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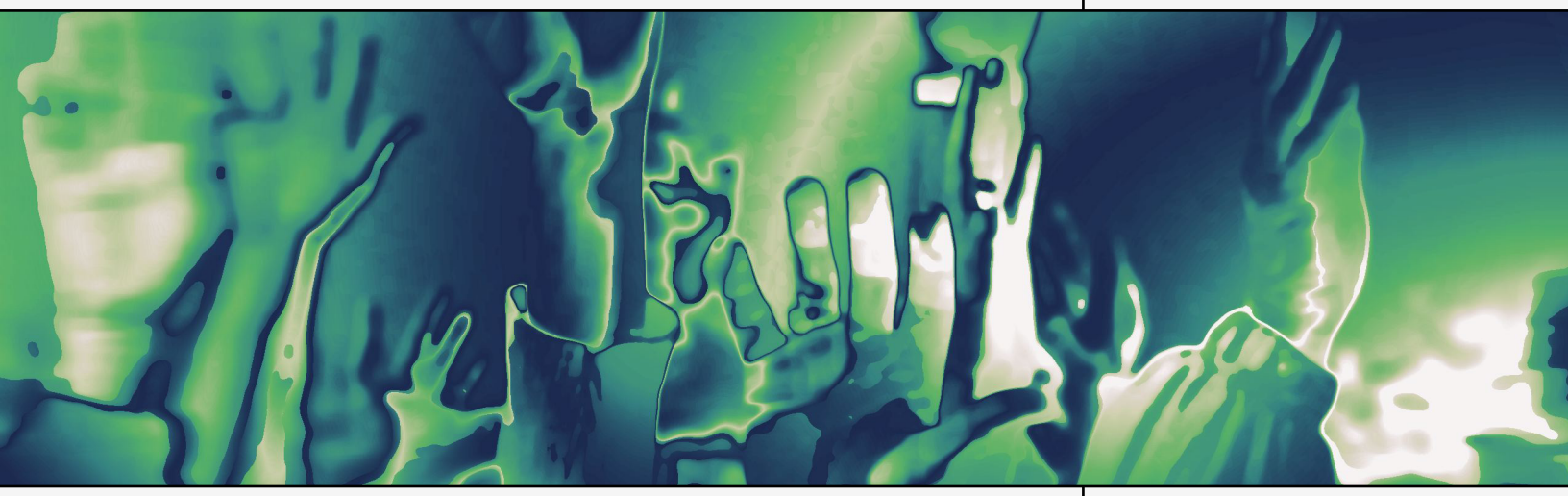

Customer Self-care Interface

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PortaSwitch® Customer self-care interface, March 2012

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

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Preface

This document provides a general overview of the Customer self-care interface.

Where to get the latest version of this guide

The hard copy of this guide is updated at major releases only, and does not always contain the latest material on enhancements that occur between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at: **www.portaone.com/support/documentation/**.

Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**
- Terminal sessions, console screens, or system file names are displayed in `fixed width font`

Exclamation mark draws your attention to important information or action.

NOTE: Notes contain helpful suggestions about or references to materials not contained in this manual.

Timesaver means that you can save time by taking the action described in the paragraph.

Tips provide information that might help you solve a problem.

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Hardware and Software Requirements

Client System Recommendations

- OS: Windows XP, Vista or 7, UNIX or Mac OS X
- Web browser: Internet Explorer 7.0 (or higher), Mozilla Firefox 3.6 (or higher)
- JavaScript and cookies enabled in web browser
- Spreadsheet processor (MS Excel or OpenOffice Calc)
- Display settings:
  - Minimum screen resolution: 1024 x 768

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1. Introduction

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Login to the Customer Self-care Interface

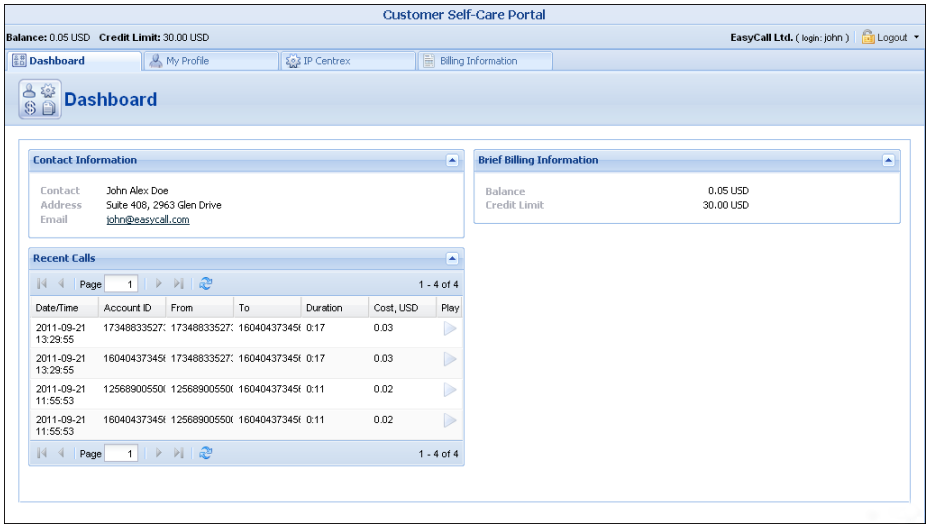
Your ITSP will provide you with a URL and credentials for logging in to the Customer self-care portal upon subscribing to their services.

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



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

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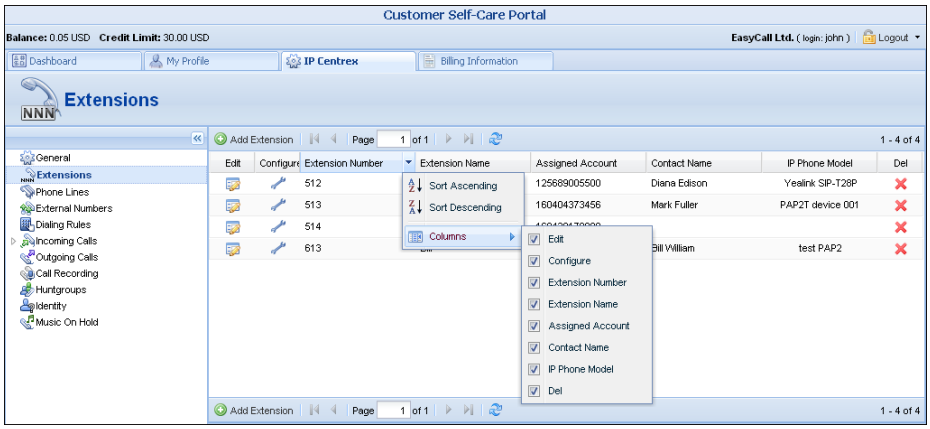
Common Features

Most of the data on the self-care portal 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 ticking or unticking items in the drop-down menu:



Action Buttons

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

1. Your ID and a login name that was used to log in.
2. The **Logout** button that terminates your current session on the web interface. Also, you can change your password here if necessary.

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

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2. Web Interface

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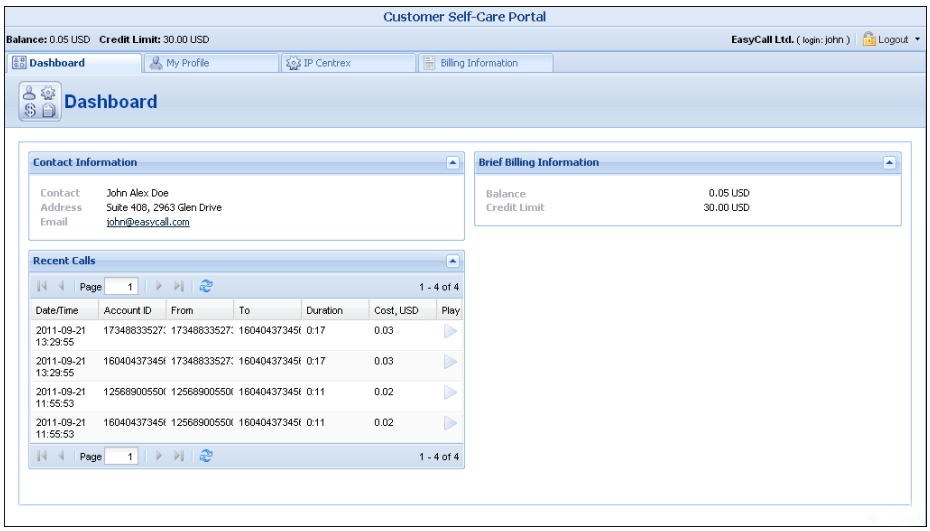
Dashboard

Your home page is organized like a dashboard so that you can easily view the most important information separated by category into different windows. In addition, these windows can be moved around, rearranged or minimized as you wish.

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



Column	Description
Contact Information	Here you can view your contact info such as address, email, etc.
Brief Billing Information	This reflects thumbnail billing information such as your current balance and credit limit.
Recent Calls	This table lists the most recent calls and call details generated by your phone lines (**account IDs** on the web interface).

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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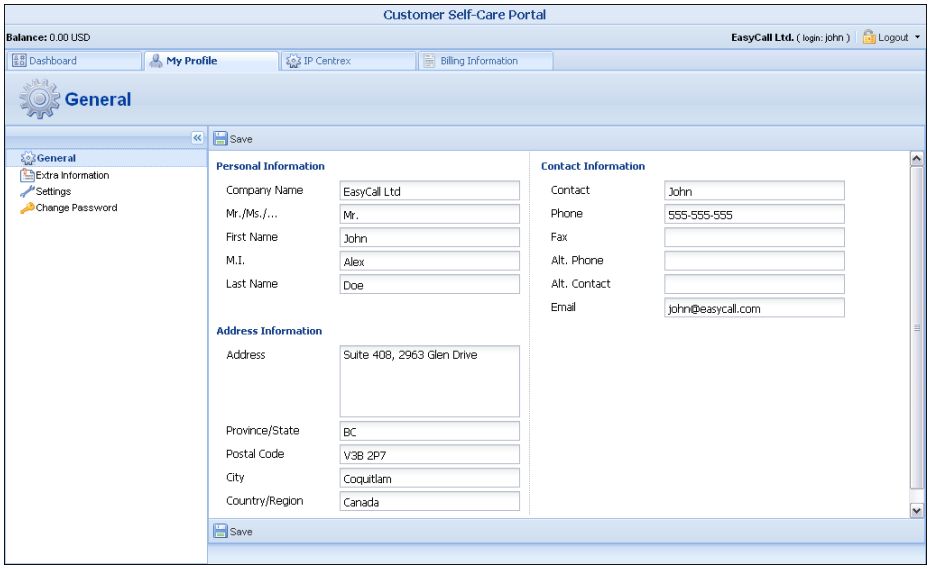

Tab	Description
General	Here you can enter general information such as company name, address, etc.
Extra Information	Here you can define extra information (such as driver's license ID or tax code) in addition to standard information. The fields for this tab are set by the Administrator.
Settings	Here you can choose the language to be used on your self-care web interface.
Change Password	Here you can change your current password for the self-care portal.

