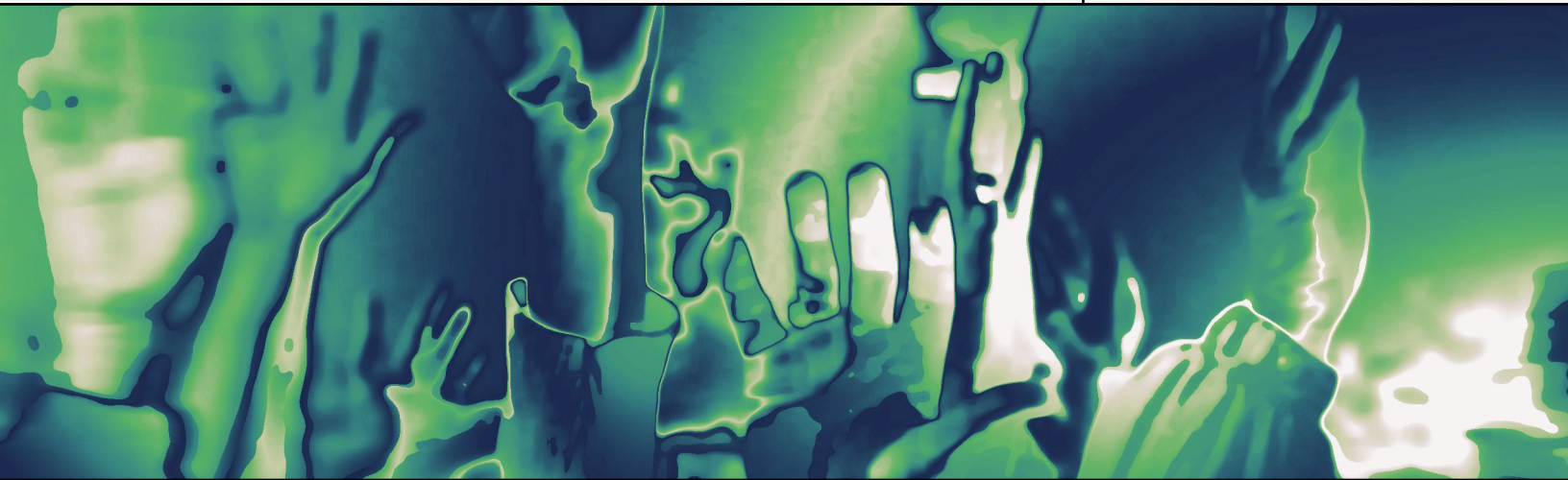


Porta  Billing[®]



**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

1 ■ Introduction

Login to the Customer Self-care Interface

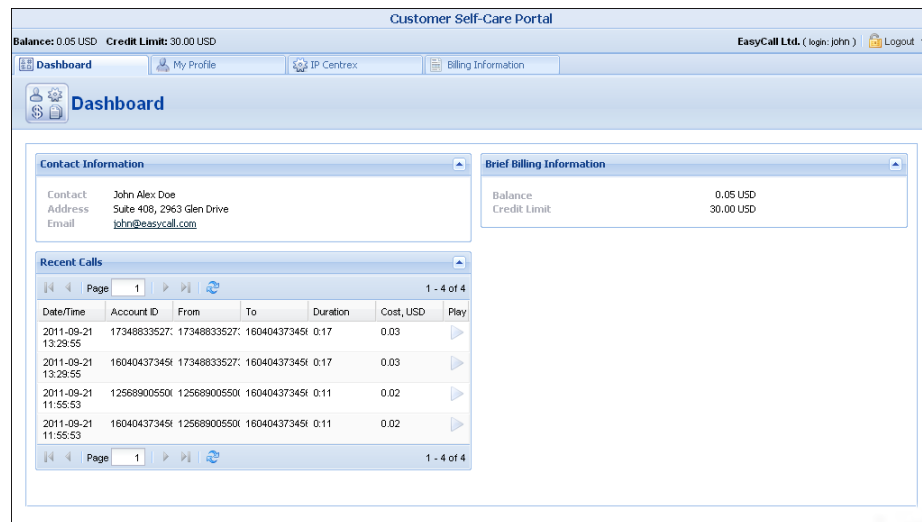
Your ITSP will provide you with a URL and credentials for logging in to the Customer self-care portal upon subscribing to their services.

