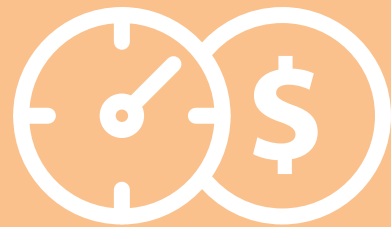




PortaBilling



Customer
Self-care
Interface

Maintenance
Release

49



Documentation

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PortaSwitch® customer self-care interface, August 2015

Please address your comments and suggestions to: Sales Department,
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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 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.

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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

Log in to the Customer Self-care Interface

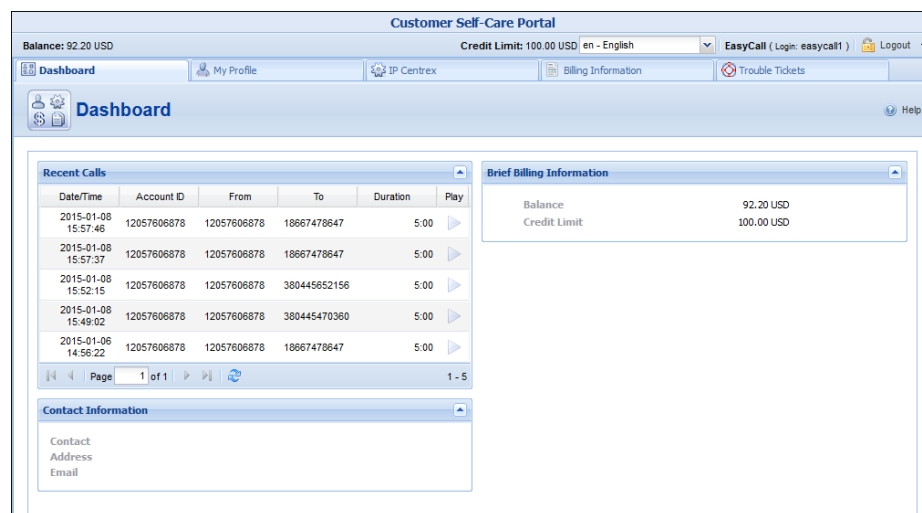
Your ITSP will provide you with a URL and credentials for logging in to the customer self-care interface upon subscribing to their services.

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**
- **Trouble Tickets**




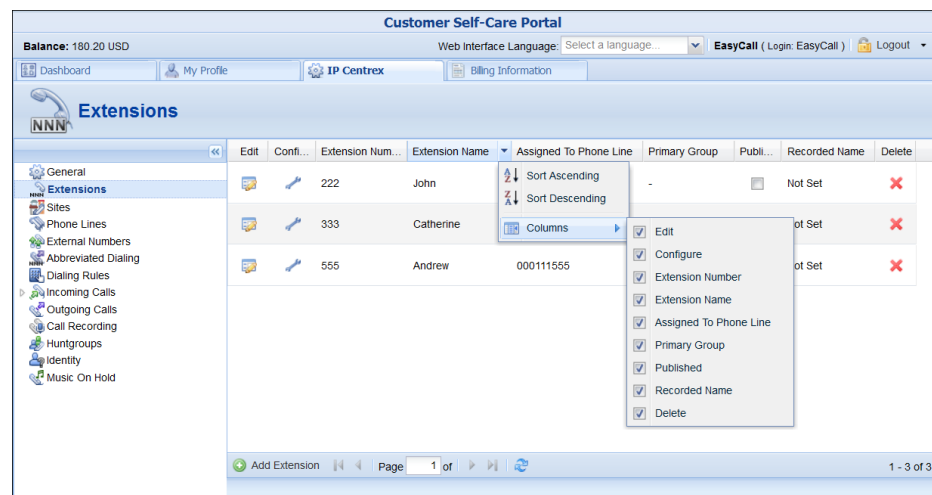
The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays 'Balance: 92.20 USD' and 'Credit Limit: 100.00 USD'. Below this is a navigation bar with tabs for 'Dashboard', 'My Profile', 'IP Centrex', 'Billing Information', and 'Trouble Tickets'. The 'Dashboard' tab is active, showing a 'Recent Calls' table and a 'Brief Billing Information' box. The 'Recent Calls' table has columns for Date/Time, Account ID, From, To, Duration, and Play. The 'Brief Billing Information' box shows 'Balance: 92.20 USD' and 'Credit Limit: 100.00 USD'. Below the table is a 'Contact Information' section with fields for Contact, Address, and Email.

Date/Time	Account ID	From	To	Duration	Play
2015-01-08 15:57:46	12057606878	12057606878	18667478647	5:00	
2015-01-08 15:57:37	12057606878	12057606878	18667478647	5:00	
2015-01-08 15:52:15	12057606878	12057606878	380445652156	5:00	
2015-01-08 15:49:02	12057606878	12057606878	380445470360	5:00	
2015-01-08 14:58:22	12057606878	12057606878	18667478647	5:00	

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

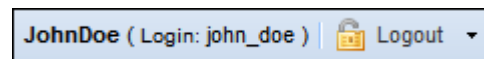
Common Features

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 drop-down menu will appear. You can choose how to sort your data and add or remove columns by selecting and clearing corresponding check box in the drop-down menu:

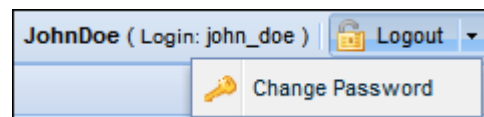


Action Buttons


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 self-care 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** tab:

Customer Self-Care Portal

Balance: 92.20 USD Credit Limit: 100.00 USD en - English EasyCall (Login: easycall1) Logout

Dashboard My Profile IP Centrex Billing Information Trouble Tickets Help

Recent Calls

Date/Time	Account ID	From	To	Duration	Play
2015-01-08 15:57:48	12057606878	12057606878	18667478647	5:00	▶
2015-01-08 15:57:37	12057606878	12057606878	18667478647	5:00	▶
2015-01-08 15:52:15	12057606878	12057606878	380445652156	5:00	▶
2015-01-08 15:49:02	12057606878	12057606878	380445470360	5:00	▶
2015-01-06 14:56:22	12057606878	12057606878	18667478647	5:00	▶

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Brief Billing Information

Balance	92.20 USD
Credit Limit	100.00 USD

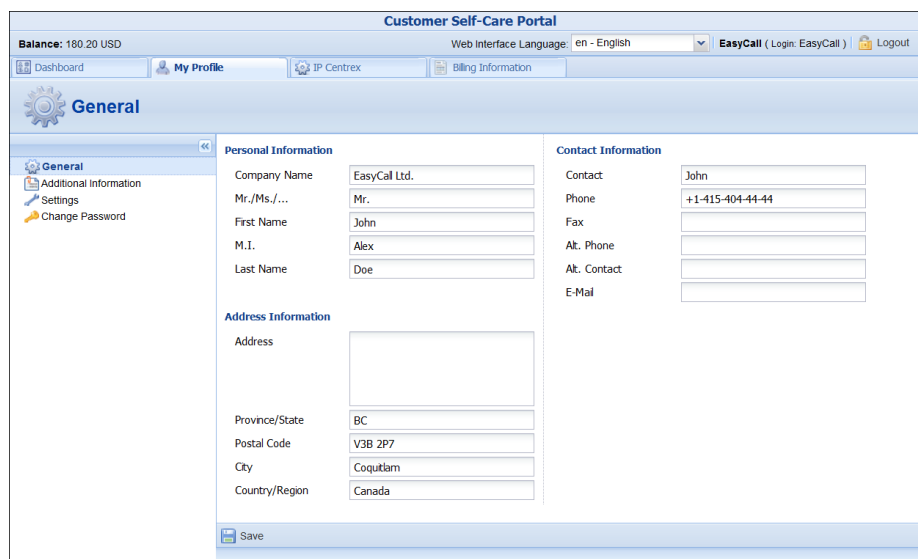
Contact Information

Contact
Address
Email

Panel	Description
Recent Calls	This table lists the most recent calls and call details generated by your phone lines (account IDs on the web interface).
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.

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.



The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays the balance as '180.20 USD' and the language as 'en - English'. The user is logged in as 'EasyCall (Login: EasyCall)' with a 'Logout' button. The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'General' tab is selected, showing a sidebar with 'General', 'Additional Information', 'Settings', and 'Change Password'. The main content area is divided into three sections: 'Personal Information' (Company Name: EasyCall Ltd., Mr./Ms./...: Mr., First Name: John, M.I.: Alex, Last Name: Doe), 'Address Information' (Address: [empty], Province/State: BC, Postal Code: V3B 2P7, City: Coquitlam, Country/Region: Canada), and 'Contact Information' (Contact: John, Phone: +1-415-404-44-44, Fax: [empty], Alt. Phone: [empty], Alt. Contact: [empty], E-Mail: [empty]). A 'Save' button is at the bottom.

