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#### PortaBilling® customer self-care interface, April 2016

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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 inbetween 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.

 $\mathbf{X}$ 

**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  $1024 \times 768$ .

# **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

				Custom	er Se	f-Care Portal		
alance: 92.20 USD						edit Limit: 100.00 USD en - English	EasyCall (Login: easycall1)	🔒 Logoi
Dashboard		Å My Profile	र्द्धे IP Centrex		Billing Information	O Trouble Tickets		
Dash	board							0
Recent Calls						Brief Billing Information		•
Date/Time	Account ID	From	То	Duration	Play	Balance	92,20 USD	
2015-01-08 15:57:46	12057606878	12057606878	18667478647	5:00		Credit Limit	100.00 USD	
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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				
N Page	1 of 1   🕨	12			1 - 5			
Contact Inform	nation							
Contact								
Address								
Email								

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:

Customer Self-Care Portal												
Balance: 180.20 USD					Web Interfa	e L	anguage: Select a lang	uage	e 🔽 Eas	syCall ( Log	jin: EasyCall ) 🛛 🔒	Logout 👻
BB Dashboard	🔏 My Profile 🔯 IP Centrex			IP Centrex	Bling Information							
Extensio	ns											
	«	Edit	Confi	Extension Num	Extension Name	•	Assigned To Phone Lin	е	Primary Group	Publi	Recorded Name	Delete
General		<b>;</b>	1	222	John	A Z Z	Sort Ascending		-		Not Set	×
Sites Phone Lines External Numbers		<b>;</b>	1	333	Catherine		Columns	<b>V</b>	Edit		ot Set	×
Abbreviated Dialing		<b>;</b>	1	555	Andrew		000111555	<b>v</b>	Configure Extension Numb	ber	ot Set	×
Incoming Calls								V	Extension Name	,		
Call Recording								V	Assigned To Ph	one Line		
Huntgroups								V	Primary Group			
Music On Hold								V	Published			
								V	Recorded Name	•		
								V	Delete			
		🗿 Ad	d Extensio	in 🕅 🖣 Page	1 or 🕨 🖗		2					1 - 3 of 3

#### **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.

JohnDoe ( Login	: john	n_doe ) 📔 Logout 👻
	2	Change Password

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:

			Main Cus	tomer	Self-Care Po	rtal				
ailable Funds: 1,001.10 USD				Veb Interface Language: en - English 🛛 👻 Easy Call Ltd. ( Login: easy					:allitd )   🛅 Log	
Dashboard 🕹 My Profile						Information		🚫 Trouble T	ckets	
Dashboard										٩
Recent Calls					Brief Billing In	formation				
Date/Time Account ID Fi	om To	Duration	Cost, USD	Pl	PL Available Funds 1001.10 USD					
There is no data to display										
4 4 Page 1 of 1 ▶ ▶	æ				Branch Office	s				
Contact Information					There is no da	ta to display				
Contact					4 4 Page	e 1 of 1	I 🕨 🕅 🕯	8		
Address Easy Cal Str., 1						unts				
					Destinati Group	Service	Product	Discount	Used/Total	Expiration
					EUROPE	Voice Calls		100%	0 USD of 5	30 days
					USA&C	Voice Calls		100%	0 minute of	30 days

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	Here you can view your contact info such as address,
Information	email, etc.
Brief Billing	This reflects thumbnail billing information such as
Information	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.

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•		Customer Sen-	Care Portar			0.1
Available Funds: 152.98 USD	C	VVe	eb Interrace Lang	uage: en - English	EasyCall (Login: easyCall1)	Eugout +
[意思] Dashboard	🐣 My Profile	ि IP Centrex	Bill	ing Information	O Trouble Tickets	
General						😡 Help
	Personal Information			Contact Information		
Ceneral General	Company Name	Easy Call Ltd		Contact	John	
Additional Information	Mr./Ms./	Mr.		Phone	+1-415-404-44-44	
Change Password	First Name	John		Fax		
	M.I.	Alex		Alt. Phone		
	Last Name	Doe		Alt. Contact		
	Address Information			E-Mail		
	Country	CANADA	*			
	Address Line 1	239 Suite 5				
	Address Line 2					
	City	Coquitlam				
	Province/State	British Columbia	~			
	Postal Code	V3B2P7				
	ave Save					
		@ 2001-2016 PortaOne, In	c. All rights reserve	d.		

Group	Description
General	Here you can enter general information such as
	company name, address, etc.
Additional	Here you can define extra information (such as
Information	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	Here you can change your current password for the
Password	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

		Customer Self-	Care Portal	
Available Funds: 10.00 USD			Web Interface Language: en - English	🖌 EasyCall (Login: easycallco) 🔤 Logout 👻
E Dashboard	🐣 My Profile	រដ្ឋ៍ IP Centrex	Billing Information	Trouble Tickets
General				🛞 Help
Control Extensions	Paging/Intercom Paging/Intercom Prefix Extension Number Length	123456 3		
Abbreviated Dialing Dialing Rules  Automotion Calls  Coll Logs  Log Huntgroups  Call Logs  Call Lo				
_∰ Identity ੴ Music On Hold				
	Save			

Field	Description
Paging /	Intercom calls enable users belonging to the same
Intercom	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 /	This appears only if <b>Paging / Intercom</b> is enabled;
Intercom	this is a special code that is dialed before the other
Prefix	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	This sets the maximum speed dial length (also known
Number	as "abbreviated number length"). Please see the
Length	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.

					Customer Se	elf-Care Portal				
Balance: 180.20 USD Web Interface Language:							en - English	~	EasyCall ( Login: EasyCall )	🔒 Logout 🔹
1 Dashboard	🛛 🐣 My Profile			🙀 IP Centrex	📑 Bi	ling Information				
Extension NNN	ons									
	*	Edit	Conf	Extension N	Extension Name	Assigned To Phon	Primary Group	Publi	Recorded Name	Del
General		<b>:</b>	1	222	John	000111666	-		Not Set	×
Sites Phone Lines External Numbers		<b>:</b>	1	333	Catherine	000111777	-		Not Set	×
Abbreviated Dialing		<b>:</b>	1	555	Andrew	000111555	-		Not Set	×
) agi Incoming Calis Cultor Calis Call Recording Call Recording C										
		📀 Ad	id Extens	ion 🛛 🕯 Pa	age 1 of 🕨	₩   &				1 - 3 of

To add a new extension number, click the <sup>(2)</sup> 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 hunt group 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: 180.20 USD						Web Interf	Web Interface Language: en - English 🛛 🖌 EasyCall ( Login: EasyCall )				
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Extensions											
	<b>«</b>	Edit	Confi	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Publis	Recorded Name	Delete	
🥋 General				444	Andrew	000111555	✓ This extension is not as:	~ 7	Please b Browse		
Extensions						Save	Cancel				
Phone Lines		<b></b>	1	222	John	000111666	-	<b>V</b>	Not Set	×	
Abbreviated Dialing		<b>;</b>	1	333	Catherine	000111777	-		Not Set	×	
<ul> <li>Jain Econing Calls</li> <li>Call Recording</li> <li>Laid Recording</li> <li>Hungroups</li> <li>Identity</li> <li>Music On Hold</li> </ul>											
		🗿 Ad	d Extensio	n 🚺 🖣 Page	1 of 🕨 🕅 🦂	8				1 - 2 of 2	

	Customer Self-Care Portal											
Balance: 180.20 USD						Web Interfa	ce Language: en - English		EasyCall ( Login: EasyCall )	🔒 Logout 👻		
Dashboard	🐣 My Profile		1	IP Centrex	📄 Biling Info	mation						
Extensio	ns											
	*	Edit	Confi	Extension Number	Extension Name	Assigned To Phone Line	Primary Group	Publis	Recorded Name	Delete		
General		<b></b>	1	222	John	000111666	-	$\checkmark$	Not Set	×		
Sites Phone Lines External Numbers		<b>;</b>	1	333	Catherine	000111777	-		Not Set	×		
Abbreviated Dialing			1	444	Andrew	000111555		$\checkmark$	Not Set	×		
ing Daming Kutes ⇒ An Incoming Calls © Outpoing Calls © Call Recording ∰ Hunkgroups ∰ Music On Hold												
		🚫 Ad	d Extensio	n 🕅 🖣 Page	1 of 🕨 🕅 🧯	8				1 - 3 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  $\times$  **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).