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




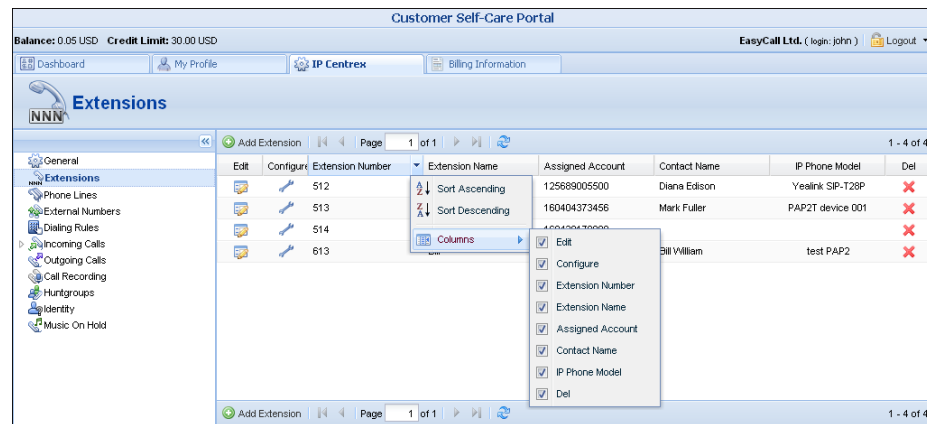
The screenshot displays the 'Customer Self-Care Portal' interface. At the top, it shows the user's balance (0.05 USD) and credit limit (30.00 USD). The main navigation bar includes tabs for 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'Dashboard' tab is active, showing a 'Contact Information' section with details for John Alex Doe, Suite 408, 2963 Glen Drive, and email john@easyvcall.com. Below this is a 'Recent Calls' table with columns for Date/Time, Account ID, From, To, Duration, Cost, USD, and Play. The table lists four recent calls. To the right of the 'Recent Calls' section is a 'Brief Billing Information' box showing the current balance and credit limit.

Date/Time	Account ID	From	To	Duration	Cost, USD	Play
2011-09-21 13:29:55	17348833527	17348833527	16040437345	0:17	0.03	Play
2011-09-21 13:29:55	16040437345	17348833527	16040437345	0:17	0.03	Play
2011-09-21 11:55:53	12568900550	12568900550	16040437345	0:11	0.02	Play
2011-09-21 11:55:53	16040437345	12568900550	16040437345	0:11	0.02	Play

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

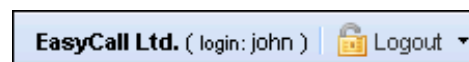
Common Features

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.

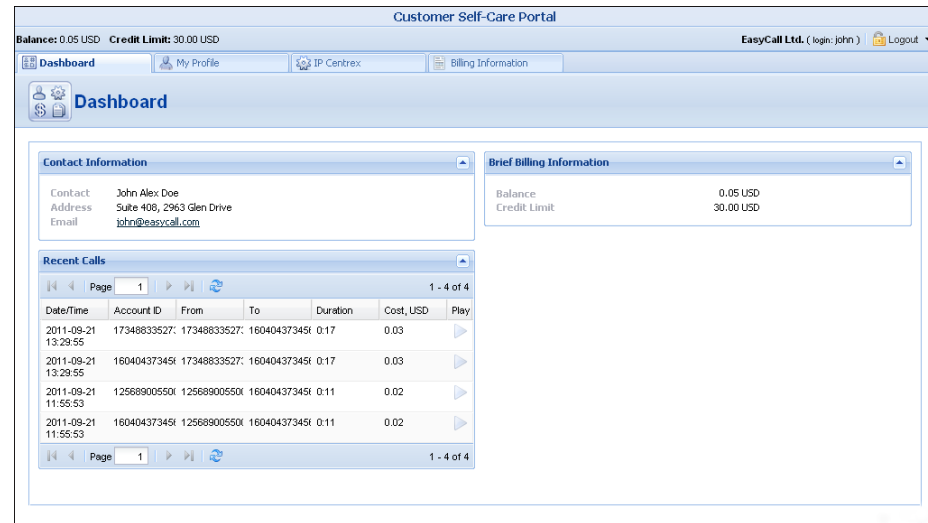
In order for changes to take effect when adding / editing information, you need to click the  **Save** icon on the appropriate page. If you do not want to save the information entered – just press **Cancel**.

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 windows. In addition, these windows can be moved around, rearranged or minimized as you wish.

