



New Features Guide

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Preface

PortaSwitch® Maintenance Release 91 is the next leap-forward release, consistent with our “fast releases, precisely on time” ideology.

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 introduced between major 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**.
- Terminal sessions, console screens, or system file names are displayed in `fixed width font`.



The **exclamation mark** draws your attention to important actions that must be taken for proper configuration.

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



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



Archivist explains how the feature worked in previous releases.



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



Tips provide information that might help you solve a problem.

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Strong Customer Authentication support for online payments

To prevent fraudulent transactions and make online payments more secure, new Strong Customer Authentication (SCA) requirements have been introduced in Europe as a part of the **second Payment Services Directive (PSD2)**. Service providers in the European Economic Area (EEA), UK, and Switzerland must meet SCA (also known as two-factor authentication, 2FA) requirements. Without SCA, the customers' banks may decline the payments.

SCA is implemented with 3D Secure authentication. Applying 3D Secure adds an extra step after the checkout, where the customer has to provide additional information to complete the payment (e.g., to enter a one-time password received on their phone).

For example, the service provider uses Stripe payment processor to receive online payments. Mary Smith, their customer, lives in the UK and, therefore, she has to pass SCA.

Let's say Mary Smith wants to pay her invoice via the self-care interface. She fills in her card details and initiates payment. Meanwhile, Stripe sends a transaction request to Mary's bank. The bank sends a one-time password to Mary's phone. Mary is redirected to the bank page, where she enters a one-time password to authenticate a payment. After the confirmation, Mary is redirected back to the PortaBilling® self-care interface. Once the payment is successful, Mary's balance changes in PortaBilling®.

Note that the customer's bank may decline the auto-payments because there is no customer to pass SCA. If the auto-payment is declined, the next auto-payments are automatically disabled. The customer receives an email notification informing that the payment has failed because it requires an additional verification step. They can make a manual payment from their self-care interface.

Currently, Stripe payment processor is supported by SCA. Support for other payment processors operating in the EEA will be implemented in future releases. SCA with Stripe is immediately available to you in MR91, MR90-1 via iPaaS (Integration Platform as a Service). If you're using Stripe on the older release of PortaSwitch®, i.e., MR55–MR90, PortaOne® team can make a backport patch for the specific MR to enable SCA for Stripe. **Contact us** to find out more.

Benefits

- Service providers meet SCA requirements and can continue accepting online payments in the EEA, UK, and Switzerland.
- End users gain an additional security layer for their online payments due to 2FA.

Call supervision

Customers that use IP Centrex can now supervise their colleagues' calls in real time. For example, a manager can listen in on a sales agent's calls, guide them, and, if needed, participate in the calls.

Call supervision is available in three modes:

- **Spy mode** – a manager can join an active call to listen in on the agent and the client's conversation without revealing the manager's presence. For example, managers can silently monitor calls to provide feedback afterward and suggest improvements to agents' communication skills.
- **Whisper mode** – a manager can speak to the agent directly while the client is not hearing the manager. The manager can assist the agent and give tips during the conversation with the client. For example, managers can use this mode when training new agents.
- **Barge-in mode** – a manager can speak to both parties – the agent and the client. For example, the agent has trouble handling the client's concern, so the agent asks the manager for assistance. The manager joins the call using the barge-in mode to speak to the client directly.

A manager can choose any of these modes when joining an active call and switch between modes during the call.

Benefits

- IP Centrex customers can use call supervision to train new agents, evaluate their performance, and improve customer service, sales, technical support, etc.
- Managers can ensure that agents process calls in a way that meets the company's standards.
- Agents receive help from the managers in real time and can resolve issues on the spot.

Let's consider an example.

The ABC company has a call center with customer support and sales teams. Adam is a manager of the customer support team. He is authorized

to join agents' calls to assist or provide feedback. John is a new agent in the customer support team with the extension 744.

Adam sees on the special IP phone console that John has an active call with a client. Adam decides to check how John is handling the call. To join the call in spy mode, Adam dials *90744 (where *90 is the **Spy mode** prefix and 744 is John's extension). Now Adam can hear the conversation.