Dachhoard	Q. Mu D	rafila	Siz ID Cor	ateau		Pilling	Information						
Dashboaru	a ny ri	Torne	age in cei	id ex		Control	Information						
Dashl	board												
AccountID: 1	2568900550	00				Onli	ne				Ext	ension #: 5	512 (Dian
Contact Inform	ation						Brief Billing I	nformatio	n				
Contact E Address Email	viana Edison						Type Balance Refunds Non Call Rel	ated Cha	rges		Debit 9.98 USD 0.00 USD 0.00 USD		
Recent Calls													
🕅 4 🛛 Page	1   🕨 🕅	2			1 - 1	of 1	Product & Di	counts I	nformation				
Date/Time	From	To	Duration	Cost, USD	P	lay	Product	Eas	yCall				
2011-09-21	125689005500	160404373456	0:28	0.05			Destination	Service	Peak Level	Threshold	Used	Current Disc	Next Discou
14 4 Page	1 🕨 🕅	2			1 - 1	of 1	sa.JNB	Voice Calls	N/A	200 USD	0 USD	100% (for free)	0% (normal rate)
							Member of H	untgroup	s Informatio	n			
							Group Na	пе					
							1 New Dep	artment					

# 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.

Note that even if no customer sites are created, there is the virtual default site in the system that includes all the accounts that have not been explicitly assigned to a customer site.

			Customer Self-Care	Portal	
Balance: 180.20 USD				Web Interface Language: en - English	EasyCall ( Login: EasyCall ) 🔒 Logout 🔸
Dashboard	🔏 My Profile	P Centrex	Billing Information		
Sites					
	~	Default Site	Site Name:	Default Ste	
General					
Sites			Limit Simultaneous Calls:	Yes	*
Phone Lines			Max Number of Simultaneous Calls:	4	
Me External Numbers			Max Number of Incoming Calls:		
Dialing Rules			Max Number of Outgoing Calls:		
Incoming Calls			Max Number of Forwarded Cals:		
all Recording					
A Huntgroups			Codec Connectivity Profile:	Unknown	*
Music On Hold			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	Engage real-time checks of the number of
Simultaneous	concurrent calls made by accounts that belong to
Calls	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	Allow only a specific number of concurrent calls
Simultaneous	(regardless of their type, such as incoming or
Calls	outgoing) for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Incoming Calls	incoming calls for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Outgoing Calls	outgoing calls for accounts at this site.
Max Number of	Allow only a specific number of concurrent
Forwarded Calls	forwarded calls for accounts at this site.
Codec	Codec connectivity profile that will be used for
Connectivity	bandwidth allocation calculation. Every new call's
Profile	allocated bandwidth is calculated by considering a
	negotiated codec and its parameters to enable full
	if no more bandwidth is available
Max Bandwidth	Bandwidth utilization limitation to ensure that only
Man Dundwiddii	an acceptable number of calls are allowed, in order
	to avoid severe degradation of the sound quality on
	calls in progress.
Max Incoming	Bandwidth utilization limitation for incoming calls.
Bandwidth	
Max Outgoing	Bandwidth utilization limitation for outgoing calls.
Bandwidth	
Location	Customer's permanent location for geo-IP fraud
Information	prevention.
Current Location	Customer's permanent location. It contains a
	country code top-level domain (in <i>iso_3166_1_a2</i>
Allowed Mability	format, e.g. <i>fr</i> for France, <i>de</i> for Germany etc.)
Allowed Mobility	• Stationary user (constant location)
	option can be used if the customer is not authorized to make calls from various
	countries (e.g. as a residential customer
	would make calls from his SIP phone) Calls
	made from any other country will be
	screened.
	• The Roaming user (frequent location)
	option can be used for customers who

travel frequently. In this case, a change in
location would be considered acceptable.

# **Phone Lines**

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

	Customer Self-Care Portal											
Balance: 11.55 USD					Credit Limit: 1,000.00 USD en - English				EasyCall Ltd ( Login: EasyCallLtd )   🛅 Logo			🔒 Logout 🔹
Dashboard	🐣 My Profie		iP Centr	ex	📄 Billing Inf	ormation						
Phone L	ines											🕑 Help
Separal	~	Configure	ID	ldle, days	Available Funds, USD	Туре	Product	Batch	Site	Forwarding Enabled	SIP	IP Phone Model
Extensions		1	16041235003	0	Unlimited	Credit	SIP Subscribers		Default Site	-	0	Linksys/SP
Phone Lines		1	16041235004	0	100.00	Credit	SIP Subscribers		Default Site	×	0	Linksys/SP
Abbreviated Dialing		1	16041235005		99.93	Credit	SIP Subscribers		Default Site	-		
A Incoming Calls     Outgoing Calls		1	17781225000		99.93	Credit	SIP Subscribers		Default Site	-		
Call Recording		1	19070712231		99.93	Credit	SIP Subscribers	1111	Default Site	-		
A Music On Hold		1	42727269710		99.93	Credit	SIP Subscribers	1111	Default Site	-		
a masic criticia		1	60718744698		99.93	Credit	SIP Subscribers	1111	Default Site	-		
		1	60985666273		99.93	Credit	SIP Subscribers	1111	Default Site	-		
		∃ Group E	By Batch 🛛 🕅 🚽	Page	1 of 1 🕨	M   &						1 - 8 of 8

Column	Description
Configure	Click <b>Configure</b> 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	The amount of funds available for the user to spend
Funds	on services.
Туре	The type of phone line. It may either be <b>Debit</b> or
	<b>Credit</b> . 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	The forwarding field shows whether this function is
Enabled	enabled or disabled for a particular phone line. When
	it is enabled, the <b>Ves</b> icon is shown. The field with
	an <b>— No</b> 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  $\equiv$  **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 O Add New Number.

NNN Edit Phone Line: 000999	123			a ×
Dashboard	🐣 My Profile	iP Centrex	Biling Information	
Edit Forw	arding			
General General External Numbers Dalaing Rules Dalaing Rules Call Screening Call Screening Call Screening Call Recording Call Recording Auto Attendant ZDSA Call Barring dioentity Music On Hold Emergency Calls	**	Enable Rule Description Number Hide Advanced Settings Caling Party Display Rng for Rng Schedule:	Forwarding to a cell phone 35644890579 Caler Number and Name 15 Caler Number and Name Market State Only at the following time interval	
	1	🚽 Save 🛛 🗦 Back		
	1	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 interval interval. Please consult the *How* section for more information.

Edit Phone Line: 000999123							8×
🔠 Dashboard 🦀 My Profile	2	Ę	IP Centrex	Biling Information			
Forwarding							
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Call Screening	Edit	Order	Number	Description	Forward Settings	Enable	Delete
Call Screening Call Recording Call Recording Call Recording Call Recording Call Recording Faxes Call Auto Attendant Call Call Call Call Call Call Call Call	Ę		35644890579	Forwarding to a cell phone	Ring Schedule: Always Ring for: 15 sec Calling Party Display: Caller Number and Name	۲	×
Call Barring Addentity Music On Hold Emergency Calls							
	O Add	New Num	nber 🔚 Save 🛛 🖣 🖣	Page 1 of 🕨 🕅			1 - 1 of 1

- 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 **O** 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.

Here Edit Phone Line: 000999123			8 ×
🔠 Dashboard 🦀 My Pro	fle 🔐 IP Centrex	Billing Information	
Edit Advanced	Forwarding		
•	Q.		<u>^</u>
Ceneral Ceneral Ceneral Ceneral Ceneral Dialing Rules Ceneral Callscreening Call Recording Call	Enable Rule Description Number SIP Proxy Hide Advanced Settings Transport Protocol Keep Original CLD Caling Party Display Ring for Ring Schedule:	Image: Constraint of the second se	E
	Save Dack	<ul> <li>Aways</li> <li>Only at the following time interval</li> </ul>	

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.

HNN Edit Phone Line: 0009	99123				ie.	7 X
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Simple I	orwardi	ng				
General External Numbers Dialing Rules Nincoming Calls Simple Forwarding Call Screening Call Recording Witcemail Faxes Auto Attendant DiaA	<u>×</u>	Forward To		35644890579		
Call Barring     Addentity     dentity     Music On Hold     Music On Hold     Emergency Calls		Save				

- 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.
- 3. Click the 🗄 Save.

### **DIDs (External Numbers)**

On this tab you can allocate DID numbers, either provisioned on-demand from an external DID provider or via your service provider's DIDs.

