upload your prompt' text box and a 'Browse...' button. At the bottom, there are 'Save' and 'Back' buttons, and a label 'Auto Attendant'.



## DISA

The **DISA** (Direct Inward System Access) functionality allows you to make an outgoing call as if you were using your IP phone. For example, while on a business trip you need to make an international call. To do so, enable **DISA**, then dial the voicemail access number and choose the option for **DISA**, enter the password and then input the telephone number.

The screenshot shows the 'Account Self-Care Portal' interface. At the top, it displays 'Balance: 10.00 USD', 'Web Interface Language: en - English', and the user's login information '12345678913 (Login: 12345678913)' with a 'Logout' button. The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', 'Products Configuration', and 'Billing Information'. The left sidebar lists various services: General, DIDs, Phone Book, Dialing Rules, Incoming Calls, Forwarding, Call Screening, Call Logs, Conferences, Voicemail, Faxes, Auto Attendant, **DISA** (highlighted), Call Barring, Identity, Music On Hold, and Emergency Calls. The main content area is titled 'DISA' and contains a checkbox for 'Enable DISA' which is checked, and a text field for 'DISA Password' with the value '654321123'. At the bottom, there are 'Save' and 'Auto Attendant' buttons.

## Call Barring

On the **Call Barring** page you can prohibit outgoing calls to specific destinations.

Note, that this page will only be active if your provider has enabled the **Call Barring** service for you (otherwise it is grayed out). Depending on your needs, you may activate / deactivate **Call Barring** by selecting or clearing the check box on the top.

The screenshot shows the 'Account Self-Care Portal' interface for the 'Call Barring' section. The top navigation and sidebar are identical to the previous screenshot. The main content area is titled 'Call Barring' and features a checkbox for 'Call Barring, choosing destinations to block' which is checked. Below this, there is a table with columns 'Enabled' and 'Class of Phone Numbers'. The table contains two rows: '1 Premium SAR' and '2 Premium numbers', both with the 'Enabled' checkbox checked. At the bottom, there are 'Refresh' and 'Save' buttons.

	Enabled	Class of Phone Numbers
1	<input checked="" type="checkbox"/>	Premium SAR
2	<input checked="" type="checkbox"/>	Premium numbers



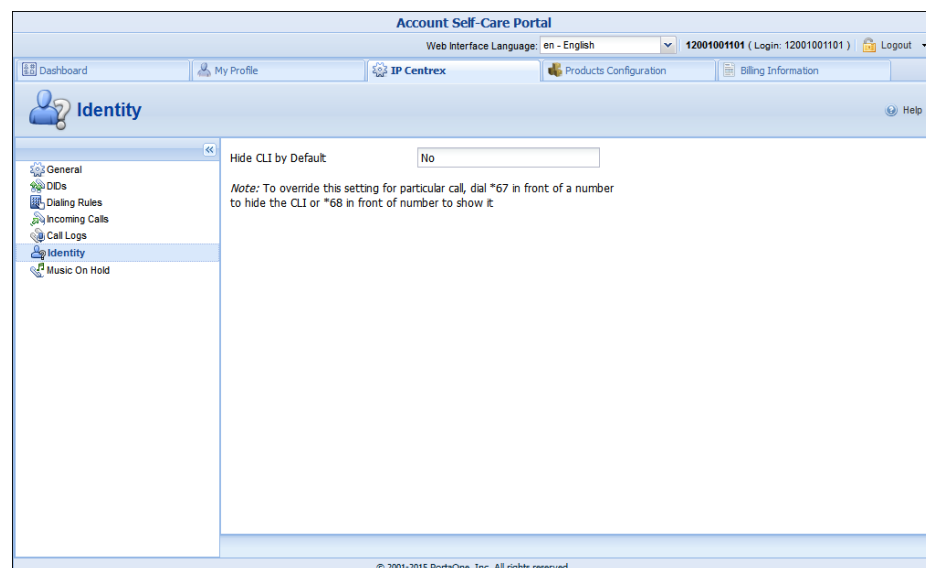
## Identity

This page displays **Hide CLI by Default** status defined by your provider. The following options are available:

- **No** – Caller ID is shown by default.
- **Yes** – Caller ID is hidden by default.


Note that when making a call, you can dial the special feature access code before dialing the phone number to override the default setting.

For more information, please see the *Service feature codes (also known as Feature Access Codes)* table in the **Dialing rules** section of this guide.