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



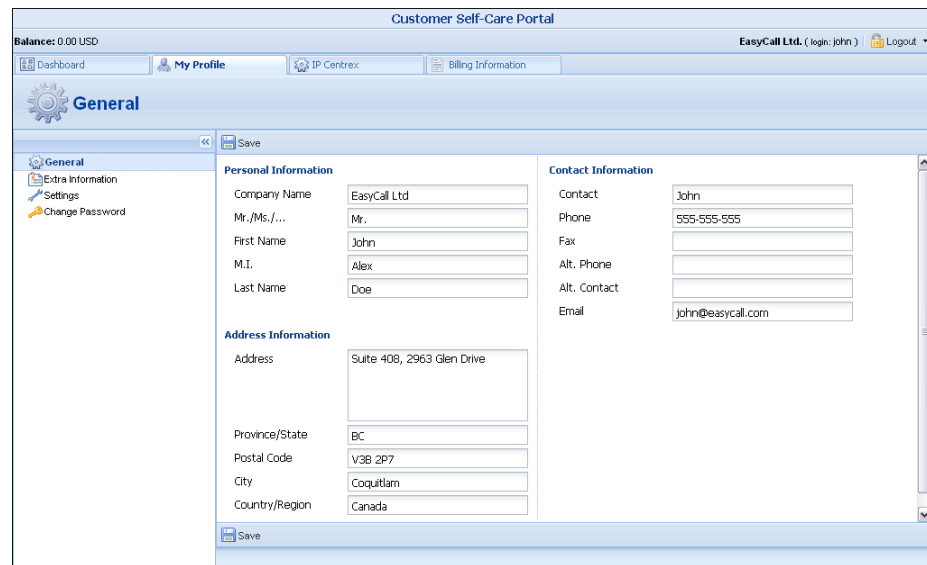
The screenshot shows the 'Customer Self-Care Portal' interface. At the top, it displays 'Balance: 0.05 USD' and 'Credit Limit: 30.00 USD'. Below this are tabs for 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'Dashboard' tab is active, showing three main sections: 'Contact Information' (John Alex Doe, Suite 408, 2963 Glen Drive, john@easycall.com), 'Brief Billing Information' (Balance: 0.05 USD, Credit Limit: 30.00 USD), and 'Recent Calls'. The 'Recent Calls' section is a table with 4 rows and 7 columns: Date/Time, Account ID, From, To, Duration, Cost, USD, and Play. The table shows calls from 2011-09-21.

Date/Time	Account ID	From	To	Duration	Cost, USD	Play
2011-09-21 13:29:55	17348833527	17348833527	16040437345	0:17	0.03	
2011-09-21 13:29:55	16040437345	17348833527	16040437345	0:17	0.03	
2011-09-21 11:55:53	12568900550	12568900550	16040437345	0:11	0.02	
2011-09-21 11:55:53	16040437345	12568900550	16040437345	0:11	0.02	

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.:



Customer Self-Care Portal

Balance: 0.00 USD

EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

General

General
Extra Information
Settings
Change Password

Personal Information

Company Name: EasyCall Ltd.
Mr./Ms./...: Mr.
First Name: John
M.I.: Alex
Last Name: Doe

Contact Information

Contact: John
Phone: 555-555-555
Fax:
Alt. Phone:
Alt. Contact:
Email: john@easycall.com

Address Information

Address: Suite 408, 2963 Glen Drive
Province/State: BC
Postal Code: V3B 2P7
City: Coquitlam
Country/Region: Canada

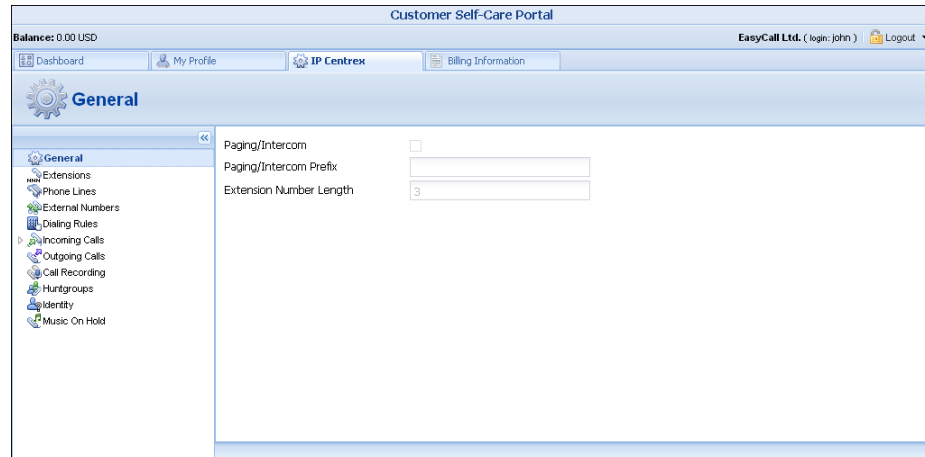
Save

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.