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.

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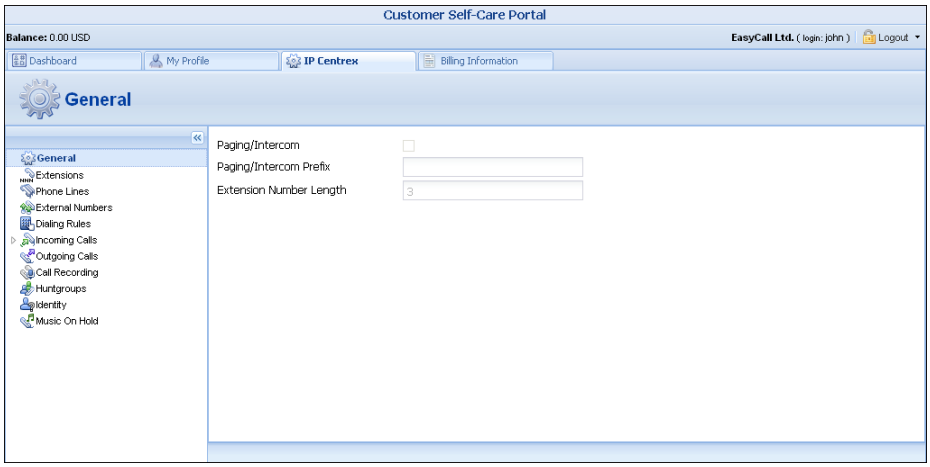
General



Field	Description
Paging / Intercom	Intercom calls enable users belonging to the same group to use two phones like on-door speakerphones. Here you can see whether this feature is enabled or not for your phone line.
Paging / Intercom Prefix	This appears only if **Paging / Intercom** is enabled; this is a special code that is dialed before the other extension number to automatically connect both extensions. When a two-way audio channel is established, speakerphone mode is immediately activated on the phone of the party being called.
Extension Number Length	Here you can see the number of digits for an extension number (e.g. 3, as per usual). Keep this in mind when adding extensions.

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.

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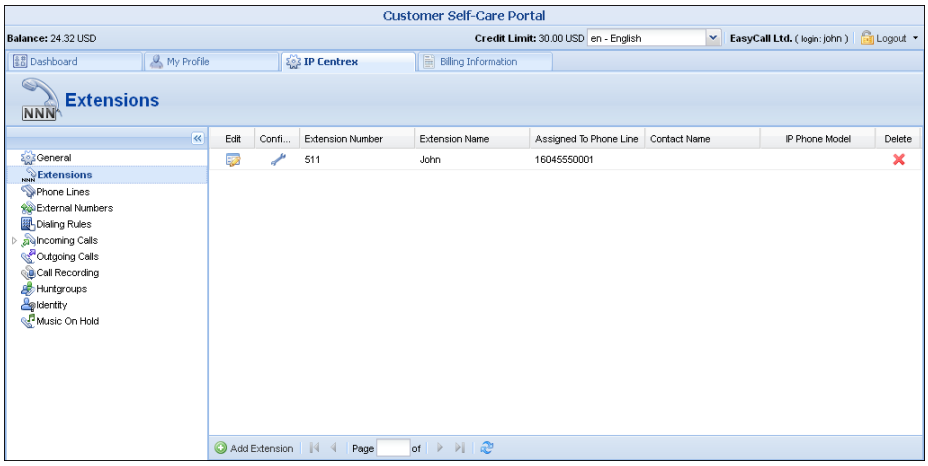
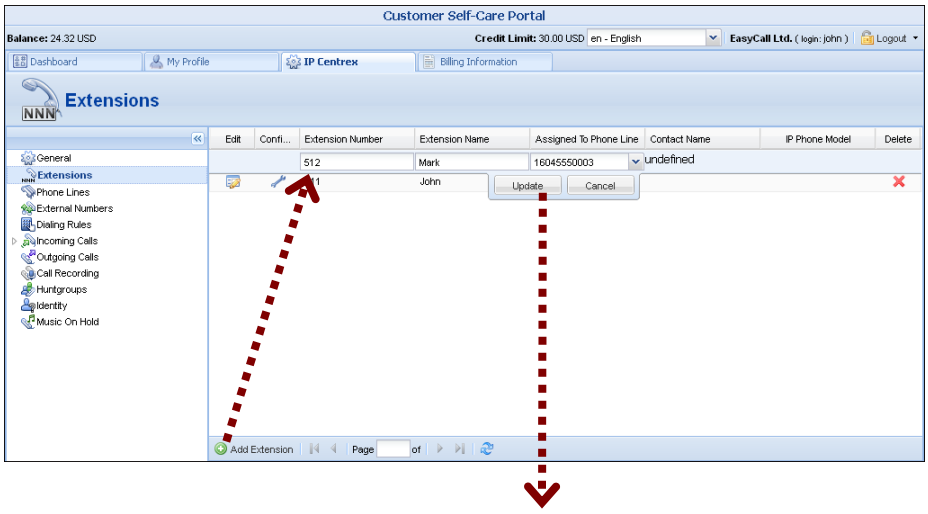


To add a new extension number, click the **Add Extension** button and enter the following information:

- **Extension Number** – Type in the number the end-user will dial on his phone (an extension number should contain only digits).
- **Extension Name** – Enter the logical name for this extension (e.g. name of the person using this line: "John").
- **Assigned To Phone Line** – This is the number that the extension is associated with. Here you should specify one of your phone lines by selecting it from the drop-down list. (Note that each phone line from the list can only be used once.



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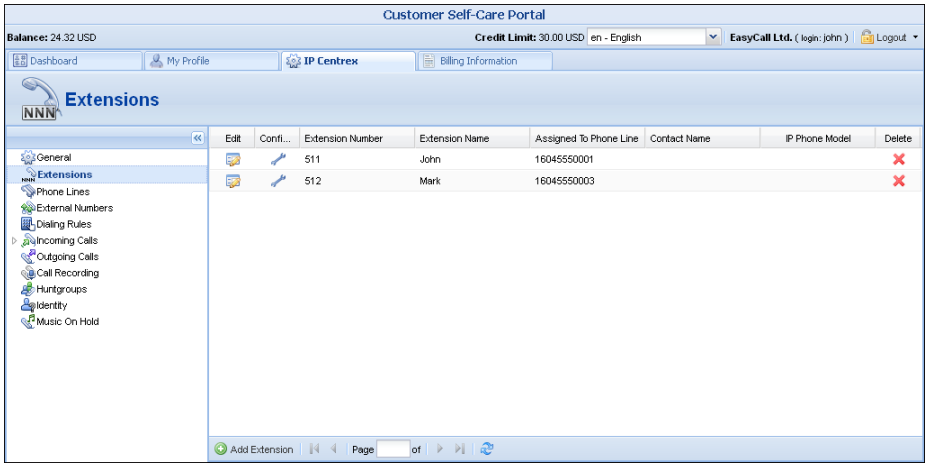
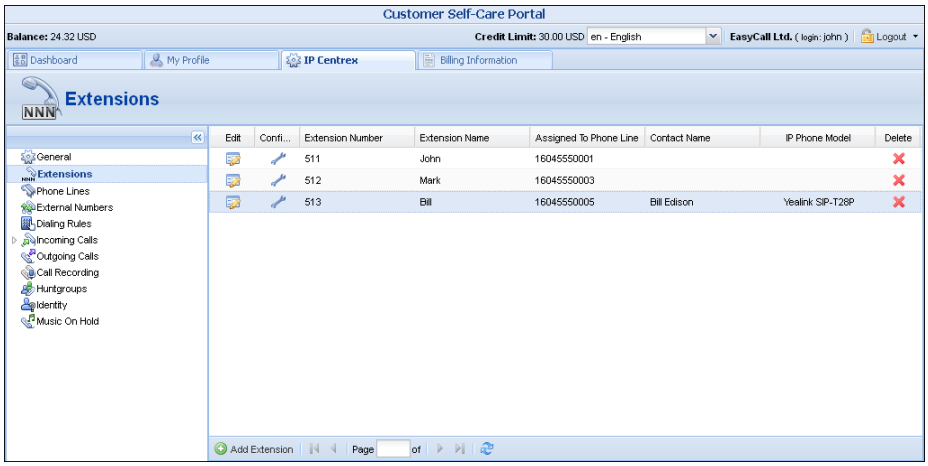


Once all the information is entered, click the **Update** button. You can easily change the number and extension name and manage phone line assignments by simply clicking on that extension number or on the **Edit** icon. To remove the extension from the list, click the **Delete** button.



You can view more information about the assigned phone line:

- **Contact Name** – The contact name of the phone line holder
- **IP Phone Model** – Indicates the IP phone that is assigned to a particular phone line.

To view and edit information about the *extension*, press the **Configure** icon next to the extension number. You will see the **Edit Extensions** page (note that some details are read-only):