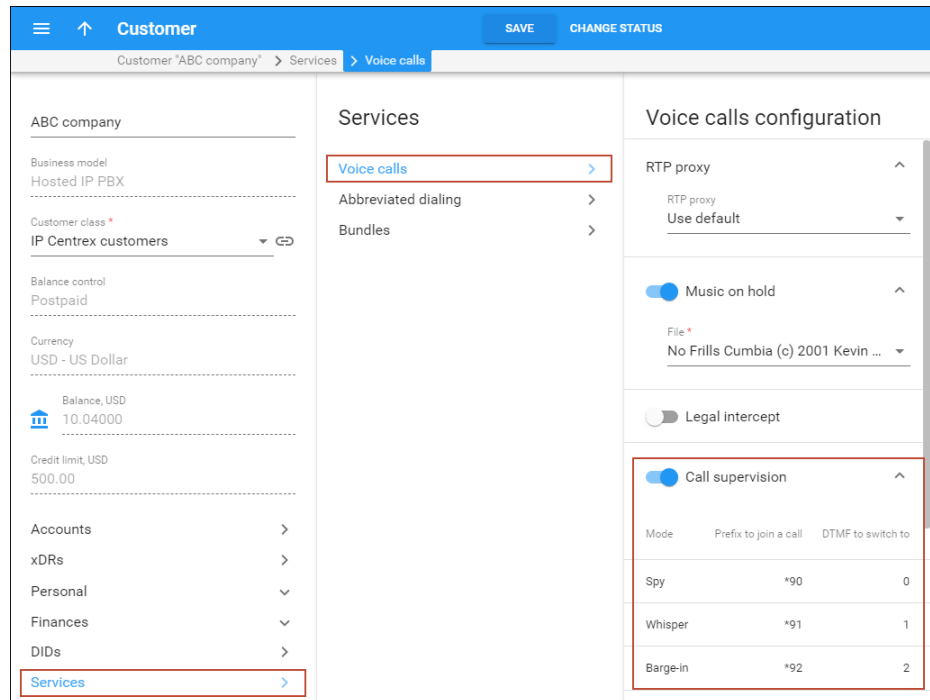
John answers a few of the client's questions. When the client asks another question, John can't find the required information. John requests assistance from Adam in the corporate chat. Adam has already been listening in on this call, so he switches to the **Whisper mode** by dialing **1**. Adam tells John how to find the information.

The client keeps asking about the service details. Adam decides that John needs help in handling this call. Adam switches to the **Barge-in mode** by dialing **2**, introduces himself to the client and explains the relevant details. The client is satisfied with the provided information, and the call ends.

Configuration

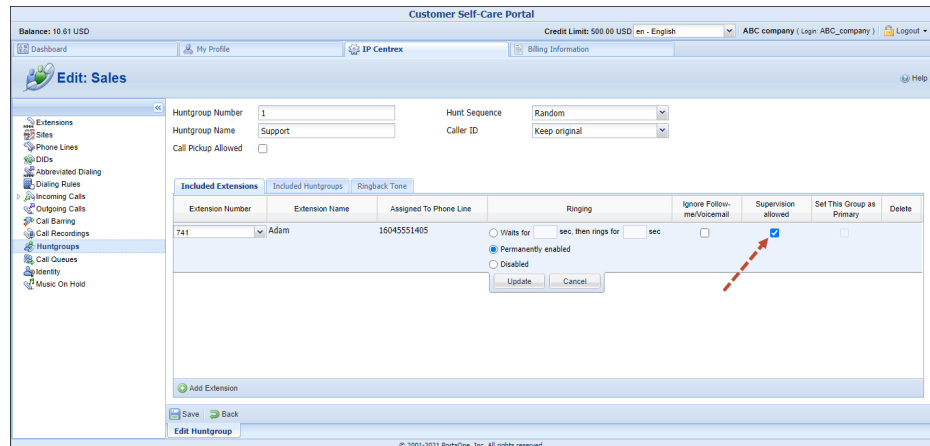
To configure call supervision, these steps must be performed:

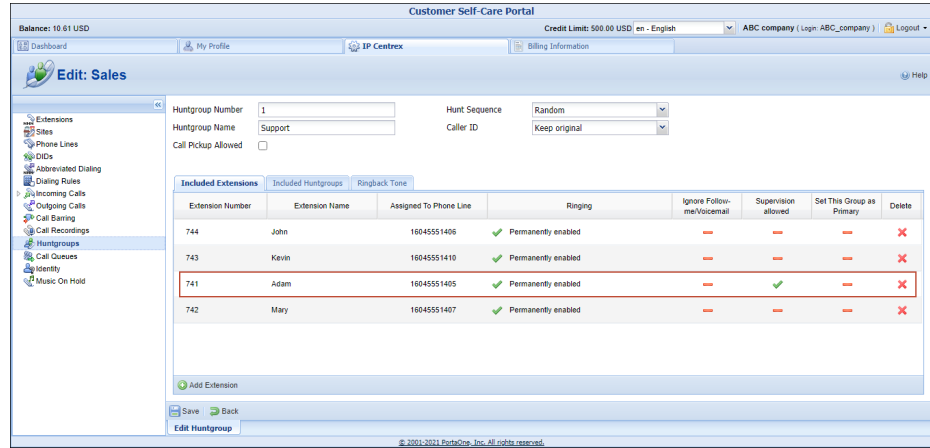
1. On the PortaBilling® administrator web interface.
The administrator enables the call supervision feature for the customer:
opens the **Customer** record > **Services** > **Voice calls** > turns on the **Call supervision** toggle > **Save**.



- On the customer web self-care interface. The customer configures the extensions in a huntgroup that are authorized to access the other huntgroup members' calls.

For example, to add Adam as a manager of the “Support” huntgroup, the customer opens the **IP Centrex** tab > **Huntgroups** > **“Support” huntgroup** configuration > **Add extension** > fills in details > selects the check box for **Supervision allowed** option > **Save**.





Specifics

The default prefixes and Dual-Tone Multi-Frequency (DTMF) codes for call supervision feature:

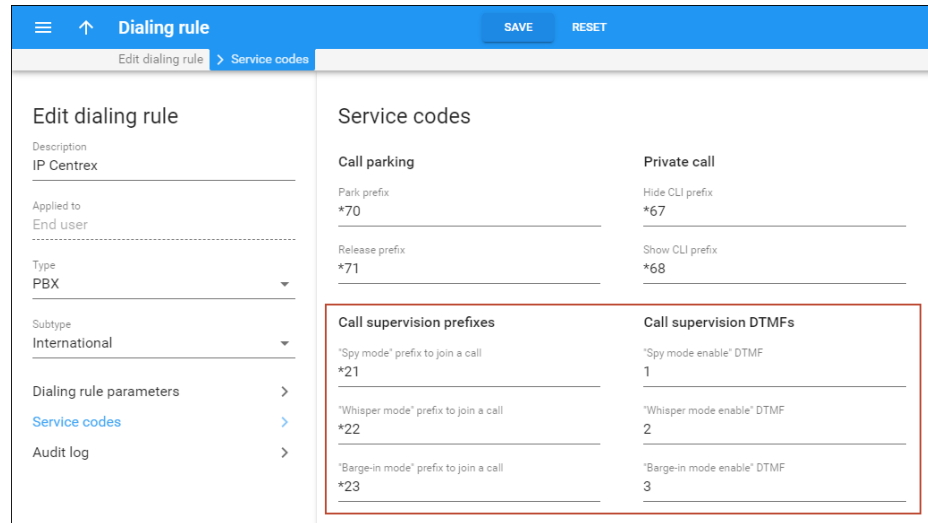
Call supervision mode	Prefix to join an active call	DTMF code to switch to this mode from any other
Spy mode	*90	0
Whisper mode	*91	1
Barge-in mode	*92	2

For example, to join a call made by an agent with extension 888 in the whisper mode, a manager dials the corresponding prefix followed by the extension: *91888. To switch, e.g., from the whisper mode to spy mode, the manager dials the DTMF for the spy mode: **0**. To switch to the barge-in mode, the manager dials **2**.