To do this, click the **O** Add DID button at the bottom of the page. In the Add new DID number dialog box, choose a country and an area in which you want to purchase a DID, and a DID number. Once the number is chosen, you will see the applicable fees for using this DID number.

			Cus	tomer Self-Care P	ortal			
Balance: 16.19 USD				Credit Limit: 1,000.	00 USD en - English	~	John Doe Inc. ( Login: johndoeinc )	🔓 Logout 👻
10 Dashboard	8	4y Profile	iP Cer	itrex	Billing Information			
DIDs								😡 Help
	~	Edit	DID	Country	Assigner	t to	Monthly charges	Delete
Ceneral Extensions Estes Stes Store Store Store Store Call Logs Call Logs Call Logs Call Logs Call Logs Call Logs Call Logs Call Cogs Call		There is n	o data to display					
-	•••	🔾 Add DI	D 🕅 🖣 Page 1 of 1	► N 2				
			© 2001-	2016 PortaOne, Inc. All right	ts reserved.			

			Custo	mer Self-Care Portal			
Balance: 16.19 USD				Credit Limit: 1,000.00 USD en - English	~	John Doe Inc. ( Login: Johndoeinc )	🔒 Logout 👻
E Dashboard	A M	ly Profile	इंट्रे IP Centre	K Billing Informat	ion		
DIDs							🕑 Help
	~	Edit	Add new DID number			Monthly charges	Delete
General		There is r	Choose a country	UNITED STATES OF AMERICA	~		
Sites			Choose an area	Washington	~		
Phone Lines			Choose a number	1	~		
W DIDs				12065551235			
Dialing Rules				12065551236			
A Incoming Calls				12065551277			
Outgoing Calls							
Huntgroups							
Call Queues							
Music On Hold				Ok Cancel			
		C Add D	D 1 of 1	PI 62			
			0.0004.0044	Parts Days Taxa III sinhly any and			
			(C) 2001-2010	Forcaone, Inc. An rights reserved.			

As soon as you confirm the new DID number, your number will appear as unassigned. Click the **Edit** icon to assign this number to an account (phone line).

If you no longer need a DID number, simply delete it from the list of allocated DIDs. As a result, you are no longer charged for the usage of this DID number. If the DID number was assigned to an account as an alias prior to deletion, this alias is removed in PortaBilling®.

			Customer Self-Care Por	tal		
Balance: 10.97 USD			Credit Limit: 1,000.00 US	D en - English 💌 🔹	John Doe Inc. ( Login: johndoeinc )	🔒 Logout 👻
10 Dashboard	8 M	My Profile	😳 IP Centrex	Billing Information		
DIDs						😡 Help
	«	DID	Country	Assigned to	Monthly charges	Delete
General Extensions		12065551236	UNITED STATES OF AMERICA Washington	Unassigned	1.10 USE	D 🗙
Stes Phone Lines Phone Lines Daing Rules Abbreviated Dialing Daing Rules Outgoing Calls Call Cogs Call Cogs Call Ources Call Ources Call Ources Call Ources Munic On Hold						
		O Add DID 4 Page	1 of 1 🕨 🕅 🧬			1 - 1 of 1

# 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 Limi	t: 1,000.00 USD en - English	Easy Call Ltd. ( Login: easycalltd )	🔓 Logout 🕞
율曹 Dashboard	My Profile	र्द्धे IP Centrex	Billing Information	O Trouble Tickets	
Abbreviated Di	aling				🚱 Help
କୁଁ General	Abbreviated	Number Length 3			
Extensions	Edit	Abbreviated #	# To Dial	Description	Delete
Phone Lines		188	12177700088	Amanda's office Lynksys	×
Abbreviated Dialing		189	12177700089	Andrew's IP Phone	×
값) Deling Rules > 값 Incoming Calls 생 Outgoing Calls 생 Call Logs & Funtproups 없 Call Queues 생 Music On Hold					
	🔘 Add 🛛 🕼	🖣 Page 1 of 1 🕨 🕅			1 - 2 of 2
	Save				

To add a new abbreviated dialing number, click the ③ 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.
	<b>NOTE:</b> 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.

			Customer Se	elf-Care Porta	l.			
Balance: 465.80 USD					Credit Limit: 20,000.00 USD	en - English	GUAZU CALLS ( Login: Iguazu_admin )	🔒 Logout 🕞
👪 Dashboard 🕹 M	ly Profile	IP Centrex	📄 Biling Information		💮 Trouble Tickets			
Dialing Rules								😡 Help
Conserver Conserver	Dahing Rules: Transitie QL on outpoint of Transitie QL on incorring of Your location Your location Your accode(s): Always dai the area code as a part of the number: Emergency numbers (e.g. 1911, 112): National Exceptions (e.g. 1963): Check Yoursel You are oping to cal: To cal wore work load the To cal internationally you dia	North America, BC, 10 dg als: 10 als: Yes 1 004586 len d 004586 len d 0045866 len d 0045866 len d 0045866 le	es al perfec 	1 011 411 34 5-1234	Service Featureet Park Prefit: Relase Prefit: Hield CIP Prefit: Show CLI Prefit:	Codes 70 71 72 73 76 76 76 76 76 7 7 7		
	are Jare							
			© 2001-2015 PortsOne.	, Inc. All rights reser	ved.			

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**.

			Customer Self-Care Por	al	
Balance: 234.80 USD				Credit Limit: 1,000.00 USD on - English	Easy Call Ltd. ( Login: easycalltd ) 🔒 Logout 🔹
a Dashboard	🐣 My Profile	😳 IP Centrex	🖹 Billing Information		
Dialing Rules					(i) Heb
General	Dialing Rules:	Custom Rule		*	
Boss dos     Boss dos     Boss dos     Boss dans     Boss     Boss dans     Boss dans     Boss dans     Boss dans     Boss	CLD Translation Rule: Translatic CLI on incomm Translatic CLI on incomm Sarvice Features Codes Park Prefic: Release Prefic: Group Pickup Prefic: Hide CLI Prefic: Show CLI Prefic:	(x) + //> (x) + // (x) + //	5 Text		
	E Save				
			@ 2001-2015 PortsOne, Inc. All rights re	erved.	

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 spaces and is evoluble only if call participation
	enabled for the customer
Group Pickup	An end user can dial this access code to answer a
Prefix	call arriving to the other accounts of this customer.
	The default value is *40.
	nis 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 spaces and a swellahla only if <b>Hide CLL</b> 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 <b>Hide CLL</b> is
	enabled for the account.

# **Incoming Calls**

Here you can set the parameters for incoming calls.

# Porta 🎽 Billing®

		Customer	Self-Care Por	rtal			
Balance: 165.16 USD		с	redit Limit: 1,000	.00 USD en - English	~	JohnDoe ( Login: john_doe )	🔒 Logout 👻
호랑 Dashboard 🖉	My Profile	🔆 IP Centrex		Billing Information			
Incoming Calls							🕑 Help
	Ext-to-Ext Call Distinctive R	ng No		*			
Seneral Sevenations	Group Pickup	Yes		~			
Sites	Group Pickup Prefix	*40					
Phone Lines	Endpoint Redirection						
Abbreviated Dialing							
Dialing Rules							
Call Parking							
Call Loos							
A Huntgroups							
Call Queues							
	E Save						
© 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 Call Pickup	The <b>Group Pickup</b> feature enables an end user to answer a call arriving to the other accounts of this customer by dialing a <b>Group Pickup Prefix</b> .
	• Select <b>Yes</b> to activate group pickup for the customer.
	• Select <b>No</b> to make group pickup unavailable to the customer.
	Note that group pickup must be enabled for the particular huntgroup as well.
Group Pickup Prefix	An end user can dial this access code to answer a call arriving to the huntgroup that this end user belongs to.
	The default value is *40.
	This access code is available only if group pickup is enabled for the customer.
	Read-only field. For information about how to configure <b>Group Pickup Prefix</b> , please see the <i>Service Feature Codes (also know as Feature Access Codes)</i> table in the <b>Dialing rules</b> section of this guide.