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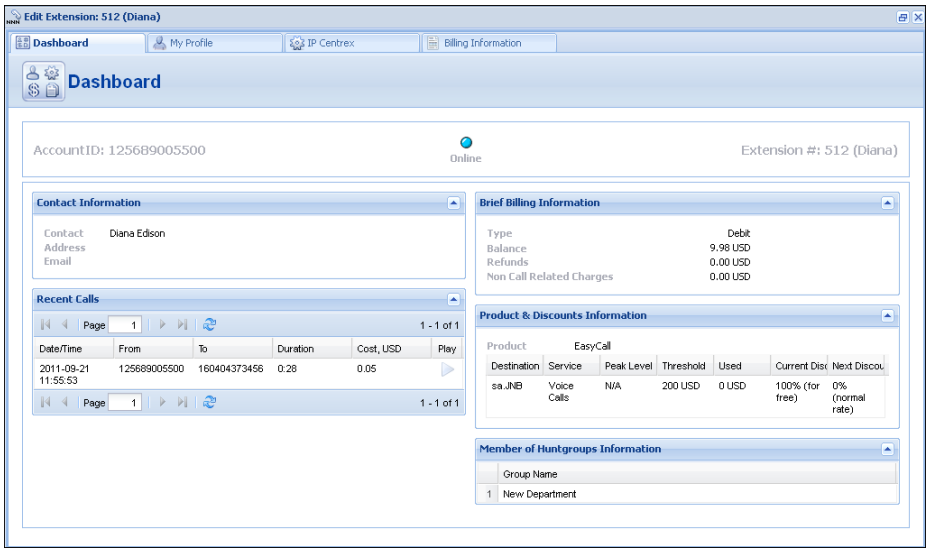
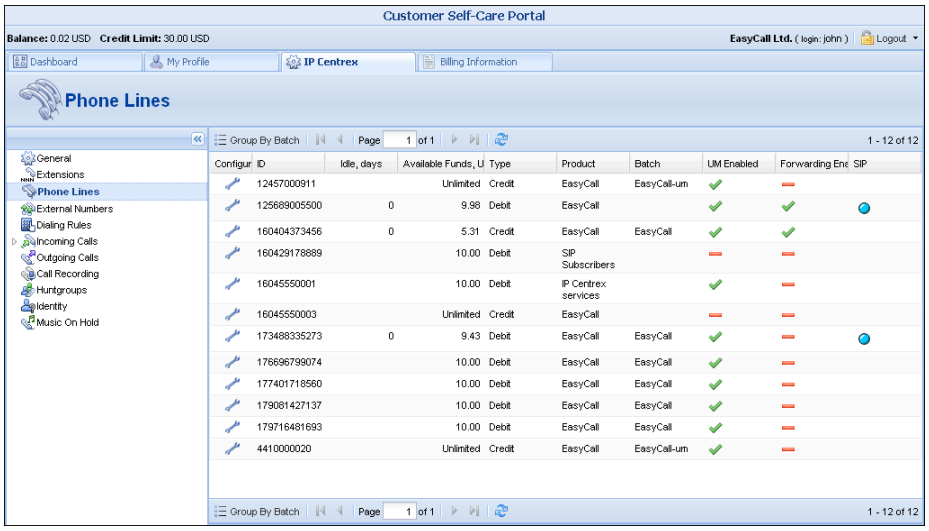


Phone Lines

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



Column	Description
Configure	Click on the **Configure** icon to edit the settings for a particular phone line.
ID	The primary identification for this phone line.
Idle, days	The amount of days the phone line has not been in use.
Available Funds	The amount of funds available for the user to spend on services.
Type	The type of phone line. It may either be “Debit” or “Credit.” “Debit” is usually associated with prepaid

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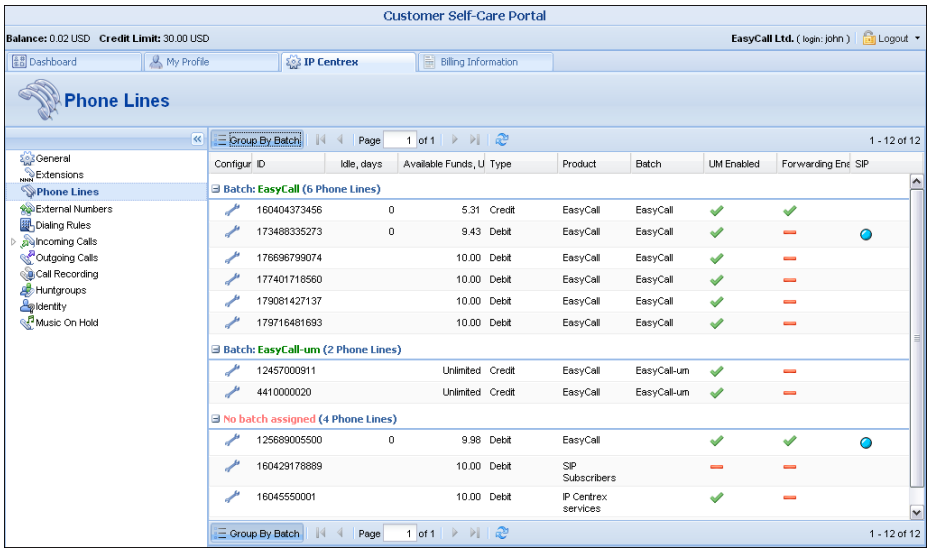
	cards. "Credit" is a phone line that will be invoiced for costs incurred.
Product	The product assigned to a particular phone line.
Batch	Batch is a group of phone lines under the same logical name. Here you can see the name of the batch that a particular phone line belongs to.
UM Enabled	The UM field shows whether UM services are enabled or disabled for a particular phone line. When they are enabled, the ✔ icon is shown. The field with an ⊖ icon indicates that UM services are disabled.
Forwarding Enabled	The forwarding field shows whether this function is enabled or disabled for a particular phone line. When it is enabled, the ✔ icon is shown. The field with an ⊖ icon indicates that forwarding is disabled.
SIP	When the phone line is used by a phone to register with the SIP server, the icon is shown.

You can also view phone lines grouped by batch by clicking the **Group By Batch** button located at the top or 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.

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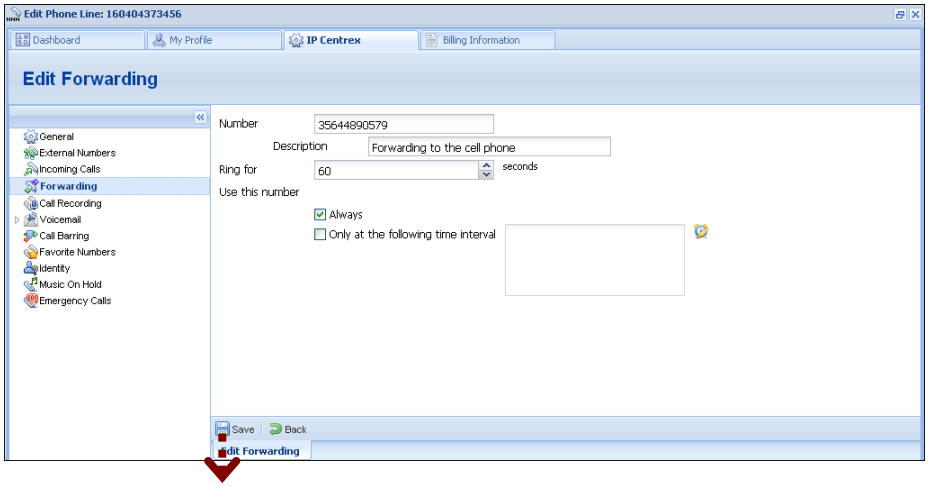
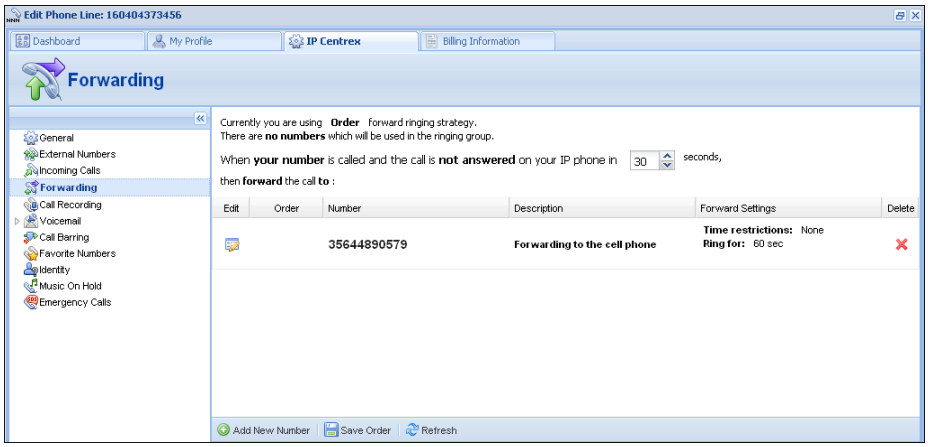
1. In the **IP Centrex** section, choose **Forwarding**.
2. Click **Add New Number**.



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.
   - **Use this number** – Choose the period during which the number is used. If you check the box next to **Always,** the call will always be forwarded to your cell phone. If you want to forward calls to a cell phone only during a specific time period, check the box next to **Only at the following time interval** field and click the icon to define that interval. Please consult the *How* section for more information.



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

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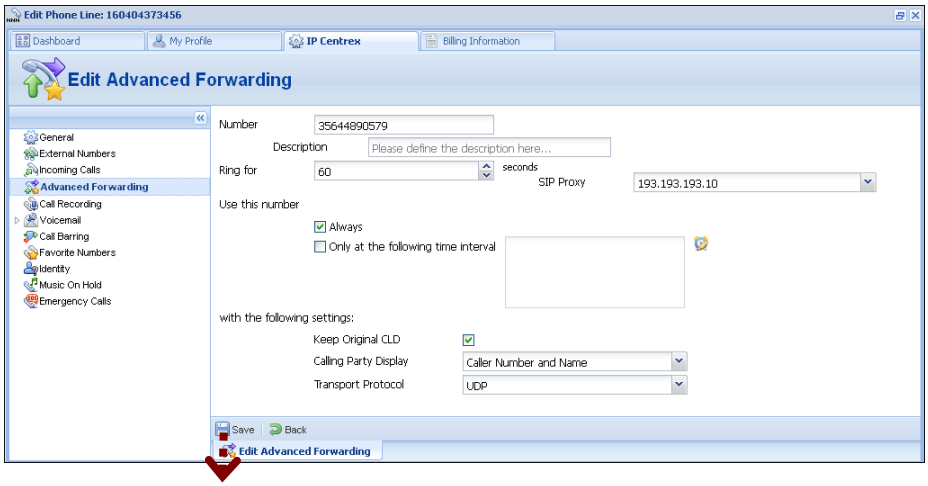
5. Repeat steps 2-4 until all the desired follow-me numbers have been added.

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 the steps below:

1. In the **IP Centrex** section, choose **Advanced Forwarding**.
2. Click **Add New Number** to add the number on which you wish to receive forwarded calls.
3. Enter the information needed. The fields are very similar to those for adding a follow-me number as described above.
4. Below are additional fields that are not available when adding a follow-me number.
   - **SIP Proxy** – Select SIP proxy from the drop-down menu.
   - **Keep Original CLD** – Check this option 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.
     - If you choose **Caller Number and Forwarder Name**, then the phone number of the caller and the forwarder's name will be displayed.
     - To see the phone number and the name of the forwarder, select **Forwarder Number and Name**.
   - **Transport Protocol** – This enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications for PBXes that do not support UDP.