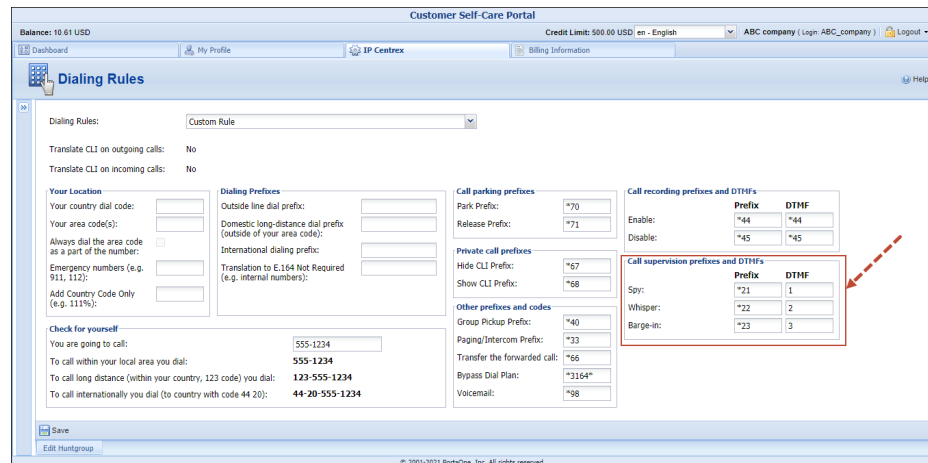
It's possible to change the default prefixes and DTMF codes by creating a new dialing rule.

For example, a customer migrates to IP Centrex from their legacy PBX. The customer's managers are used to the call supervision prefixes *21, *22, *23, and DTMF codes 1, 2, 3. To keep these prefixes and DTMF codes in IP Centrex, the administrator:

- creates a customer record with the dialing rules option enabled;
- creates a new dialing rule of PBX type; and
- changes the default prefixes and DTMF codes in the dialing rule.



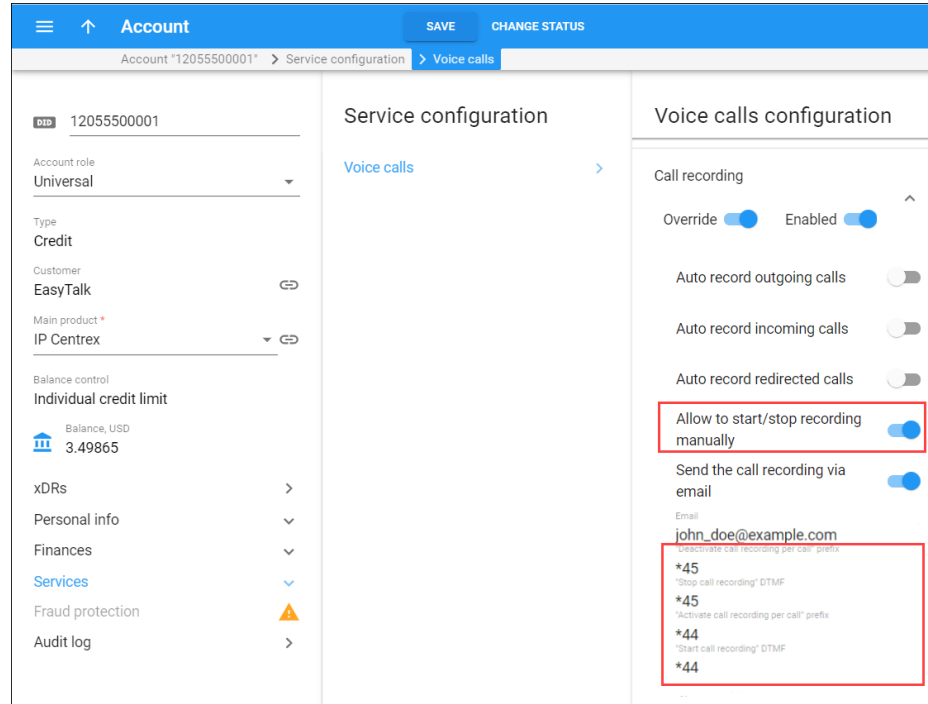
Customers can edit the supervision prefixes and DTMF codes on their customer self-care interface: they need to open the **IP Centrex** page > **Dialing rules**, switch to the **Custom rule** and change the call supervision prefixes and DTMF codes.