Group	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 interface.
Change Password	Here you can change your current password for the self-care interface.



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

The screenshot shows the 'General' settings page in the Customer Self-Care Portal. The page title is 'Customer Self-Care Portal'. At the top, it shows 'Available Funds: 10.00 USD', 'Web Interface Language: en - English', and 'EasyCall (Login: easycallco) Logout'. The sidebar on the left lists various settings categories: General, Extensions, Sites, Phone Lines, DIDs, Abbreviated Dialing, Dialing Rules, Incoming Calls, Outgoing Calls, Call Logs, Huntgroups, Call Queue, Identity, and Music On Hold. The 'General' category is selected. The main content area shows three settings: 'Paging/Intercom' with a checked checkbox, 'Paging/Intercom Prefix' with a text input field containing '123456', and 'Extension Number Length' with a text input field containing '3'. A 'Save' button is located at the bottom of the settings area.

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	This sets the maximum speed dial length (also known as “abbreviated number length”). Please see the Abbreviated dialing section of this guide.

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 interface.

Extension N...	Extension Name	Assigned To Phon...	Primary Group	Publi...	Recorded Name	Del...
222	John	000111666	-	<input checked="" type="checkbox"/>	Not Set	✖
333	Catherine	000111777	-	<input type="checkbox"/>	Not Set	✖
555	Andrew	000111555	-	<input type="checkbox"/>	Not Set	✖

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

- **Extension Number** – Type the number the end user will dial on his phone (an extension number should contain only digits).
- **Extension Name** – Type 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 interface).
- **Assigned To Phone Line** – This is the phone number that the extension is associated with. Here you should specify one of your phone lines by selecting it from the list. (Note that each phone line from the list can only be used once).
- **Primary Group** – Select the hunt group 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 telemarketers 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.



Customer Self-Care Portal

Balance: 190.20 USD

Web Interface Language: en - English

EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Extensions

General	Edit	Conf...	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Publis...	Recorded Name	Delete
			444	Andrew	000111555	This extension is not as...	<input checked="" type="checkbox"/>	Please Browse...	
			222	John	000111666	-	<input checked="" type="checkbox"/>	Not Set	✖
			333	Catherine	000111777	-	<input type="checkbox"/>	Not Set	✖

Add Extension Page 1 of 2

Customer Self-Care Portal

Balance: 190.20 USD

Web Interface Language: en - English

EasyCall (Login: EasyCall) Logout


Dashboard My Profile IP Centrex Billing Information

Extensions


General	Edit	Conf...	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Publis...	Recorded Name	Delete
			222	John	000111666	-	<input checked="" type="checkbox"/>	Not Set	✖
			333	Catherine	000111777	-	<input type="checkbox"/>	Not Set	✖
			444	Andrew	000111555	-	<input checked="" type="checkbox"/>	Not Set	✖


Add Extension Page 1 of 3

Once all the information is entered, click the **Save** button.

You can change the extension name and manage phone line assignments by double-clicking on that extension number or on the  **Edit** icon.

To remove the extension from the list, click  **Delete**.

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, click  **Configure** next to the extension number. You will see the **Edit Extensions** page (note that some details are read-only).

Edit Extension: 512 (Diana)

Dashboard My Profile IP Centrex Billing Information

Dashboard

AccountID: 125689005500 Online Extension #: 512 (Diana)

Contact Information

Contact: Diana Edison
Address:
Email:

Brief Billing Information

	Debit
Type	
Balance	9.98 USD
Refunds	0.00 USD
Non Call Related Charges	0.00 USD

Recent Calls

Date/Time	From	To	Duration	Cost, USD	Play
2011-09-21 11:55:53	125689005500	160404373456	0:28	0.05	

Page 1 1 - 1 of 1

Product & Discounts Information

Product: EasyCall

Destination	Service	Peak Level	Threshold	Used	Current Disc	Next Discou
sa.JNB	Voice Calls	N/A	200 USD	0 USD	100% (for free)	0% (normal rate)

Member of Huntgroups Information

Group Name
1 New Department

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.

Customer Self-Care Portal

Balance: 190.20 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Sites

Default Site

Site Name: Default Site

Limit Simultaneous Calls: Yes

Max Number of Simultaneous Calls: 4

Max Number of Incoming Calls:

Max Number of Outgoing Calls:

Max Number of Forwarded Calls:

Codec Connectivity Profile: Unknown

Max Bandwidth:

Max Incoming Bandwidth:

Max Outgoing Bandwidth:

Location Information: Disabled

Current Location:

Allowed Mobility:

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 <i>iso_3166_1_a2</i> format, e.g. <i>fr</i> for France, <i>de</i> for Germany etc.)




Allowed Mobility	<ul style="list-style-type: none"> • 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.

Configure	ID	Idle, days	Available Funds, USD	Type	Product	Batch	Site	Forwarding Enabled	SIP	IP Phone Model
	16041235003	0	Unlimited	Credit	SIP Subscribers		Default Site			Linksys/SP...
	16041235004	0	100.00	Credit	SIP Subscribers		Default Site			Linksys/SP...
	16041235005	99.93	Credit	SIP Subscribers			Default Site			
	17781225000	99.93	Credit	SIP Subscribers			Default Site			
	19070712231	99.93	Credit	SIP Subscribers	1111		Default Site			
	42727269710	99.93	Credit	SIP Subscribers	1111		Default Site			
	60718744698	99.93	Credit	SIP Subscribers	1111		Default Site			
	60985666273	99.93	Credit	SIP Subscribers	1111		Default Site			

Column	Description
Configure	Click Configure to edit the settings for a particular phone line.
ID	The primary identification for this phone line (i.e. account ID).
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 usually associated with postpaid services.
Product	The product assigned to a particular phone line.

Batch	Accounts can be grouped into batches. Each batch has its own descriptive 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  Yes icon is shown. The field with an  No icon indicates that forwarding is disabled.
SIP	When the phone line is used by a phone to register with the SIP server, the  Online 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 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. On the **IP Centrex** tab, select **Forwarding**.
2. Click  **Add New Number**.

Edit Phone Line: 000999123

Dashboard My Profile IP Centrex Billing Information

Edit Forwarding

- General
- External Numbers
- Dialing Rules
- Incoming Calls
- Forwarding**
- Call Screening
- Call Recording
- Voicemail
- Faxes
- Auto Attendant
- DISA
- Call Barring
- Identity
- Music On Hold
- Emergency Calls

Enable Rule ☒

Description Forwarding to a cell phone

Number 35644890579

Hide Advanced Settings

Calling Party Display Caller Number and Name


Ring for 15

Ring Schedule: ☒ Always ☐ Only at the following time interval

Save Back

Edit Forwarding

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.
 - **Always** – Calls will always be forwarded to your cell phone.
 - **Only at the following time interval** – If you want to forward calls to a cell phone only during a specific time period. Click the  icon to define that interval. Please consult the *How* section for more information.

4. Click the **Save** 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 these steps:

1. On the **IP Centrex** tab, choose select **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 in the **Follow-Me Forwarding Mode** chapter.

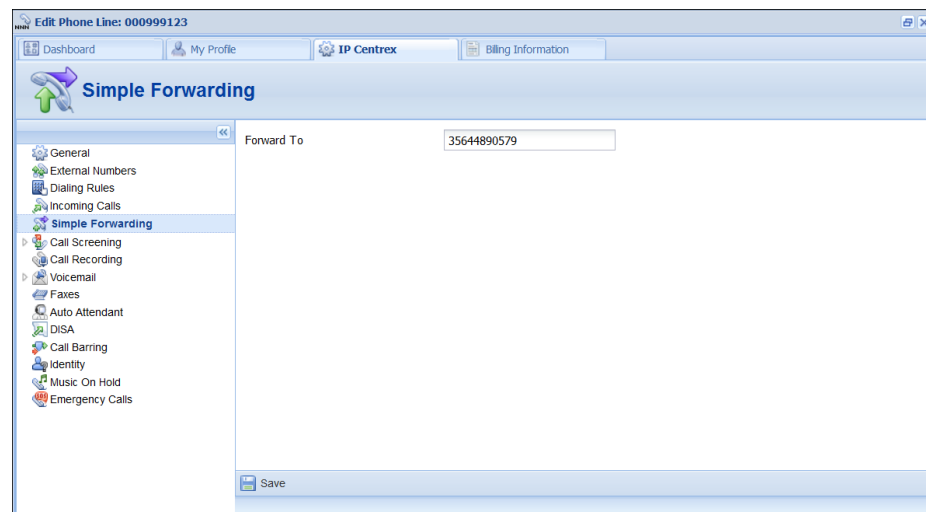
Additional fields that are not available when adding a follow-me number:

- **SIP Proxy** – Select SIP proxy from the list.
- **Keep Original CLD** – Select this check box 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.


