PORTA ONE

PortaBilling

Account Self-care Interface Guide

54

Maintenance Release

Documentation

www.portaone.com

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PortaSwitch® Account Self-care Interface, April 2016
Maintenance Release 54
V1.54.01

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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/**.

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 11.0 or above, Mozilla Firefox 38 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

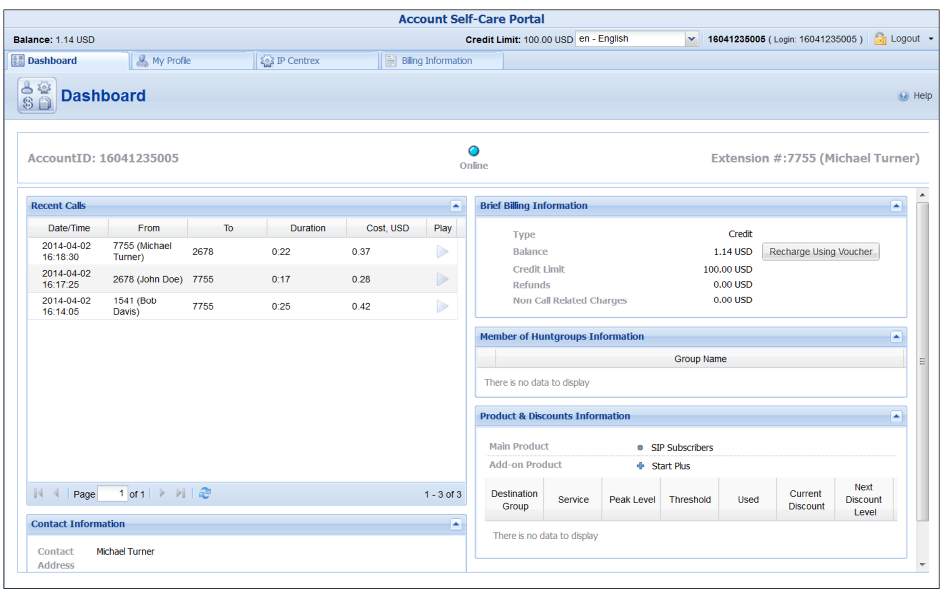
Your ITSP will provide you with a URL and credentials for logging in to the account self-care interface upon subscribing to their services.

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:

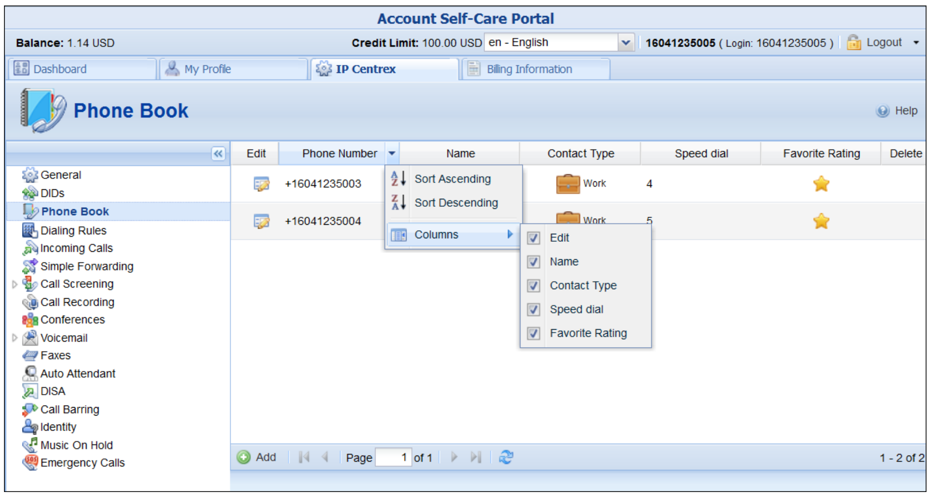
- Dashboard (your home page)
- My Profile
- IP Centrex
- Billing Information



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

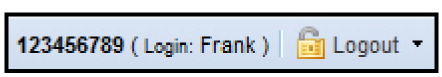
Common Features

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.

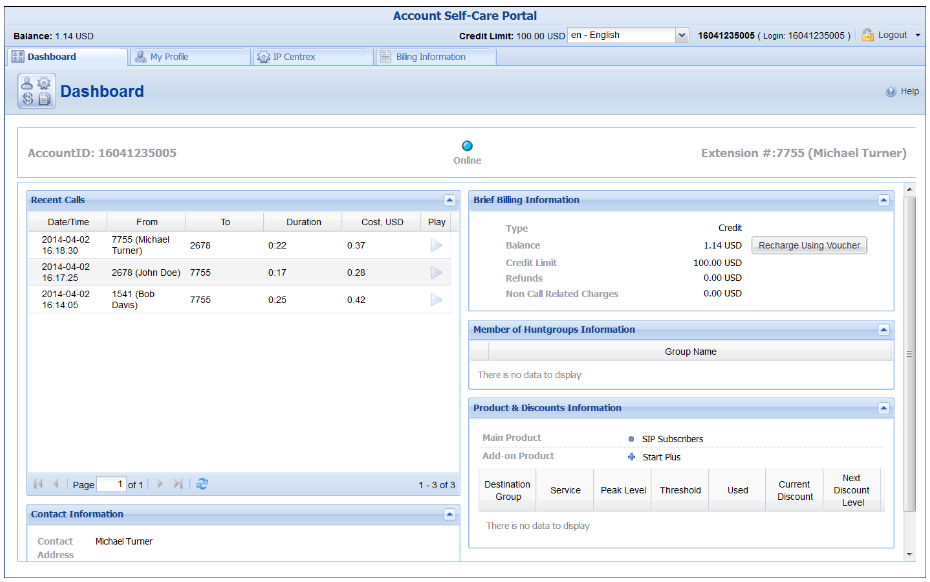
In order for changes to take effect when adding / editing information, you need to click the **Save** icon on the appropriate page. If you do not want to save the information entered – just click **Cancel**.

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**:

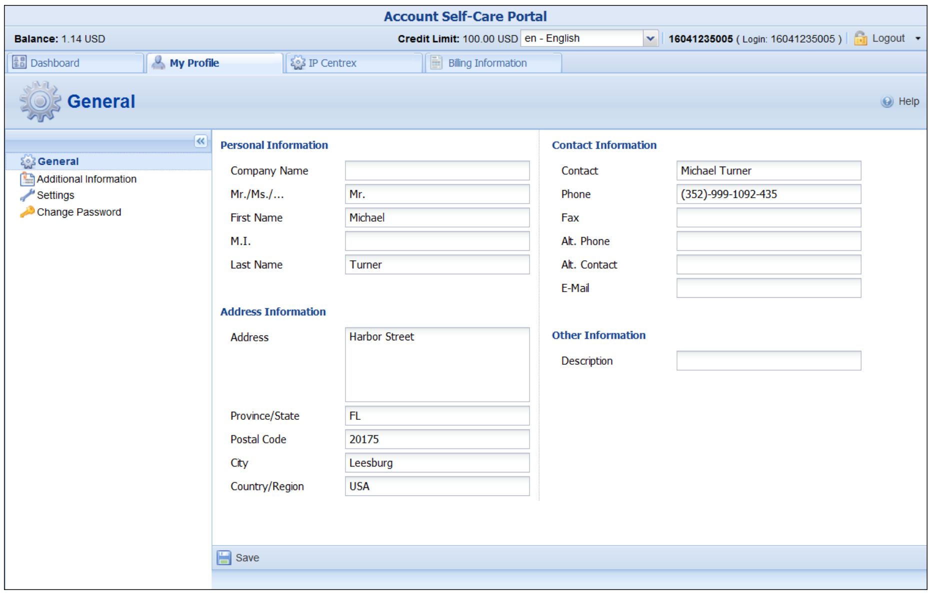


Panel	Description
Brief Billing Information	This reflects thumbnail billing information such as your available funds (or balance), refunds and charges information. Balance information will only be displayed for phone lines which have an individual balance control.
Contact Information	Here you can view your contact info such as address, email, etc.
Member of Huntgroups Information	This shows whether your extension belongs to any of the huntgroups.
Product & Discount Information	Here you can find all the necessary information concerning your product and available discounts.
Recent Calls	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).

Status	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.

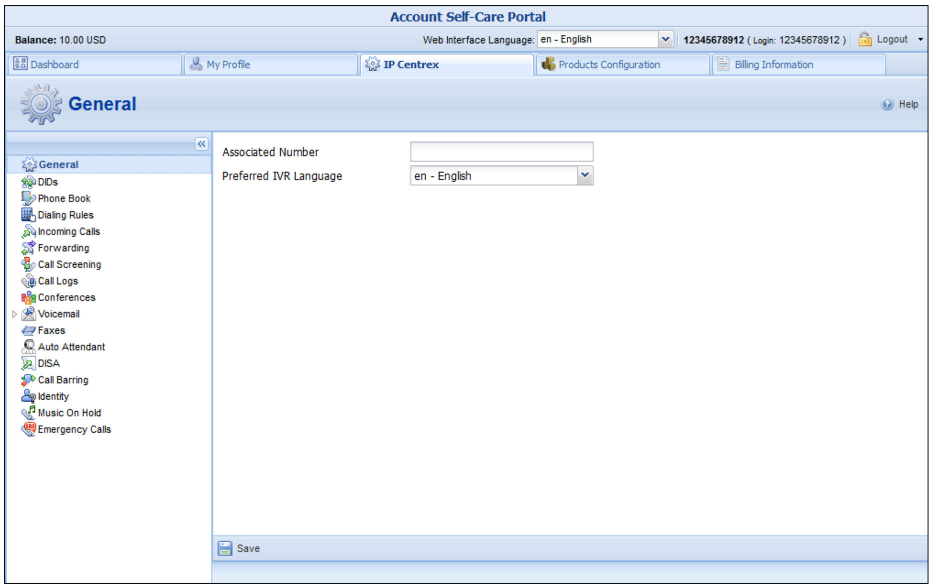


Tab	Description
General	Here you can enter general information such as company name, address, etc.
Additional Information	This is a list of additional fields. The fields for this tab are set by your provider.
Settings	Here you can choose the language to be used on your self-care interface.
Change Password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

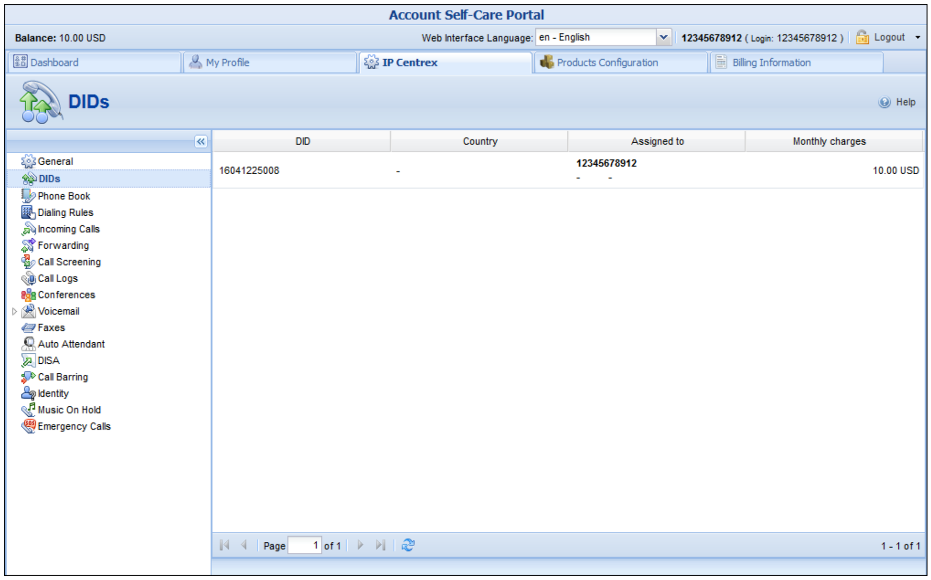


Field	Description
Associated Number	This field may be used for various purposes depending on the services offered by your provider. Ask your service provider about how to use this particular option.
Preferred IVR Language	Here you can select the language you prefer for interacting with an IVR application.

DIDs (External Numbers)

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

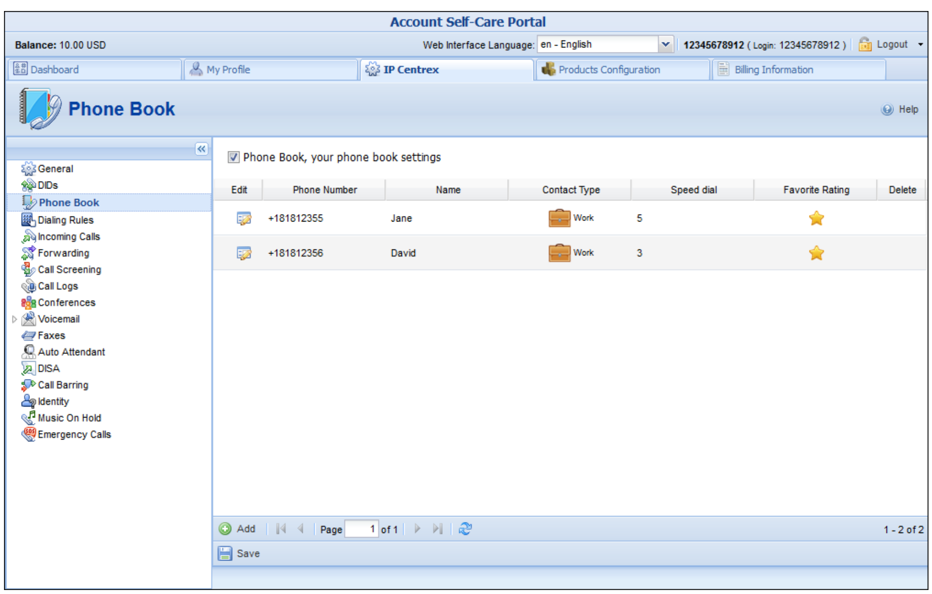
Here you can find a list of available DID numbers (the numbers should initially be defined on the customer self-care interface or by your provider).