General



Customer Self-Care Portal

Balance: 0.00 USD EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

General

- General
- Extensions
- Phone Lines
- External Numbers
- Dialing Rules
- Incoming Calls
- Outgoing Calls
- Call Recording
- Huntgroups
- Identity
- Music On Hold

Paging/Intercom ☐

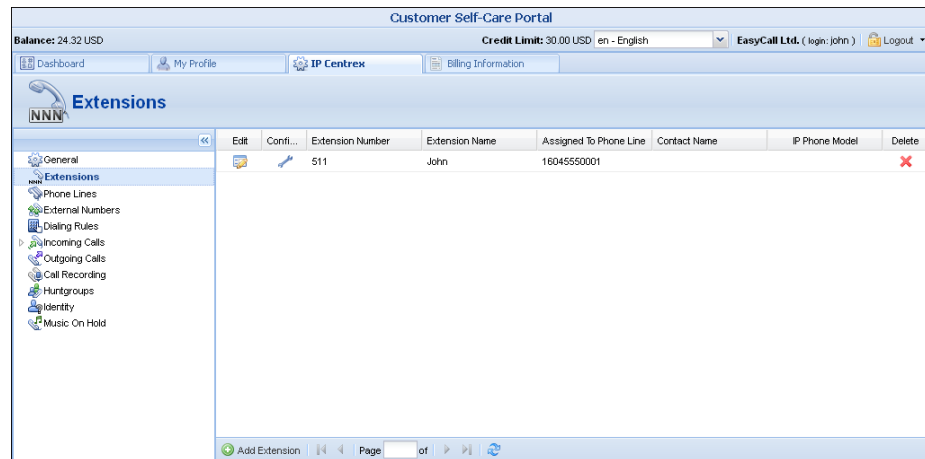
Paging/Intercom Prefix


Extension Number Length

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.

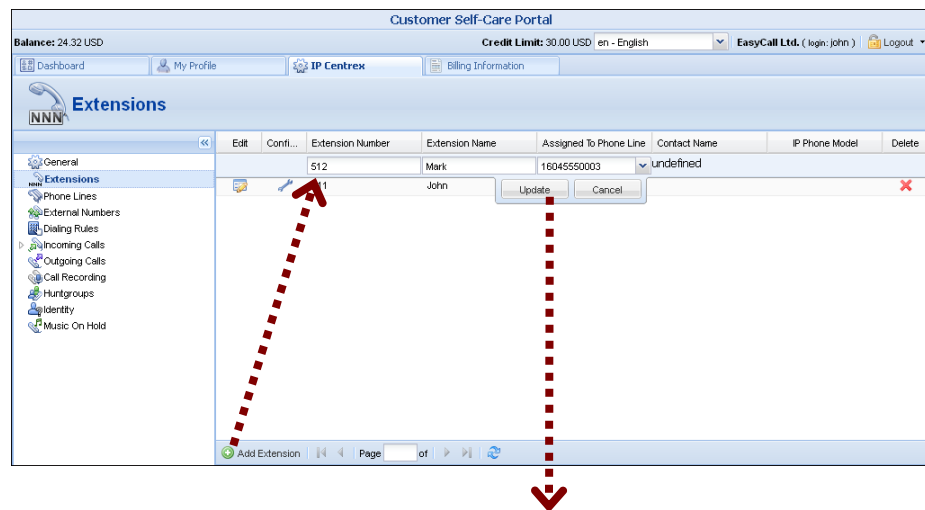
Extensions

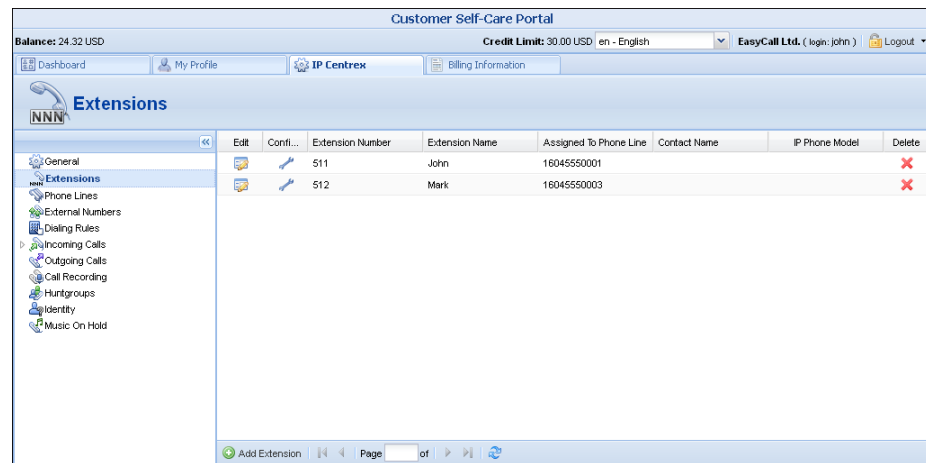
Here you can define a list of extensions for phone lines within your IP Centrex environment. You can easily add new extensions or change existing ones without any actual reconfiguration of your phone.