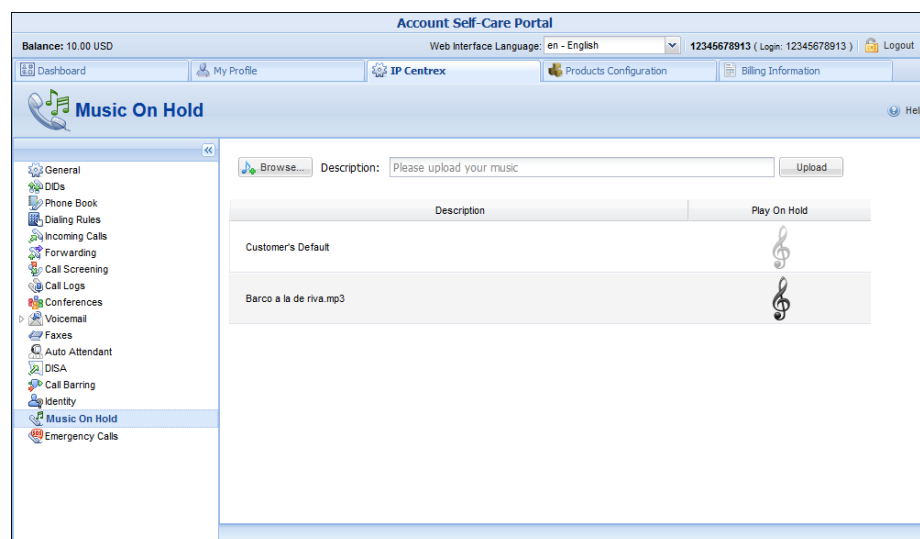


## Music on Hold

Here you can define which music will be used for calls on hold. To select music, click the **Browse** button, select an audio file and click **Upload**.

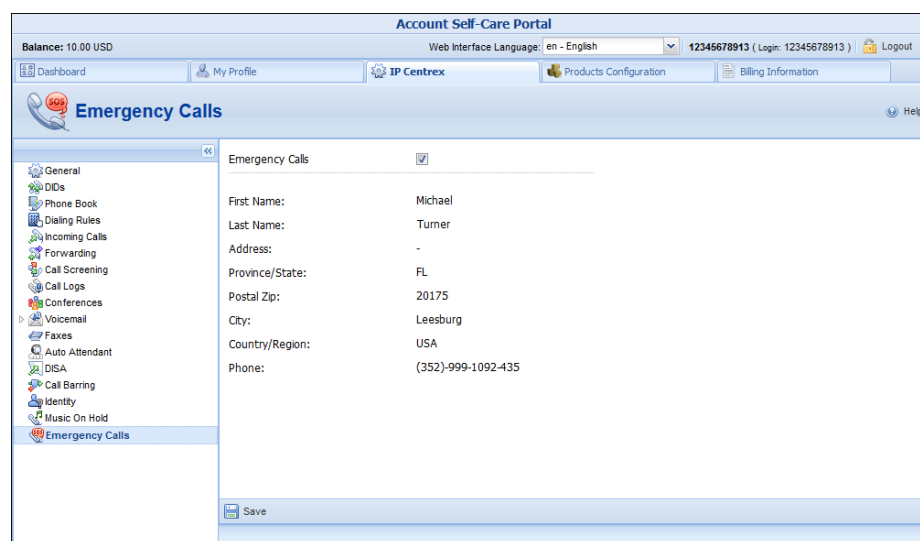
The music will be enabled within 10 minutes. Click the  treble clef to enable / disable this feature.





## Emergency Calls

This page contains the information about your location. In case of an emergency call, this information will be processed by the PSAP and the police / fire department / ambulance will receive all required information about your location.



## Products Configuration tab

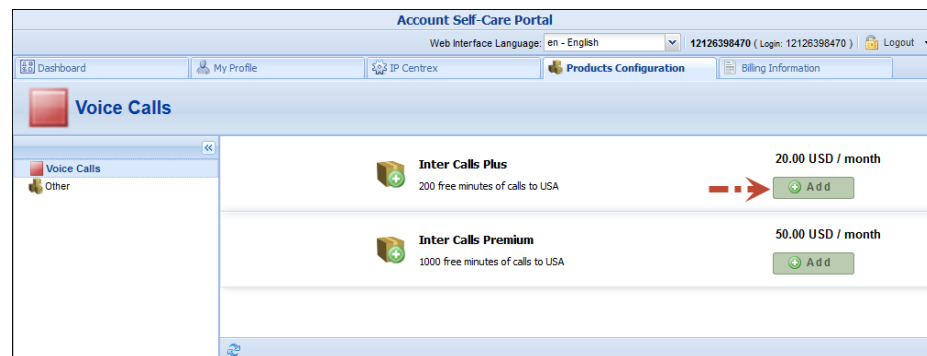
This tab contains information about all available add-on products for your account. The add-on products are organized in groups that are visible on the left-hand side of the page. The right-hand side of the page contains all of the add-ons that belong to a corresponding product group.



The add-on products that do not belong to any product groups can be found in the default group **Other**.

All available (not yet assigned to you) add-on products are at the top of the list, and already assigned products are at the bottom of it.

When you sign up for a service via an add-on product which comes with bulk discounts, a dialog box opens that lists all of the available prepay plans. Select the plan which best fits your needs.



## Billing Information tab

### Billing Summary

On this page you can view your billing information arranged in four information panels:

- Brief Billing Information
- Transactions Totals Information
- Active Subscriptions
- Product & Discounts Information



**Account Self-Care Portal**

Balance: 0.00 USD    Web Interface Language: en - English    160493145872 (Login: 160493145872)    Logout

Dashboard    My Profile    IP Centrex    Products Configuration    **Billing Information**

---

**Billing Summary**    Help

**Billing Summary**

- Billing Summary
- Subscriptions
- Transactions
- Volume Discounts
- Top-up Account
- Mobile Payment Transfer

**Brief Billing Information**

Type	Credit	
Balance	0.00 USD	<a href="#">Recharge Using Voucher</a>
Refunds	0.00 USD	
Non Call		
Related Charges	0.00 USD	