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.



Speed Dial

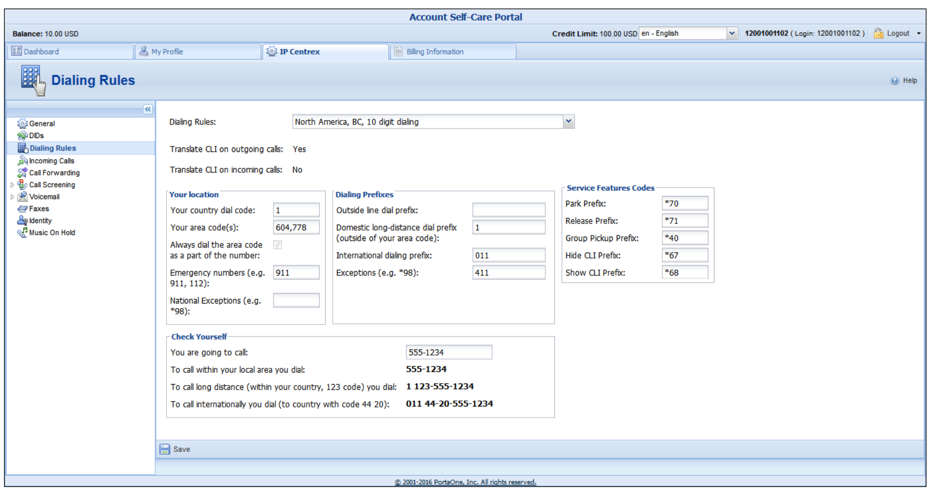
The **Speed Dial** option allows you to assign speed dial codes to numbers. Please contact your provider to inquire about the maximum speed dial length.

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.



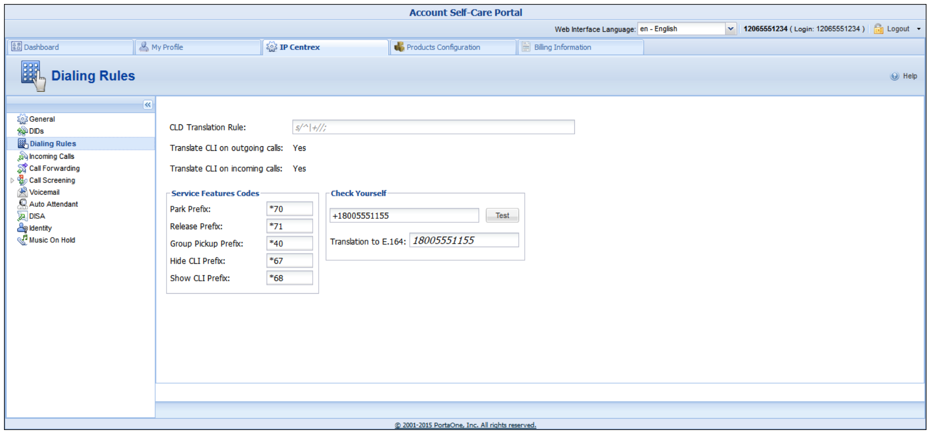
By default, the Dialing Rules feature is disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If the Dialing Rules feature is enabled by your service provider, this will allow you to define various dial plan parameters such as an international dialing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

You can selected 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**.

You can also review whether a caller's number will be translated according to the selected rule for incoming and outgoing calls. (Note that only administrators can turn the translation feature on and off.)

When the dialing rule is defined with a Perl regular expression, in the **Check Yourself** section, type the phone number in the format you are accustomed to and click **Test**.



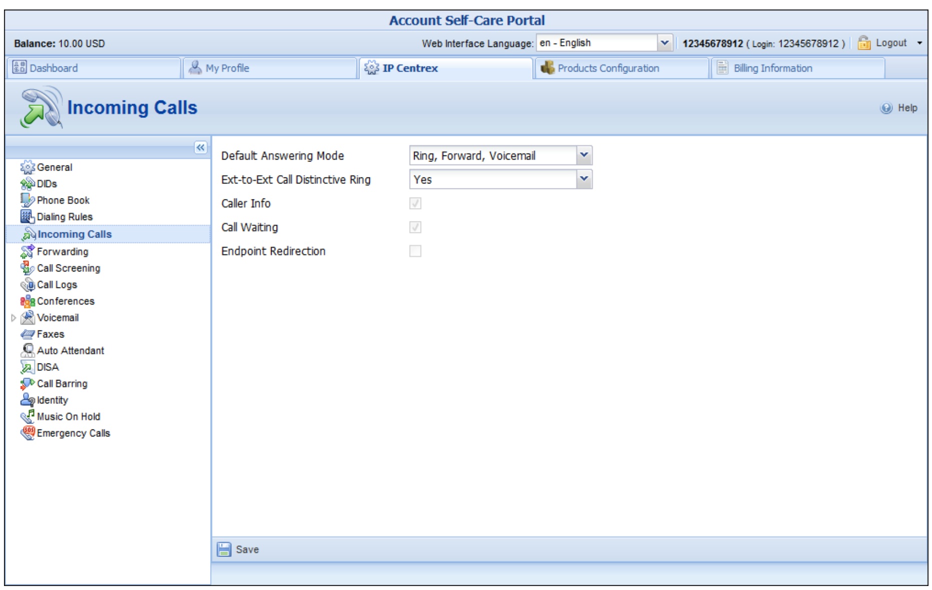
Service features codes

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.



Field	Description
Default Answering Mode	This option specifies the method for processing incoming calls.
Ext-to-ext Call Distinctive Ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern that is different from the default tone.
Caller Info	This option displays caller info for incoming calls (set

	by provider).
Call Waiting	Indicates the status of the **Call Waiting** function (set by provider).
Endpoint Redirection	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:

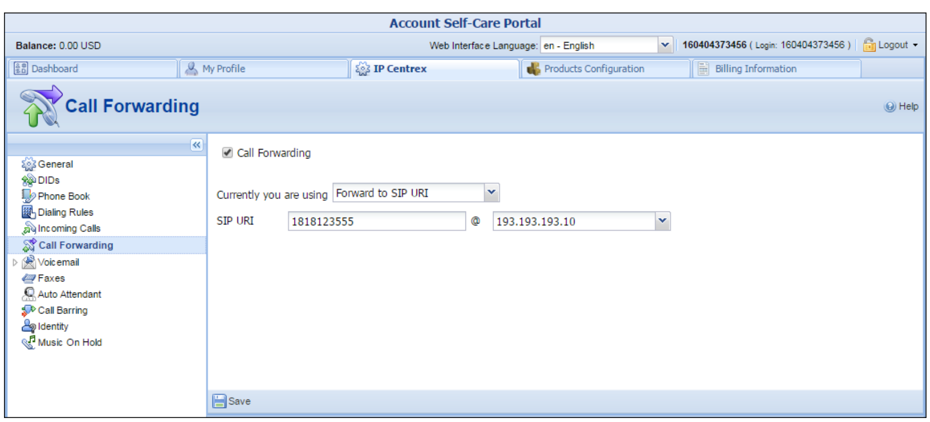
- Eliminates missed calls.
- Calls can follow you wherever you go.
- Eliminates waiting for important calls.
- Enhances home security when you are away.

There are several types of forwarding:

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

Forward to SIP URI

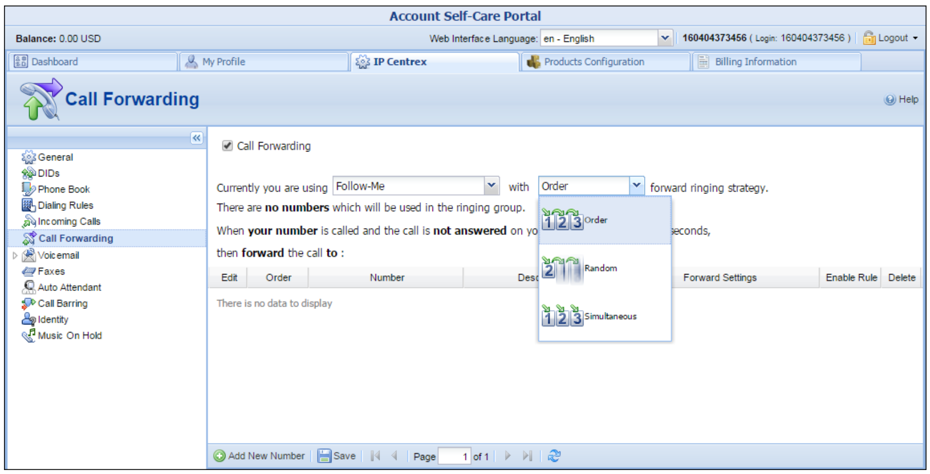
Forward to SIP URI allows to specify not only a destination phone number but also an IP address for calls to be forwarded to. This is useful when calls have to be routed directly to an external SIP proxy.



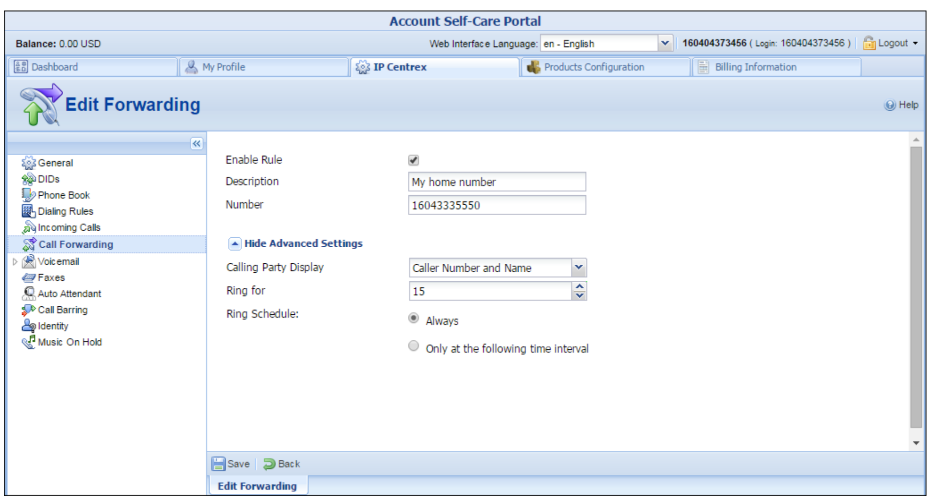
Follow-Me

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.



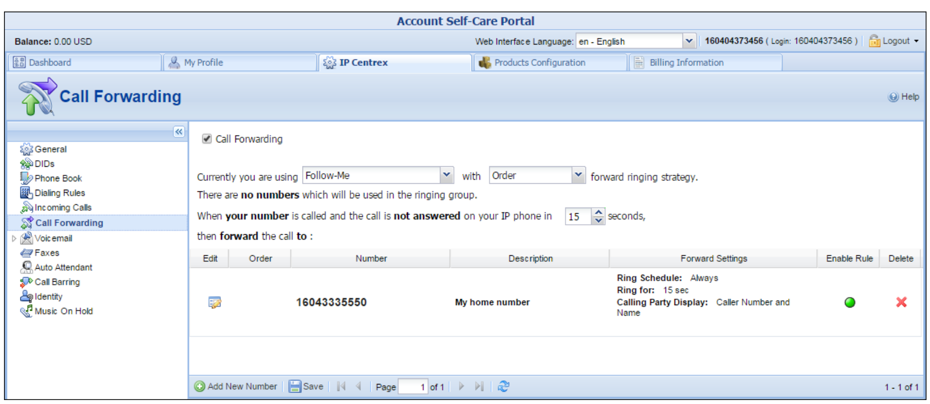
3. Click **Add New Number**.



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.

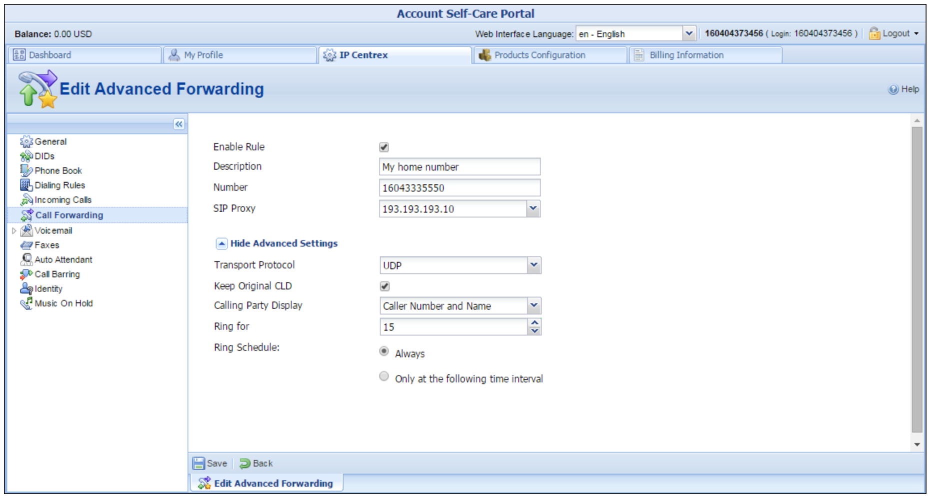


6. Repeat steps 2–4 until all the desired **Follow-Me** numbers have been added.

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.

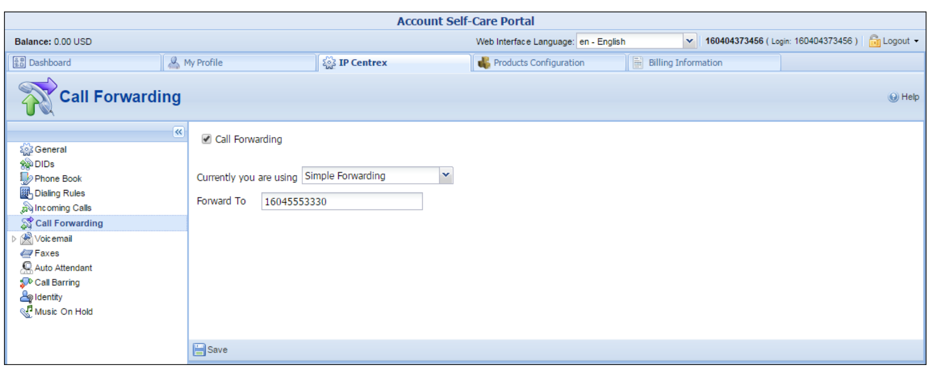


5. Click the **Save** icon to save the results of your work.

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.