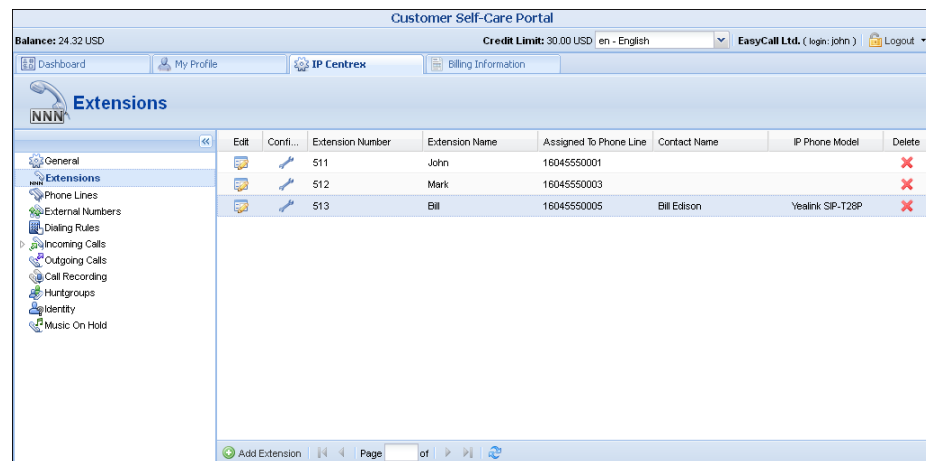
To add a new extension number, click the  **Add Extension** button and enter the following information:

- **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).






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):

Edit Extension: 512 (Diana)

Dashboard
My Profile
IP Centrex
Billing Information

Dashboard

AccountID: 125689005500
Online
Extension #: 512 (Diana)

Contact Information

Contact: Diana Edison
Address:
Email:

Brief Billing Information

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

Recent Calls

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

Product & Discounts Information

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

Member of Huntgroups Information

Group Name
1 New Department

Phone Lines

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

Customer Self-Care Portal

Balance: 0.02 USD Credit Limit: 30.00 USD

EasyCall Ltd. (login: john) Logout


Dashboard
My Profile
IP Centrex
Billing Information






Phone Lines


Group By Batch
Page 1 of 1
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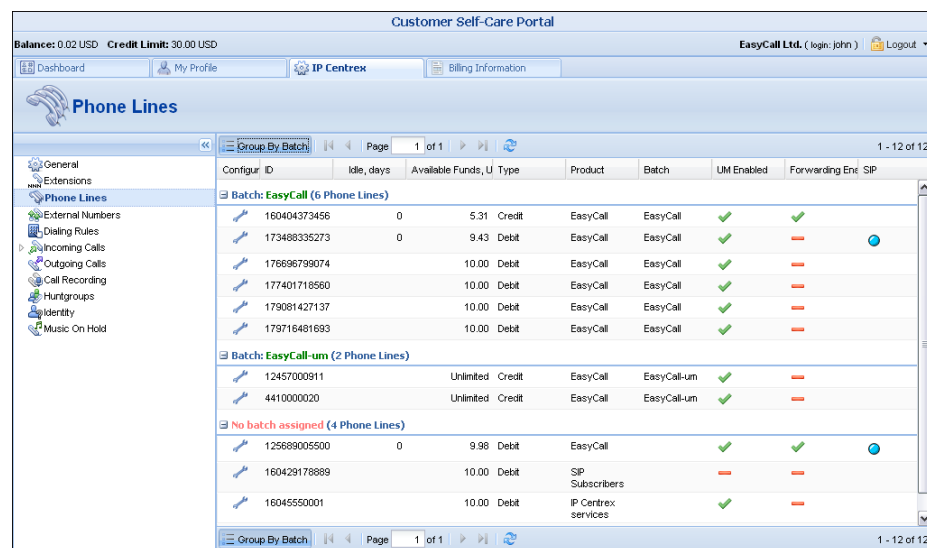
Configure	ID	Idle, days	Available Funds, U	Type	Product	Batch	UM Enabled	Forwarding End	SIP
	12457000911		Unlimited	Credit	EasyCall	EasyCall-um			
	125689005500	0	9.98	Debit	EasyCall				
	160404373456	0	5.31	Credit	EasyCall	EasyCall			
	160429178889		10.00	Debit	SIP Subscribers				
	16045550001		10.00	Debit	IP Centrex services				
	16045550003		Unlimited	Credit	EasyCall				
	173488335273	0	9.43	Debit	EasyCall	EasyCall			
	176696799074		10.00	Debit	EasyCall	EasyCall			
	177401718560		10.00	Debit	EasyCall	EasyCall			
	179081427137		10.00	Debit	EasyCall	EasyCall			
	179716481693		10.00	Debit	EasyCall	EasyCall			
	4410000020		Unlimited	Credit	EasyCall	EasyCall-um			




