**Transactions Totals Information**

From	2014-08-10
Till	2014-11-10
Usage Charges	0.00 USD
<b>Total</b>	<b>0.00 USD</b>
Total Transactions	0

**Active Subscriptions**

Subscription	Periodic Fee	Start Date	Finish Date
There is no data to display			

**Product & Discounts Information**

Main Product: ☒ SmartCall

Add-on Products: ☒ Asia-100, ☒ USA & Canada



Destina... Group	Service	Discount name	Used/Remaining	Expiration
East Asia	Voice Calls	Asia	0 minute of	21 days
US & Canada	Voice Calls	1000 minutes to USA & Canada	0 minute of	21 days
US & Canada	Voice Calls	500 minutes to USA & Canada	0 minute of	30 days

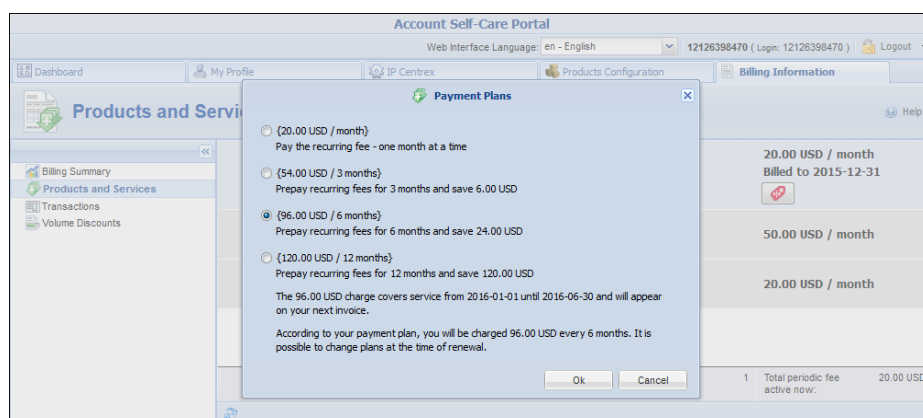
Field	Description
<b>Brief Billing Information</b>	<p>This reflects billing information such as available funds (or balance), refunds and charges information.</p> <p>You can also recharge your phone (account) using a voucher here. To do that, click the <b>Recharge Using Voucher</b> button and fill in a valid voucher number.</p> <p>Note, that balance information and the <b>Recharge Using Voucher</b> button are only displayed for phone lines which have individual balance control.</p>
<b>Transactions Totals Information</b>	This reflects your total transactions (calls, payments, refunds, subscription charges, etc.).
<b>Active Subscriptions</b>	This shows you the subscription plans that currently apply to you.
<b>Product &amp; Discounts Information</b>	This displays information about your current products (main and add-on ones) and discounts.

## Products and Services

This page presents information about subscription plans that apply to the account, subscription plans' recurring fees and "billed to" dates.



Subscriptions charged in advance that come with bulk discounts are marked with the  **Discount** icon. By clicking the  **Discount** icon you can change the selected for this subscription prepay plan. Note that changes you have made will only take effect when the current prepay plan is over.



## Transactions

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

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



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

- A date and time range by clicking the **Calendar** icon.
- A certain service type.

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


Service	Total Transactions	Charged Quantity	Charged Amount	Show Details
Subscriptions	1		0.07000 USD	
Voice Calls	3	64 (minute)	1.06667 USD	
Total Service Used:	2			
Total Transactions:	4		Total Charged Amount: 1.14 USD	

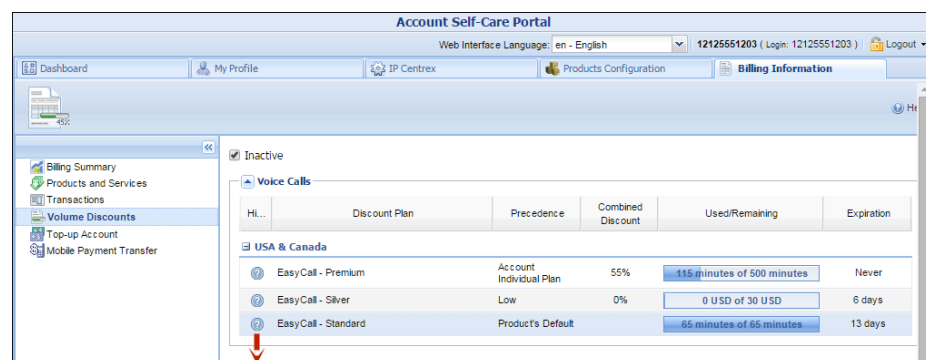
Click the **Download** icon to download Transaction Detail Records in the .csv format.