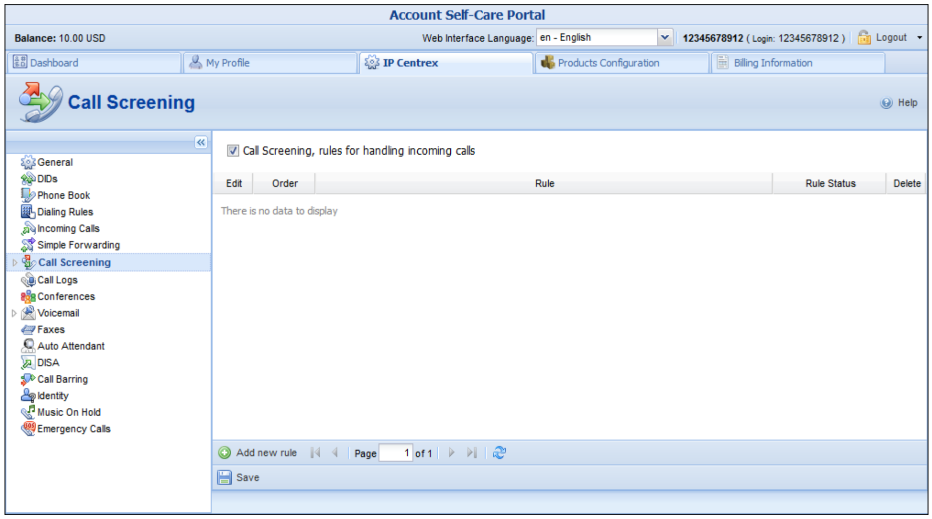


3. Click the **Save** icon.

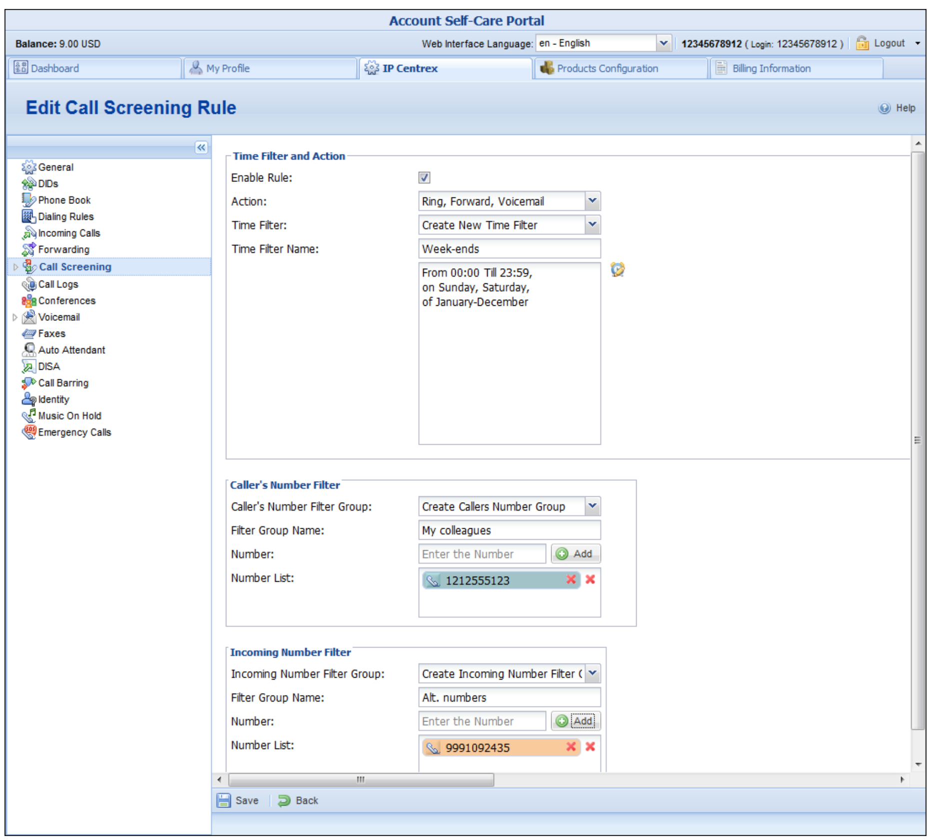
Call Screening

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.



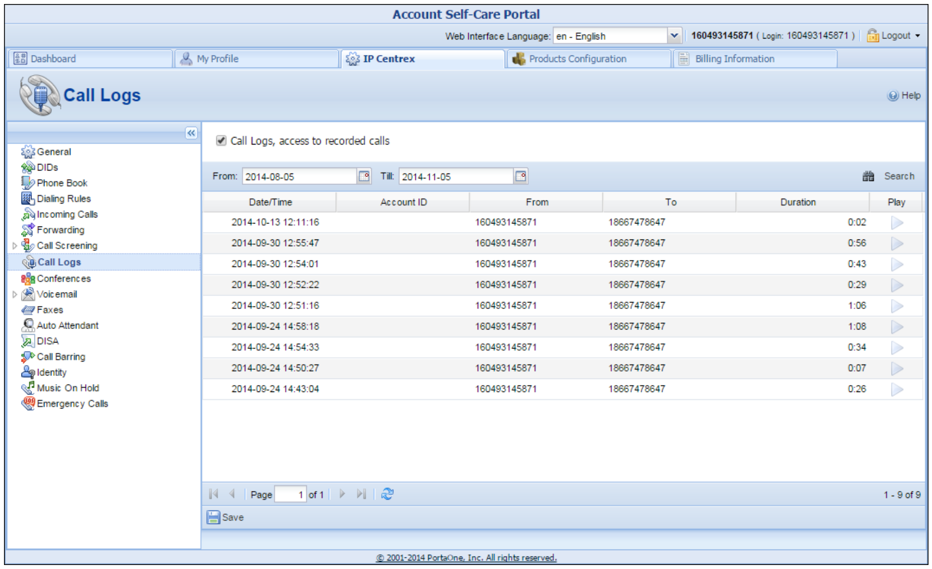
Field	Description
	Time Management and Action
Enable Rule	Allows you to temporarily disable a rule without actually deleting it (so it can be used later on).
Action	Specifies which actions should be taken if a particular phone call satisfies the conditions for this rule.
Time Filter	Allows you to select a condition applicable to the time when a call is made.
Time Filter Name	Enter the name for a new time filter. If you want to set specific parameters for your time filter, click the **Period Wizard** icon to define the interval. Please see the **How to define a time period using the wizard?** section for information about how to use the Period Wizard.
	Caller's Number Filter
Caller's Number Filter Group	Allows you to select a condition applicable to an incoming phone number (phone number of a person trying to contact you).
	Incoming Number Filter
Incoming Number Filter Group	Allows you to select a condition applicable to one of your phone numbers that a person tries to contact you.
	*The following fields are similar to both **Caller's Number Filter** and **Incoming Number Filter***
Filter Group Name	Enter the name for the new filter group.
Number	Add the number(s) to your filter group. First enter the number and then click the **Add** button.
Number List	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.

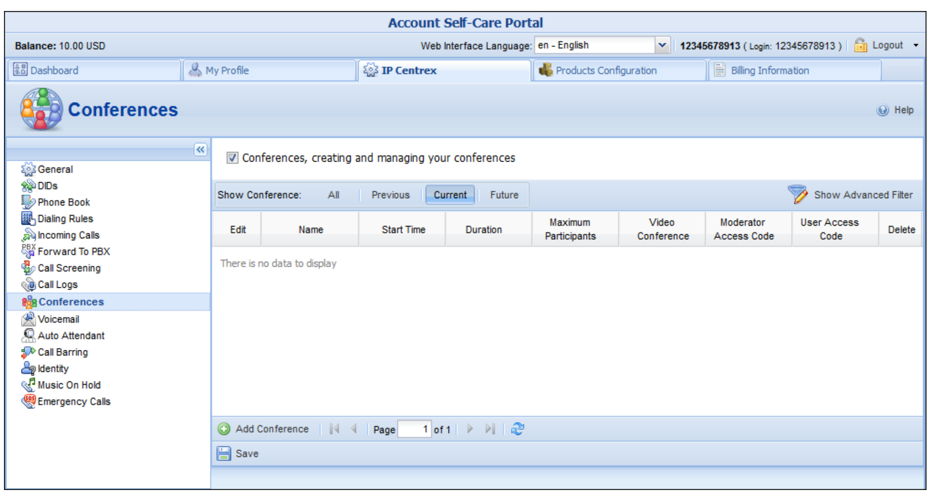
Depending on your needs, you may activate / deactivate **Call Recording** by selecting or clearing the check box on the top.



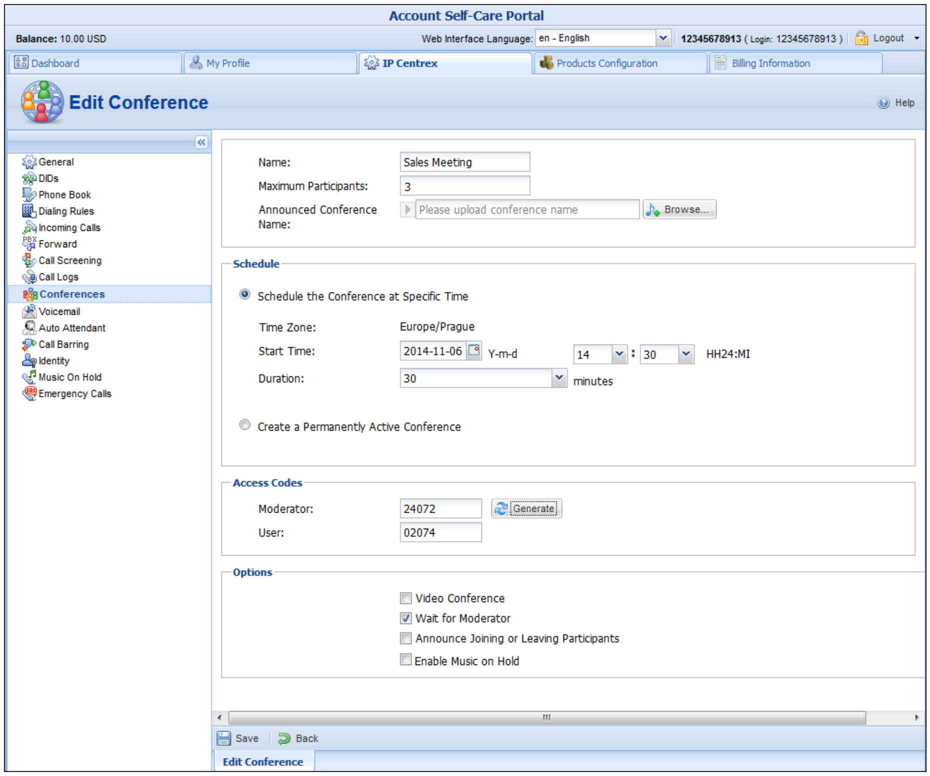
Conferences

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.



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.



Field	Description
Name	A description of your conference.
Maximum Participants	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.
Announced Conference Name	Upload a sound file with the name of the conference as it will be announced to people joining it.
Schedule	Specify the date and time when the conference will start.
Duration	In order to prevent service abuse, you must specify the maximum allowed conference duration (in minutes).
Create a Permanently Active Conference	**Maximum Session Time:** 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.
Access Codes	Access codes are created automatically, but you can generate a new set of codes by clicking the **Generate** button.

Options	
Video Conference	Enable it, if you want to have a Video Conference.
Wait for Moderator	If activated, conference participants will not be able to communicate with each other until the host (moderator) arrives.
Announce Joining or Leaving Participants	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.
Enable Music on Hold	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.

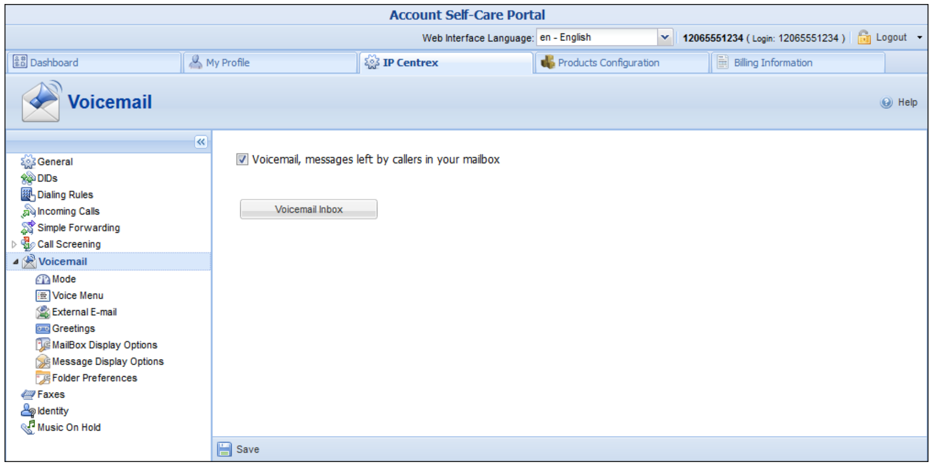
On the **Conferencing** page you may choose which conferences to display – current, future, etc. You may also make an extensible search using **Show Advanced Filter** in the top right-hand corner via:

- 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.