4. Click  **Save**.

Simple Forwarding

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




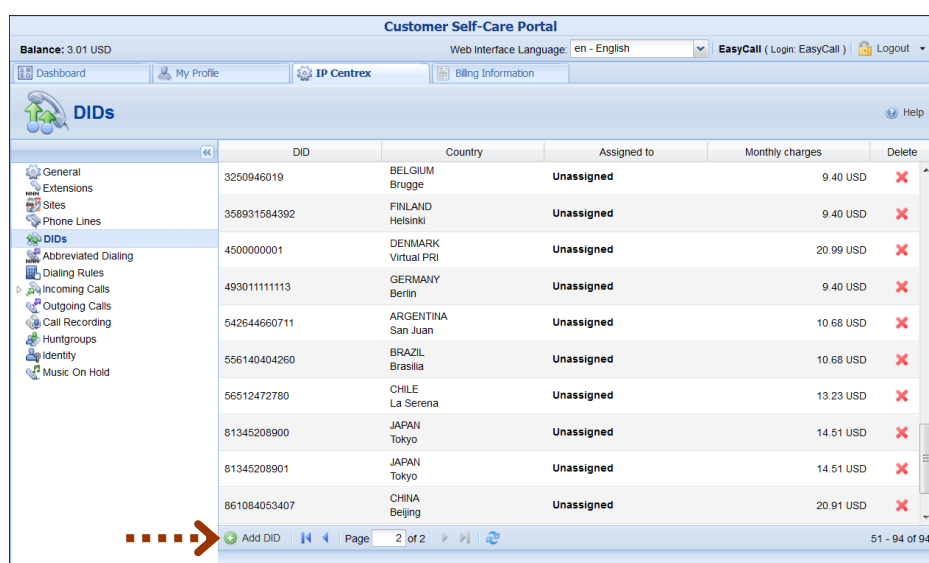
1. On the **IP Centrex** tab, select **Simple Forwarding**.
2. Enter the following information:
 - **Forward To** – The number you wish the calls to be forwarded to.

- Click the  Save.

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:














Customer Self-Care Portal

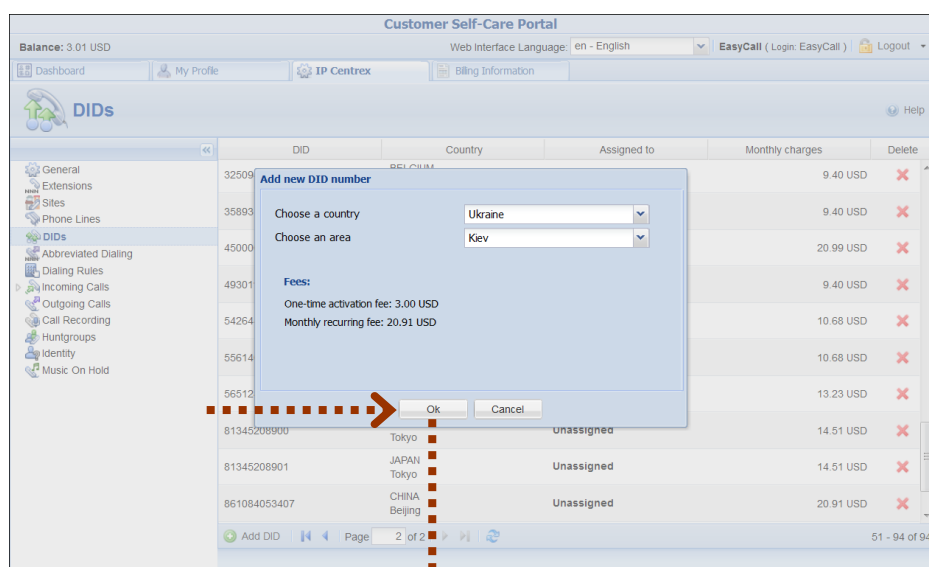
Balance: 3.01 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

DIDs

DID	Country	Assigned to	Monthly charges	Delete
3250946019	BELGIUM Brugge	Unassigned	9.40 USD	
358931584392	FINLAND Helsinki	Unassigned	9.40 USD	
4500000001	DENMARK Virtual PRI	Unassigned	20.99 USD	
493011111113	GERMANY Berlin	Unassigned	9.40 USD	
542644660711	ARGENTINA San Juan	Unassigned	10.68 USD	
556140404260	BRAZIL Brasilia	Unassigned	10.68 USD	
56512472780	CHILE La Serena	Unassigned	13.23 USD	
81345208900	JAPAN Tokyo	Unassigned	14.51 USD	
81345208901	JAPAN Tokyo	Unassigned	14.51 USD	
861084053407	CHINA Beijing	Unassigned	20.91 USD	

 Add DID Page: 2 of 2 51 - 94 of 94














Customer Self-Care Portal

Balance: 3.01 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

DIDs

DID	Country	Assigned to	Monthly charges	Delete
3250946019	BELGIUM	Unassigned	9.40 USD	
358931584392	FINLAND	Unassigned	9.40 USD	
4500000001	DENMARK	Unassigned	20.99 USD	
493011111113	GERMANY	Unassigned	9.40 USD	
542644660711	ARGENTINA	Unassigned	10.68 USD	
556140404260	BRAZIL	Unassigned	10.68 USD	
56512472780	CHILE	Unassigned	13.23 USD	
81345208900	Tokyo	Unassigned	14.51 USD	
81345208901	JAPAN Tokyo	Unassigned	14.51 USD	
861084053407	CHINA Beijing	Unassigned	20.91 USD	

 Add DID Page: 2 of 2 51 - 94 of 94

Add new DID number

Choose a country:

Choose an area:

Fees:

One-time activation fee: 3.00 USD

Monthly recurring fee: 20.91 USD

Customer Self-Care Portal

Balance: 3.01 USD

Web Interface Language: en - English

EasyCall (Login: EasyCall)


Logout

Dashboard











My Profile


IP Centrex

Billing Information


 DIDs

Help

	DID	Country	Assigned to	Monthly charges	Delete
General	3250946019	BELGIUM Brugge	Unassigned	9.40 USD	
Extensions	358931584392	FINLAND Helsinki	Unassigned	9.40 USD	
Sites	380442217221	UKRAINE Kiev	Unassigned	20.91 USD	
Phone Lines	4500000001	DENMARK Virtual PRI	Unassigned	66.96 USD	
DIDs	493011111113	GERMANY Berlin	Unassigned	9.40 USD	
Abbreviated Dialing	542644660711	ARGENTINA San Juan	Unassigned	10.68 USD	
Dialing Rules	556140404260	BRAZIL Brasilia	Unassigned	10.68 USD	
Incoming Calls	56512472780	CHILE La Serena	Unassigned	13.23 USD	
Outgoing Calls	81345208900	JAPAN Tokyo	Unassigned	14.51 USD	
Call Recording	81345208901	JAPAN Tokyo	Unassigned	14.51 USD	
Huntgroups					
Identity					
Music On Hold					

 Add DID

Page 2 of 2



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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 (also known as Speed Dial)

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.

Customer Self-Care Portal

Balance: 69.41 USD

Credit Limit: 1,000.00 USD

en - English

Easy Call Ltd. (Login: easycalltd)

Logout


Dashboard

My Profile

IP Centrex

Billing Information

Trouble Tickets

Abbreviated Dialing

Help

General

Extensions

Sites

Phone Lines

DIDs

Abbreviated Dialing

Dialing Rules

Incoming Calls

Outgoing Calls

Call Logs





Huntgroups

Call Queues

Music On Hold

Abbreviated Number Length

3


Edit	Abbreviated #	# To Dial	Description	Delete
	188	12177700088	Amanda's office Lynksys	
	189	12177700089	Andrew's IP Phone	