Enhanced on-demand call recording

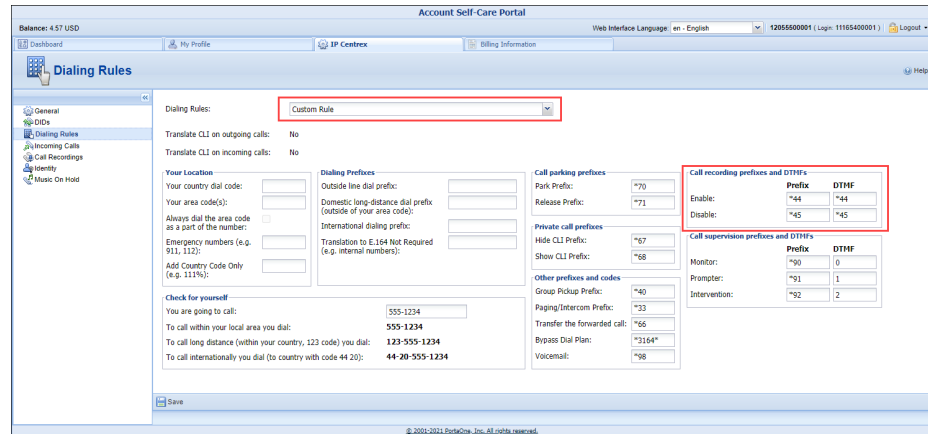
With this release, end users can activate the on-demand call recording by DTMF codes. Thus, the on-demand call recording is available for all end users, regardless of the SIP phone model they use.

To enable a specific account to start/stop call recording at any time during a call, the administrator enables the **Allow to start/stop recording manually** option in the call recording configuration. To start/stop the recording, the end user dials DTMF codes. For example, to start the recording during a call, they dial *44 and to stop the recording – *45.



The administrator can change the default DTMF codes by creating a new dialing rule and assigning it to a customer/account.

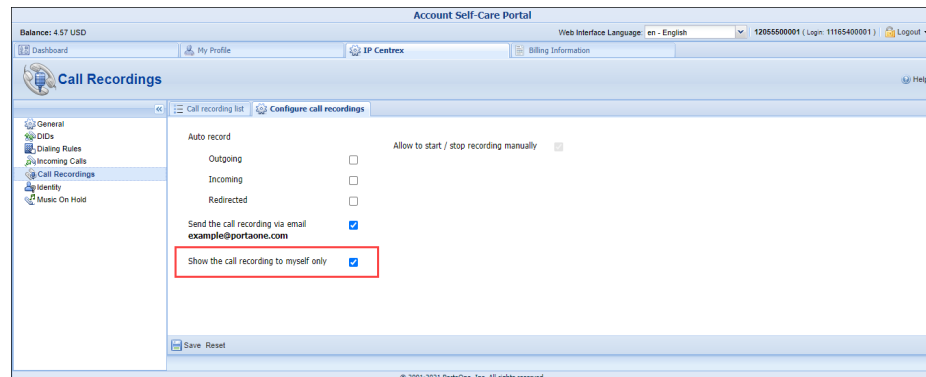
Also, the end users can edit default DTMF codes in the custom dialing rule configuration on their self-care interface.



The administrator can allow end users to hide call recordings from their colleagues on the self-care interface. To do this, the administrator:

- Creates a new access role for the account with permissions to modify the **Show the call recording to account only** option.
- Assigns this access role to a specific account.

Then, the end user can manage the **Show the call recording to myself only** option on their self-care interface.