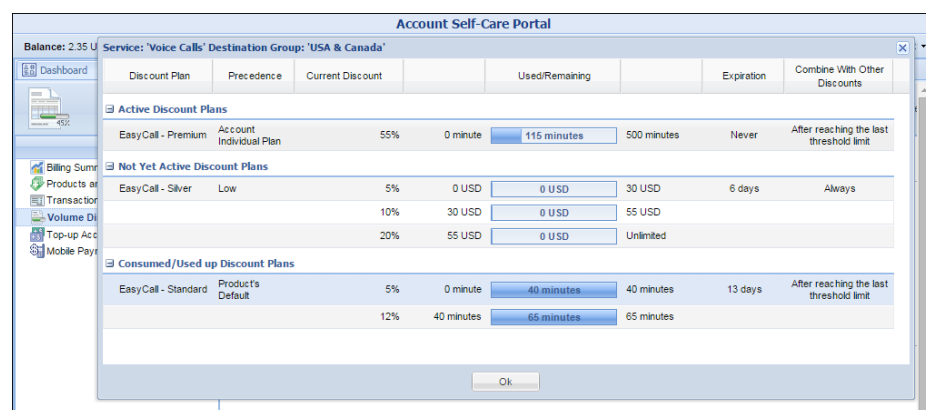
## Volume Discounts

This page displays all *active* discounts assigned to a user's account. This clearly shows which discount the end user will receive when making a call or consuming traffic, as well as what volume of services is still available with a discount. To display *inactive* volume discount plans, the **Inactive** check box must be selected.

Information about volume discounts' usage history can be obtained in the **Discount History** dialog box, which is available by clicking the  **History** button.



Hi...	Discount Plan	Precedence	Combined Discount	Used/Remaining	Expiration
<b>USA &amp; Canada</b>					
?	EasyCall - Premium	Account Individual Plan	55%	115 minutes of 500 minutes	Never
?	EasyCall - Silver	Low	0%	0 USD of 30 USD	6 days
?	EasyCall - Standard	Products Default		65 minutes of 65 minutes	13 days



Discount Plan	Precedence	Current Discount	Used/Remaining	Expiration	Combine With Other Discounts
<b>Active Discount Plans</b>					
EasyCall - Premium	Account Individual Plan	55%	0 minute / 115 minutes / 500 minutes	Never	After reaching the last threshold limit
<b>Not Yet Active Discount Plans</b>					
EasyCall - Silver	Low	5%	0 USD / 0 USD / 30 USD	6 days	Always
		10%	30 USD / 0 USD / 55 USD		
		20%	55 USD / 0 USD / Unlimited		
<b>Consumed/Used up Discount Plans</b>					
EasyCall - Standard	Products Default	5%	0 minute / 40 minutes / 40 minutes	13 days	After reaching the last threshold limit
		12%	40 minutes / 65 minutes / 65 minutes		

Field	Description
Inactive	Displays the volume discounts with <i>Consumed/Used up</i> or <i>Not Yet Active</i> status applicable to the account.
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 dialog box which shows extended information about the discount plan.



<b>Discount Plan</b>	The name of the volume discount plan applicable for this customer.
<b>Precedence</b>	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.
<b>Combined Discount</b>	Shows the total discount value currently applied to the customer that resulted in the discounts' combination.
<b>Used / Remaining</b>	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.
<b>Expiration</b>	Shows the time left for the discount to be reapplied to the account. If <b>Never</b> is defined, it means that this discount is for one-time use and will not be reapplied to the account.
<i>Discount History</i>	
<b>Status</b>	The current status of the discount plan: <ul style="list-style-type: none"><li>• <b>Active Discount Plans</b> – The discount plans that are currently in use.</li><li>• <b>Consumed</b> – The discount plans that have already been used up.</li><li>• <b>Not Yet Active</b> – Currently inactive discount plans.</li></ul>
<b>Current Discount</b>	The value of the discount currently applied to the account.
<b>Expiration</b>	The time left for the discount plan counters to be reset.
<b>Combine With Other Discounts</b>	Shows the way this discount plan is combined with other discount plans applicable to a session.

## Top-up Account

On this page you can recharge your phone (account) using a voucher. To do that, fill in a valid voucher number and click **Recharge**.

## Mobile Payment Transfer

The **Mobile Payment Transfer** page allows you to transfer funds from your phone (account) to mobile numbers all over the world.

Please consult the [How to...](#) section for more information.



## Make a Payment

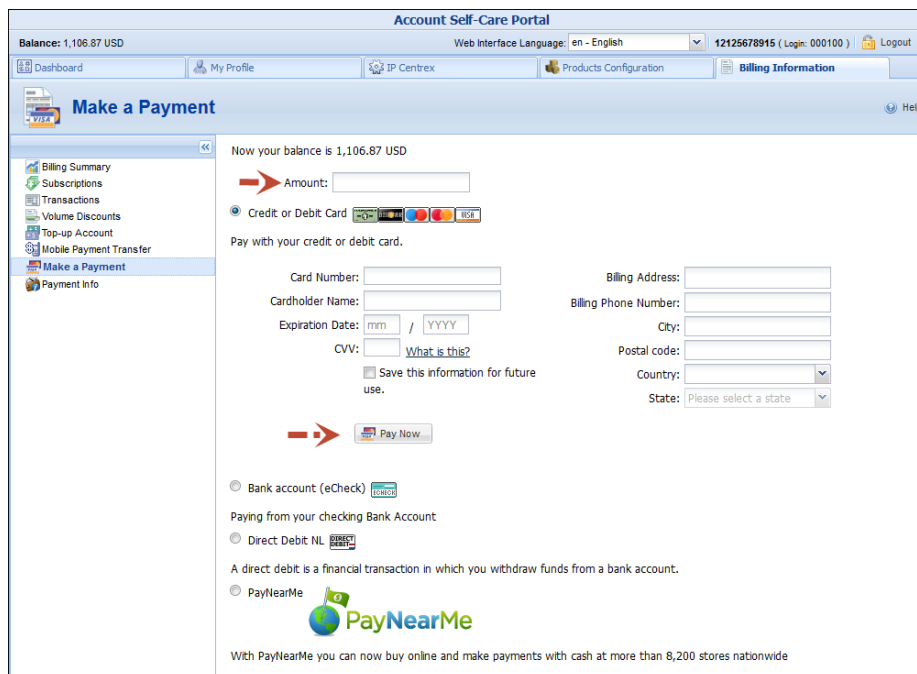
This page is available only if this functionality is enabled by your provider. On this page you can see your current balance and top it up by choosing one of the available payment methods.