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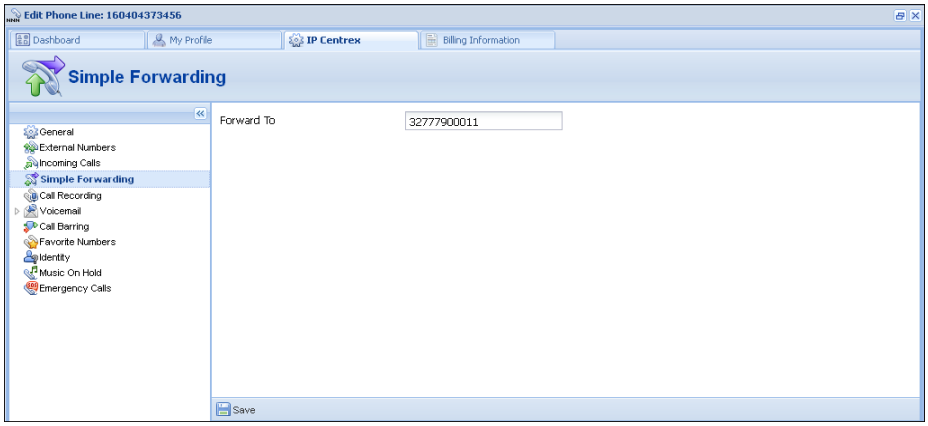
5. Click the **Save** icon to save the results of your work.

Simple Forwarding

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

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



3. Click the **Save** icon.

External Numbers

A particular phone line can be enabled to make and receive calls in several ways (i.e. using more than one number); for instance, several phone numbers may be registered for PINless dialing with a single prepaid card. In this case, a phone line (named **master account** on the web interface) contains the actual balance and other billing information, and the multiple numbers associated with it. These numbers serve as links or pointers for the phone line.

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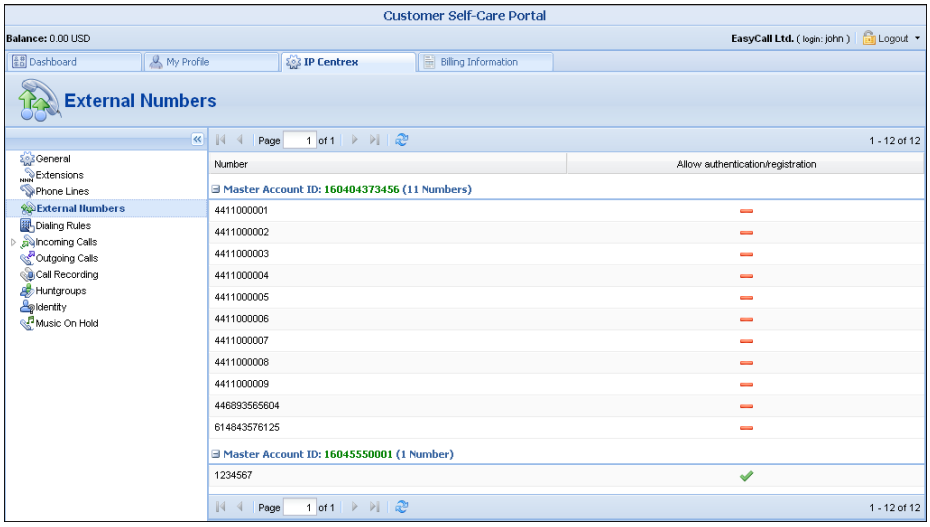
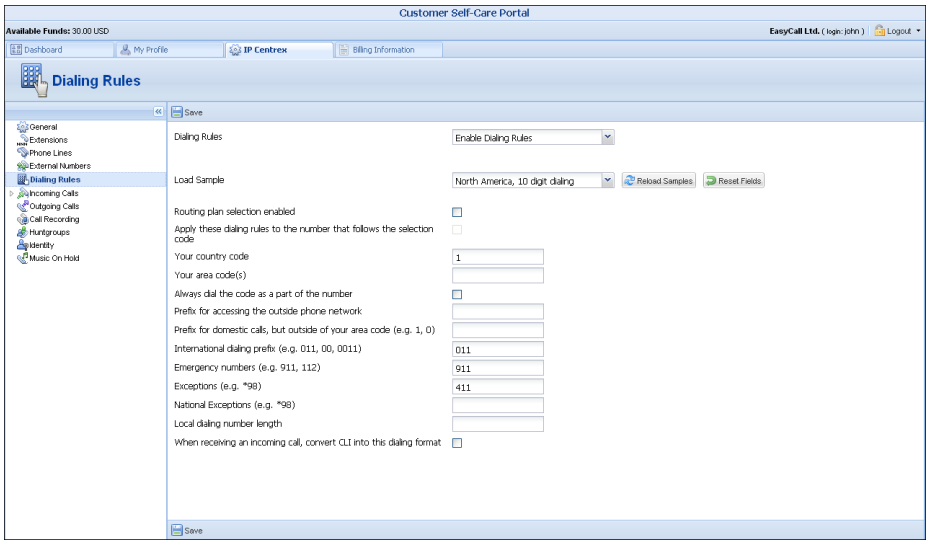


Field	Description
Number	This contains alternative numbers for a specific phone line.
Allow authentication /registration	This defines whether this alternative number can be used independently for authentication and registration (e.g. having two IP phones concurrently registered, one that uses the phone line's number and the other that uses an alternative number.) If this option is disabled, then this alternative number can only be used for forwarding calls to a phone line.

Dialing Rules

Using this tab, you can define a way of dialing phone numbers that is convenient to you or your users.



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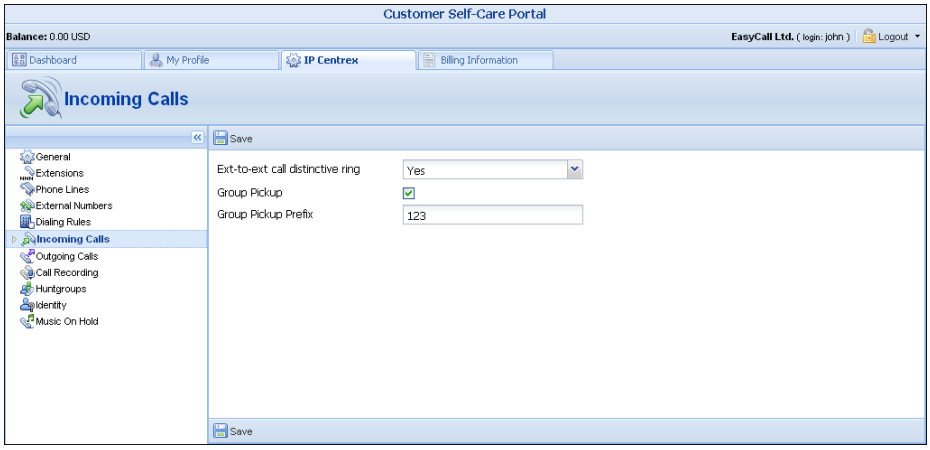
By default, dialing rules are disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If you wish to define the way in which your end users dial phone numbers, you can use the **Enable Dialing Rules** option. This will allow you to enter various dial plan parameters such as an international dialing prefix or area code. You may type in your own number translation rules instead (as Perl regular expressions) if you select the **Use Custom Translation Rules** option.

Once you have decided to enable the dialing rules, you can enter various dial plan parameters, such as your international dialing prefix. Several sample settings are provided for your convenience. For instance, in order to load sample settings for "traditional" North American dialing, select "North America, WA, 10 digit dialing" from the drop-down list. To revert to the last saved settings, click **Reload Samples**. In order to reset all the parameters, click the **Reset Fields** button.

Confirm that you have described the numbering format correctly. Verify that for all three examples provided (local, domestic and international calls) this is how you want the numbers dialed. You can change the parameters to suit your requirements.

Incoming Calls

Here you can set the parameters for incoming calls:



Column	Description
Ext-to-ext call distinctive ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
Group Pickup	Enable the **Group Pickup** feature, which enables phones within the same IP Centrex environment to answer each other's calls by dialing a **Group Pickup Prefix**.

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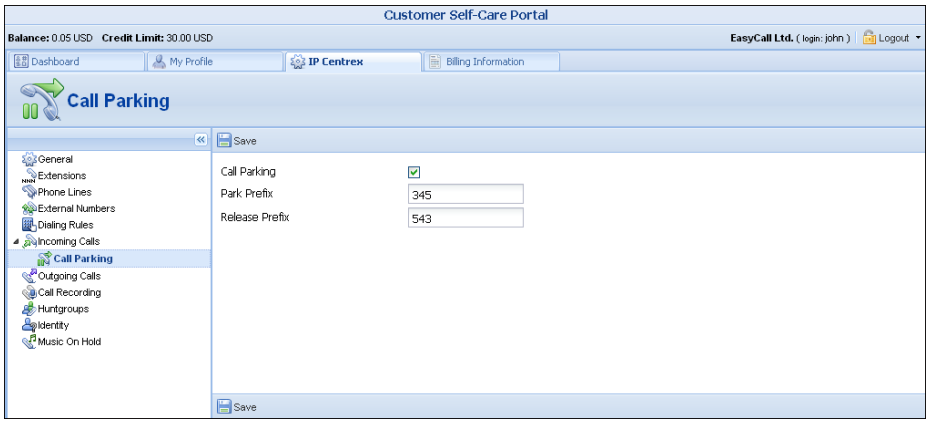
Group Pickup Prefix	This is only available if **Group Pickup** is activated. Specify the special code for picking up calls here.

Call Parking

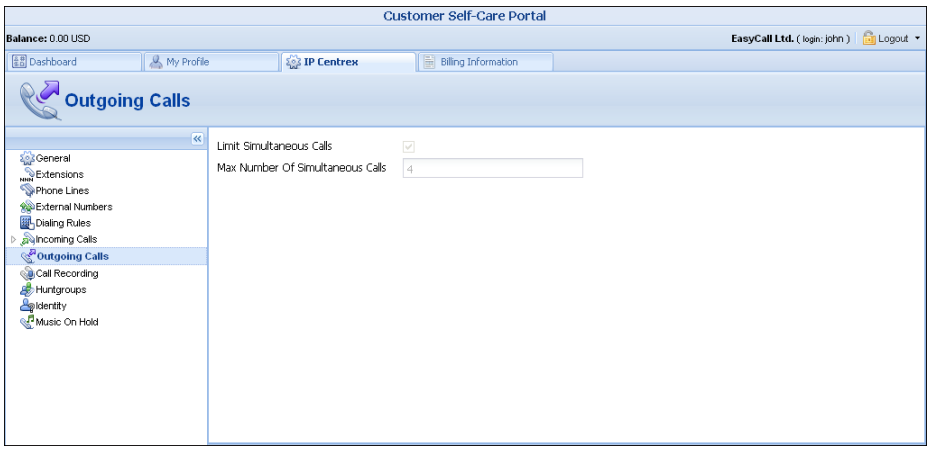
Call parking allows users to put a conversation on hold and then resume it from a different IP phone. If you enable this feature, you can set the required parameters for it here.