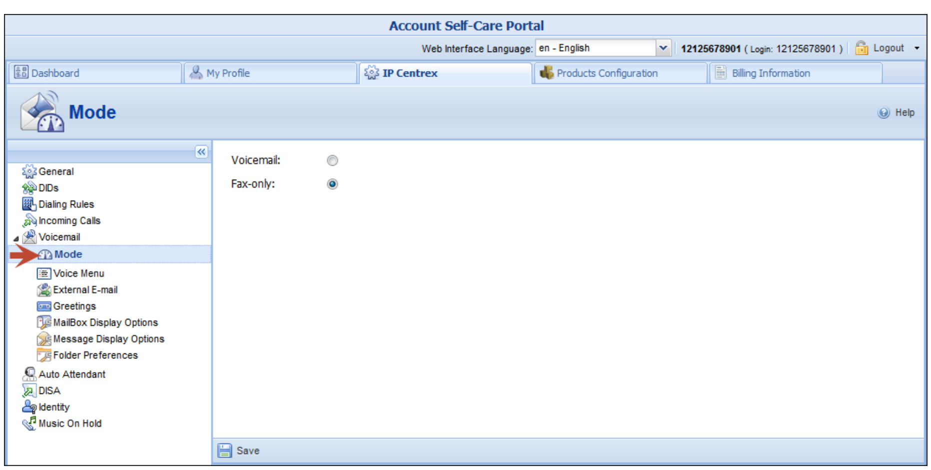


To check your mailbox, click the **Voicemail Inbox** button.

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, either 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, choose an appropriate voice message audio format and define one of the following actions:

- **Forward** – Select this to send a voicemail recording to the external email and to delete it from the Media Server.
- **Forward as Attachment** – This works like the previous option, but the email is sent as an attachment (*.eml format).
- **Copy** – Select this to send a voicemail recording to the email while a copy remains on the Media Server.
- **Notify** – Select this to send only a notification to the email while the voicemail recording remains on the Media Server.

Click **Save** to apply the changes.

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:

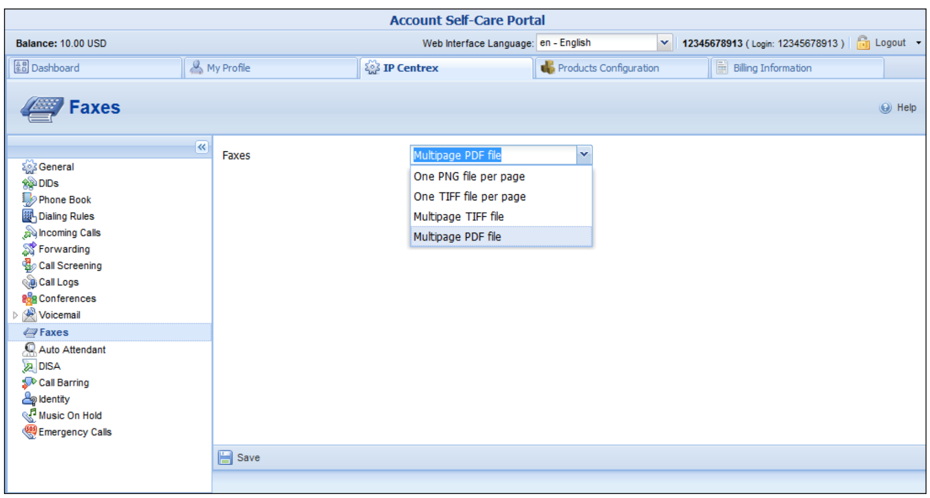
- **Trash Folder** – Specifies which folder messages will go to when you delete them.
- **Draft Folder** – Specifies which folder messages you save as drafts will go to.
- **Sent Folder** – Specifies the folder where sent items are saved.
- **Enable Unread Message Notification** – This option specifies 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.

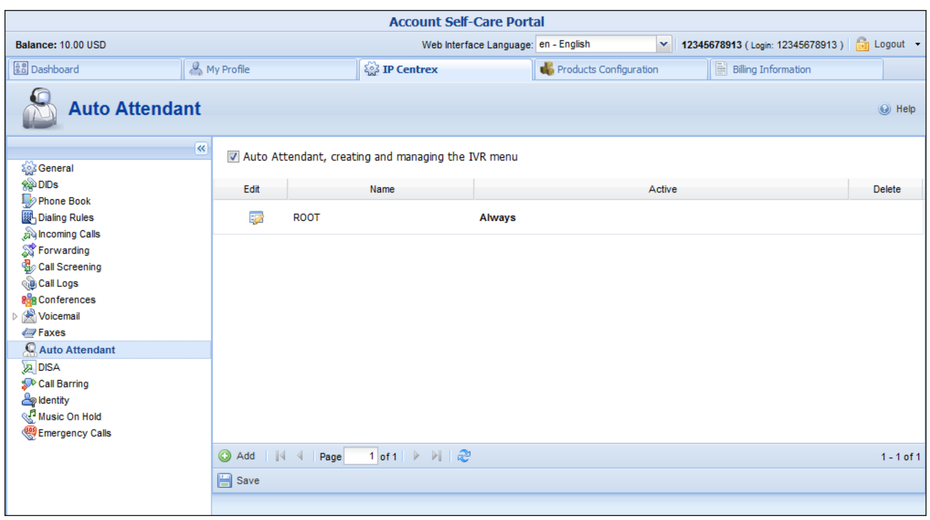
Note, that this page is only active if your provider has enabled the **Auto Attendant** service for you (otherwise it will be grayed out). Depending on your needs, you may activate / deactivate the **Auto Attendant** by selecting or clearing the check box on the top.

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

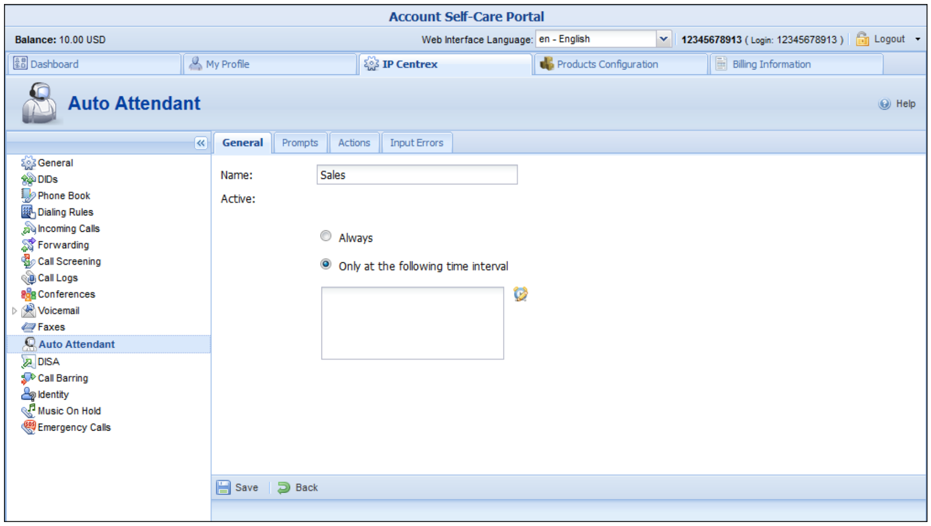
The auto attendant is composed of a set of menus. The main screen lists all the menus available. You can modify one of the existing menus by clicking the **Edit** icon or by simply double-clicking the required menu item in the list.



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

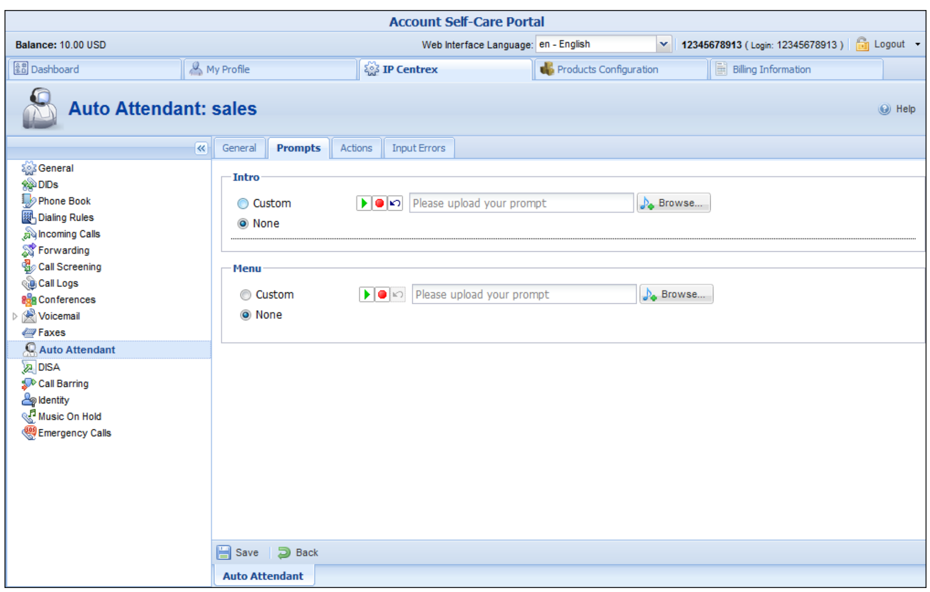
- **Name** – A descriptive name for the menu, i.e. 'Sales' for a sales department.
- **Active** – Time definition when the current menu is active.
    - To set the menu as always active, select the **Always** option.
    - To set the other time period, select **Only at the following time interval** and 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

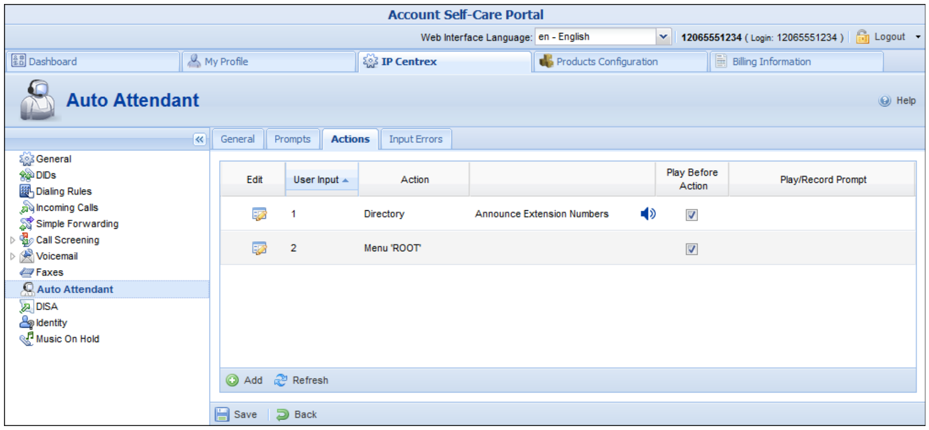
To record a prompt, use the following buttons:

- – **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



Field	Description
Edit	Click the **Edit** icon to make changes in the action.
User Input	• **Not Active** – When the current menu is not active. • **0 – 9, #, *** – User selection on telephone keypad. • **Timeout** – No selection received from user. • **Fax** – Fax CNG tone detected.
Action	See the description of available actions below, under the table.
	Provides additional information.
Play Before Action	Select this check box if the corresponding prompt is to be played before an action is performed.
Play / Record Prompt	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).

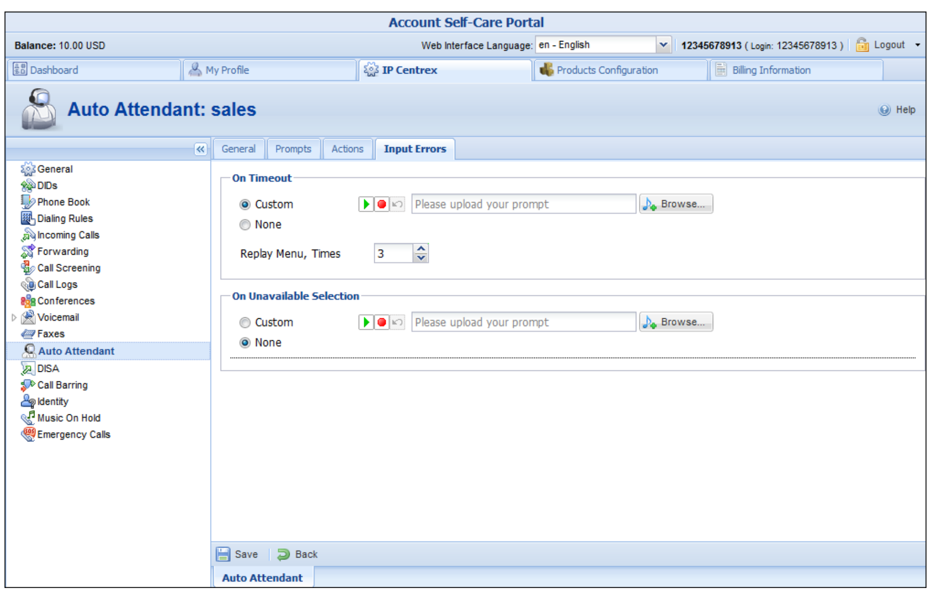
- **Dial extension directly** – Transfers the call to an extension number entered by the caller from his phone. The extension number should start with the same digit as the "Dial extension directly" option. To prevent abuse (e.g. someone attempting to enter a long-distance number in this way), you can 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

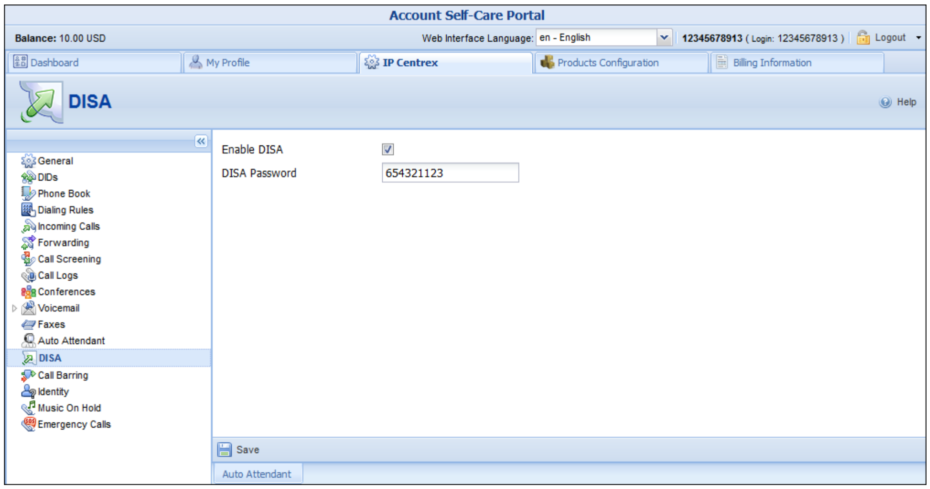
On the **Input Errors** page you can record / upload the **Timeout** and **Unavailable Selection** prompts. For detailed instructions on how to do this, please refer to the Prompts section of this document.