#### **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.

	Customer Self-Care Portal						
Balance: 165.16 USD		Credit Limit: 1,000	.00 USD en - English	~	JohnDoe (Login: john_doe ) 🔓 Logout 👻		
🔠 Dashboard	My Profile	🔯 IP Centrex	Billing Information				
Call Parking		а			🕑 Help		
«	Call Parking	No	~				
General	Park Prefix	*70					
Constant of the second	Park Prenk Release Prefx	*71					
	Save						

	I
Field	Description
Call Parking	• Select <b>Enabled</b> to activate call parking for the
	customer.
	• Select <b>Disabled</b> to make call parking
	unavailable to the customer.
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.
	Read-only field. For information about how to configure <b>Park Prefix</b> , please see the <i>Service Feature Codes (also known as Feature Access Codes)</i> table in the <b>Dialing rules</b> section of this guide.
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.
	Read-only field. For information about how to configure <b>Release Prefix</b> , please see the <i>Service Feature Codes (also known as Feature Access Codes)</i> table in the <b>Dialing rules</b> section of this guide.

# **Outgoing Calls**

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

	Cust	omer Self-Care Portal				
Balance: 180.20 USD		Web Interface Language:	en - English	EasyCall ( Login	n: EasyCall) 🔒 Logout 👻	
🔠 Dashboard 🦀 My Profile	e 🔯 IP Centrex	Biling Information				
Outgoing Calls						
Control Contr	Limt Smutaneous Cals Max Number Of Smutaneous Cals	2				

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

# **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.

		Customer Self	-Care Portal			
Balance: 12.03 USD		Credit Li	mit: 1,000.00 USD en - Engli	sh 💙 Norm	a Baker (Login: NormaB ) 🛛 🔓	Logout 👻
Dashboard	🐣 My Profile	ip Centrex	📄 Billing Info	rmation	Trouble Tickets	
Call Logs						😧 Help
	Krom: 2014-08-11	TII: 2014-11-11	3		đ	Search
Seneral Services	Date/Time	Account ID	From	То	Duration	Play
Sites	2014-10-30 13:39:38	ANI123456788	ANI123456788	12125551234	0:33	2
Phone Lines	2014-10-30 13:38:59	ANI123456788	ANI123456788	12125551234	0:33	2 🕨
Market Dialing	2014-10-30 13:36:57	123456788	123456788	12125551234	0:33	2 🕨
Dialing Rules	2014-10-30 13:36:33	123456788	123456788	12125551234	0:33	2 🕨
Incoming Calls	2014-10-30 13:33:54	123456788	123456788	12125551234	0:33	2 🕨
Call Logs	2014-10-30 13:33:23	123456788	123456788	18667478647	0:33	2 🕨
종 Hundproups 월 Ceal Queue 슬 Sentry 생 <sup>4</sup> Music On Hold						1.6.46
	Page 1 of	F1 🕨 PI				1 - 6 of 6
	Save					

# Huntgroups

Sometimes it is necessary for a call to be delivered to several extensions at once. With the **Huntgroup** function, you can easily configure a call distribution scheme such that incoming calls are simultaneously delivered to one or more assigned extensions.

				Cu	stomer Self-Care P	ortal				
Available Funds: 10.00 USD					Web In	terface Language: en - Eng	plish 👻 Eas	syCall (Login: eas	sycallco) 🛛 🔂	Logout -
Dashboard	<u>&amp;</u> N	ly Profile		iP Centre	x	Billing Information	🚫 Trouble Tick	ets		
Huntgroups										🕑 Help
-Maria	«	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete
Sites Phone Lines			Þ	100	Sales	123 Order	Empty Huntgroup	Keep original	~	×
Abbreviated Dialing		<b>,</b>	P	200	Support	Random	Empty Huntgroup	Keep original	~	×
A (in coming Calls     A)     A (coming Calls     A)     Call Parking     A)     Coll Calls     A)     Call Logs     And Call Calls     A)										
An Cobbe An Identity Music On Hold										
		🔘 Add	Huntgroup	I Page 1 of	1 🕨 🕅 🛛 🤓					1 - 2 of 2



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

To add a new huntgroup click the ③ **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 2015-09-11, and phone line 777222 with extension 222 was last used on 2015-09-09, 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 hunt group.

			Customer Self-	Care Portal						
Available Funds: 388.98 USD				Web Interface Language	en	- English	✓ Eas	syCall ( Login: eas	ycall1 )   🔂 L	ogout 👻
ashboard	🐣 My Profile	(i)	P Centrex	Billing Inform	nation	1	🚫 Trouble Tic	kets		
Huntgroups										🕑 Help
Conoral	Edit	Huntgroup Number	Huntgroup Name	Hunt Sequence	-	Configure	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete
Extensions		100	Sales	Order	~	1		Keep origi 💌		
Phone Lines Phone Lines Phone Lines Phone Lines Phone Lines Phone Units Phone Units Phone Units Phone Units Phone Lines Phone				Update	Cance	21				

- Assigned Extensions To specify which extensions the calls will be delivered to, follow the steps below:
  - 1. Click the **Configure** icon.
  - 2. Click the **O** Add Extension button on the Included Extensions tab.

#### Porta <mark>🖌</mark> Billing®

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10 Dashboard	8 M	y Profile		👔 IP Cer	ntrex		📄 Billing Info	rmation		🗌 🚫 Trouble	Tickets					
🥬 Huntgro	ups													😡 Help		
(A) Canada	**	Edit	Huntgroup !	lumber	Huntgroup N	larne	Hunt Sequenc		Configure	Assigned Extensions	Cale	ID C	II Pickup Allowed	Delete		
Extensions			100	Sal	69		Order	v	1		Keep of	rigi 💌				
Phone Lines							Update	Cancel	-							
Abbreviated Dialing							Customer	Self-Ca	are Porta	d .						
Dialing Rules	Available Fund	ds: 388.98 (	USD					We	eb Interface	Language: en	- English		Easy	Call ( Login: C	asycall1) 🏻	🖥 Logout 👻
Cutgoing Calls	E Dashboard		🔏 M	y Profile		1	IP Centrex		📄 Bi	lling Informatio	n	🚫 Tro	uble Ticka	ets		
Huntgroups	👋 Ec	dit: Sal	es						¥							🕒 Help
La Identity	~															
Music on Hold	ses General			Huntgroup N	umber	100				Hunt Sequ	ience	Order			*	
	Extension	5		Huntgroup N	ame	Sales				Caller ID		Keep orig	inal		*	
	Sites Phone Lin	es		Call Pickup A	lowed 8	0										
	Abbreviate	ed Dialing		Included	Extensions	Includ	led Huntgroups									
	Dialing Ru	les Calls Calls		Order	Extension	Number	Extension Na	me	Assigned To	o Phone LI	Ringing Delay, sec	Ringing Time, se	) 90 m	Ignore Follow- e/Voicemail	Set This Group as Primary	Delete
	Call Logs				101	×	Bill		1205760687	78			15			
	Huntgroup & Call Queu	ps és					_	)	Update	e Cano	el					
	aldentity															
	👷 Music On I	Hold														
				Add Exte	ension											
				📄 Save 🛛 📮	Back											
				Edit Huntgr	oup											
							(2) 2001-2015 Porta	one, Inc.	All rights rese	erved.						

- 3. From the **Extension Number**, select the required extension.
- 4. Specify the following options:
- **Ringing** Specify whether this extension rings when a call arrives to the huntgroup:
  - a. Enabled for ... delayed for ... sec Specify the delay in seconds before the extension begins to ring and the duration of the ring.
  - b. **Permanently enabled** The extension is always active and rings once a calls arrives to the huntgroup.
  - c. **Disabled** The extension does not ring when a call arrives to the huntgroup. The extension owner can still perform call pickup if that has been defined for the huntgroup.
- **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.
- 5. Click Update.