Column	Description
Call Parking	Enables the **Call Parking** feature.
Park Prefix	This is only available if **Call Parking** is activated; this allows you to specify a key combination for parking a call.
Release Prefix	This is only available if **Call Parking** is activated; this allows you to specify a code in order to quit the call parking status and resume the conversation.

Outgoing Calls

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



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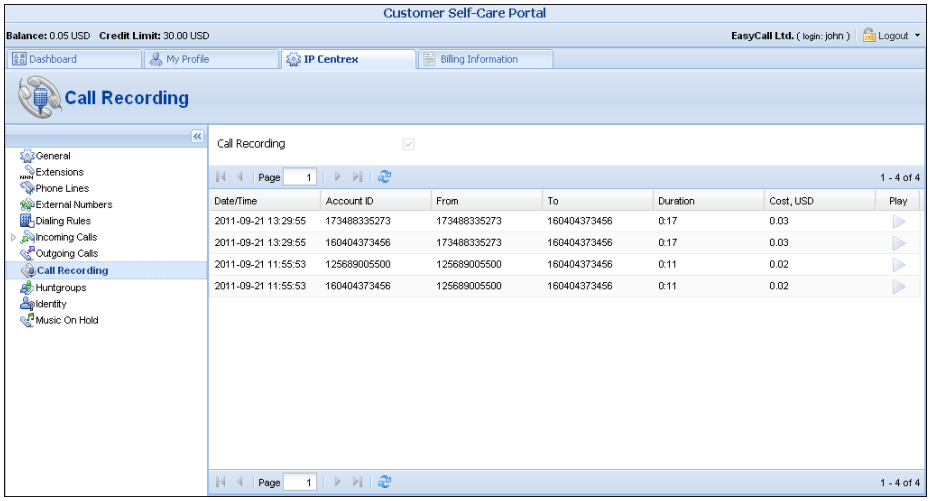
Column	Description
Limit Simultaneous Calls	This shows whether there is a limit on the number of concurrent calls that can be made by your phone lines.
Max Number of Simultaneous Calls	This shows the maximum number of concurrent calls permitted for your phone lines.

Call Recording

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 and listen to recordings.



Huntgroups

Sometimes there is a need for a call to be delivered to several extensions at once. With the **Huntgroup** function – you can easily configure a scheme for call distribution in such a way that incoming calls are delivered to one or more assigned extensions.

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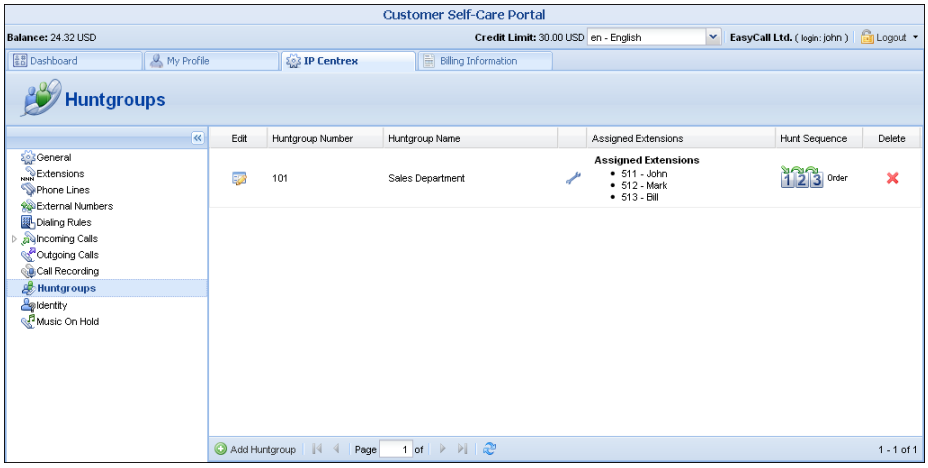

To add a new huntgroup, click the **Add Huntgroup** button and enter the following information:

- **Huntgroup Number** – The number the end-user must dial on his phone to reach one or more assigned extensions.
- **Huntgroup Name** – Logical name for this group of extensions, e.g. "New department."
- **Hunt Sequence** – Specifies the order for delivering a call to one or more extensions.
    - If **Order** is chosen, extensions will be called one by one from the first (topmost) to the last number until the call is answered.
    - Choose **Random** if you want to use a random order.
    - **Simultaneous** enables simultaneous calls to every extension from the list.
    - If you choose **Least Used:** This sorts the phone lines in descending order beginning with their last usage, and delivers a call to their extensions, accordingly. (For example, phone line 777111 with extension 111 was last used on 2010-12-11, and phone line 777222 with extension 222 was last used on 2010-12-12, so the call goes to extension 111 and if it is not answered, it goes to extension 222.)

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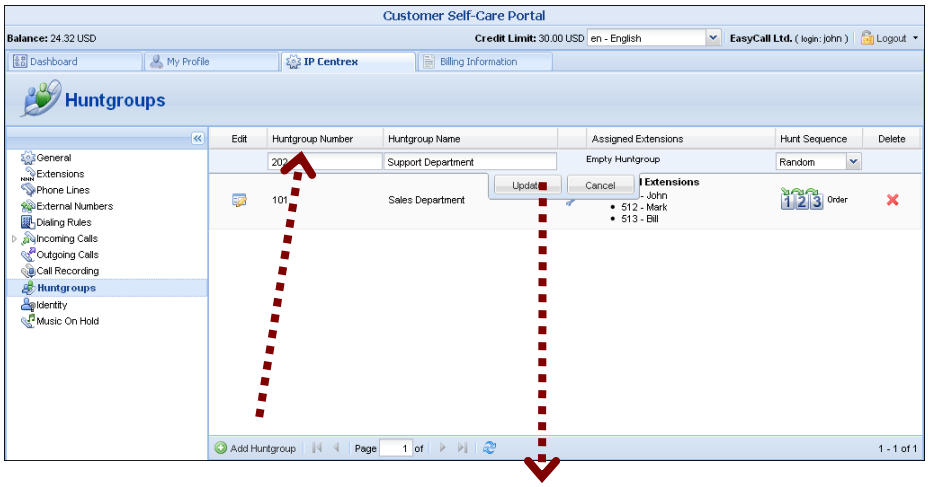
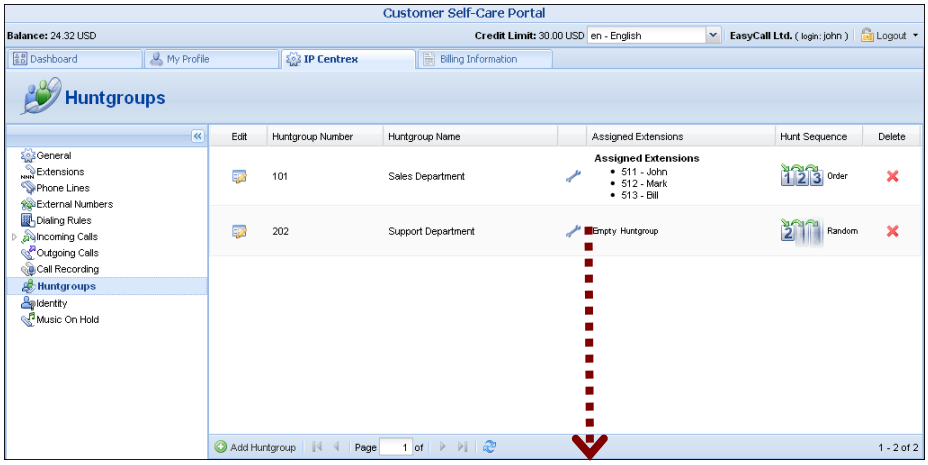
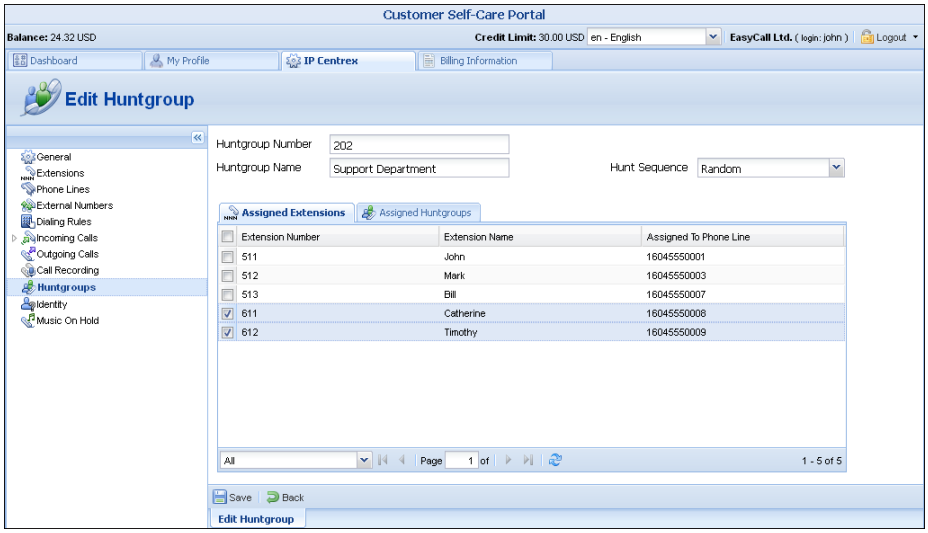




Once all the information is entered, click the **Update** button. Then specify one or several extensions that calls should be delivered to. Click the icon next to **Assigned Extensions** to open the window for extensions selections and check the boxes next to the desired extensions.