Add

Page 1 of 1

1 - 2 of 2

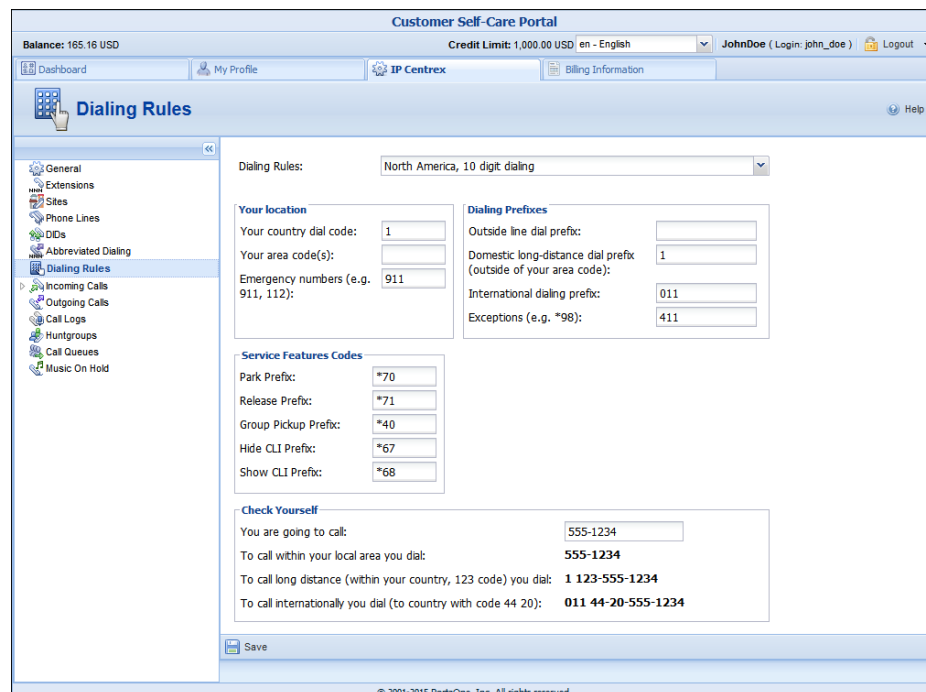
Save

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.
# 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.



The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays the user's balance (165.16 USD), credit limit (1,000.00 USD), and language (en - English). The user is logged in as JohnDoe. The navigation menu includes Dashboard, My Profile, IP Centrex, and Billing Information. The 'Dialing Rules' tab is selected, showing a sidebar with various system settings like General, Extensions, Sites, Phone Lines, DIDs, Abbreviated Dialing, Incoming Calls, Outgoing Calls, Call Logs, Huntgroups, Call Queues, and Music On Hold.

The main content area for 'Dialing Rules' is titled 'North America, 10 digit dialing'. It contains several sections:


- Your location:**
 - Your country dial code: 1
 - Your area code(s):
 - Emergency numbers (e.g. 911, 112): 911
- Dialing Prefixes:**
 - Outside line dial prefix:
 - Domestic long-distance dial prefix (outside of your area code): 1
 - International dialing prefix: 011
 - Exceptions (e.g. *98): 411
- 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: 1 123-555-1234
 - 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.

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
Park Prefix	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.
Release Prefix	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.
Group Pickup Prefix	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.
Hide CLI Prefix	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 Hide CLI is enabled for the account.
Show CLI Prefix	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 Hide CLI is enabled for the account.

Incoming Calls

Here you can set the parameters for incoming calls.

The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays the user's balance (165.16 USD), credit limit (1,000.00 USD), language (en - English), and user name (JohnDoe). Below this is a navigation bar with links to Dashboard, My Profile, IP Centrex, and Billing Information. The main content area is titled 'Incoming Calls' and features a sidebar with a tree view of settings: General, Extensions, Sites, Phone Lines, DIDs, Abbreviated Dialing, Dialing Rules, Incoming Calls (selected), Call Parking, Outgoing Calls, Call Logs, Huntgroups, Call Queues, and Music On Hold. The 'Incoming Calls' section contains four settings: 'Ext-to-Ext Call Distinctive Ring' (set to No), 'Group Pickup' (set to Yes), 'Group Pickup Prefix' (set to *40), and 'Endpoint Redirection' (checked). A 'Save' button is located at the bottom of the settings area. The footer of the page indicates the copyright is © 2001-2015 PortaOne, Inc. All rights reserved.

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	<p>The Group Pickup feature enables members of the same IP Centrex environment (customer's accounts) or the same huntgroup to answer each other's calls by dialing a Group Pickup Prefix.</p> <ul style="list-style-type: none">• Select Enabled to activate group pickup for the customer.• Select Disabled to make group pickup unavailable to the customer. <p>Note that group pickup must be enabled for the particular huntgroup as well.</p>

Group Pickup Prefix	<p>An end user can dial this access code to answer a call arriving to the huntgroup that this end user belongs to.</p> <p>The default value is *40.</p> <p>This access code is available only if group pickup is enabled for the customer and for the huntgroup.</p> <p>Read-only field. For information about how to configure Group Pickup Prefix, please see the <i>Service Feature Codes (also known as Feature Access Codes)</i> table in the Dialing rules section of this guide.</p>
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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.

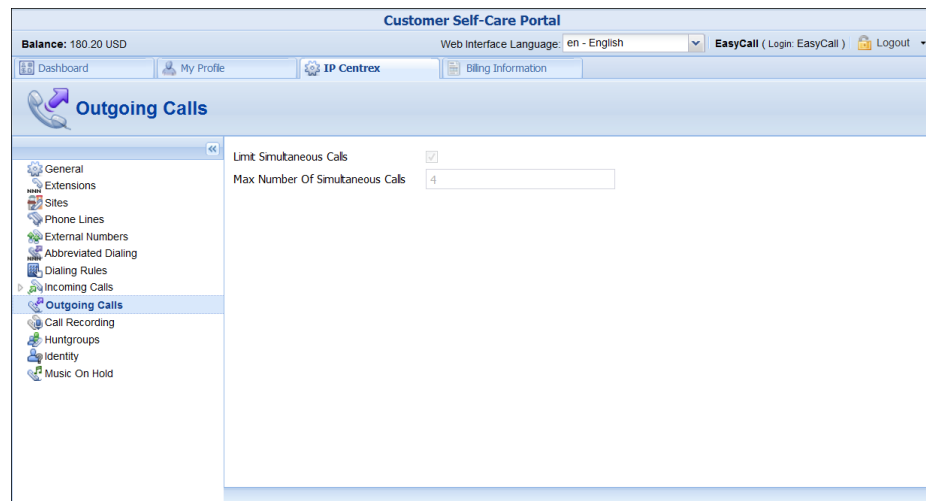
The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays the user's balance (165.16 USD), credit limit (1,000.00 USD), language (en - English), and user name (JohnDoe). The 'Call Parking' section is active, showing a dropdown menu set to 'No'. Below this, the 'Park Prefix' is set to '*70' and the 'Release Prefix' is set to '*71'. A 'Save' button is located at the bottom of the configuration area.

Field	Description
Call Parking	<ul style="list-style-type: none"> Select Enabled to activate call parking for the customer. Select Disabled to make call parking unavailable to the customer.

Park Prefix	<p>An end user can dial this access code to park a call.</p> <p>The default value is *70.</p> <p>This access code is available only if call parking is enabled for the customer.</p> <p>Read-only field. For information about how to configure Park Prefix, please see the <i>Service Feature Codes (also known as Feature Access Codes)</i> table in the Dialing rules section of this guide.</p>
Release Prefix	<p>An end user can dial this access code to retrieve a call from the parked status.</p> <p>The default value is *71.</p> <p>This access code is available only if call parking is enabled for the customer.</p> <p>Read-only field. For information about how to configure Release Prefix, please see the <i>Service Feature Codes (also known as Feature Access Codes)</i> table in the Dialing rules section of this guide.</p>

Outgoing Calls

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



The screenshot shows the 'Customer Self-Care Portal' interface. At the top, there's a header with 'Balance: 180.20 USD', 'Web Interface Language: en - English', and 'EasyCall (Login: EasyCall) Logout'. Below the header is a navigation bar with 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The main content area is titled 'Outgoing Calls' and features a left sidebar with a tree view containing 'General', 'Extensions', 'Sites', 'Phone Lines', 'External Numbers', 'Abbreviated Dialing', 'Dialing Rules', 'Incoming Calls', 'Outgoing Calls' (selected), 'Call Recording', 'Huntgroups', 'Identity', and 'Music On Hold'. The main panel displays two settings: 'Limit Simultaneous Calls' with a checked checkbox and 'Max Number Of Simultaneous Calls' with a text input field containing the value '4'.

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.

Date/Time	Account ID	From	To	Duration	Play
2014-10-30 13:39:38	ANI123456788	ANI123456788	12125551234	0:32	
2014-10-30 13:38:59	ANI123456788	ANI123456788	12125551234	0:32	
2014-10-30 13:36:57	123456788	123456788	12125551234	0:32	
2014-10-30 13:36:33	123456788	123456788	12125551234	0:32	
2014-10-30 13:33:54	123456788	123456788	12125551234	0:32	
2014-10-30 13:33:23	123456788	123456788	18667478647	0:32	

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.

Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete
		100	Sales	Order	Empty Huntgroup	Keep original		
		200	Support	Random	Empty Huntgroup	Keep original		



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

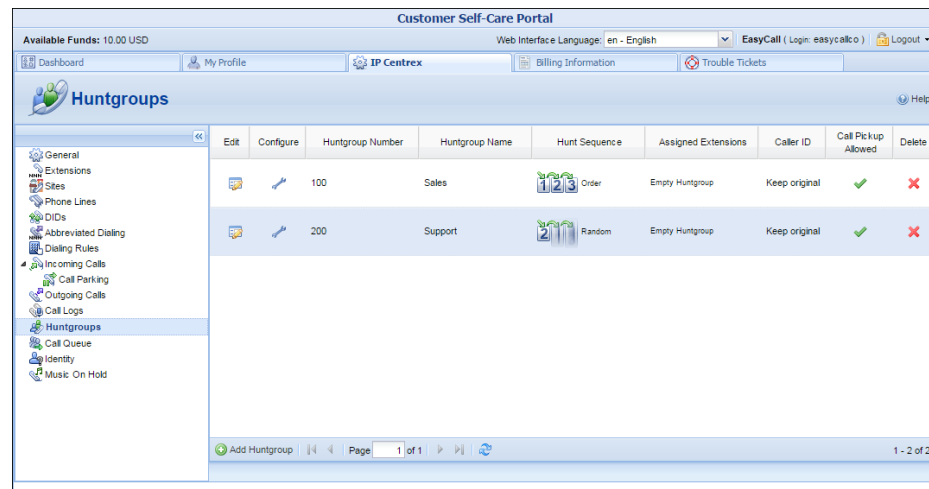
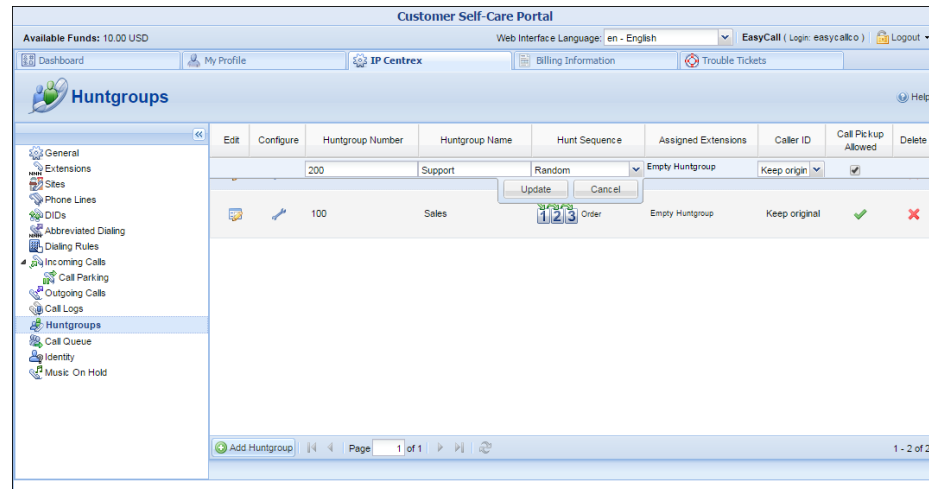
To add a new huntgroup, follow these steps:

1. 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** – Short descriptive name for this group of extensions, e.g. “New department.”
 - **Hunt Sequence** – The order for delivering a call to one or more extensions.
 - If **Order** is selected, extensions will be called one by one from the first (topmost) to the last number until the call is answered.
 - Select **Random** if you want to use a random order.
 - **Simultaneous** enables simultaneous calls to every extension from the list.
 - **Least Used** 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



2. Once all the information is entered, click the **Update** button.

To specify one or several extensions that calls should be delivered to, follow these steps:

1. Click the **Configure** icon next to the huntgroup number.
2. Click the **Add Extension** button.

Customer Self-Care Portal

Balance: 180.20 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Huntgroup: Support Department

Huntgroup Number: 99 Hunt Sequence: Random
 Huntgroup Name: Support Department Caller ID: Keep original
 Call Pickup Allowed: ☒

Included Extensions Included Huntgroups

Order	Extension Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow-me/Voicemail	Set This Group as Primary	Delete
555	Tom	000111888		15		<input type="checkbox"/>	<input type="checkbox"/>	
444	Andrew	000111555		Infinite		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Add Extension

Save Back

- From the **Extension Number**, select the required extension.
- Specify the following options:
 - 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.
- Click **Updated**.

Customer Self-Care Portal

Balance: 180.20 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Huntgroup: Support Department

Huntgroup Number: 99 Hunt Sequence: Random
 Huntgroup Name: Support Department Caller ID: Keep original
 Call Pickup Allowed: ☒

Included Extensions Included Huntgroups

Order	Extension Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow-me/Voicemail	Set This Group as Primary	Delete
555	Tom	000111888		15		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
444	Andrew	000111555		Infinite		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Add Extension

Save Back

In order for changes to take effect you need to click the **Save** button 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**.

Customer Self-Care Portal

Balance: 180.20 USD | Web Interface Language: en - English | EasyCall (Login: EasyCall) | Logout

Dashboard | My Profile | IP Centrex | Billing Information

Edit Huntgroup: Sales

Huntgroup Number: 111 | Hunt Sequence: Order
 Huntgroup Name: Sales | Caller ID: Keep original
 Call Pickup Allowed: ☒

Included Extensions | **Included Huntgroups**

Order	Huntgroup Number	Huntgroup Name	Included Extensions	Ignore Follow-me/Voicemail	Delete
	112	Support	Empty Huntgroup	<input checked="" type="checkbox"/>	

Update | Cancel

Add Huntgroup

Save | Back | Edit Huntgroup

Customer Self-Care Portal

Balance: 180.20 USD | Web Interface Language: en - English | EasyCall (Login: EasyCall) | Logout

Dashboard | My Profile | IP Centrex | Billing Information

Edit Huntgroup: Sales

Huntgroup Number: 111 | Hunt Sequence: Order
 Huntgroup Name: Sales | Caller ID: Keep original
 Call Pickup Allowed: ☒

Included Extensions | **Included Huntgroups**

Order	Huntgroup Number	Huntgroup Name	Included Extensions	Ignore Follow-me/Voicemail	Delete
	112	Support	Empty Huntgroup	<input checked="" type="checkbox"/>	

Add Huntgroup

Save | Back | Edit Huntgroup

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.

When a new incoming call arrives, it is assigned a position in the queue. The callers hear announcements about number of callers ahead of them in the queue and the estimated waiting time. After that, the specified “music on hold” is played, and every 5 minutes the callers are updated about their current positions in the queue and the estimated wait time.

Note that estimated wait time is calculated as follows:

- For the *new* Media Server:
(Average handle time)*(Number of callers ahead).
- For the *previous-generation* Media Server:
(Average handle time)*[(Number of simultaneous calls made to the call queue number) – (Maximum number of outgoing calls to agents)].

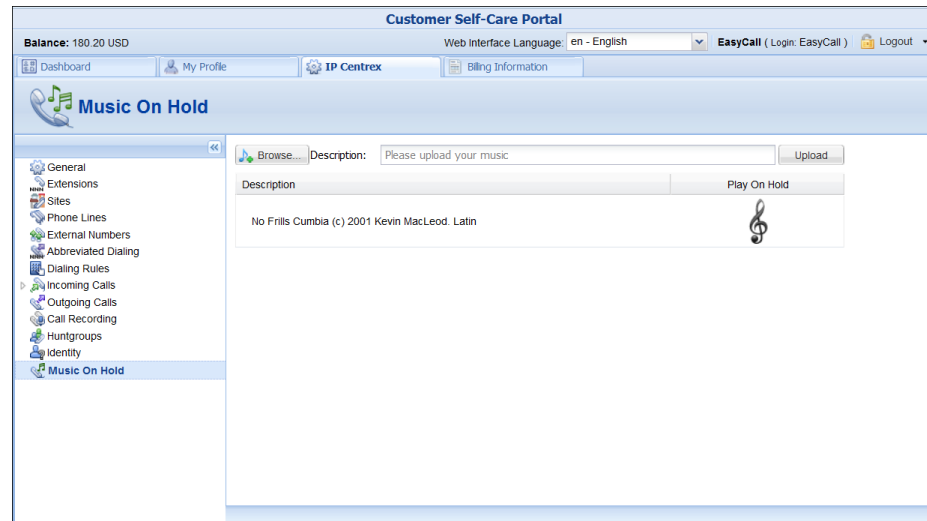
Every call queue contains several configuration parameters:


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. Note: Empty huntgroups are not listed. Add at least one extension to the huntgroup first.
Maximum number of outgoing calls to agents	The maximum number of calls that agents can process simultaneously. You can think of it as the number of agents who answer calls made to a call center (e.g. if you have 5 agents who answer calls made to Sales, they can process a maximum of 5 calls, simultaneously).