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.





**Account Self-Care Portal**


Balance: 1,106.87 USD    Web Interface Language: en - English    12125678915 (Login: 000100)    Logout

Dashboard    My Profile    IP Centrex    Products Configuration    Billing Information    Help

### Make a Payment

Now your balance is 1,106.87 USD


➔ Amount:

☒ Credit or Debit Card 


Pay with your credit or debit card.

Card Number: <input type="text"/>	Billing Address: <input type="text"/>
Cardholder Name: <input type="text"/>	Billing Phone Number: <input type="text"/>
Expiration Date: <input type="text"/> / <input type="text"/>	City: <input type="text"/>
CVV: <input type="text"/> <a href="#">What is this?</a>	Postal code: <input type="text"/>
<input type="checkbox"/> Save this information for future use.	Country: <input type="text"/>
	State: <input type="text"/>


➔

☐ Bank account (eCheck) 

Paying from your checking Bank Account

☐ Direct Debit NL 

A direct debit is a financial transaction in which you withdraw funds from a bank account.

☐ PayNearMe 

With PayNearMe you can now buy online and make payments with cash at more than 8,200 stores nationwide

## 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 is available only if this functionality is enabled by your provider. This page allows you to set up the following parameters for automated periodic payments.



The screenshot shows the 'Account Self-Care Portal' with a top navigation bar including 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'Billing Information' tab is active. On the left is a sidebar menu with options like 'Billing Summary', 'Subscriptions', 'Transactions', 'Volume Discounts', 'Top-up Account', 'Mobile Payment Transfer', 'Make a Payment', and 'Payment Info'. The main content area is titled 'Payment Info' and contains a 'Preferred Payment Method' section. This section has three radio buttons: 'Credit or Debit Card' (selected), 'Bank account (eCheck)', and 'Direct Debit N/A'. The 'Credit or Debit Card' section displays payment details for an American Express card: Card Number 1234xxxxx8765, Cardholder Name John Doe, and Expiration Date 07 / 2016. To the right, the Billing Address is Suite 408, 2963 Glen Drive, Coquitlam, CANADA, British Columbia, V3B 2P7. Below the card details is an 'Edit' button. The 'Auto-Payments' section at the bottom has a 'Pay' checkbox and two input fields for the amount and threshold, both currently set to 0.00 USD. A 'Save' button is at the bottom right.

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

If you want to pay with a different credit card, enter the new card information into the **Preferred Payment Method** section. Click **Save** to save this new credit card information. PortaBilling® will ask you to make a minimum payment in order to check the credit card information. The funds will then be transferred to your balance.

The dialog box features a large blue circle with a white question mark on the left. The text on the right reads: 'In order to check your credit card information and save your changes, please make a payment of 5.00 USD or more. The funds will be transferred to your balance.' Below this, it says: 'Click 'Yes' if you want to proceed with the payment and 'No' in order to go back to Payment Info.' There is an 'Amount:' label followed by a text input field containing '5.00 USD' and '(5.00 USD minimum)' to its right. At the bottom are 'Yes' and 'No' buttons.

After successful payment processing, this new credit card information is stored. Further payments and automatic payments (if configured) will be made using this card.

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.



---

***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.



# 3. How to ...

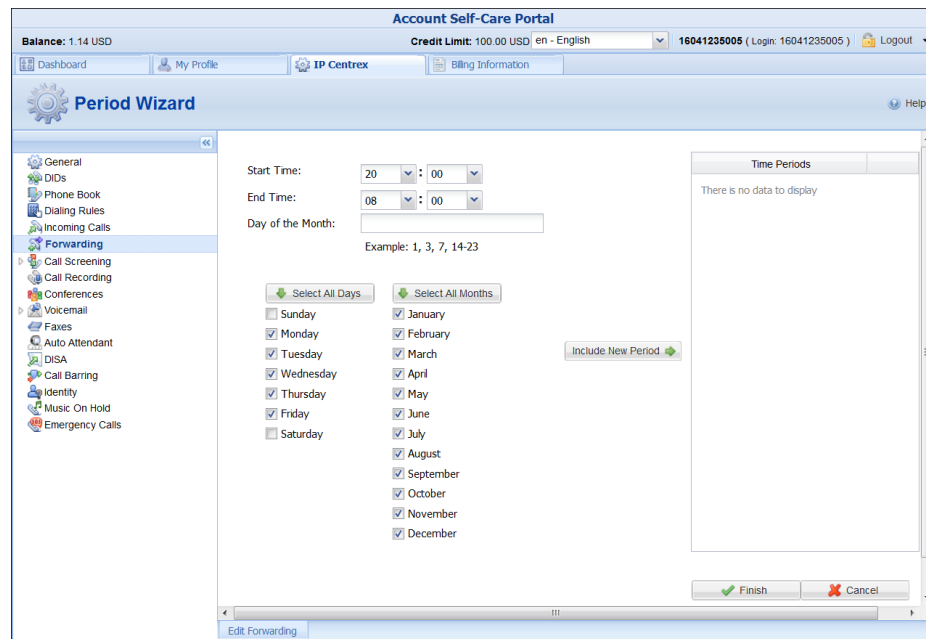


## ... define a time period using the wizard?

With the Period 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. 8 p.m. 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.