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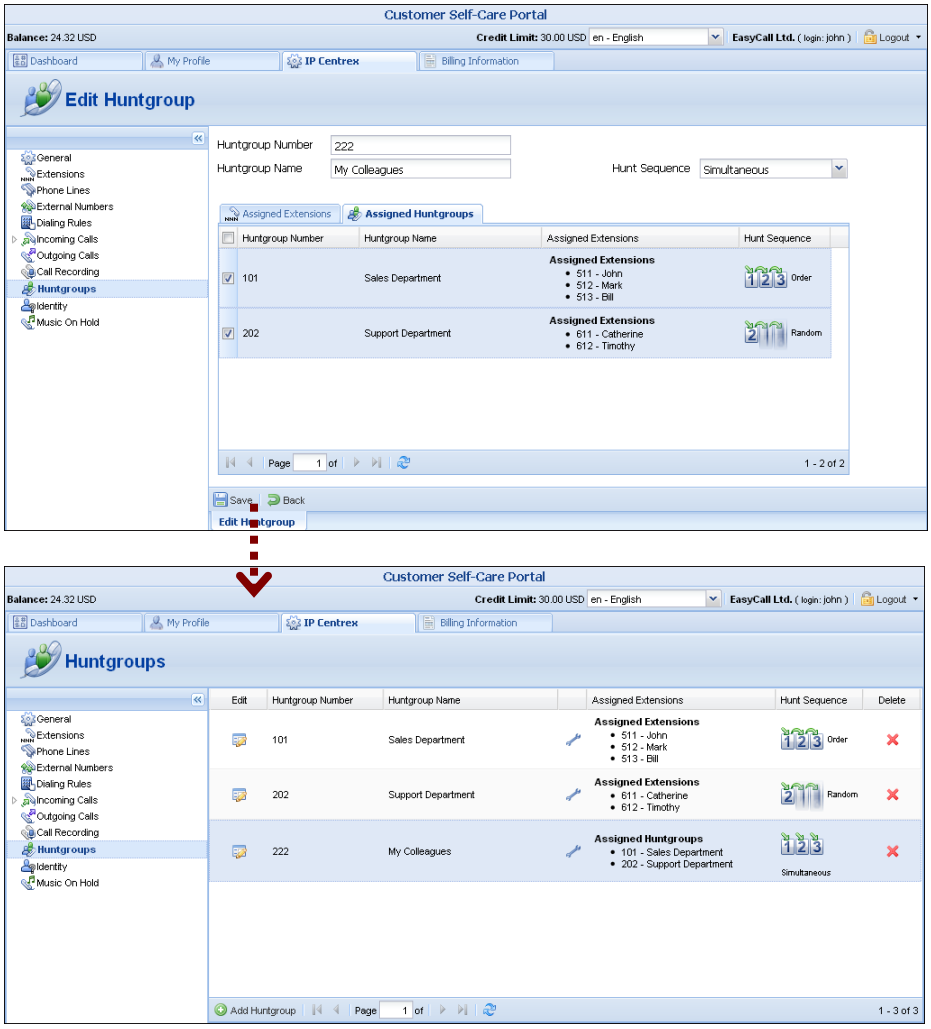
In order for changes to take effect you need to click the **Save** icon at the bottom of the page; you can also use the **Back** button to return to the previous menu.

Several huntgroups can be combined into one huntgroup. Go to the window for selecting extensions, choose the **Assigned Huntgroups** tab and check the boxes next to the desired groups. Then click **Save**.



NOTE: Extension and huntgroup numbers must be different.

Identity

It is possible to set up the following options for handling **Identity** information:

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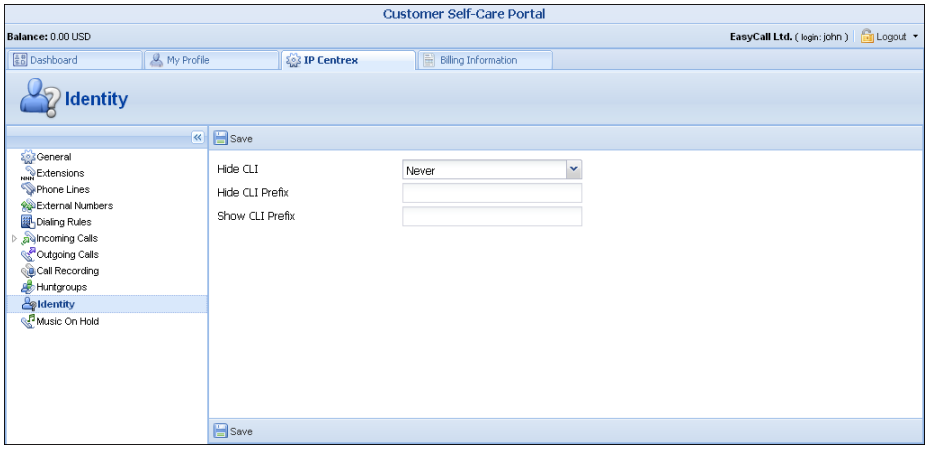

Column	Description
Hide CLI	Removes CLI (ANI) information for outgoing calls. You can choose one of the following options: • **Never** – Always show CLI. Privacy service is not permitted. • **Always** – Always hide CLI. Privacy service is permitted and in effect (all calls are private). • **Automatic** – Allows flexible configuration for CLI hiding. It depends on the prefix number dialed and the privacy headers provided by an IP phone device.
Hide CLI Prefix	Enter the prefix to be dialed before the outgoing number in order to prevent the called party from seeing your phone number (Only available when **Hide CLI** option is set to "Automatic").
Show CLI Prefix	Enter the prefix to be dialed before the outgoing number in order to allow the called party to see your phone number (Only available when **Hide CLI** option is set to "Automatic").

Music on Hold

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

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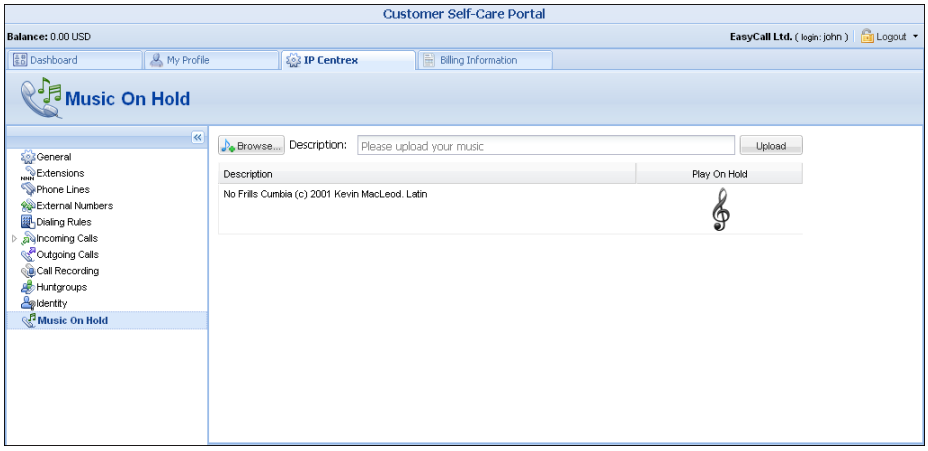

Click the treble clef 𝄞 to enable / disable this feature. To upload your own music, select a file from your local file system using the **Browse** button.

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

Summary

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

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

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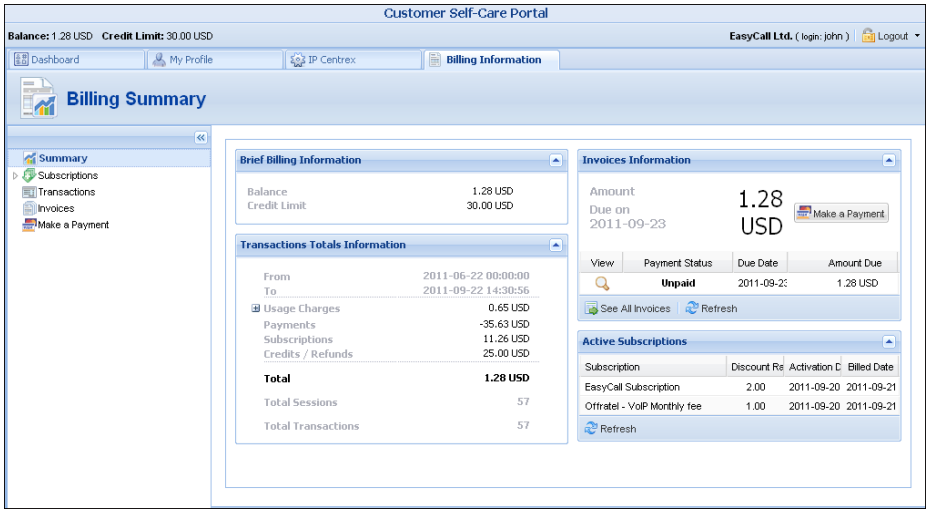
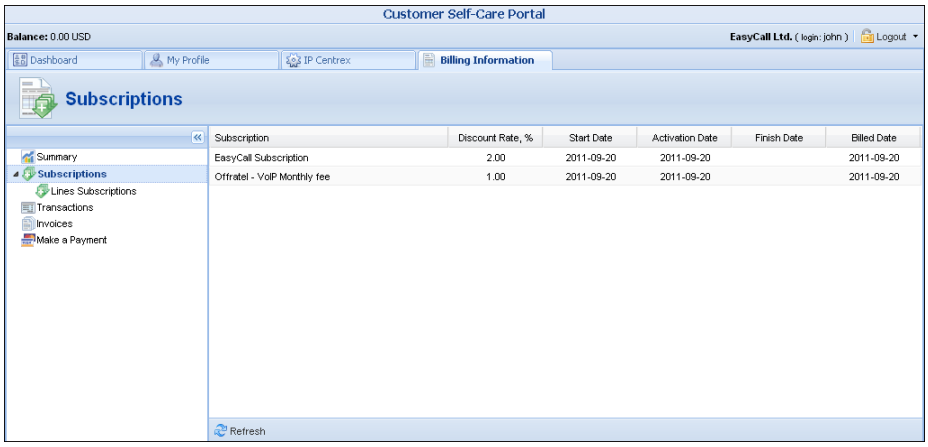


Brief Billing Information	This reflects your billing info such as current balance, etc.
Transactions Totals Information	This reflects your total transactions (calls, payments, refunds, subscription charges, etc.)
Invoices Information	This displays information for your most recent invoice along with its status (due / unpaid). To view all of the invoices use the **See All Invoices** button. You can also view the amounts due for the present day and make payments at the same time.
Active Subscriptions	Subscription plans that currently apply to you.

Subscription

This tab displays the subscription plans currently being applied to you.



Subscription	Subscription plans being applied to you.

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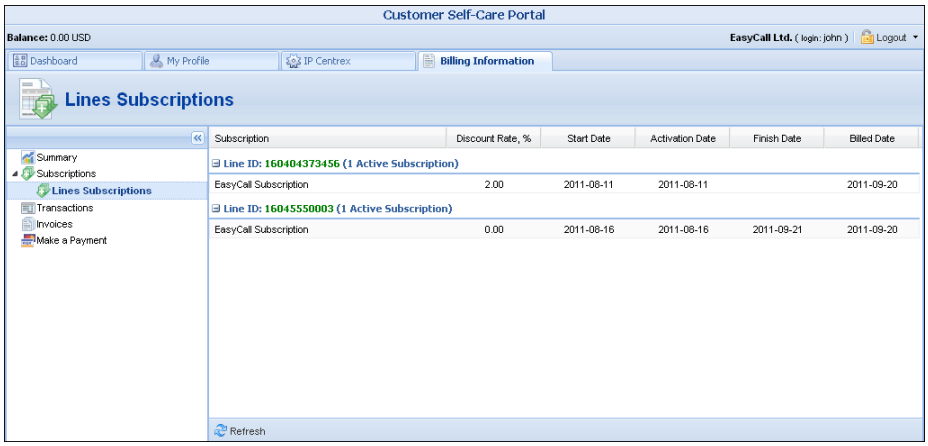
Discount Rate, %	Amount of discount being applied for this subscription.
Start Date	Subscription activation date.
Activation Date	This displays the date on which the subscription was activated.
Finish Date	This shows the date on which this subscription will be automatically canceled.
Billed Date	This shows the date on which subscription charges have been applied.