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



DISA

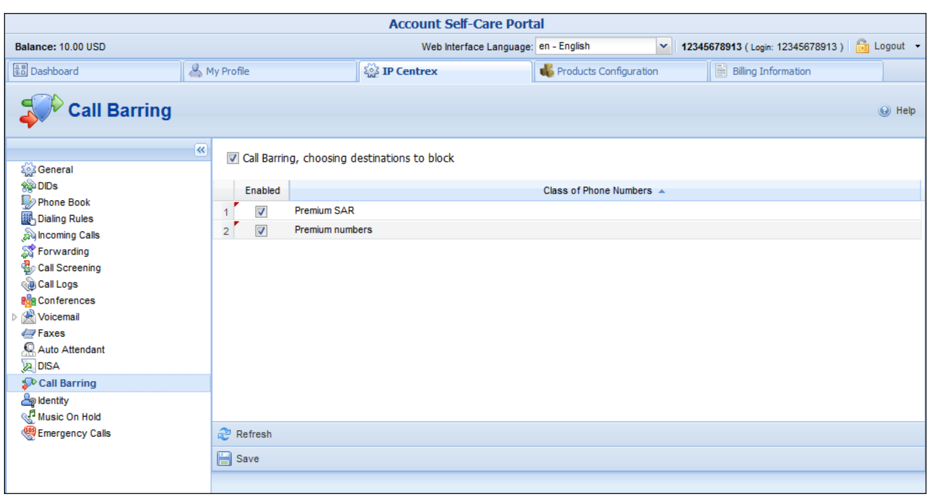
The **DISA** (Direct Inward System Access) functionality allows you to make an outgoing call as if you were using your IP phone. For example, while on a business trip you need to make an international call. To do so, enable **DISA**, then dial the voicemail access number and choose the option for **DISA**,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



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.



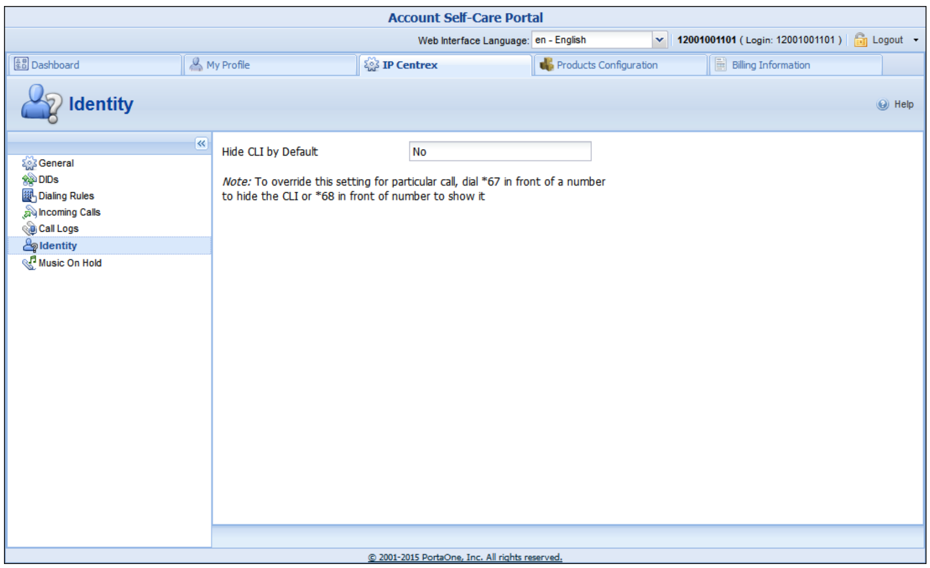
Identity

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.

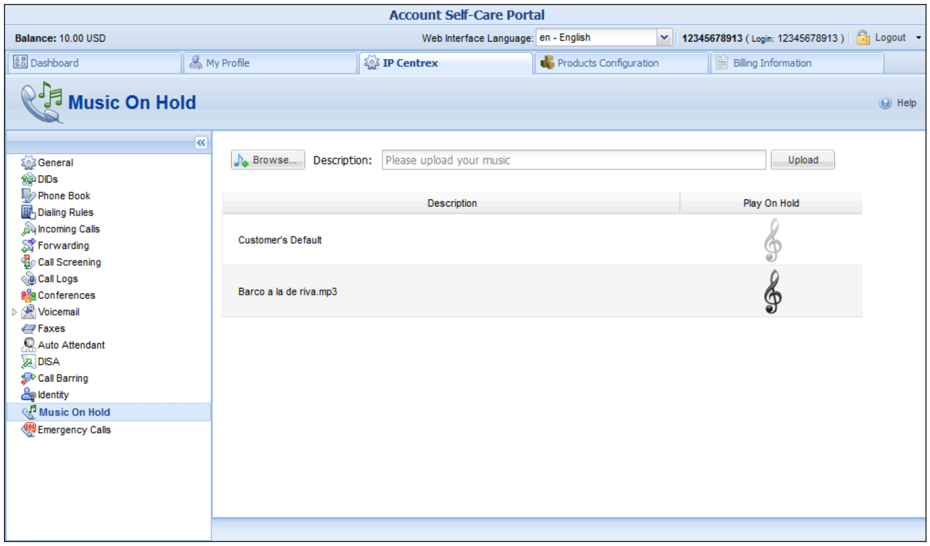
For more information, please see the *Service feature codes (also known as Feature Access Codes)* table in the **Dialing rules** section of this guide.



Music on Hold

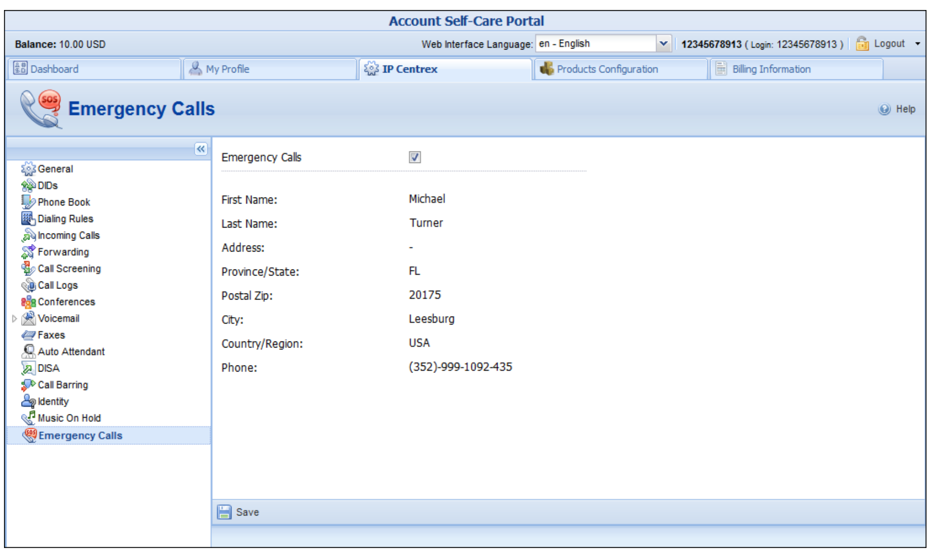
Here you can define which music will be used for calls on hold. To select music, click the **Browse** button, select an audio file and click **Upload**.

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.



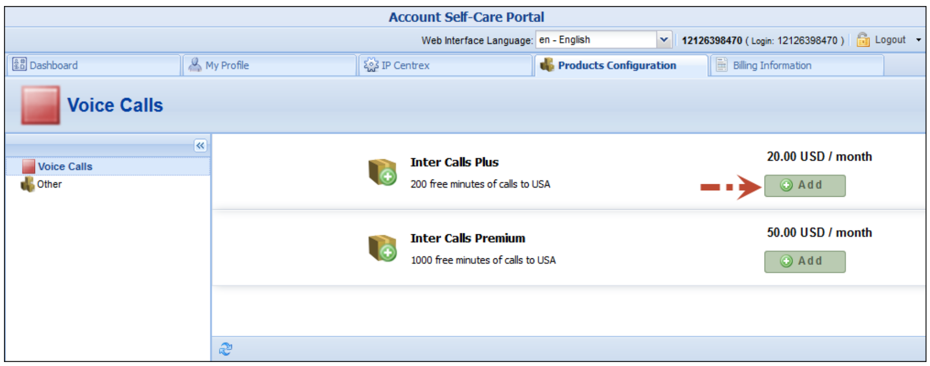
Products Configuration tab

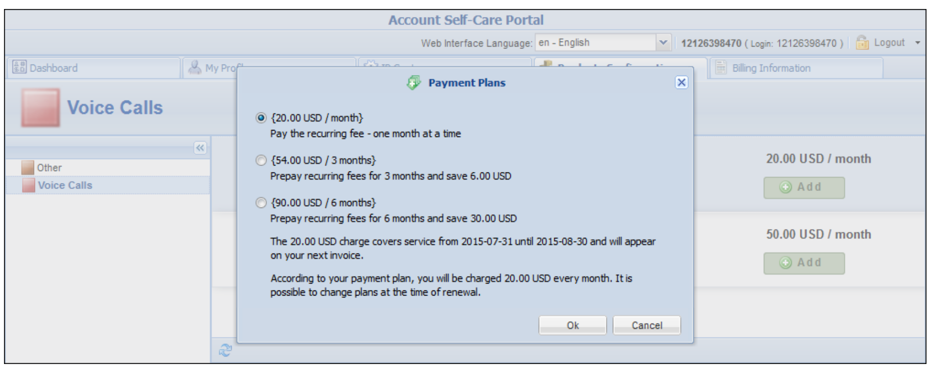
This tab contains information about all available add-on products for your account. The add-on products are organized in groups that are visible on the left-hand side of the page. The right-hand side of the page contains all of the add-ons that belong to a corresponding product group.

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.



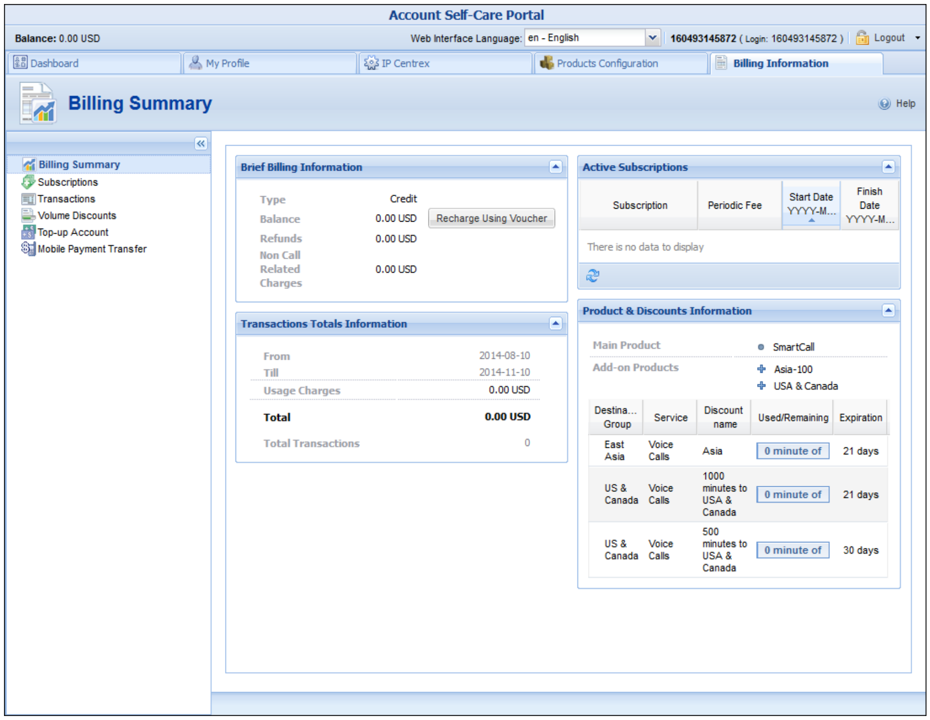


Billing Information tab

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

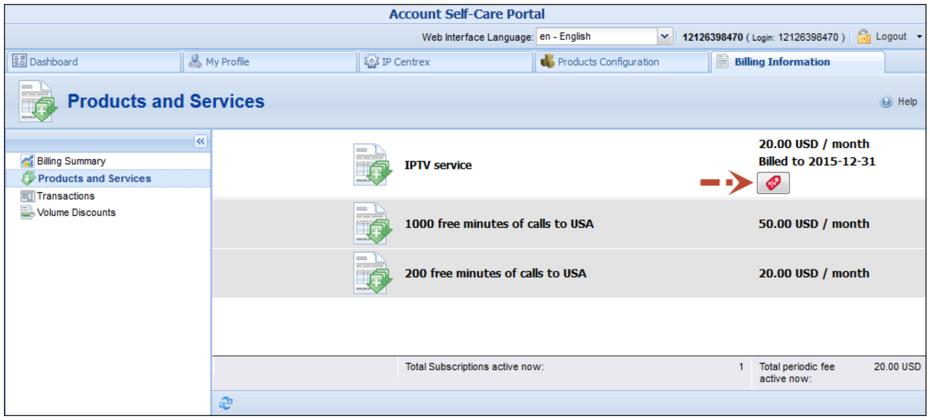


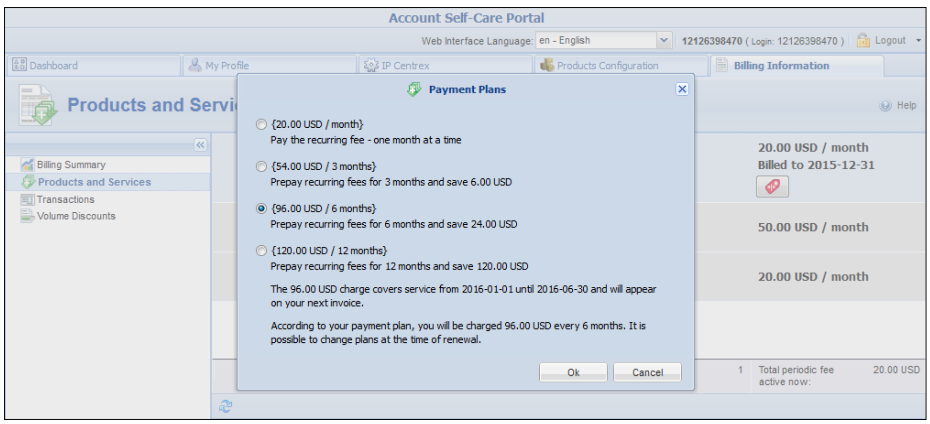
Field	Description
Brief Billing Information	This reflects billing information such as available funds (or balance), refunds and charges information. You can also recharge your phone (account) using a voucher here. To do that, click the **Recharge Using Voucher** button and fill in a valid voucher number.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