### Example 1

This example illustrates the process of creating a period within the Monday–Friday workweek that starts at 8 p.m. and lasts until 8 a.m. the next morning:



The screenshot shows the 'Account Self-Care Portal' with the 'Period Wizard' page active. The left sidebar lists various services, with 'Forwarding' selected. The main area contains fields for 'Start Time' (20:00) and 'End Time' (08:00). Below these are checkboxes for days of the week (Monday through Friday are checked) and months (all months are checked). A 'Time Periods' table on the right is empty, showing 'There is no data to display'. At the bottom, there are 'Finish' and 'Cancel' buttons.

1. Open the **Period Wizard** page.
2. In the **Start Time** box, select **20:00**.
3. In the **End Time** box, select **08:00**.
4. In the block containing days of the week, select **Monday, Tuesday, Wednesday, Thursday, Friday** check boxes.
5. In the block containing months, click the **Select All Months** button.



**Account Self-Care Portal**

Balance: 1.14 USD | Credit Limit: 100.00 USD | en - English | 16041235005 (Login: 16041235005) | Logout

Dashboard | My Profile | IP Centrex | Billing Information

**Period Wizard**

General | DIDs | Phone Book | Dialing Rules | Incoming Calls | **Forwarding** | Call Screening | Call Recording | Conferences | Voicemail | Faxes | Auto Attendant | DISA | Call Barring | Identity | Music On Hold | Emergency Calls

Start Time: 20 : 00  
End Time: 08 : 00  
Day of the Month:   
Example: 1, 3, 7, 14-23

Select All Days | Select All Months

☐ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday

☒ January ☒ February ☒ March ☒ April ☒ May ☒ June ☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

Include New Period

Time Periods

From 20:00 Till 08:00, on Monday-Friday, of January-December

Finish Cancel

Edit Forwarding

6. Click the **Include New Period** button, and this time period will appear in the **Time Periods** panel on the right side of the page.

**Account Self-Care Portal**

Balance: 0.00 USD | Web Interface Language: en - English | 160404373452 (Login: 160404373452) | Logout

Dashboard | My Profile | IP Centrex | Billing Information

**General**

General | External Numbers | Incoming Calls | Forwarding | Call Screening | Call Recording | Voicemail | Call Barring | Favorite Numbers | Identity | Music On Hold | Emergency Calls

Start Time: 20 : 00  
End Time: 08 : 00  
Day of the Month:   
Example: 1, 3, 7, 14-23

Select All Days | Select All Months

☐ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday

☒ January ☒ February ☒ March ☒ April ☒ May ☒ June ☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

Include New Period

Time Periods

From 20:00 Till 08:00, on Monday-Friday, of January-December

Finish Cancel

Edit Forwarding

7. Click **Finish** to complete the time period definition.

## Example 2

This example shows how to create a period that starts at 6 p.m. every day and lasts until 6 a.m. the next morning. Another interval is used for



weekends (24 hours). We will also include major holidays, e.g. January 1 and December 24–26.

1. Open the **Period Wizard** page.
2. To create a period that starts at 6 p.m. every day and lasts until 6 a.m. the next morning, follow these steps:
  - a. In the **Start Time** box, select **18:00**.
  - b. In the **End Time** box, select **06:00**.
  - c. In the block containing days of the week, click **Select All Days** button.
  - d. In the block containing months, click the **Select All Months** button.
  - e. Click the **Include New Period** button, and this time period will appear in the **Time Periods** panel on the right side of the page.
3. To include weekend periods, follow these steps:
  - a. In the **Start Time** box, select **00:00**.
  - b. In the **End Time** box, select **23:59**.
  - c. In the block containing days of the week, select the **Saturday** and **Sunday** check boxes.
  - d. In the block containing months, click the **Select All Months** button.
  - e. Click the **Include New Period** button.
4. To include January 1st in the period definition, follow these steps:
  - a. In the **Start Time** box, select **00:00**.