Lines Subscription

This tab displays the subscription plans currently being applied to phone lines (see the fields description above).



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 – xDRs (eXtensible Detail Records) for any desired time period.

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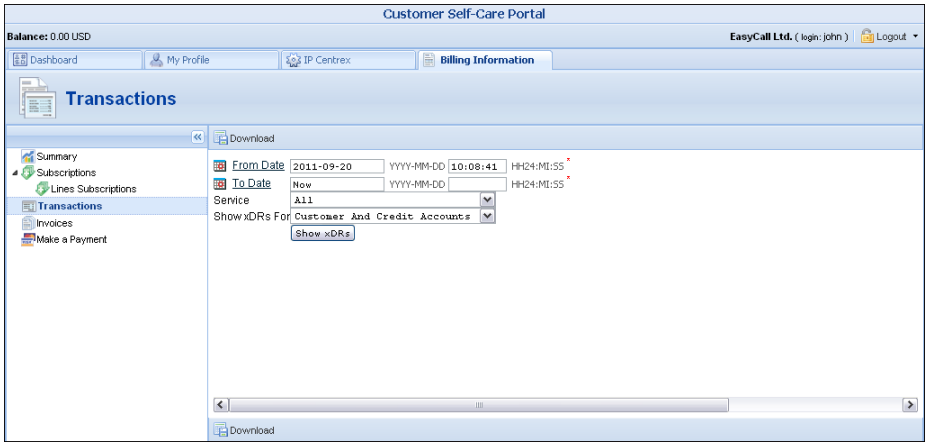
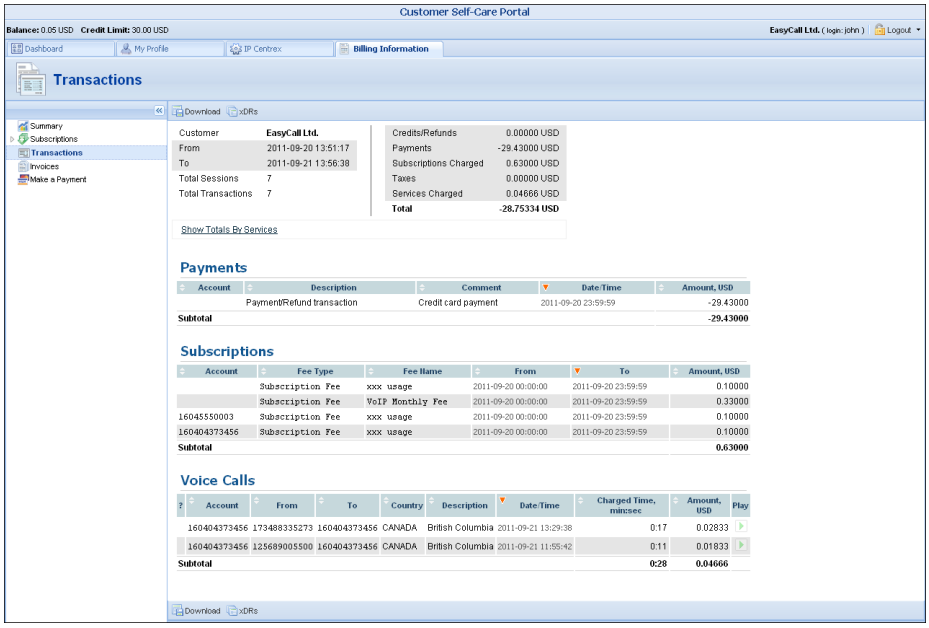


On the xDR view page you can make an extensible search via:

- A date and time range by clicking the icon
- A certain service type
- The type of required phone lines (accounts)

Set the from / to dates by clicking the icon and press the **Show xDRs** button. The result page contains a summary displayed at the top of the screen and tables list all calls and accompanying charges during a specified time period. If you want to view information (charged quantity and amounts due) for all of the services, click the **Show Totals by Services** button.



Click the icon to download xDRs in the .CSV format. To return to the previous screen, click the **xDRs** button.

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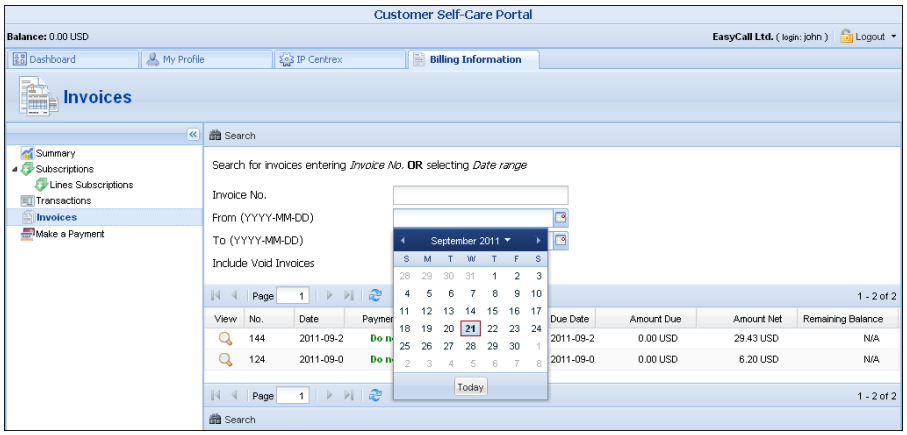
Invoices

The invoices screen allows you to view all your invoices. A particular invoice can be found by searching for its number. Groups of invoices can be searched by selecting a date range and pressing the **Search** button.



Invoices cover these parameters:

- **Invoice number** – the unique identifier for an invoice
- **Date** – the date that the invoice was issued
- **Payment status** – this specifies one of the following:
  - Do Not Pay – the invoice amount is 0, therefore no payment is required
  - Unpaid –payment has not yet been received
  - Partially Paid – payment has been received but in an amount less than the amount due
  - Paid – invoice has been paid in full
  - Overdue – invoice is unpaid and past due
  - N/A – payment status is not applicable for this invoice.
- **Period From / To** – the period for which an invoice is generated
- **Due date** – date by which payment should be received
- **Amount Due** – the amount to be paid
- **Amount Net** – sum of all charges for this period minus credits / refunds
- **Remaining Balance** – balance reported in the last invoice.

Select the **View** icon in the result list to view or print a particular invoice.

Make a Payment

This screen allows you to see your current balance and top it up with a credit card. You can also adjust the balance by using a preferred payment method.

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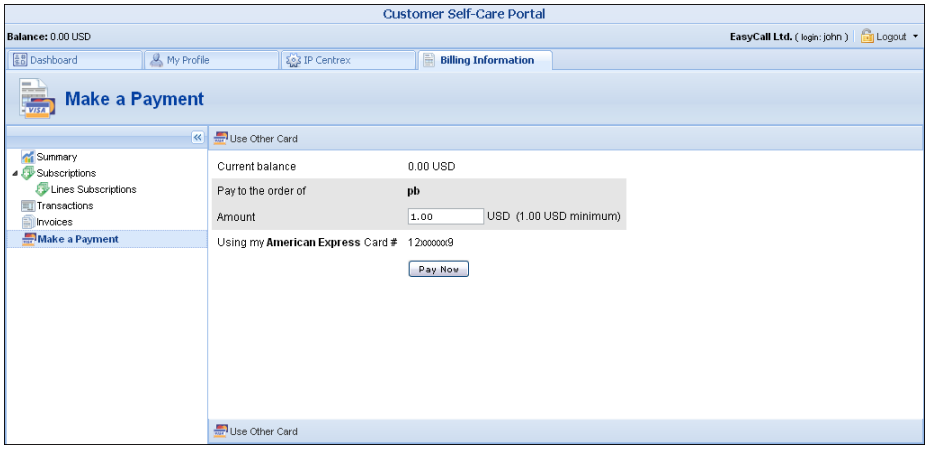
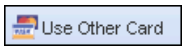
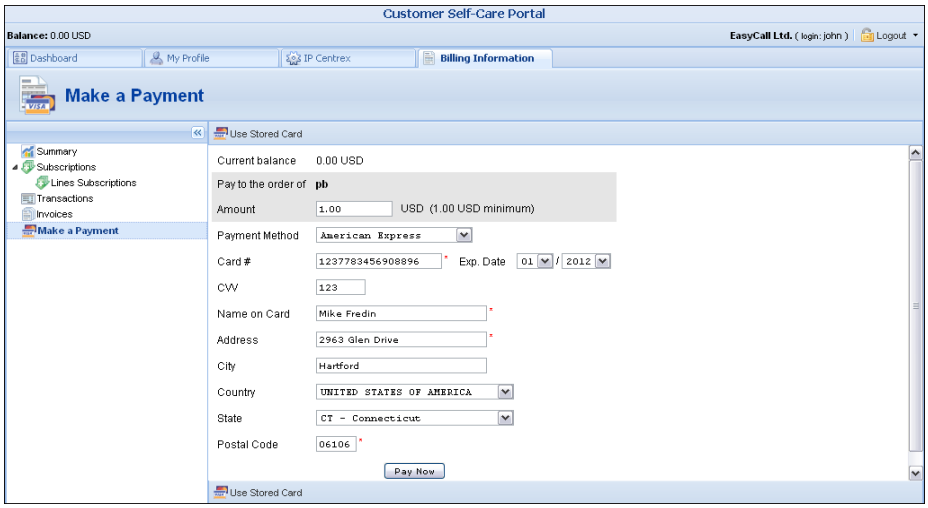


When the screen is loaded, the **Amount** field will show the amount necessary in order to equalize the balance. If you have a credit card whose payment characteristics are recorded in the system, it will be used by default. Change the amount if needed and click the **Pay Now** button to proceed with the payment.

An alternative card can be used by clicking the 

icon. The **Preferred Payment Method** drop-down menu contains a list of available payment methods. Other Payment Info fields depend on the currently selected Preferred Payment Method and may vary accordingly.



The user can return from that screen by clicking the

icon.

NOTE: If the card information has not been stored, only the Alternative Payment screen will be displayed.

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3. How to...