	<p>NOTE: This option is used only by the <i>previous-generation</i> Media Server which uses it to define whether the next call that arrives to the call queue must be placed on hold or connected to an agent.</p> <p>When the number of simultaneous calls made to the call center exceeds the value defined for this option (e.g. 10 calls arrived to the call center simultaneously, but there are only 5 agents who answer calls), the Media Server places calls 6–10 on hold within the queue.</p> <p>When the number of simultaneous calls made to the call center is fewer than the value defined for this option (e.g. 5 calls arrived to the call center simultaneously and there are 10 agents to answer calls), the Media Server immediately attempts to connect all calls to agents.</p> <p>Therefore it's important to specify a true-to-life number: if you specify a number that is too low, some calls will be queued even if there are free agents; if you specify too high a number, some calls won't be queued even if there are no actual agents to answer them. Subsequently it will be a regular call for these callers, with no queue announcements.</p>
Maximum number of incoming calls on hold	<p>The maximum number of calls that can be placed on hold within this queue.</p> <p>When this number is reached, the next call is disconnected.</p>
Average handle time, minutes	The expected average processing time for each call in minutes (used to calculate the estimated wait time).
Announce number of callers ahead	When this check box is selected, callers will hear an announcement about number of callers ahead of them in the queue. Note that this check box is currently always selected and dimmed.
Announce estimated wait time	When this check box is selected, callers will hear an announcement about the estimated wait time. Note that this check box is currently always selected and dimmed.
Music on Hold	<p>A melody (or announcement) which is played to users waiting to be connected.</p> <p>The maximum file size allowed is 3 MB.</p>

Music on Hold

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



Click the  **Play On Hold** button 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 panels:

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

Billing Summary

Balance: 70.00 USD | Credit Limit: 1,000.00 USD | en - English | EasyCall, Inc (Login: EasyCallInc) | Logout

Brief Billing Information

Balance	70.00 USD
Credit Limit	1000.00 USD

Transactions Totals Information

From	2014-12-02
To	2015-03-02
Payments	-80.00 USD
Usage Charges	0.00 USD
Total	70.00 USD
Total Transactions	3

Invoices Information

Balance due: **70.00 USD** [Make a Payment](#)

Last Invoice due date: 2015-03-03
 Last Invoice Amount: 150.00 USD
 Overdue balance: 20.00 USD
 Last Payment received on: 2015-03-02

View	Due Date	Amount	Payment Status
View	2015-03-03	50.00 USD	Unpaid
View	2015-03-01	20.00 USD	Overdue

[See All Invoices](#)

Active Subscriptions

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

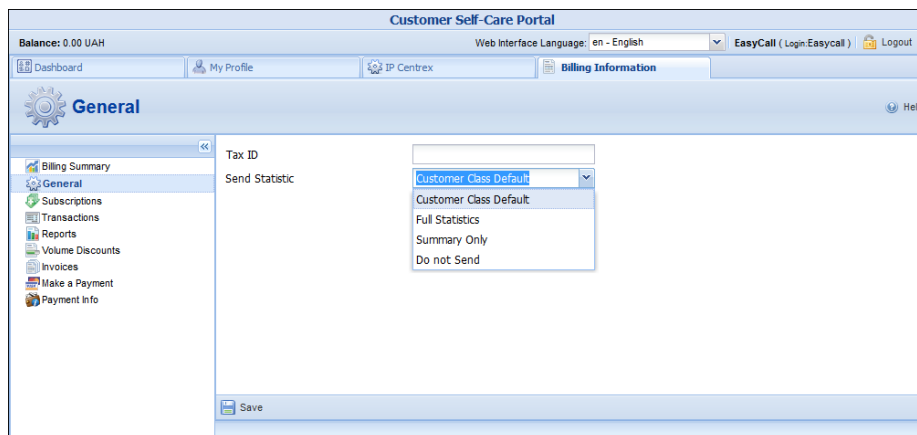
Volume Discounts

Destination Group	Service	Discount name	Used/Remaining	Expiration
There is no data to display				

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	<p>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.</p> <p>The available information fields are:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none">• 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.

Subscription	Periodic Fee	Start Date YYYY-MM-DD	Finish Date YYYY-MM-DD
Shared: (1 Active Subscription for 0.70 USD)			
Follow-Me	0.70 USD	2013-10-10	-
Account 12125412365: (4 Active Subscriptions for 17.50 USD)			
Abon plata	7.00 USD	2014-04-28	-
Follow-Me	0.00 USD	2014-04-28	-
Internet Access Start	3.50 USD	2014-04-28	-
BasicTV	7.00 USD	2014-04-28	-
Total Subscriptions active now: 15		Total periodic fee active now: 53.89 USD	

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.

Service	Total Transactions	Charged Quantity	Charged Amount	Show Details
Subscriptions	5		30.99000 USD	
Voice Calls	6	192 (seconds)	0.03198 USD	
Total Service Used:	2	Total Transactions:	11	Total Charged Amount:
				31.02 USD

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.
- 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.

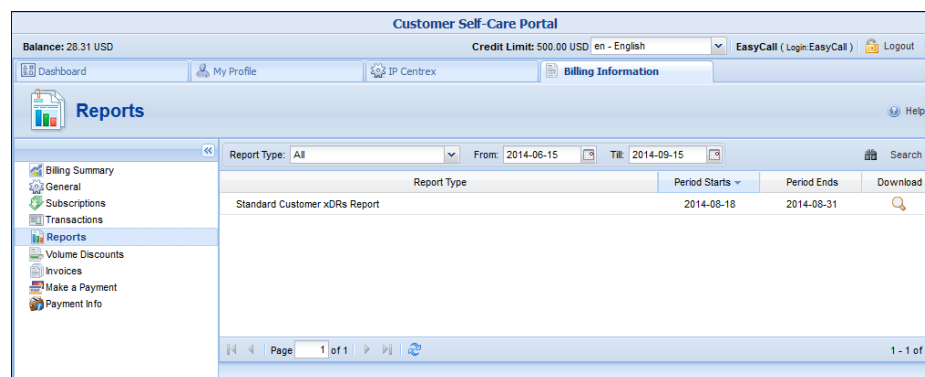
Set the from / to dates by clicking the  **Calendar** icon and click the **Show Records** button. The result page contains a summary and tables list all calls and accompanying charges during a specified time period. If you want to view additional information (charged quantity and amounts due) for the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


Click the  **Download** 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.

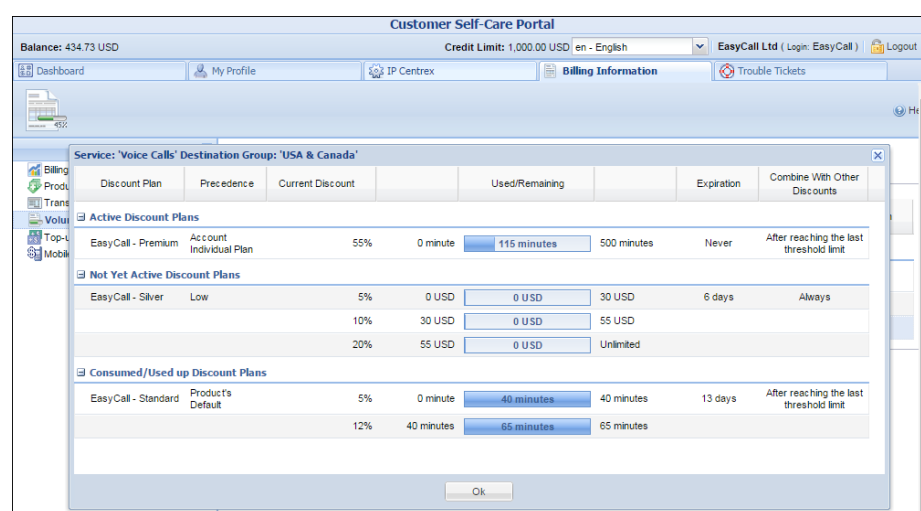
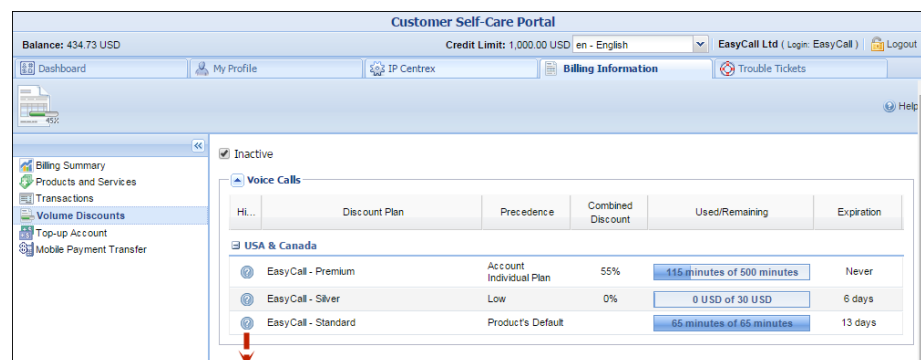


Click the  **Download** button to download an xDRs report in the desired format.