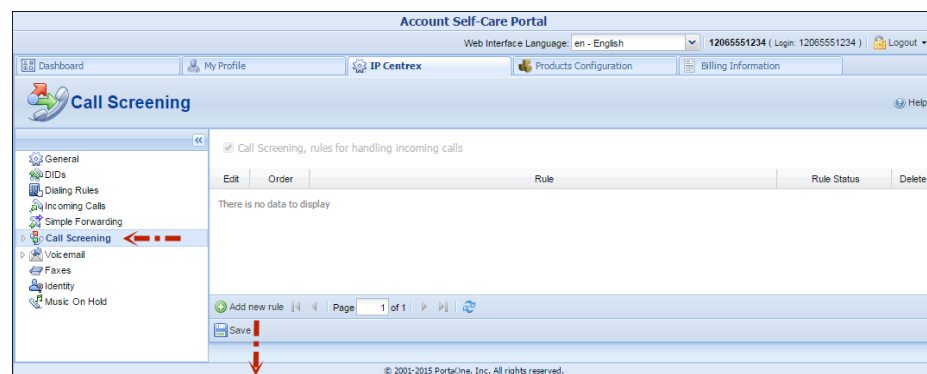
- b. In the **End Time** box, select **23:59**.
  - c. In the **Day of the Month** field, type “1”.
  - d. In the block containing months, select the **January** check box.
  - e. Click the **Include New Period** button.
5. To include December 24–26 in the period definition, follow these steps:
  - a. In the **Start Time** box, select **00:00**.
  - b. In the **End Time** box, select **23:59**.
  - c. In the **Day of the Month** field, type “24-26”.
  - d. In the block containing months, select the **December** check box.
  - e. Click the **Include New Period** button.
6. Click **Finish** to complete the time period definition.

## ... configure call screening?

On the **Call Screening** page you can define and view a list of rules for handling incoming calls.

The following example will teach us how to reject calls from unwanted numbers. To do this, a new rule will need to be created.

Click the **Add new rule** button to start.



Three sections will appear; there you can create filters for time, callers, callees and assign a particular action.



Account Self-Care Portal

Web Interface Language: en - English | 12065551234 ( Login: 12065551234 ) Logout

Dashboard | My Profile | IP Centrex | Products Configuration | Billing Information

### Edit Call Screening Rule

Help

**General**

- General
- DIDs
- Dialing Rules
- Incoming Calls
- Simple Forwarding
- Call Screening**
- Voicemail
- Faxes
- Identity
- Music On Hold

**Time Filter and Action**

Enable Rule: ☒

Action: Ring, Forward, Voicemail

Time Filter: Create New Time Filter

Time Filter Name: Name

**Caller's Number Filter**

Caller's Number Filter Group: Create Callers Number Group

Filter Group Name: New Filter Group Name

Number: Enter the Number Add

Number List:

**Incoming Number Filter**

Incoming Number Filter Group: Create Incoming Number Filter G


Filter Group Name: New Filter Group Name

Number: Enter the Number Add

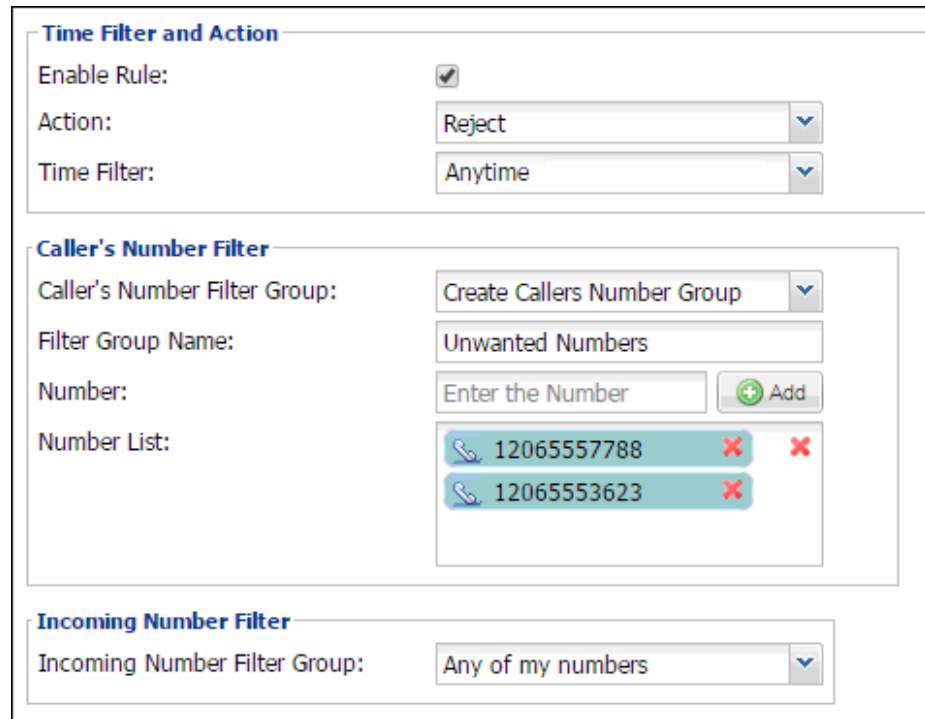
Number List:

Save Back

© 2001-2015 PortaOne, Inc. All rights reserved.

1. Choose the **Action** that will be applied to the rule. In this case it is **Reject**.
2. From the Time Filter field, select. **Anytime** (It is not necessary to create a new time filter since we want to reject calls from unwanted callers 24/7). If you want to define a different time period, select **Create New Time Filter** and click the  **Period Wizard** icon. Please see the [How to define a time period using the wizard?](#) section for information about how to use the Period Wizard.