Group By Batch
Page 1 of 1
1 - 12 of 12


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

	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:




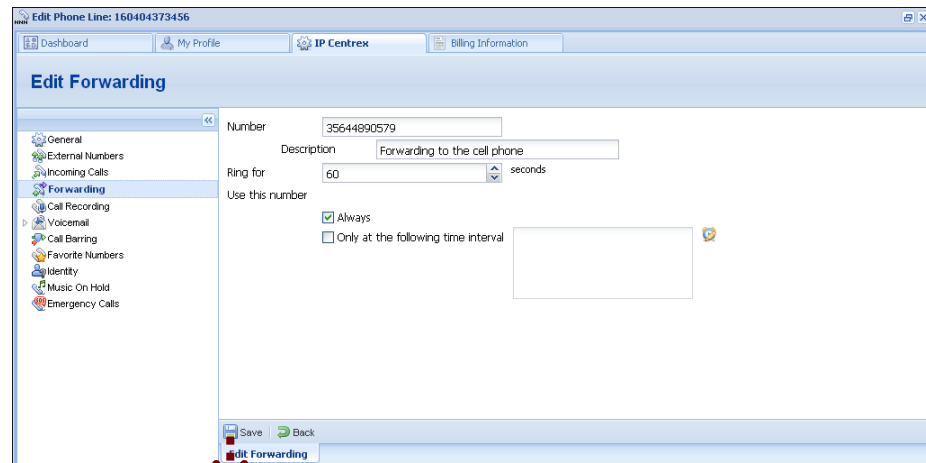
Configure	ID	Idle, days	Available Funds, U	Type	Product	Batch	UM Enabled	Forwarding Enr	SIP
Batch: EasyCall (6 Phone Lines)									
	160404373456	0	5.31	Credit	EasyCall	EasyCall			
	173488335273	0	9.43	Debit	EasyCall	EasyCall			
	176696799074		10.00	Debit	EasyCall	EasyCall			
	177401718560		10.00	Debit	EasyCall	EasyCall			
	179081427137		10.00	Debit	EasyCall	EasyCall			
	179716481693		10.00	Debit	EasyCall	EasyCall			
Batch: EasyCall-um (2 Phone Lines)									
	12457000911		Unlimited	Credit	EasyCall	EasyCall-um			
	4410000020		Unlimited	Credit	EasyCall	EasyCall-um			
No batch assigned (4 Phone Lines)									
	125689005500	0	9.98	Debit	EasyCall				
	160429178889		10.00	Debit	SIP Subscribers				
	16045550001		10.00	Debit	IP Centrex services				


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**.

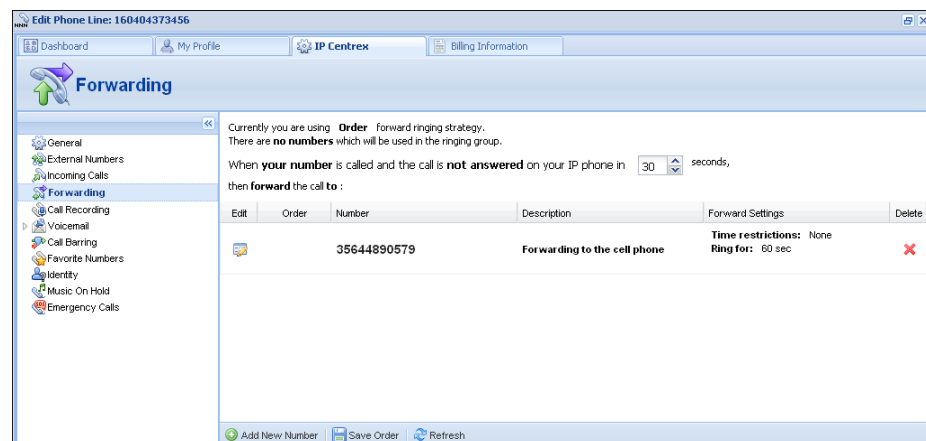
Follow-Me Forwarding Mode



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. 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.