					Customer S	elf-Care Portal					
Available Funds: 388.98 USD						Web Interface Lan	guage: en - English	~	EasyCall ( Log	in: easycall1)	🔓 Logout 👻
Dashboard	🔏 My Profile 🎡 IP Centrex				📄 Billing I	📑 Billing Information 🛞 Troub					
Bdit: Sales											😡 Help
	«	Huntgroup N	Number	100		F	lunt Sequence	Order		*	
General Strengtons		Huntgroup N	Name	Sales		0	Caller ID	Keep origin	al	~	
Sites		Call Pickup A	Allowed								
DIDs		Included	Extensions	Included	Huntgroups						
Abbreviated Dialing		Order	Extension	Number	Extension Name	Assigned To Phone Line	Ringing Delay, sec	Ringing Time, sec	Ignore Follow- me/Voicemail	Set This Gro as Primary	Delete
Alincoming Calls     Calls     Calls     Calls     Calls			101		Bill	12057606878		15	-	×	×
Huntgroups		1	102		Jake	12234527025		10	-	~	×
Apidentity											
		🔇 Add Ext	tension								
	E	🚽 Save 🛛 🍃	Back								
	1	Edit Huntg	roup								

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	¥ EasyCal	I ( Login: EasyCall )	🔓 Logout 🔹
🔝 Dashboard 🦀 My Profile		IP Centrex	Biling Information				
Edit Huntgroup:	Sales						
(*)	Huntgroup Numb	er 111		Hunt Sequence	Order		~
General	Huntgroup Name	Sales		Caller ID	Keen original		~
NNN Extensions	Call Dickup Allowor	4			ricop original		
Phone Lines	Cai Pickup Alowed						
n External Numbers	_						
Abbreviated Dialing	Included Extens	ions Included Huntgroup					
Incoming Calls	Order	Huntgroup Number	Huntgroup Name	Included E	densions	Ignore Follow- me/Voicemail	Delete
Call Recording		112 🗸	Support	Empty Huntg	roup	<b>v</b>	
A Huntgroups			Update	Cancel			
ldentity							
🖓 Music On Hold							
	O Add Huntgroo	up					
	🔚 Save 🛛 🔵 Ba	ack					
	Edit Huntaroun						

				Customer	Self-Care Po	ortal					
Balance: 180.20 USD					Web Interface L	anguage:	en - English	1	✓ Easy	Call (Login: EasyCall)	🔒 Logout 🔹
EB Dashboard	🖁 🐣 My Profile	1	IP Ce	entrex 🔡 🗄	aling Information						
🤔 Edit Hun	tgroup: S	Sales									
	«	Huntaroup Numb	er	111			Hunt Seau	ence	Order		*
General		Huntaroun Name		Sales			Caller ID		Keen orig	inal	~
Sites		Call Dislam Allower	a				Culei 10		reep ong		
Phone Lines		Cal Pickup Alowed	J	V							
Reference Stress											
Abbreviated Dialing		Included Extensi	ions	Included Huntgroups							
Dialing Rules     Ancoming Calls		Order	Huntg	group Number	Huntgroup Name	e		Included Ext	ensions	Ignore Follow-	Delete
Cutgoing Calls										me/voicemair	
Call Recording			112		Support			Empty Huntgr	oup	<b>v</b>	×
A Huntgroups											
Music On Hold											
		Add Huntgrou	up								
		🔚 Save 🛛 💭 Ba	ack								
		Edit Huntgroup									
í	l										

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)].

Customer Self-Care Portal								
Balance: 194.36 USD				Credit Limit: 1,000.00 USE	D en - English 🗸 🗸	Easy Call Ltd. ( Login: easycalltd )	🔒 Logout 🔸	
🔝 Dashboard 🤞	My Profile	IP Centrex	Billing Information	O Trouble Tickets				
Call Queue Edi	t						😡 Help	
	<li>(i)</li>							
General	Huntgrou	p: Sales	*					
Sites	Maximum number	of 10						
Phone Lines	connected ca	ls:						
Abbreviated Dialing	Maximum number of call allowed in the quer	ers 50						
Dialing Rules	alowed in the quee	-						
<ul> <li>Jog incoming Calls</li> <li>Outgoing Calls</li> </ul>	Average handle tin minut	ie, 5 is:						
🖓 Call Logs	Appounce number	of 🕅						
& Huntgroups	callers ahea	d:						
Apidentity	Announce estimated w	ait 🕡						
Music On Hold	tin	ie:						
	Music on ho	ld: 🕨 🔍 Music on Hold 1.mp	3 🎝 Browse					
	🔚 Save 🛛 💭 Back							
	Call Queue Edit							
			@ 2001-2015 PortsOne, Inc. All rights re	served.				

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	The maximum number of calls that agents can
number of	process simultaneously. You can think of it as the
connected calls	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).
	<b>NOTE:</b> This option is used only by the <i>previous-generation</i>
	arrives to the call queue must be placed on hold or connected
	to an agent.
	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
	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
	attempts to connect all calls to agents.
	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
	number, some calls won't be queued even if there are no

Every call queue contains several configuration parameters:

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3
ed.

# Identity

On this page information about your identity (your phone number) is displayed. Here you can manage the identity that will be used for outgoing calls made from all of your phone lines.

	Custo	omer Self-Care Portal			
Available Funds: 242.95 USD	W	eb Interface Language: en - English	*	John Doe ( Login: johndoe )	🔒 Logout 👻
🔠 Dashboard 🔏 !	My Profile	🔯 IP Centrex	Billing Inform	nation	
ldentity					🛞 Help
×	Overrite Identity:	If Different From All Cust	omer Accounts	*	
Seneral Extensions	Batch:			*	
Sites	Identity:	12125554120			
Phone Lines     Mone Lines	Overrite Display Number:	If Ruled Out by the Ident	tity Constraint	*	
Abbreviated Dialing	Overrite Display Name:	Never		*	
Dialing Rules     Jolaing Rules     Jolaing Calls     Outgoing Calls     Outgoing Calls     Call Logs     Call Ucgs     Call Ucges     Call Ucues     Dialing Internative     Music On Hold					
	E Save				
	© 2001-20	15 PortaOne, Inc. All rights reserved.			

**NOTE**: You can only manage the identity if you have been granted special permission by your service provider.

Column	Description
Override	This option defines the rules for which identity will be

Identity	used for outgoing calls made from all of your phone lines
	based on the one supplied by the user's phone device.
	The following options are available:
	• <b>Never</b> – This option means that the caller identity
	(display number and display name) will be
	displayed for the callee exactly as it was
	configured by the user on his device.
	If Different From Account ID And Aliases –
	The caller identity supplied by the user's phone
	device will be overridden if it differs from the
	phone line authorized for the call or any of the
	aliases assigned to this phone line.
	• If Different From All Customer Accounts –
	The caller identity supplied by the user's phone
	device will be overridden if it doesn't match any
	of your phone lines or their aliases.
	• If Different From All Accounts in the
	<b>Specified Batch</b> – The caller identity supplied by
	the user's phone device will be overridden if it
	does not match any of the phone lines from a
	specific batch
	• If Different From All Accounts in the Specified
	Huntgroup – The caller identity supplied by the
	user's phone device will be overridden if it does
	not match any of the extensions from a specific
	hot materially of the extensions from a specific
	• If Different From All Associate in the Specified
	• If Different From All Accounts in the specified
	she = The caller identity supplied by the user's
	mothe device will be overhidden in it does not
	match any of the phone lines from a specific site.
	• Always – The identity defined by the caller on his
	device will always be overridden by the identity
	that you define. This allows you to manually
	specify the display number and / or display name
	to be used for all of your phone lines.
Batch	Specify which batch the phone line that is verified for
	identity must belong to (this field is only available when <b>If</b>
	Different From All Accounts in the Specified Batch
	has been selected).
Huntgroup	Specify a huntgroup the phone line that is verified for
	identity must belong to (this field is only available when If
	Different From All Accounts in the Specified
0.	Huntgroup is selected).
Site	Specify the site the phone line that is verified for identity
	must belong to (this field is only available when If
	Different From All Accounts in the Specified Site is
	selected).

Identity	Specify the identity that will be used to override the
	identity sent by the caller's device if that one doesn't
	comply with the rules specified in the <b>Override Identity</b>
	list.
Override	This allows you to control the "Caller number" – the
Display	number that is visible on the phone display of the called
Number	party. The possible values are:
	• Never – The caller's display number will not be
	modified and will be displayed for the called party
	as is.
	• If Ruled Out by the Identity Constraint – The
	caller's display number is verified according to a
	rule set for the identity. For example, when the If
	Different From Account ID and Aliases option is
	selected in the <b>Override Identity</b> list, and the
	caller's display number doesn't match the phone
	line that is authorized for the call or any of the
	aliases assigned to this phone line, the display
	number will be overridden.
	• If Different From the Used Identity – The
	caller's display number will be overridden if it is
	different from the caller identity used for the call.
	• Always – The display number will always be
	overridden, regardless of the limitations applied to
	the identity.
Override	This allows you to override the caller name used by the
Display	calling account. The possible values are:
Name	• Never – The display name defined by the user
	will not be modified and will be displayed for the
	called party as is
	• Alwaye The display name defined by the user
	will always be overridden
1	will always be overliddell.