Volume Discounts

The **Volume Discounts** group displays all *active* discounts that apply to you. 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** panel, which is visible by clicking the  **History** button.



Field	Description
Inactive	Displays the volume discounts with <i>Consumed/Used up</i> or <i>Not Yet Active</i> status applicable to the customer.
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	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 selected, it means that this discount is for one-time use and will not be reapplied to the customer.
<i>Discount History</i>	
Status	The current status of the discount plan. <ul style="list-style-type: none"> • 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  **Calendar** icon. If you want to include void invoices, just select the corresponding check box and then click **Search**.

Customer Self-Care Portal

Balance: 6.27 USD Credit Limit: 1,000.00 USD en - English EasyCall Ltd (Login: EasyCall) Logout

Dashboard My Profile IP Centres Billing Information Trouble Tickets Help

Invoices

View Invoices over the Period

From: 2015-03-23 YYYY-MM-DD

To: 2015-06-23 YYYY-MM-DD

☐ Include Void Invoices

Enter Invoice Number

View	No.	Period Starts	Period Ends	Due Date	Amount	Payment Status
	104	2015-06-14	2015-06-21	2015-06-25	0.00 USD	Paid
	103	2015-06-07	2015-06-14	2015-06-18	0.00 USD	Paid
	102	2015-05-31	2015-06-07	2015-06-11	0.00 USD	Paid
	101	2015-05-24	2015-05-31	2015-06-04	0.00 USD	Paid
	100	2015-05-17	2015-05-24	2015-05-28	0.00 USD	Paid

Page 1 of 1 1 - 14 of 14

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.

Click 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.

Customer Self-Care Portal

Available Funds: 1,056.24 USD Web Interface Language: en - English EasyCall Ltd. (Login: easycalls) Logout

Dashboard My Profile IP Centrex Billing Information

Make a Payment

Balance, USD: -56.24

➔ Amount, USD:

☒ Credit or Debit Card

Pay with your credit or debit card.

Card Number: Country:

Cardholder Name: Billing Address Line 1:

Expiration Date: / Billing Address Line 2:

CVV: [What is this?](#) City:

☐ Save this information for future use. Province/State:

Postal code:

Billing Phone Number:

➔

☐ 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.

Payment Info

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

The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays the user's balance (353.02 USD), credit limit (1,000.00 USD), and language (en - English). The 'Payment Info' section is active, showing a sidebar with navigation links like Billing Summary, General, Subscriptions, Transactions, Reports, Volume Discounts, Invoices, Make a Payment, and Payment Info. The main content area is titled 'Preferred Payment Method' and offers two options: 'Credit or Debit Card' (selected) and 'Bank account (eCheck)'. The credit card section includes fields for Card Number, Cardholder Name, Expiration Date, CVV, Country, Billing Address Line 1, Billing Address Line 2, City, Province/State, Postal code, and Billing Phone Number. There is a 'Save' button at the bottom of this section. The 'Auto-Payments' section below it has a checkbox for 'Auto-pay invoice using this payment method' and a 'Pay' checkbox with a value of 500.00 USD, which is set to trigger when the balance exceeds 1,000.00 USD. A 'Save' button is also present at the bottom of the Auto-Payments section.

In the **Preferred Payment Method** area 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.

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.

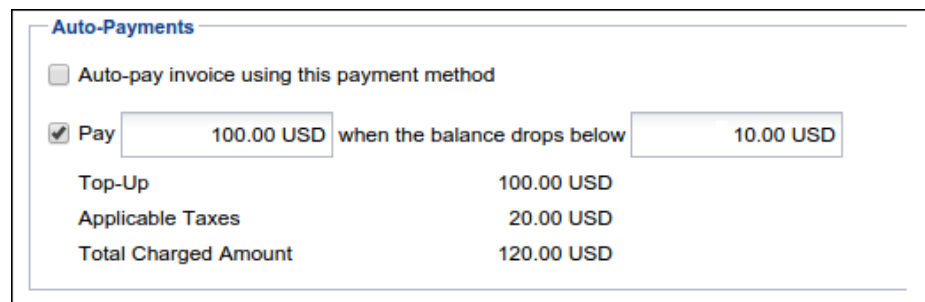
The dialog box features a large blue circle with a white question mark on the left. The text on the right states: 'In order to check your credit card information and save your changes, please make a payment of 5.00 USD or more. The funds will be transferred to your balance.' Below this, it instructs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

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 and the service provider has enabled the Taxes upon Payment functionality for you, the taxes for such services are calculated and applied when your balance automatically tops up.



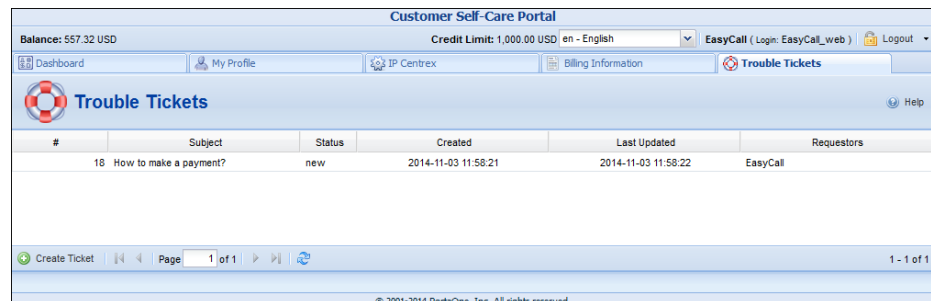
The screenshot shows the 'Auto-Payments' section. It has a header 'Auto-Payments' in blue. Below it, there is a checkbox 'Auto-pay invoice using this payment method' which is unchecked. Below that, there is a checked checkbox 'Pay' followed by a text input field containing '100.00 USD' and the text 'when the balance drops below' followed by another text input field containing '10.00 USD'. Below these fields, there is a table with three rows: 'Top-Up' with value '100.00 USD', 'Applicable Taxes' with value '20.00 USD', and 'Total Charged Amount' with value '120.00 USD'.

Auto-Payments	
<input type="checkbox"/>	Auto-pay invoice using this payment method
<input checked="" type="checkbox"/>	Pay 100.00 USD when the balance drops below 10.00 USD
Top-Up	100.00 USD
Applicable Taxes	20.00 USD
Total Charged Amount	120.00 USD

The tax amount is calculated based on the amount of the top-up and then added to the payment sum. Upon successful payment processing, your balance is topped up by the total charged amount excluding tax.


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.



The screenshot shows the 'Customer Self-Care Portal' header with 'Balance: 557.32 USD' and 'Credit Limit: 1,000.00 USD'. Below the header, there are navigation tabs: 'Dashboard', 'My Profile', 'IP Centrex', 'Billing Information', and 'Trouble Tickets' (which is selected). The 'Trouble Tickets' section has a table with columns: '#', 'Subject', 'Status', 'Created', 'Last Updated', and 'Requestors'. There is one row with the following data: '# 18', 'Subject: How to make a payment?', 'Status: new', 'Created: 2014-11-03 11:58:21', 'Last Updated: 2014-11-03 11:58:22', and 'Requestors: EasyCall'. At the bottom, there is a 'Create Ticket' button and a pagination bar showing 'Page 1 of 1'.

#	Subject	Status	Created	Last Updated	Requestors
18	How to make a payment?	new	2014-11-03 11:58:21	2014-11-03 11:58:22	EasyCall

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

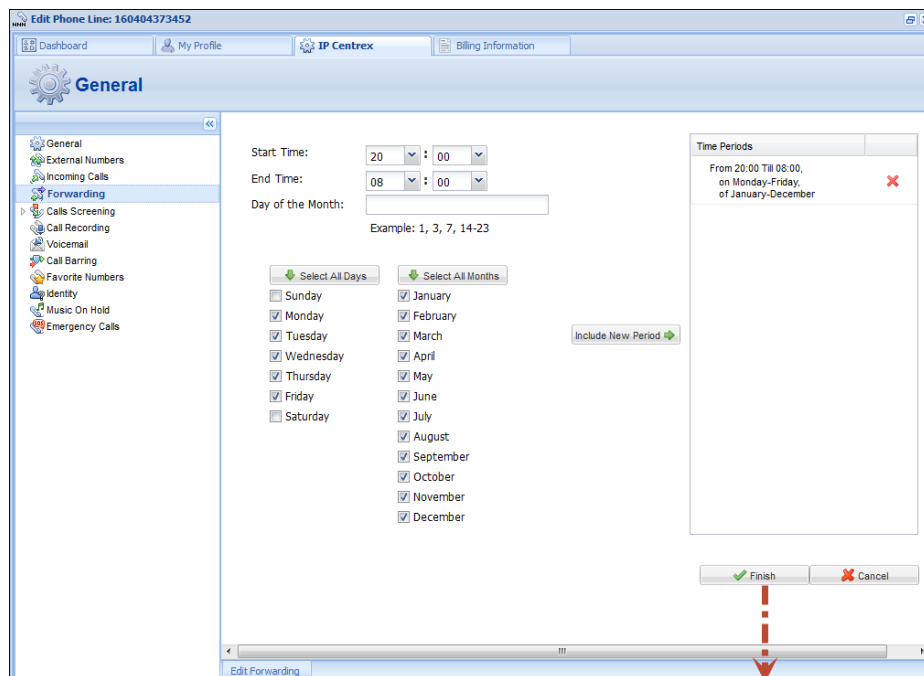
3. How to...