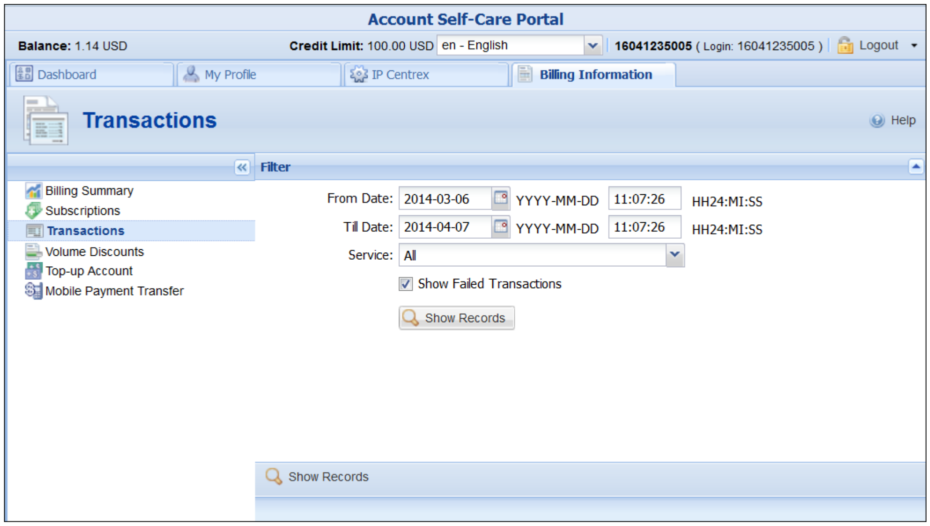




Transactions

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

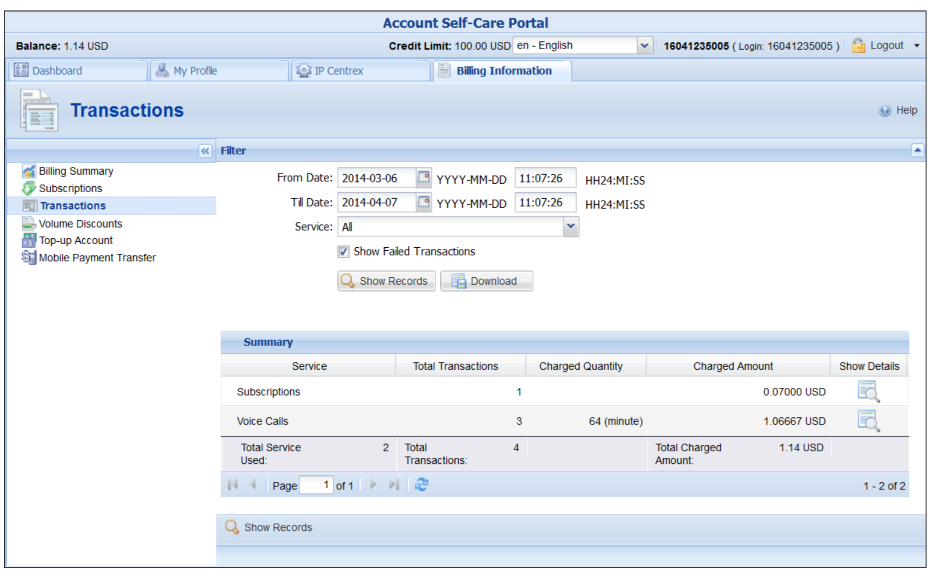
This page allows you to view and download transaction records – for any desired time period.



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.



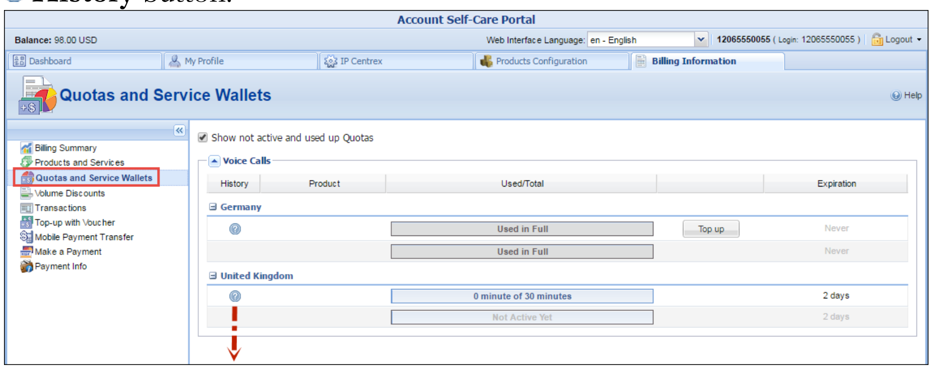
Click the Download **Download** icon to download Transaction Detail Records in the .csv format.

Quotas and Service Wallets

This page displays all *active* quotas available for you. To display the *inactive* ones, select the **Show not active and used up Quotas** check box.

Using this page, you can either top up your service wallet by credit card or transfer money from your main balance. To do this, click the **Top up** button. It redirects you to the **Make a Payment** page where you can select the necessary amount of service and proceed with the payment procedure.

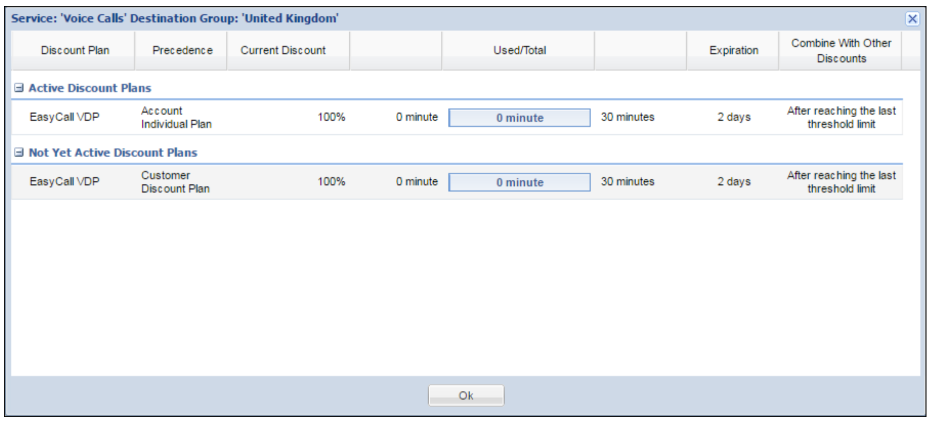
To find more extensive information about a particular quota, click on the **History** button.



Field	Description
Show not active and used up Quotas	Displays the quotas and service wallets with the *Consumed / Used up* and *Not Yet Active* status applicable to you.
Service	A specific service (voice calls, messaging, data transfer, etc.) that this quota or service wallet will apply to.
Destination Group	Information about quotas and service wallets used and remaining is shown, grouped by destination group names. Each name represents one group included in the discount plan assigned to you.
History	Shows extended information about the quotas and service wallets.
Product	Shows the product which this quota or service wallet is assigned to.
Used/Total	Shows the current value of both consumed and remaining quotas and service wallets. The progress bar graphically reflects how much of the volume has been consumed.
Top up	Click this button to initiate a top-up procedure. The system redirects you to the **Make a Payment** page and shows the top-up options and their fees. When the necessary option is selected, you can

	choose to either transfer money from your balance or pay by credit card right on the same page. Please find detailed instructions in the **How to top up your service wallet** section. **NOTE:** If the **Top up** button is not available for you, please contact your service provider.
Expiration	Shows the time left for the quota to be reapplied. Service wallets do not have an expiration date, so ***Never*** is displayed in their cells.

History dialog box



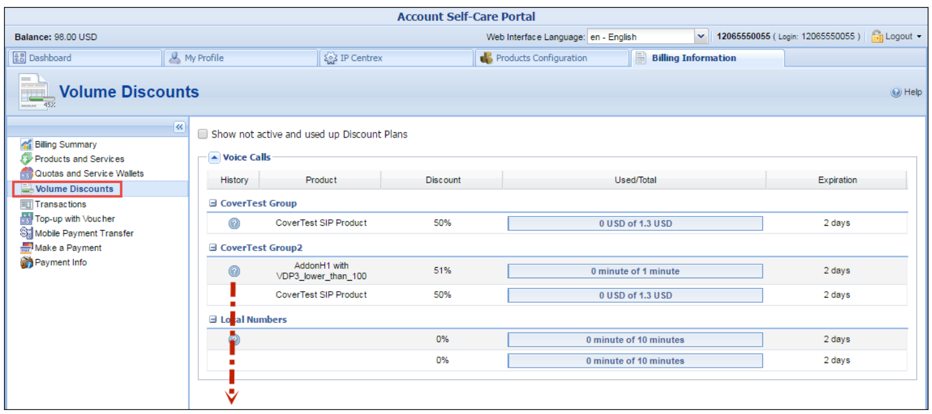
Status	The current status of the discount plans. • **Active** – The discount plans that are currently in use. • **Consumed / Used Up** – The discount plans that have already been used up. • **Not Yet Active** – Currently inactive discount plans.
Discount Plan	The name of the discount plan applicable to you.
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 lower priority. For more details about the discount's priorities look in the *Applying Volume Discount Plans* chapter of the **PortaBilling® Administrator guide**.
Current Discount	The value of the discount currently applied to you.
Used/Total	Shows the current value of both consumed and remaining quotas. The progress bar graphically reflects how much of the quota has been consumed.
Expiration	The time left for the quota counters to be reset. Service wallets do not have an expiration date, so

	Never is displayed in their cells.
Combine With Other Discounts	Shows the way this quota is applicable to a session in combination with other quotas.

Volume Discounts

The **Volume Discounts** group displays all *active* discounts that apply to you. To display *inactive* discount plans, the **Show not active and used up Discount Plans** check box must be selected.

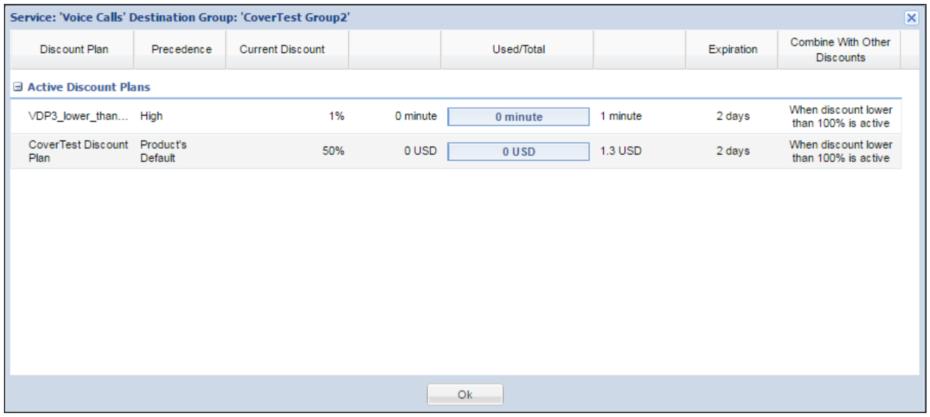
Information about volume discounts' usage history can be obtained in the **Discount History** panel, which is visible by clicking the **History** button.



Field	Description
Show not active and used up Discount Plans	Displays the volume discounts with *Consumed/Used up* or *Not Yet Active* status applicable to you.
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 discount plan assigned to you.
History	Shows extended information about the discount plan.
Product	Shows the product which this quota or service wallet is assigned to.
Discount	The value of the discount currently applied to you.
Used/Total	Shows the current value of both consumed and remaining discount volume. 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 you. If **Never** is selected, it means that this discount is for one-time use and will not be reapplied to you.

History dialog box



Status	The current status of the discount plan. • **Active** – The discount plans that are currently in use. • **Consumed/Used Up** – The discount plans that have already been used up. • **Not Yet Active** – Currently inactive discount plans.
Discount Plan	The name of the discount plan applicable for you.
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 lower priority. Find more details about the discount's priorities in the *Applying Volume Discount Plans* chapter of the **PortaBilling® Administrator guide**.
Current Discount	The value of the discount currently applied to you.
Used/Total	Shows the current value of both consumed and remaining discount volume. The progress bar graphically reflects how much of the discounted service has been consumed.
Expiration	The time left for the discount counters to be reset.
Combine With Other Discounts	Shows the way this discount plan is combined with other discount plans applicable to a session. Find more details about this in the *Modes for Combining Discounts* chapter of the **PortaBilling® Administrator guide**.

Top-up Account

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

Note that if you use a prepaid calling card, this card should not have been previously used. Also it must share the same product as the account being recharged.

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.