# **Music on Hold**

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

	Cus	tomer Self-Care Portal		
Balance: 180.20 USD		Web Interface Language: en - English	👻 EasyCall ( Login: EasyCall ) 👸 Log	gout 👻
🔠 Dashboard 🦂 My Profile	P Centrex	Biling Information		
Music On Hold				
(4)	Browse Description: Please	e upload your music	Upload	
Extensions	Description		Play On Hold	
Sites Phone Lines External Numbers Abbreviated Dialing	No Frills Cumbia (c) 2001 Kevin M	acLeod. Latin	Ş	
Dialing Rules Dialing Rules Outgoing Calls Collige Calls Call Recording				
a Identity				

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 six information panels:

- Brief Billing Information
- Transactions Totals Information
- Invoices Information
- Active Subscriptions
- Volume Discounts
- Quotas and Service Wallets

		Cust	tomer Self-C	Care Porta	al					
Balance: 251.73 USD			Credit Limit:	1,000.00 USD	en - I	English	✓ E	asy Call Ltd. ( L	ogin: easycallt	i) 🔓 Logou
B Dashboard	My Profile	👔 IP Cer	ntrex		🖹 Bil	lling Inform	ation			
Billing Summa	iry									@ H
	<b>«</b>									
Billing Summary	Brief Billing Informa	tion				Invoices	Information			<ul> <li>Image: A set of the set of the</li></ul>
Subscriptions	<b>B</b> -1		254 72 110	_		Balance	e due	0.0	o usi	)
Quotas and Services Wallets	Balance Daily spendi	na limit	251, 73 USL 200.00 USE	2						
Measured Services	Available da	ily credit	200.00 USE	5		Last in	voice due da	ate	2016-02-0	
Transactions	Spending lin	it expires	2016-02-20	00:00:00		Last In	voice Amou	nt wed on	4.99 08	,
Reports	Credit Limit		1000.00 US	SD		2016-0	ayment rece )2-15	ived on	4.99 08	,
Make a Payment										
Payment Info	Transactions Totals	Information				View	Due Date	Period Total	Paymen	Payment Status
	From			2015-11-19	9	There is r	no data to displa	ay		
	Total usage	charges	arges 11.00 USD		>	🗟 See All Invoices 🛛 🍣				
	Subscription	s		114.04 USD		Active St	ubscriptions			
	Total			16 93 1150					Start	Finish
	Total Transa	ctions		22	2	Su	bscription	Periodic Fee	Date	Date YYYY
						Prepay Pl	an	48.00 L	ISD 2015-0	-
	Quotas and Service	s Wallets				Prepay Pl	an 2	216.00 L	ISD 2015-0	
	Destination					Easy Call	plus	100.00 L	ISD 2016-0	
	Group Se	vice	Used/Total	Expiration	n	æ				
	There is no data to	display								
	Volume Discounts									
	Destina Group Service	Discount	Used/Tota	al Expiratio	on					
	USA Voice Calls	100%	0 minu	ite 15 day	rs					

Field	Description
Brief Billing Information	This reflects your billing info, such as current balance, credit limit, daily spending limit, etc.
	<ul> <li>The available information fields are:</li> <li>Balance – This shows the customer's current balance.</li> </ul>
	• <b>Daily spending limit</b> – This shows the amount of money per day that the customer can spend on services.
	• Available daily credit – This shows the amount that the customer has already spent of their daily spending limit.
	• Autoreset the limit on – This shows the date and time when the daily spending limit expires.
	• <b>Credit Limit</b> – This shows the customer's current credit limit.
Transactions	This reflects your total transactions (calls, payments,
Totals	refunds, subscription charges, etc.)
Information	
Invoices	This section is intended to help you better understand
Information	your invoice status and other billing-related details – a
	thumbnail sketch, so to speak, of how much money is

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	owed, the due date, is there any amount overdue, etc.
	The available information fields are:
	• <b>Balance Due</b> – 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	Subscription plans that currently apply to you.
Subscriptions	
Volume Discounts	Volume discount plans that currently apply to you.
Quotas and	Quotas and service wallets that currently apply to you.
Service	
Wallets	

# General

		Customer Self-Ca	re Portal			
Available Funds: 145.49 USD		W	/eb Interface Language: en - English	~	EasyCall ( Login: easyCall1 )	🔓 Logout 👻
🔝 Dashboard	My Profile	IP Centrex	Billing Information	🚫 Trouble Ti	ckets	
General						\rm Help
Billing Summary     General     Guotas and Service Wallets     Wolume Discounts     Wolume Discounts     Weasured Services     Transactions     Reports     Invoices     Make a Payment     Make a Payment into	Tax ID Send Statistic	Customer Class Default Customer Class Default Full Stattics Summary Only Do not Send				
	E Save					

Field	Description					
Tax ID	Your tax ID.					
Send Statistic	Defines what kind of xDR statistics should be delivered					
	to you by email:					
	• <b>Customer class default</b> – Use the settings for					
	the customer class.					
	• Full Statistics – Send a .cvs file with a					
	complete list of xDRs.					
	• Summary Only – Do not send a full list of					
	xDRs, only a brief summary					
	• <b>Do Not Send</b> – 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.

	Customer Self-Care Portal							
Available Funds: 145.49 USD			Web Interface Language:	en - English	👻 EasyCall ( L	.ogin: easycall1 ) 🛛 🔒 Logout		
Dashboard	8 N	ly Profile	🔡 Billing Informati	ion	🚫 Trouble Tickets			
Subscription	IS					🕑 He		
	~	Subscription	Periodic Fee		Start Date YYYY-MM-DD 🔺	Finish Date YYYY-MM-DD		
General		Shared: ( 1 Active Subscription for 0.17 USD )						
5 Subscriptions		Linksys Phone Rental		0.17 USD	2016-04-05	-		
Quotas and Service Wallets		Account 12057606878: (1 Active Subscription for 0.67 USD )						
Volume Discounts		EasyCall plus 0.67			2015-06-26			
Transactions		Account 12234527025: (1 Active Subscription for 1.0	3 USD )					
Reports		Subscription plan (in advanced)		1.03 USD	2015-03-19	-		
Make a Payment		Account 12348276661: (1 Active Subscription for 1.03 USD )						
📸 Payment Info		Subscription plan (in advanced)		1.03 USD	2015-03-19	•		
		Account 12954051356: (1 Active Subscription for 1.03 USD )						
		Subscription plan (in advanced)			2015-03-19	-		
		Account 12999734703: (1 Active Subscription for 1.03 USD )						
		Subscription plan (in advanced)		1.03 USD	2015-03-19			
		Total Subscriptions active now: 7	Total periodic fee active now:	5.63 USD				

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

#### **Quotas and Service Wallets**

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

Using this page, you can 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 or service wallet, click on the **(2)** History button.



Field	Description
Show not	Displays the quotas and service wallets with the
active and used	Consumed / Used up and Not Yet Active status
up Quotas	applicable to you.
Service	A specific service (voice calls, messaging, data
	transfer, etc.) that this quota or service wallet will
	apply to.
Destination	Information about quotas or service wallets used and
Group	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
	plans.
Peak Level	Shows when the quota is used (peak or off-peak
	period).
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.
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 <b>How to top up your service</b>							
	wallet section.							
	<b>NOTE:</b> If the <b>Top up</b> 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							
	<i>Never</i> is displayed in their cells.							

#### History dialog box

Service: 'Voice Calls' Destination Group: 'United Kingdom'									
Discount Plan	Precedence	Current Discount		Used/Total		Expiration	Combine With Other Discounts		
∃ Active Discount P	lans								
EasyCall VDP	Customer Discount Plan	100%	0 minute	0 minute	30 minutes	2 days	After reaching the last threshold limit	t	
				Ok					

Field	Description								
Status	The current status of the discount plans.								
	• Active – The discount plans that are currently								
	in use.								
	• <b>Consumed / Used Up</b> – The discount plans								
	that have already been used up.								
	• Not Yet Active – Currently inactive discount								
	plans.								
<b>Discount Plan</b>	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	The value of the discount currently applied to you.								
Discount									
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	Shows the way this quota is applicable to a session in
Other	combination with other quotas.
Discounts	

# **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 **Wistory** button.

Main Customer Self-Care Portal									
Balance: 248.90 USD				Credit Limit: 1,000.00 USD on - English	🖌 Easy Call Ltd. ( Login: easycalltd ) 🛛 Logout 🔹				
ashboard	🐣 My Profile	🔯 IP Centrex	Billing Information	O Trouble Tickets					
Volume Disco	unts				🛞 Heb				
	Show not active and u	sed up Discount Plans							
Billing Summary	Voice Calls								
Subscriptions	Torce cans		-						
Duotas and Service Wallets	History	Peak Level	Discount	Used/lotal	Expration				
Volume Discounts	■ EUROPE								
Measured Services	0		100%	0 USD of 5 USD	30 days				
Reports	∃ USA&Canada								
Invoices	0		100%	0 minute of 200 minutes	30 days				
Payment Info									
	<i>æ</i>								
			@ 2001-2016 PortsOne, Inc. A	I rights reserved.					