... 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. 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. The following 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 'Edit Phone Line' wizard for line 160404373452. The 'General' tab is active. The 'Start Time' is set to 20:00 and the 'End Time' is set to 08:00. The 'Day of the Month' section has checkboxes for each day of the week: Sunday (unchecked), Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), and Saturday (unchecked). There are buttons for 'Select All Days' and 'Select All Months'. The 'Time Periods' panel on the right is empty, showing 'There is no data to display'. At the bottom right, there are 'Finish' and 'Cancel' buttons.

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



Edit Phone Line: 160404373452

Dashboard My Profile IP Centrex Billing Information

General

General
External Numbers
Incoming Calls
Forwarding
Calls 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

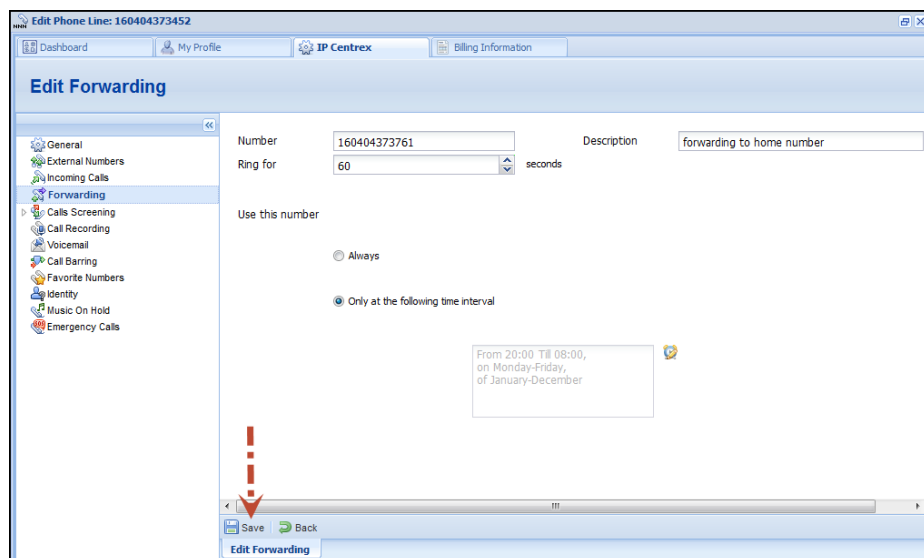
Include New Period

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

Finish Cancel

Edit Forwarding

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



Edit Phone Line: 160404373452

Dashboard My Profile IP Centrex Billing Information

Edit Forwarding

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

Number: 160404373761 Description: forwarding to home number
Ring for: 60 seconds

Use this number

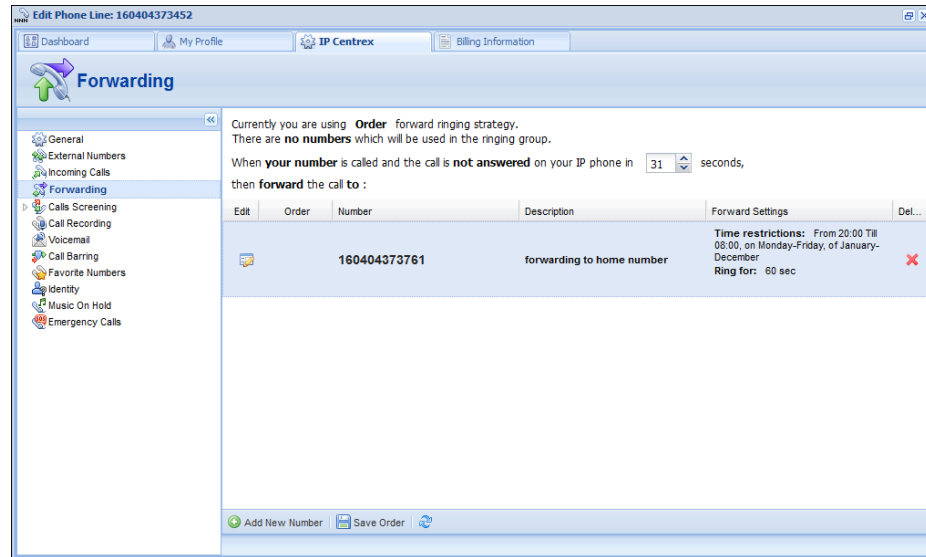
☐ Always
☒ Only at the following time interval

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

Save Back

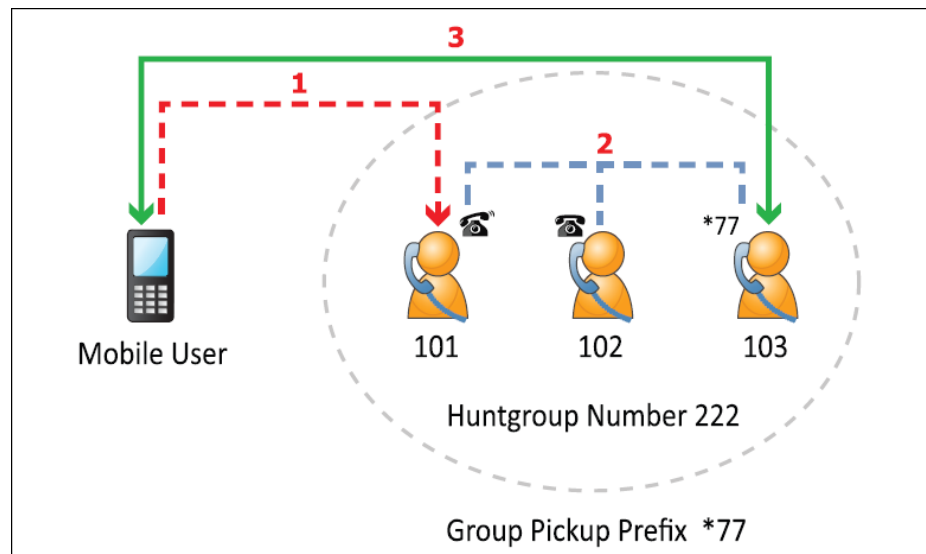
Edit Forwarding

- 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. On the **IP Centrex** tab, select **Incoming Calls**.
2. To enable Group Pickup feature, select **Yes** from the **Group Pickup** list.

3. Select **Dialing Rules**. For your current dialing rule, in the **Service Feature Codes** area, in the **Group Pickup Prefix** box, type *77. Click **Save**.
4. Select **Huntgroups**, and 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** 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** is enabled for the huntgroup.

Customer Self-Care Portal

Balance: 180.20 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Huntgroup: Support Department

General

Huntgroup Number: 99 Hunt Sequence: Random

Huntgroup Name: Support Department Caller ID: Keep original

Call Pickup Allowed: ☒

Included Extensions

Order	Extension Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow-me/Voicemail	Set This Group as Primary	Delete
↓	555	Tom	000111888		15	—	✓	✗
↑ ↓	999	Irene	000111999		15	—	✓	✗
↑	444	Andrew	000111555		Infinite	—	✓	✗

Add Extension

Save Back

Customer Self-Care Portal

Balance: 180.20 USD Web Interface Language: en - English EasyCall (Login: EasyCall) Logout

Dashboard My Profile IP Centrex Billing Information

Huntgroups

	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete
			88	Sales Department	123 Order	Assigned Extensions <ul style="list-style-type: none"> 222 - John 333 - Catherine 999 - Irene 	Keep original	✓	✗
			99	Support Department	2 Random	Assigned Extensions <ul style="list-style-type: none"> 444 - Andrew 555 - Tom 999 - Irene 	Keep original	✓	✗

Add Huntgroup Page 1 of 1 1 - 2 of 2

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.