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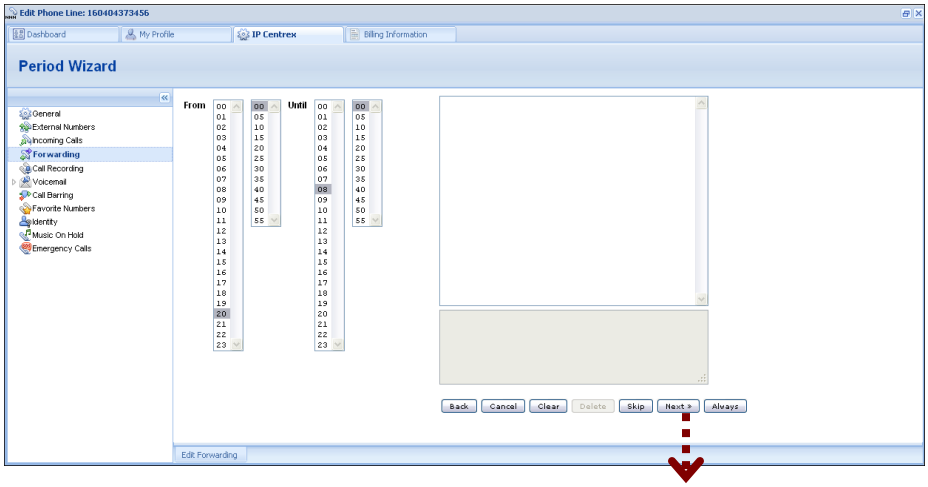
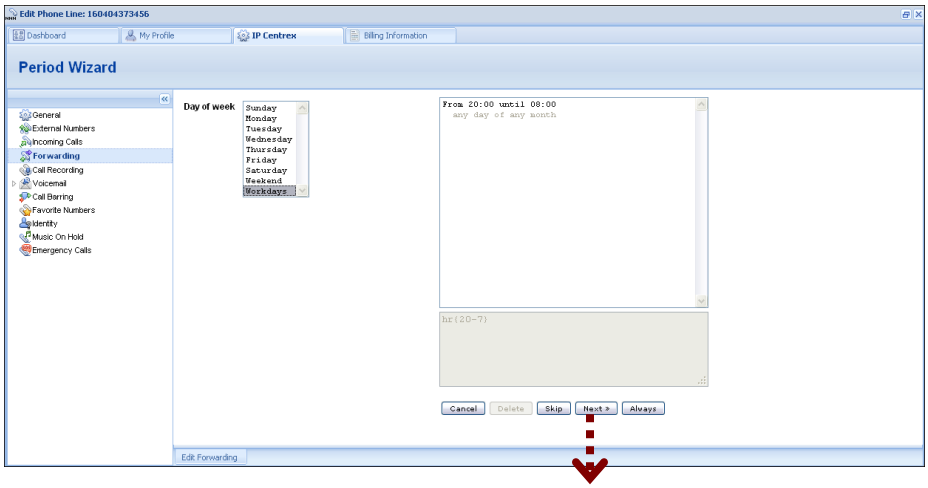
... define a time period using the wizard?

With the period definition wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based on a 24-hour clock, i.e. 8pm is the same as 20:00.) The following example illustrates the process of creating a period within the Monday-Friday workweek that starts at 8pm and lasts until 8am the next morning:

1. On the first page of the wizard, select 8pm in the **From** box and 8am in the **Until** box. Then click **Next**.



2. Select *Workdays* in the **Day of week** box and click **Next** to go to the next page.



3. Click **Skip** on the following two pages (**Day of month** and **Month**).

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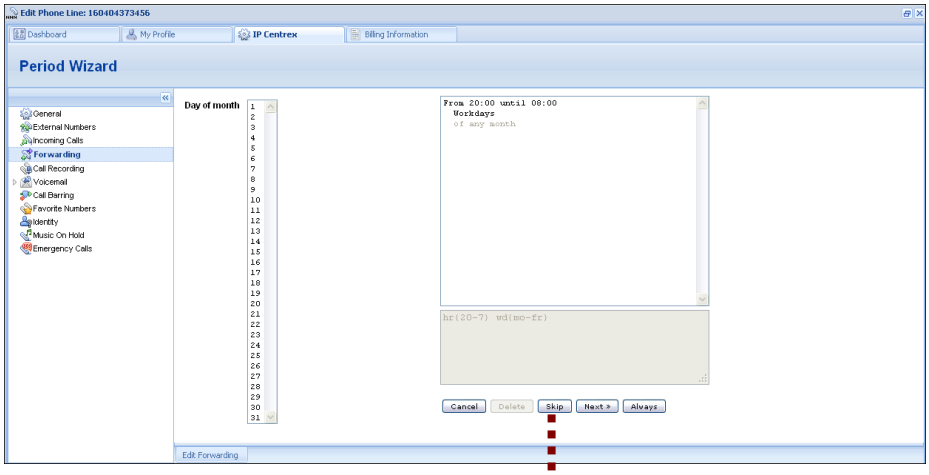

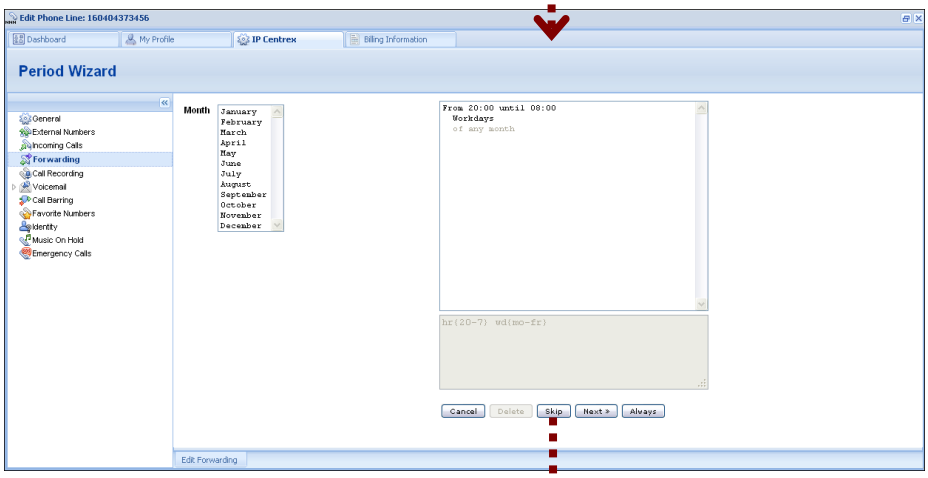

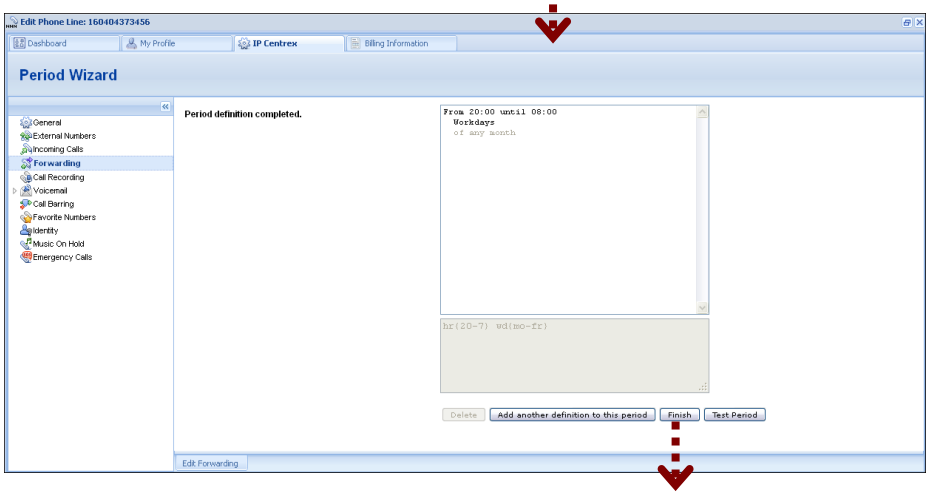

4. Click **Finish** to complete the period definition. If you wish to set one more definition for this period, click **Add another definition to this period**.

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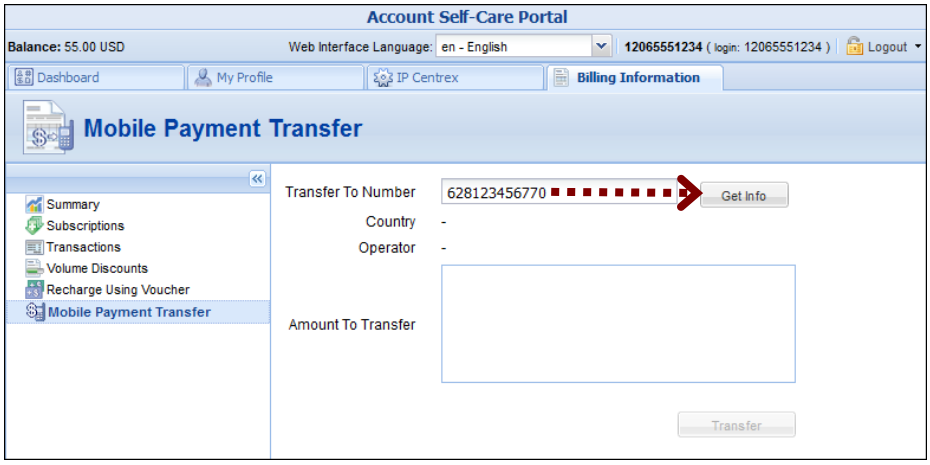
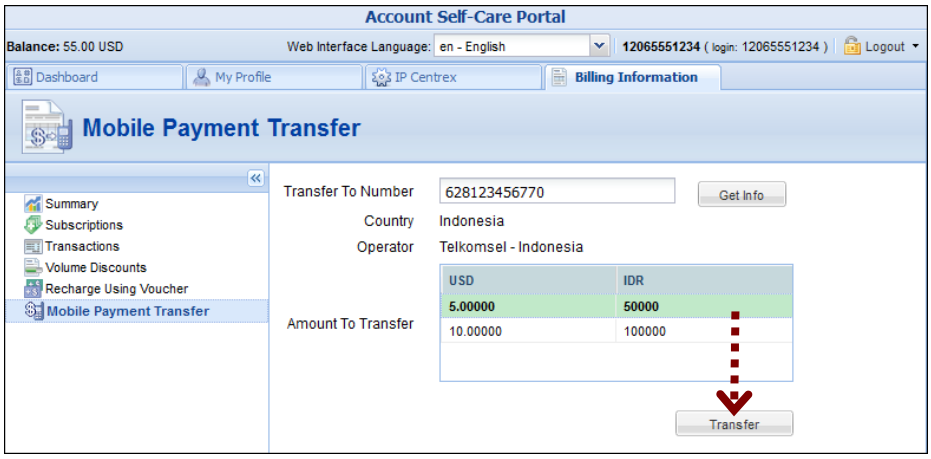
... transfer funds to mobile numbers?

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

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



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



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

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