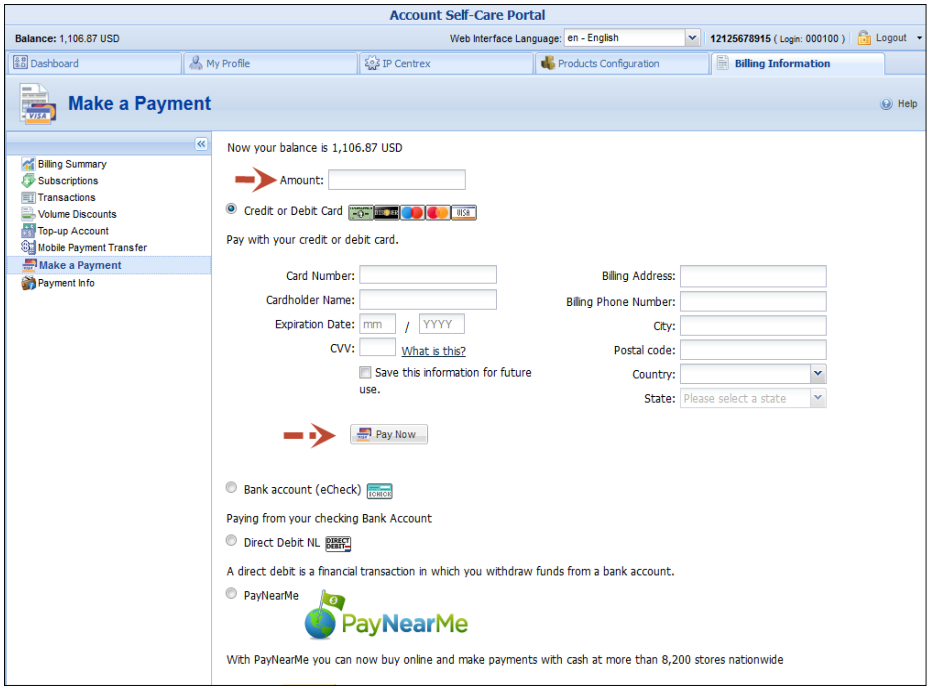
Make a Payment

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.
- **PayPal** – Allows you to pay using your PayPal account.

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.



Pay with Bitcoins

You can also top up your balance with Bitcoins (BTC):

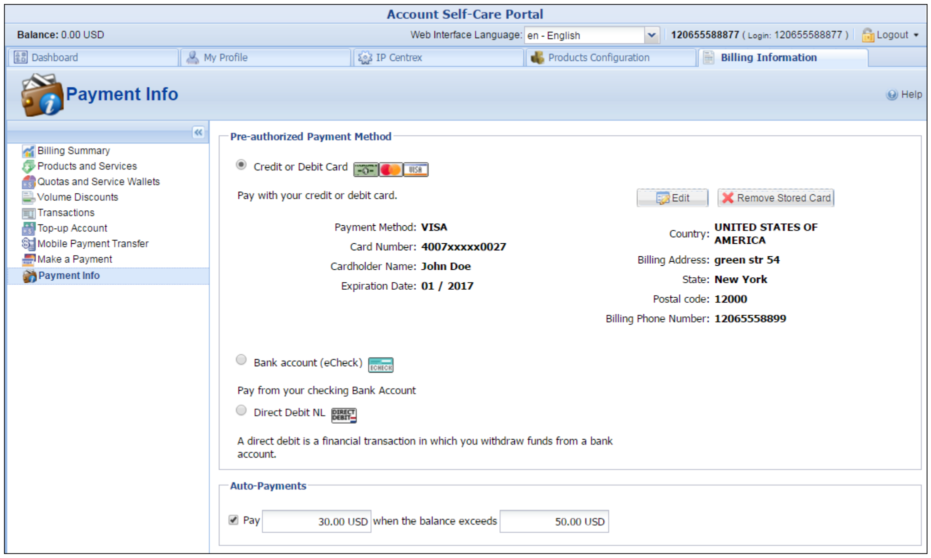
1. In the **Amount** field, type a top-up amount.
2. Choose **New Payment Method** and click **Next**.
3. Choose **Pay with Bitcoins** and click **Next**. You will see the top-up amount in Bitcoins according to the current exchange rate and the Bitcoin payment address to where payment must be sent.
4. With a Bitcoin client or Bitcoin wallet online service, send the top-up amount from your Bitcoin wallet to this address. For your convenience, the Bitcoin address can be scanned with a QR code.
5. When the transaction has been submitted, click **Done**.
6. Once the Bitcoin amount is received, your balance is topped up.

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

The **Payment Info** page is only available if this functionality is enabled by your service provider. On this page you can set up the pre-authorized payment method and configure auto payments.



Pre-authorized Payment Method

In the **Pre-authorized Payment Method** section you can choose which type of payment method to use: Credit or Debit Card, Bank account (eCheck) or Direct Debit NL.

Update your credit card information

If you want to pay with a different credit card, click **Edit** and enter the new card information. Click **Save** to save this new credit card information.

As soon as you add a new credit card to PortaBilling®, the credit card is verified. During the credit card verification process, the system performs an Authorization only transaction instead of an actual charge. The Authorization only transaction reserves an amount of money on your credit card for a certain time period. This does not affect your balance in PortaBilling® or change your credit card balance.

If the verification was successful, this new credit card information is stored. Further payments and automatic payments (if configured) will be made using this card.

Auto-Payments

Note that the **Auto-Payments** section is only active if the **Pre-authorized Payment Method** is chosen and all the required information is filled in for it (for example, credit card information).

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 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.

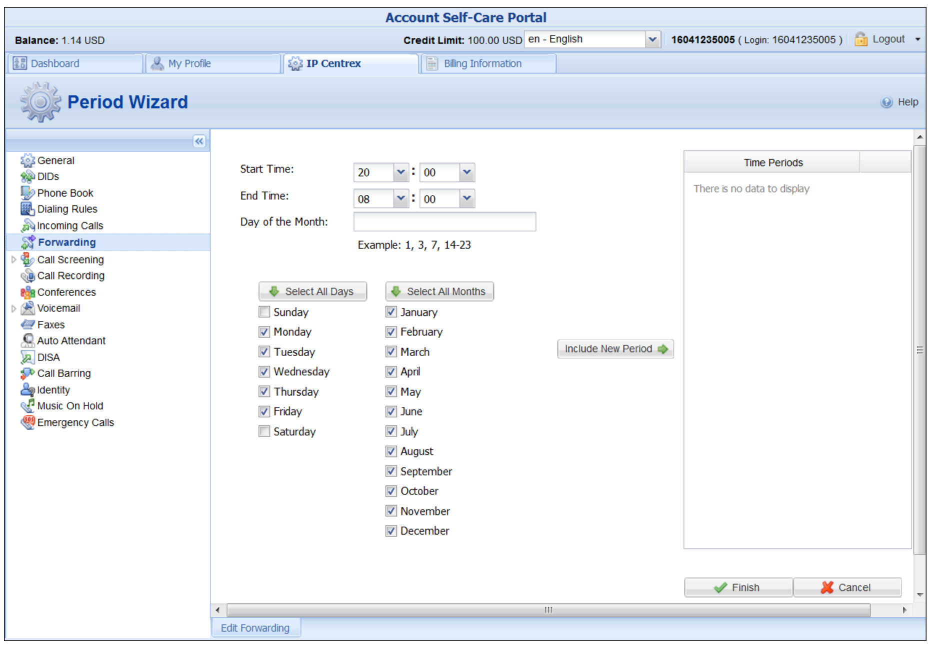
3. How to ...

... define a time period using the wizard?

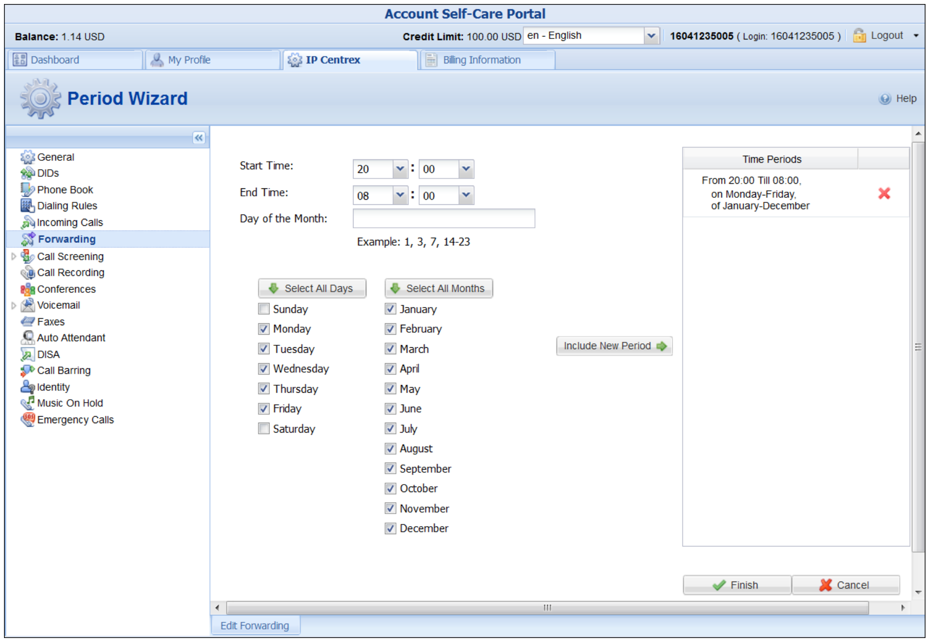
With the Period Wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based 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

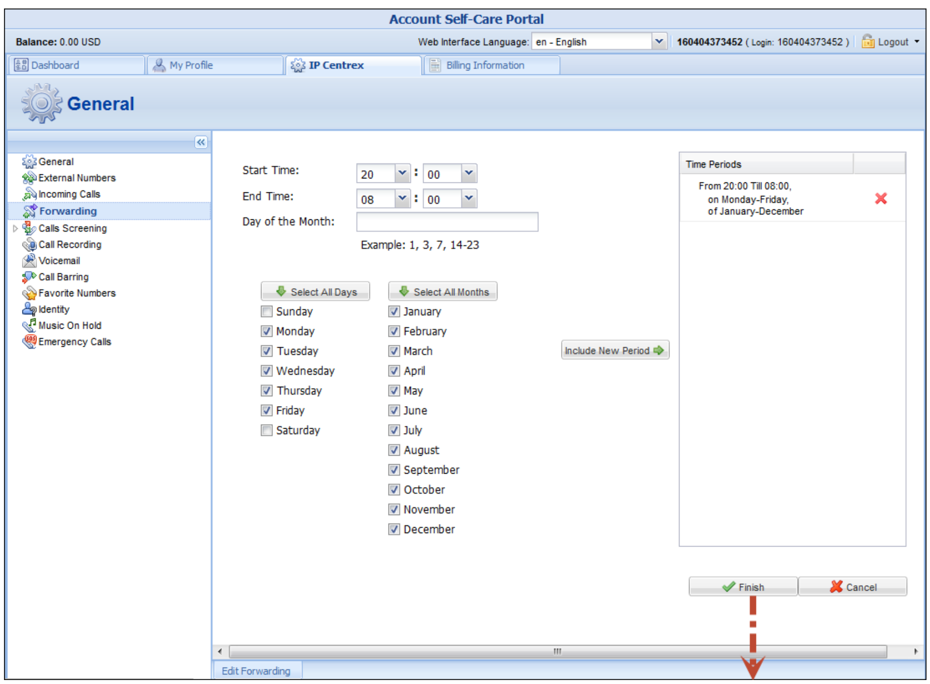
This example illustrates the process of creating a period within the Monday–Friday workweek that starts at 8 p.m. and lasts until 8 a.m. the next morning:



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.



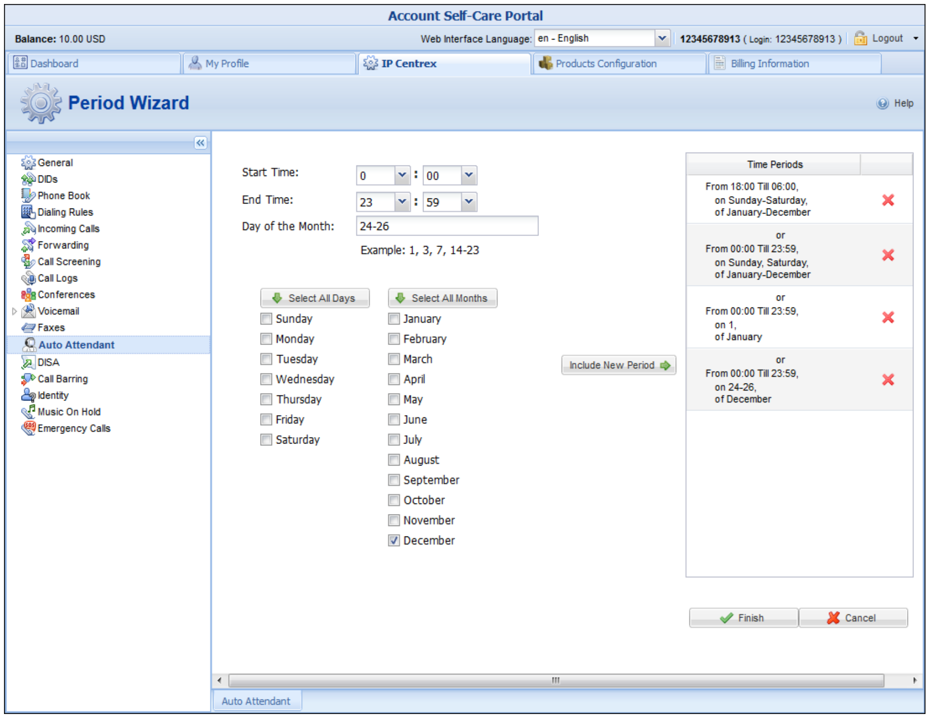
6. Click the **Include New Period** button, and this time period will appear in the **Time Periods** panel on the right side of the page.



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 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.

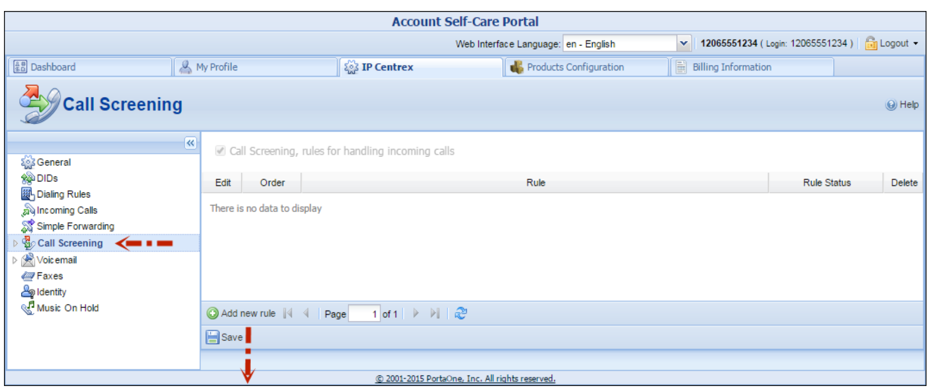
6. Click **Finish** to complete the time period definition.