Field	Description
Show not	Displays the volume discounts with Consumed / Used
active and used	up or Not Yet Active status applicable to you.
up Discount	
Plans	
Service	A specific service (voice calls, messaging, data
	transfer, etc.) that this volume discount will apply to.
Destination	Information about discounts used and remaining is
Group	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.
Peak Level	Shows when the discount is used (peak or off-peak
	period).
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 <b>Never</b> is selected, it means that this discount is for
one-time use and will not be reapplied to you.

#### History dialog box

Service: 'Voice Calls' Destination Group: 'USA'									
Discount Plan	Precedence	Current Discount		Used/Total		Expiration	Combine With Other Discounts		
Active Discount P	lans								
USA discount	Customer Discount Plan	10%	0 minute	20 minutes	20 minutes	1 day	Always		
		20%	20 minutes	26 minutes	40 minutes				
		30%	40 minutes	0 minute	Unlimited				

Field	Description								
Status	The current status of the discount plan.								
	• Active – The discount plans that are currently								
	in use.								
	• <b>Consumed / Used Up</b> – 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	The value of the discount currently applied to you.								
Discount									
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	Shows the way this discount plan is combined with								
Other	other discount plans applicable to a session. Find								
Discounts	more details about this in the Modes for Combining								
	Discounts chapter of the PortaBilling® Administrator								
	guide.								

			Customer Se	f-Care Po	rtal			
Available Funds: 145.49 USD				Web Inter	face Language: en - Eng	glish 🔽 Ea	syCall (Login: easyca	ll1 ) 🛛 🔓 Logout 🝷
Dashboard	🐣 My Profile	👔 IP Cer	itrex	🖶 B	illing Information	🚫 Trouble Tickets	5	
Transactions								🕑 Help
	« Filter							
Contraction and Summary and Summary	From Date:	2016-04-05	YYYY-MM-DD	21:46:26	HH24:MI:SS			
👼 Subscriptions	Till Date:	2016-04-06	YYYY-MM-DD	21:46:26	HH24:MI:SS			
Quotas and Service Wallets	Service:	All		~				
Measured Services	Show records for:	Customer And C	Credit Accounts	~				
Transactions		Show Failed	Fransactions		-			
Reports Invoices Make a Payment Payment Info		Q Show Record	ls Download	t				
	Summary							
	Service		Total Transact	ions	Charged Quantity	Charged Am	ount	Show Details
	Subscriptions			6			5.50000 USD	EQ.
	Total Service Used:	1	Total Transactions:	6		Total Charged Amount:	5.50 USD	
	II I Page 1	of 1 🗼 🕅	2					1 - 1 of 1
	🔾 Show Records							

# **Measured Services**

On this tab you can view the parameters of allocated resources usage and their usage statistics.

Customer Self-Care Portal									
Balance: 146.40 USD W	eb Interface Language: en - E	nglish	Measured_Servic	e_Custome	r ( Login: test_cust	omer) 🔒 🔂 Logout 🗸			
🔡 Dashboard	My Profile	iP Centrex							
Measured Services									
C Billing Summan/	Measured Parameter	Apply Charge	Charge based on	Free Items	Price per Item, USD	Service			
General	Kative Calls	Yes	Average value	2	5	Quantity Based			
Quotas and Service Wallets Volume Discounts	PBX Extensions	Yes	Average value	0	3	Measured Service			
Image: Contract of the second seco									

Field	Description
Measured	The name of the allocated resource that you use and
Parameter	are charged for.
Usage Period	Represents your billing period. Any billing period can
	be selected.
Apply Charge	Defines whether or not this resource is free of
	charge.
Charge based	Specifies how charges apply to you for allocated
on	resource usage.
	The criteria are:
	• Average – The average amount of the
	consumed resource.

	• Maximum – The maximum amount of the
	consumed resource.
	• <b>Minimum</b> – The minimum amount of the
	consumed resource.
Free Items	The number of resources included in your service
	bundle.
Price per item	The price for each unit of consumed resources.
Service	The service associated with this resource.

#### **Statistics window**

Statistics are provided per resource. To open the statistics window, click the kilon next to the resource name. On the statistics window you will see two graphs.



The bottom graph displays resource usage data for the last three months; the upper graph displays a detailed view of the resource usage for a particular time interval selected from the three-month period below.

To select a time period, click on the start date in the bottom graph and drag the mouse cursor to the finish date.

The topmost part of the window provides additional information about the selected metric. The following options are available:

Field	Description
Usage Period	Specify which billing period to see the information
	for.
Value	The value of measured resources for the current

	billing period. It can be minimum, maximum or
	average.
Remaining	Shows the number of free of charge resources
Free Items	available from your service bundle.
Applied	Displays your charges for the selected billing period.
Charges	
_	Charges for the current billing period are not
	displayed because this period is not yet closed.

### 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.

		С	ustomer Sel	f-Care Po	rtal			
Available Funds: 145.49 USD				Web Inte	rface Language: en - Englisi	n 👻	EasyCall ( Login: easyCall	1 ) 🔓 Logout 🔹
🔝 Dashboard	& My Profile	IP Centre	2X		Billing Information	🚫 Trouble Tie	ckets	
Transactions								😡 Help
	« Filter							
General	From Date: 20	016-04-05	YYYY-MM-DD	21:46:26	HH24:MI:SS			
5 Subscriptions	Till Date: 20	016-04-06	YYYY-MM-DD	21:46:26	HH24:MI:SS			
Ouotas and Service Wallets	Service: Al				*			
Measured Services	Show records for: Cu	ustomer And Cre	dit Accounts		*			
Transactions		Show Failed Tra	insactions					
Reports	Q	Show Records	Download					
	Summary							
	Service		Total Transacti	ons	Charged Quantity	Chargeo	d Amount	Show Details
	Subscriptions			6			5.50000 USD	EQ.
	Total Service Used:	1 T T	otal 'ransactions:	6		Total Charged Amount	5.50 USD	
	II Page 1 of	1 🕨 🕅 🛛 🥷	2					1 - 1 of 1
	Q Show Records							

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 ch<u>osen service</u>(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.

			Custom	er Self-Care Por	tal			
Available Funds: 145.49 USD				Web Interf	ace Language: en - English	~	EasyCall ( Login: easycall1 )	🔓 Logout 🔹
🔝 Dashboard	8	My Profile	🔯 IP Centrex	🗎 Bi	lling Information	🚫 Trouble Tic	kets	
Reports								😡 Help
	~	Report Type: All	~	From: 2016-01-06	Till: 2016-04-06	-		🃸 Search
General			Report 1	lype		Period Starts -	Period Ends	Download
Subscriptions		Standard Customer xDRs Re	eport			2016-01-19	2016-01-19	Q
Quotas and Service Wallets		Standard Customer xDRs R	port			2016-01-18	2016-01-18	Q
Measured Services		Standard Customer xDRs Re	eport			2016-01-17	2016-01-17	Q
Transactions		Standard Customer xDRs R	eport			2016-01-16	2016-01-16	Q
Reports		Standard Customer xDRs Re	eport			2016-01-15	2016-01-15	Q
Make a Payment		Standard Customer ×DRs R	eport			2016-01-14	2016-01-14	Q
Payment Info		Standard Customer xDRs Re	eport			2016-01-13	2016-01-13	Q
		Standard Customer ×DRs Re	eport			2016-01-12	2016-01-12	Q
		Standard Customer xDRs Re	eport			2016-01-11	2016-01-11	Q
		Standard Customer ×DRs Re	eport			2016-01-10	2016-01-10	Q
		Standard Customer xDRs Re	eport			2016-01-09	2016-01-09	Q
		Standard Customer ×DRs Re	eport			2016-01-08	2016-01-08	Q
		Standard Customer xDRs Re	eport			2016-01-07	2016-01-07	Q
		Standard Customer ×DRs Re	eport			2016-01-06	2016-01-06	Q,
		1 of 7	► N 😂					1 - 15 of 91

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

# Invoices

The **Invoices** page allows you to view your last 6, 12, 24 or all invoices. If you want to include void invoices, just select the corresponding check box and then click **Search**.