The screenshot displays a web interface for configuring call filters. It is divided into three main sections:

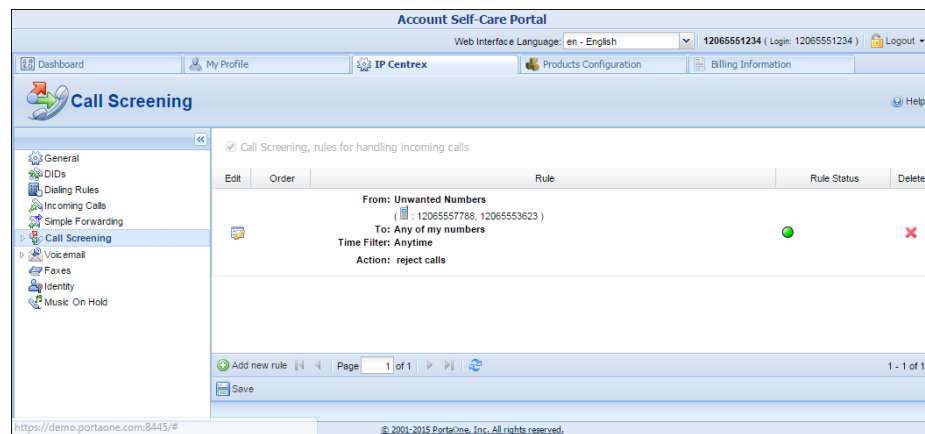
- Time Filter and Action:** Contains a checked 'Enable Rule' checkbox, an 'Action' dropdown menu set to 'Reject', and a 'Time Filter' dropdown menu set to 'Anytime'.
- Caller's Number Filter:** Includes a 'Caller's Number Filter Group' dropdown set to 'Create Callers Number Group', a 'Filter Group Name' text field containing 'Unwanted Numbers', a 'Number' text field with the placeholder 'Enter the Number' and an 'Add' button, and a 'Number List' containing two entries: '12065557788' and '12065553623', each with a delete icon.
- Incoming Number Filter:** Features an 'Incoming Number Filter Group' dropdown set to 'Any of my numbers'.

3. Since you want to reject calls from certain numbers, you need to create a **Caller's Number Filter** group. To do this, fill in the **Filter Group Name** field. In this case the group's name is **Unwanted Numbers**. To add a number to the group, enter the phone number and click the **Add** button. Repeat this step for each new number you wish to add to the group.

**NOTE:** If you need to add a group of numbers starting with the same prefix, use the % character at the end to specify that the current string is the prefix.

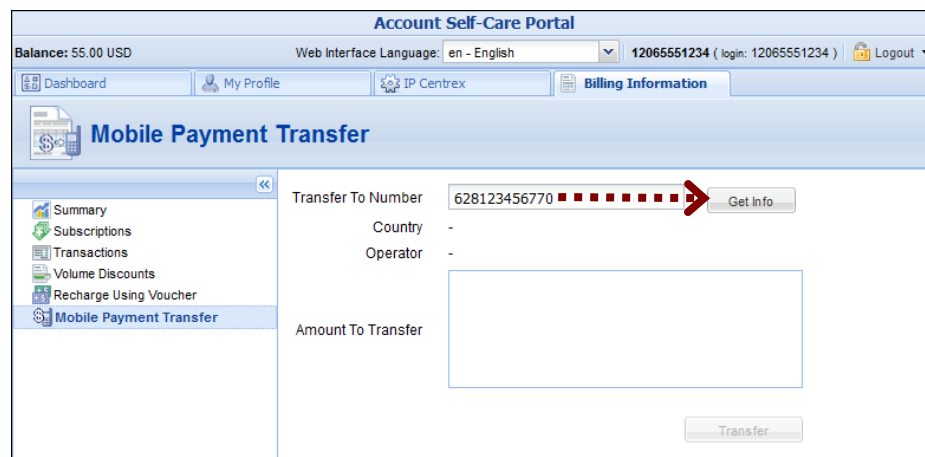
4. You might have aliases or an extension assigned to your account. The **Incoming Number Filter** section helps adjust the settings for them. In this case we want to apply the above rule to all numbers, so select the **Any of my numbers** option.
5. Click the **Save** button. After this you can see the conditions of the rule and its working status.





## ... transfer funds to mobile numbers?

Input the desired number to the **Transfer To Number** field. Note that the number must be entered using the international mobile dialing format (+ followed by the country code and then the rest of the number). For example, +12065551234 for a US number or +44712345678 for a mobile number in the UK. Then click the **Get Info** button to see how much you can transfer to the specified mobile number and how much you will be charged for this.



In the **Amount To Transfer** list, choose the desired amount to transfer and click the **Transfer** button.



**Account Self-Care Portal**

Balance: 55.00 USD      Web Interface Language: en - English      12065551234 ( login: 12065551234 )      Logout

Dashboard    My Profile    IP Centrex    **Billing Information**

### Mobile Payment Transfer

[Summary](#)  
[Subscriptions](#)  
[Transactions](#)  
[Volume Discounts](#)  
[Recharge Using Voucher](#)  
**[Mobile Payment Transfer](#)**


Transfer To Number: 628123456770 [Get Info](#)

Country: Indonesia

Operator: Telkomsel - Indonesia

USD	IDR
5.00000	50000
10.00000	100000

Amount To Transfer



[Transfer](#)

**NOTE:** Funds may not become immediately available to the end user although a message appears saying that the operation was successful immediately after clicking the **Transfer** button. There may be a delay of up to 10 minutes.