Edit	Order	Number	Description	Forward Settings	Delete
		35644890579	Forwarding to the cell phone	Time restrictions: None Ring for: 60 sec	

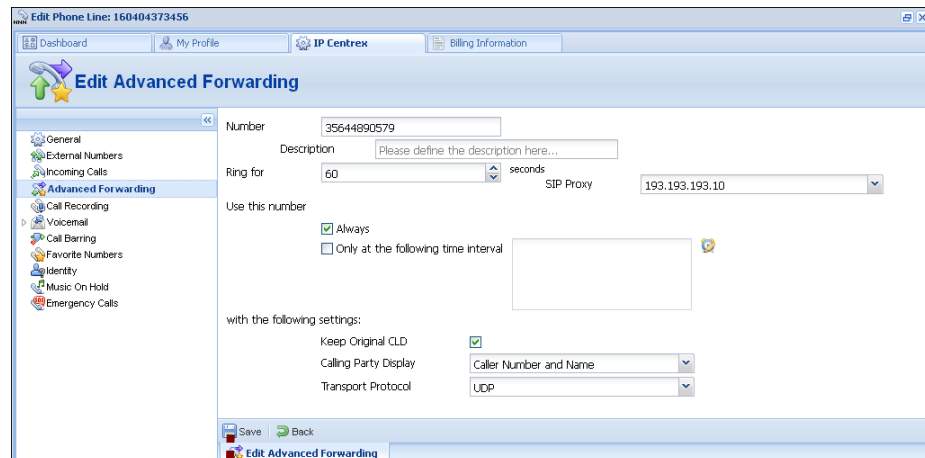
4. Click the  **Save** icon to save the results of your work.


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 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.

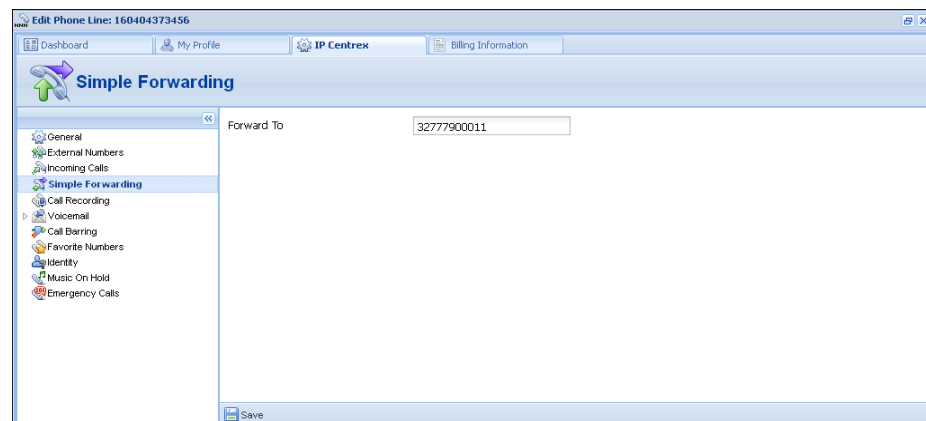


5. Click the  **Save** icon to save the results of your work.

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.



The screenshot shows a web browser window titled "Edit Phone Line: 160404373456". The interface has a top navigation bar with tabs: "Dashboard", "My Profile", "IP Centrex", and "Billing Information". The "IP Centrex" tab is active. Below the navigation bar is a sidebar menu with icons and labels: "General", "External Numbers", "Incoming Calls", "Simple Forwarding" (highlighted), "Call Recording", "Voicemail", "Call Barring", "Favorite Numbers", "Identity", "Music On Hold", and "Emergency Calls". The main content area is titled "Simple Forwarding" and contains a "Forward To" label followed by a text input field containing the number "32777900011". At the bottom right of the main area is a "Save" button with a floppy disk icon.

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.

Customer Self-Care Portal

Balance: 0.00 USD

EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

External Numbers

Page 1 of 1 1 - 12 of 12

Number	Allow authentication/registration
Master Account ID: 160404373456 (11 Numbers)	
4411000001	---
4411000002	---
4411000003	---
4411000004	---
4411000005	---
4411000006	---
4411000007	---
4411000008	---
4411000009	---
44883565604	---
614843576125	---
Master Account ID: 16045550001 (1 Number)	
1234567	✓

Page 1 of 1 1 - 12 of 12

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.