Also, with this release, the end users can receive call recordings in the email notifications after the call is ended. To do this, an administrator enables the **New call recording is available** notification in the customer class assigned to a specific customer.

Benefit

- The on-demand call recording is available for all end users, regardless of the SIP phone model they use.

Configuration

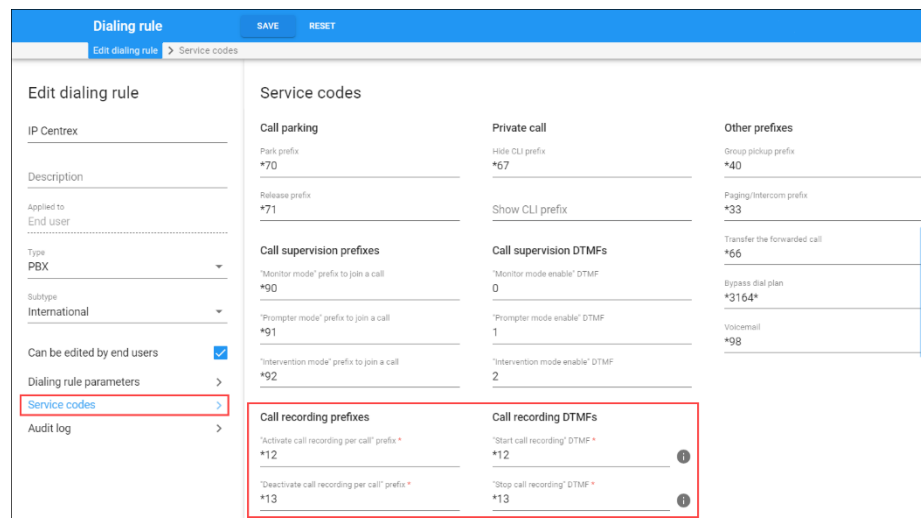
To enable a specific account to receive call recordings in the email notifications, perform the following steps:

- Enable the **New call recording is available** notification in the customer class assigned to a specific customer.
- Specify the email for an account to send the notifications to: go to **Personal info > General info > Email > Save**.
- Enable the **Send the call recording via email** option for a specific account: go to **Voice call configuration > Call recording > turn on the Send the call recording via email toggle > Save**.

The end users can manage the **Send the call recording via email** option on their self-care interface.

Change the default prefixes and DTMF codes for on-demand call recording:

- Create a customer/account record with enabled dialing rules.
- Create a new dialing rule of PBX type.
- Change the default prefixes and DTMF codes in the dialing rule.