				Custome	r Self-Care Porta	il 👘			
Available Funds: 145.49 USD					Web Interfac	e Language: en - Engli	sh 💌	EasyCall ( Login: easyc	all1 ) 🛛 🔒 Logout 👻
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Invoices									😡 Help
	<b>«</b>	All		🖌 🗌 Include Void	Invoices				🛗 Search
Summary		View	No.	Period Starts	Period Ends	Due Date	Period Total	Payments/Adjus	Payment Status
Subscriptions		Q	455	2016-04-04	2016-04-05	2016-04-06	0.00 USD	5.50 USD	Paid
Quotas and Service Wallets		Q	454	2016-04-03	2016-04-04	2016-04-05	0.00 USD	5.50 USD	Paid
Measured Services		Q	453	2016-04-02	2016-04-03	2016-04-04	0.00 USD	5.50 USD	Paid
Transactions		Q	452	2016-04-01	2016-04-02	2016-04-03	0.00 USD	5.50 USD	Paid
Reports		Q	451	2016-03-31	2016-04-01	2016-04-02	0.00 USD	5.50 USD	Paid
Make a Payment		Q	450	2016-03-30	2016-03-31	2016-04-01	0.00 USD	5.50 USD	Paid
Payment Info		Q	449	2016-03-29	2016-03-30	2016-03-31	0.00 USD	5.50 USD	Paid
		Q	448	2016-03-28	2016-03-29	2016-03-30	0.00 USD	5.50 USD	Paid

Invoices cover these parameters:

• No. (invoice number) – The unique identifier for an invoice.

- **Period Starts / Ends** The billing period for which an invoice is issued.
- **Due Date** The date by which the payment should be received.
- **Period Total** The amount of money that you are supposed to pay.
- **Payments / Adjustments** The sum of payments and adjustments that has been applied to your balance during the given billing period.
- **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.

Click the Q 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 withdraw 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 **Next**. Specify the payment information and click the **Pay Now** button to proceed with the payment.

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18 Dashboard	🐣 My Profile	1. ALE - ALE	IP Centrex	Billing Information	O Trouble Tickets	
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	~	Balance, USD: -39.9	9			
Billing Summary		Amount USD: E0.0	0			
Subscriptions		*n	ninimum pavment 1.00 USD			
Quotas and Service Wallets			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
Measured Services	Paymer	nt Methods				
Transactions	۰	<u>-0-</u>	Pay directly with any	major Credit Card Including VISA,	MasterCard, American Express	
Invoices						
Payment Info	- E	MRECT	A direct debit is a fir	nancial transaction in which you wi	thdraw funds from a bank account.	
		-	Des Gran and a desid	in Deals Annual		
		CHECK	Pay from your check	ing bank Account		
	•	PayNearMe	With PayNearMe you	i can now buy online and make pa	yments with cash at more than	
		- ayrican ic	8,200 stores nation	vide		
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To pay with other payment method, click the **Use Other Payment Methods** Use Other Payment Methods button.

#### **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 topup 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 topup 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.

		Customer Self	-Care Portal		
Balance: 0.00 USD		W	eb Interface Language: en - English	*	Easy Call Ltd. (Login: easycalltd ) 🛛 🔓 Logout 👻
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#### **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**

On this page you can set up the pre-authorized payment method and configure auto payments.

		Customer Self-C	are Portal				
Balance: 0.00 USD		Web Inte	rface Language: en - English		~	EasyCall PBX ( Login: easyCall_U	() 🔒 Logout 🔹
🔠 Dashboard	My Profile	IP Centrex	🔡 Billing Informati	on	٥	Trouble Tickets	
Payment Info							🕑 Help
a Billing Summary	Pre-authorized Paymer	nt Method					
General Subscriptions	Credit or Debit Care	1 100 100 100 100 100 100 100 100 100 1					
Quotas and Service Wallets     Volume Discounts	Pay with your credit or	debit card.		i Edit		Kemove Stored Card	
Measured Services     Transactions     Fransactions     Novices     Make a Payment     Make a Payment     Payment Info	Pa Ca Bank account (eCh	wment Method: VISA Card Number: 4007xxxxx1112 rdholder Name: Easy Call Expiration Date: 06 / 2015 eck)	2	Countr Billing Addres Stat Postal cod	y: U is: L ie: N ie: U	INITED KINGDOM ondon, Vestminster Jot Set K001	
	Pay from your checkin Direct Debit NL A direct debit is a finan account.	g Bank Account 편] acial transaction in which you with	draw funds from a bank				
	Pay 500.00	g this payment method	1,000.00 USD				

#### **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 **Preauthorized Payment Method** is chosen and all the required information is filled in for it (for example, credit card information).

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

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

#### 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.

Auto-Payme	ents		
Auto-pay	invoice using this	payment method	
✓ Pay	100.00 USD	when the balance drops below	10.00 USD
Top-Up		100.00 USD	
Applicab	e 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.

			Customer Self-Care Port	al		
Balance: 557.32 U	SD		Credit Limit: 1,000.00 U	SD en - English 🛛 🖌 Easy	/Call (Login: EasyCall_web)	🔓 Logout 🔹
B Dashboard	🔏 My Profile		र्द्धे IP Centrex	📄 Billing Information 🤞	🔆 Trouble Tickets	
Tro	uble Tickets					() Help
#	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	
Create Ticket	4 4 Page 1 of 1 ▶ ▶	2				1 - 1 of 1
			© 2001-2014 PortaOne, Inc. All rights res	erved.		

To create a new ticket, simply click the <sup>(C)</sup> **Create Ticket** button at the bottom of the page.



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:

Section 2004 Phone Line: 1604	04373452					8 ×
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General						
Cali Screenal Control Numbers Cali Screening Cali		Start Time: End Time: Day of the Month: Sunday Monday Wednesday Wednesday Wednesday Fruesday Sturday Saturday	20 1 2 00 2 2 00 2 2 00 2 2 00 2 2 00 2 2 00 2 2 2 00 2	Include New Period I	Time Periods There is no data to display	K Cancel
		Edit Forwarding				

- 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.



意思 Dashboard	A My Profile	i IP Centr	ex Biling Information			
General	al	Start Time: End Time:			Time Periods From 20:00 Till 08:00, on Monday-Eriday	
Convarding     Calls Screening     Call Screening     Call Recording     Coll Barring     Societaria     Call Barring     Call Barring     Call Barring     Call Barring     Calls     Energency Calls		Day of the Month: Select All Day Sunday Monday Tuesday Wednesday Wednesday Fruesday Fruesday Saturday Saturday	Example: 1, 3, 7, 14-23 Example: 1, 3, 7, 14-23 (*) January Ø February Ø Arch Ø April Ø March Ø April Ø July Ø July Ø August Ø September Ø October Ø November Ø December	Include New Period 🕸	of January-December	
					V Finish	Cancel
	*					

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

NNN Edit Phone Line: 160404373452					8 ×
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Edit Forwarding					
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			From 20:00 Till on Monday-Frid of January-Dece	08:00, av, imber	Ø
	Save Back Edit Forwarding			11	,

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

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Forward	ling								
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Calls Screening		Edit	Order	Number		Description		Forward Settings	Del
<ul> <li>Qie Call Recording</li> <li>Qiocemail</li> <li>Qio Call Barring</li> <li>Qie Favorite Numbers</li> <li>Qie dentity</li> </ul>				160404373761		forwarding to	home number	Time restrictions: From 20:00 Till 08:00, on Monday-Friday, of January- December Ring for: 60 sec	×
≪ <sup>2</sup> Music On Hold ⊛Emergency Cals		Add	New Number	🔚 Save Order   🍕	b 7				

# ... 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.

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	Save Save			

- 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.

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A Grand	<b>«</b>	Edit	Configure	Huntgroup Number	Huntgroup Name	Hunt Sequence	Assigned Extensions	Caller ID	Call Pickup Allowed	Delete
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		🗿 Add Hunt	group 🔢 🞼	4 Page 1 o	r 🕨 🕅 😂					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.

# ... top up a service wallet?

Service wallets make it possible to divide your balance into virtual subwallets. 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.

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- 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.

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Reports		30			5			
Invoices		60			8			
Make a Payment	> •	120			15			
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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.

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Invoices	<b>9</b>				
Payment Info	Transfer the amount	nt from your balance			
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The next screen represents updated information about the service available for you.