... configure call screening?

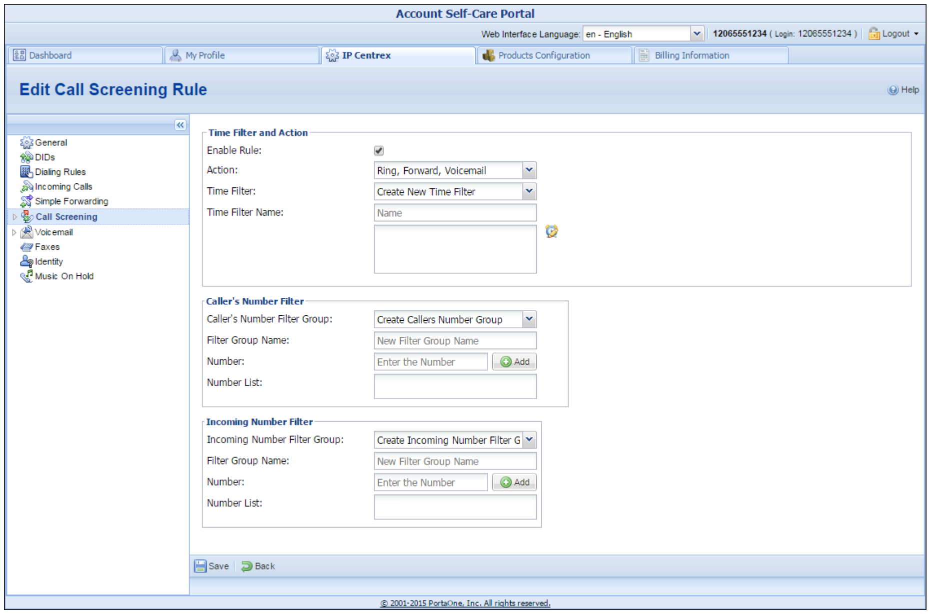
On the **Call Screening** page you can define and view a list of rules for handling incoming calls.

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

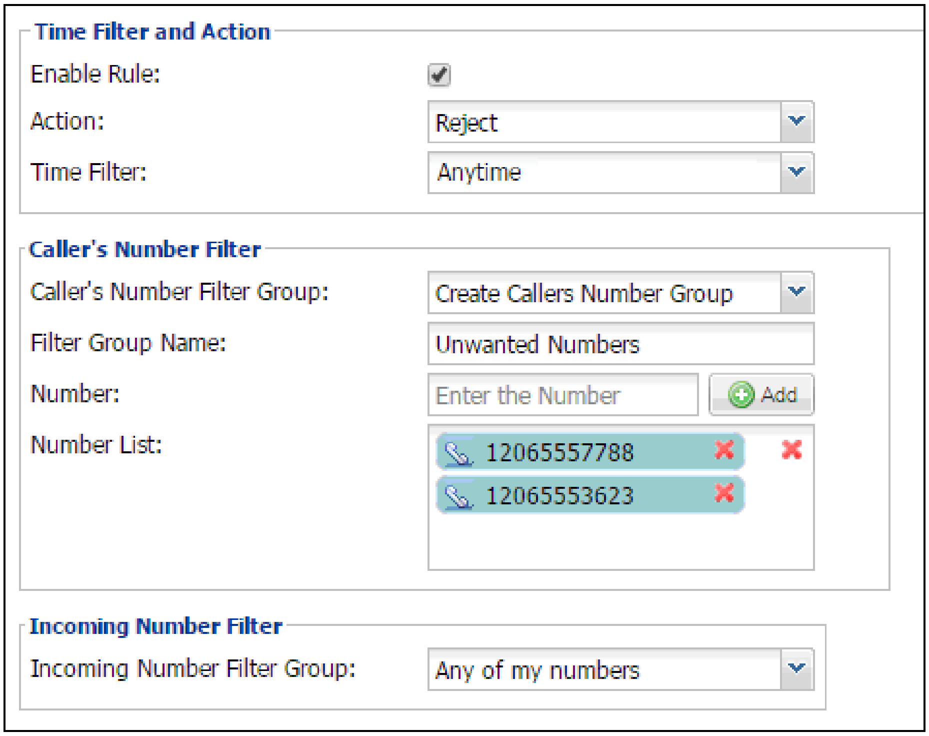
Click the **Add new rule** button to start.



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



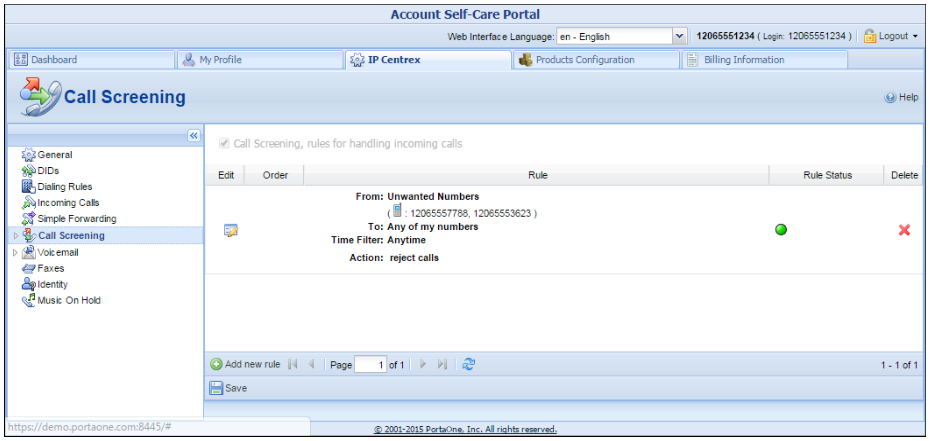
1. Choose the **Action** that will be applied to the rule. In this case it is **Reject**.
2. From the Time Filter field, select. **Anytime** (It is not necessary to create a new time filter since we want to reject calls from unwanted callers 24/7). If you want to define a different time period, select **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.



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.

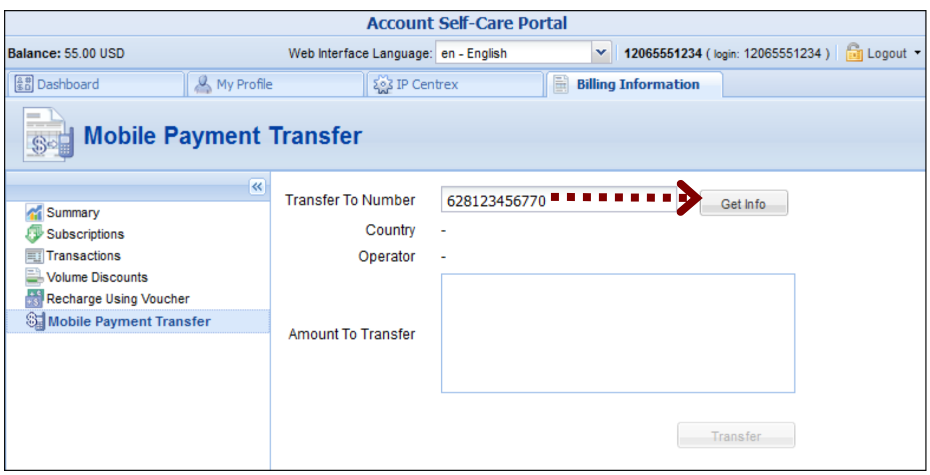
NOTE: If you need to add a group of numbers starting with the same prefix, use the % character at the end to specify that the current string is the prefix.

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.

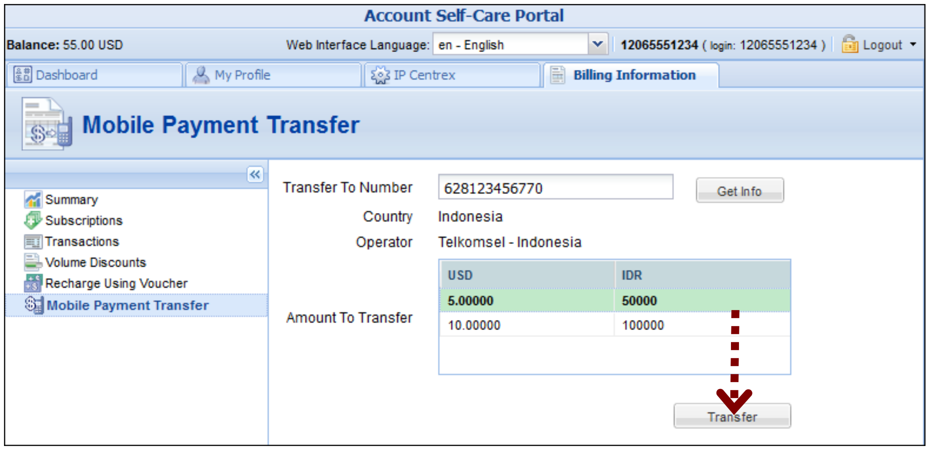


... transfer funds to mobile numbers?

Input the desired number to the **TransferTo 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.



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.

... top up a service wallet?

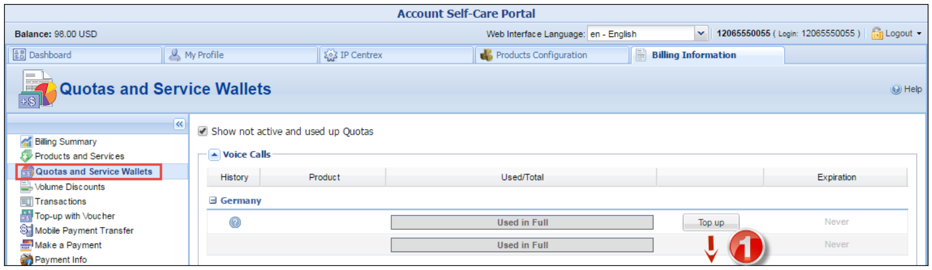
Service wallets make it possible to divide your balance into virtual sub-wallets. Each sub-wallet is designated for a specific service and destination group. Therefore, money transferred to a sub-wallet can only be used for a specific service (e.g. only for calls to the US or only for sending SMS, etc.).

For example, you want uninterrupted access to the Internet even if all of your available funds have been consumed by making calls. So either you top up your Internet service sub-wallet using a credit card or you transfer money from your main balance. You then receive a specific amount of Internet traffic that you can use even once your available funds reach zero.

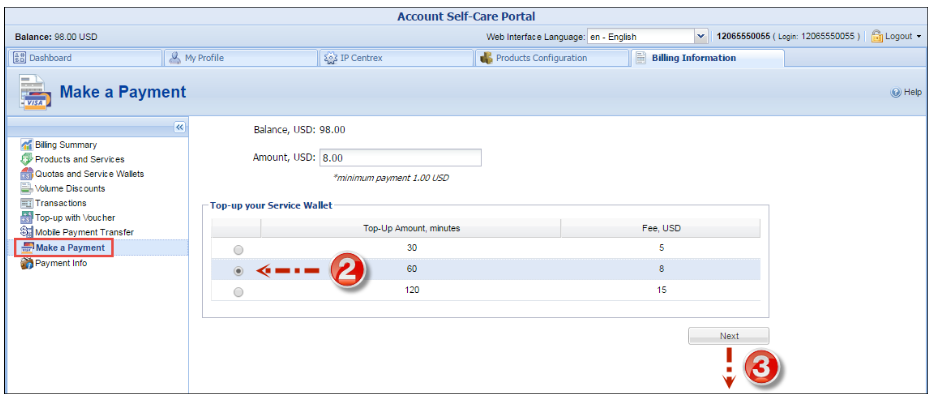
NOTE: If the **Top up** button is not available for you, please contact your service provider.

You can top up your service wallets on the **Quotas and Service Wallets** page in the **Billing Information** tab.

1. Select your preferred service and destination and click the **Top up** button.

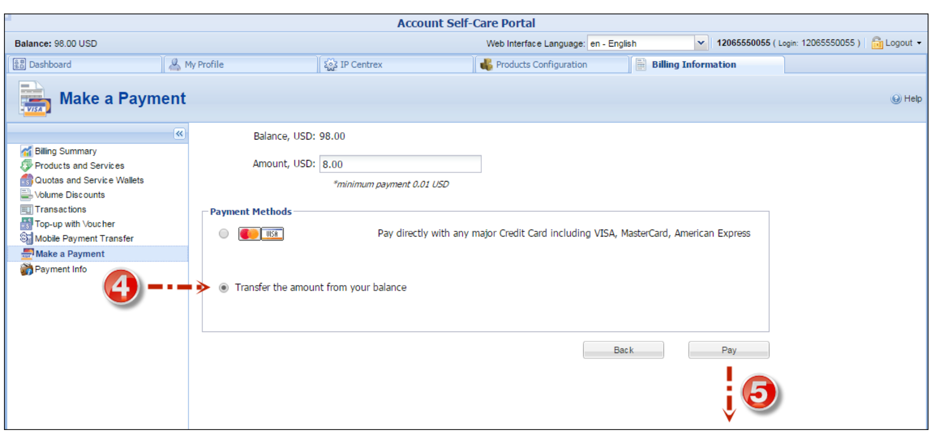


2. The system forwards you to the **Make a Payment** page. Here you can view your balance, the available top-up amounts and their fees. Select your preferred top-up option.
3. Click **Next**.



4. The next screen displays the available payment methods. Use them if you want to pay for the service by credit card. Please refer to the **Payment Info** chapter to obtain more information about how to configure online payments.

   Alternatively, you can transfer money from your main balance. To do this, select **Transfer the amount from your balance** option located below.
5. Click **Pay**.



The next screen represents updated information about the service available for you.