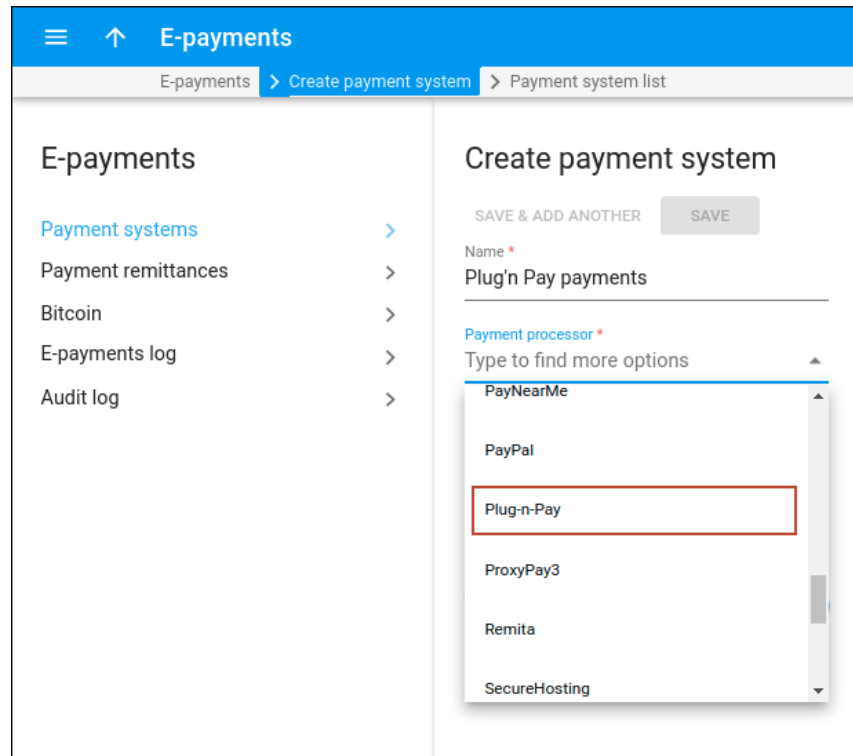


Plug'n Pay payment processor

Service providers can now accept online payments via Plug'n Pay payment processor. It is available in PortaBilling® via PortaOne® iPaaS (Integration Platform as a Service). Thus, even service providers with older PortaSwitch® versions, e.g., MR75 can start using Plug'n Pay without a full system update.

To start using Plug'n Pay, service providers need to subscribe to PortaOne® iPaaS and have an existing active Plug'n Pay merchant account. Starting with MR91, or in MR90-1, the Plug'n Pay payment processor is immediately available and can be activated within a few days. For service providers using the older release of PortaSwitch®, i.e., MR55–MR90, the PortaOne® team can make a backport patch for the specific MR to enable using Plug'n Pay. In this case, the entire integration process might take 1-2 weeks.

As a result, Plug'n Pay appears on the list of available payment processors on the PortaBilling® web interface and can be used just like any other payment processor.



Benefit

- Due to the PortaOne® iPaaS cloud-based integration with Plug'n Pay, service providers can start receiving credit card payments via this payment processor with minimal integration efforts, even if they are running an older version of PortaSwitch®.

PortaOne® iPaaS subscribers have the option to add any other payment processors. [Contact us](#) to find out more.

To find more information about iPaaS integrations, refer to the [PortaSwitch® Architecture and Concepts](#) guide.

Other features and enhancements

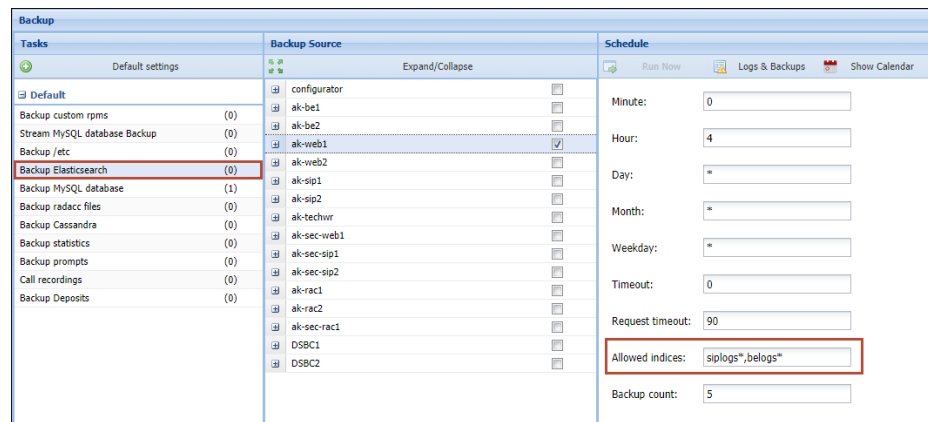
Backup configuration for Elasticsearch indices

The Elasticsearch database is storage for SIP and BE logs, web logs, ESPF logs, and CDR collections. Also, Elasticsearch creates indices for each log. While logs can be quite large, the indices themselves can occupy a lot of disc space.

An administrator can configure and create Elasticsearch backups on the Configuration server using the Archivist utility. With default settings, a backup is created for all Elasticsearch indices: siplogs, belogs, weblogs, cdrmediator, espf.

With this release, an administrator can specify the Elasticsearch indices to back up and, therefore, save disc space. To configure backup for one or several indices, an administrator specifies them in the following format: <index1>*,<index2>*,<index3>*, etc., where indexN is one of the Elasticsearch indices.

For example, to configure Elasticsearch backup for SIP and BE logs only, the administrator specifies “siplogs*,belogs*” value for the **Allowed indices** option.



This enhancement helps the administrator to save disc space by storing backups only for the required indices (e.g., SIP and BE logs).

You can find more information on how to configure backups in the [Configure Backups with Archivist](#) handbook.

Set conditions for subscription charging when no service was provided

Market environment or local regulations may require that service providers not charge customers when they don't have access to the service. PortaBilling® implements this requirement by charging a full subscription fee and then issuing credits for the days when no service was available. A customer may not have access to the service due to the following conditions:

- The account was expired.
- The account or customer were blocked.
- The customer was suspended.

- No funds were available (the balance of a customer or an individual account reached the credit limit or ran out of available funds).

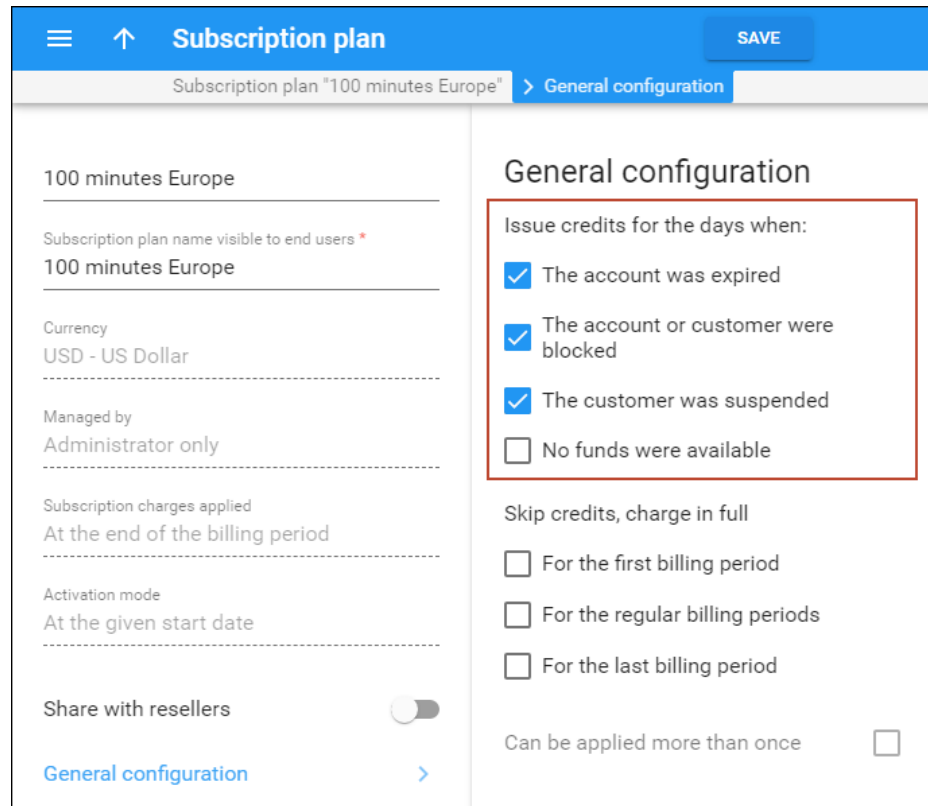
By default, credits for a subscription fee are issued under all the above conditions.

With this release, service providers can choose under which specific conditions to issue credits for a subscription fee.

Let's consider an example. The service provider Panda telecom offers 100 minutes of calls to European destinations for a \$30 monthly fee. Panda telecom doesn't charge the subscription fee for the days when customers can't use the service due to suspension, block, or their account expiration. However, when their balance reaches the credit limit, customers can use the available minutes of the 100-minute quota. Since they still can access the service, Panda telecom wants to charge the customers the subscription fee when their balance reaches the credit limit (postpaid customers) or runs out of available funds (prepaid customers).

To make this happen, the administrator:

1. Goes to **Subscription plan > General configuration > Issue credits for the days when** option.
2. Clears the check box for the **No funds were available** condition.



With this enhancement, service providers gain a tighter control over charging subscription fees and thus, can avoid revenue leakage.