Customer Self-Care Portal

Available Funds: 30.00 USD

EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Dialing Rules

Save

Dialing Rules Enable Dialing Rules

Load Sample North America, 10 digit dialing Reload Samples Reset Fields

Routing plan selection enabled ☐

Apply these dialing rules to the number that follows the selection code ☐

Your country code 1

Your area code(s)

Always dial the code as a part of the number ☐

Prefix for accessing the outside phone network:

Prefix for domestic calls, but outside of your area code (e.g. 1, 0)

International dialing prefix (e.g. 011, 00, 0011) 011

Emergency numbers (e.g. 911, 112) 911

Exceptions (e.g. *98) 411

National Exceptions (e.g. *98)

Local dialing number length

When receiving an incoming call, convert CLI into this dialing format ☐

Save

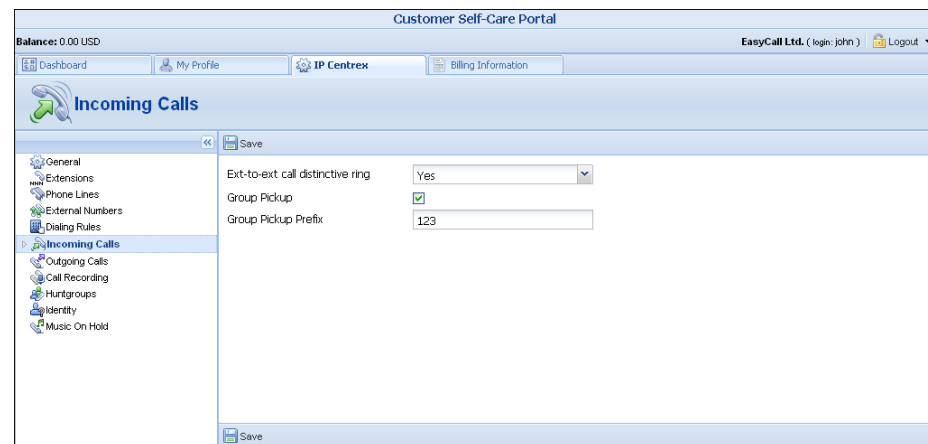
By default, dialing rules are disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If you wish to define the way in which your end users dial phone numbers, you can use the **Enable Dialing Rules** option. This will allow you to enter various dial plan 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:

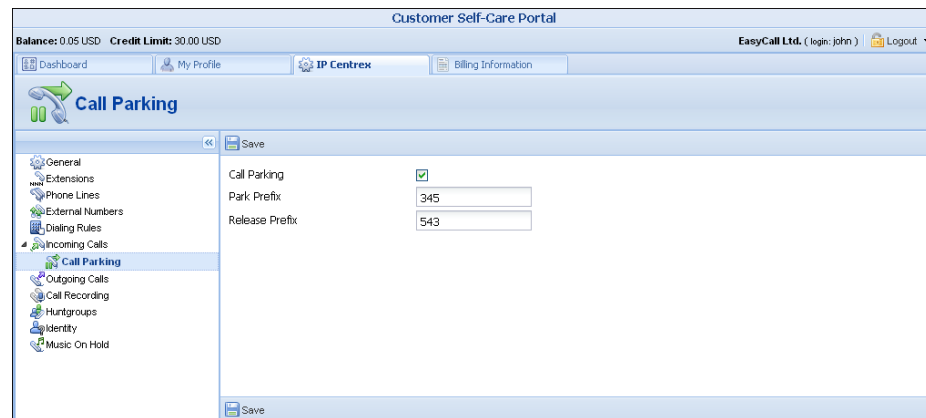


Column	Description
Ext-to-ext call distinctive ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
Group Pickup	Enable the Group Pickup feature, which enables phones within the same IP Centrex environment to answer each other's calls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

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

Call Parking

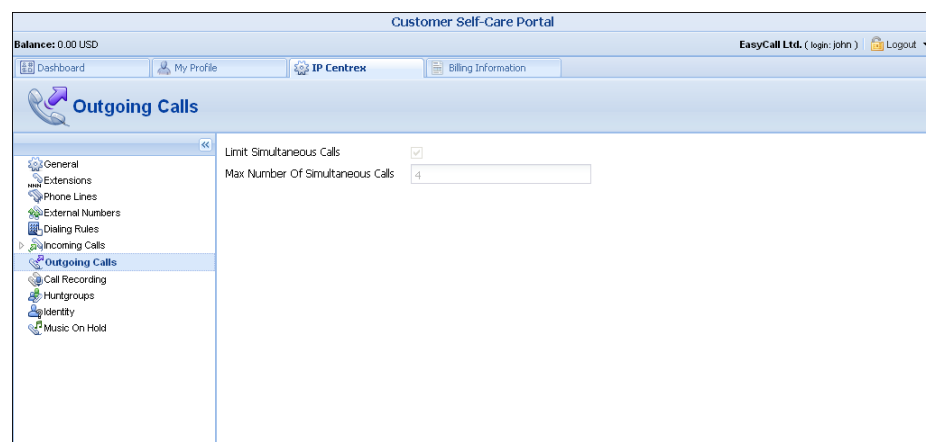
Call parking allows users to put a conversation on hold and then resume it from a different IP phone. If you enable this feature, you can set the required parameters for it here.



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):

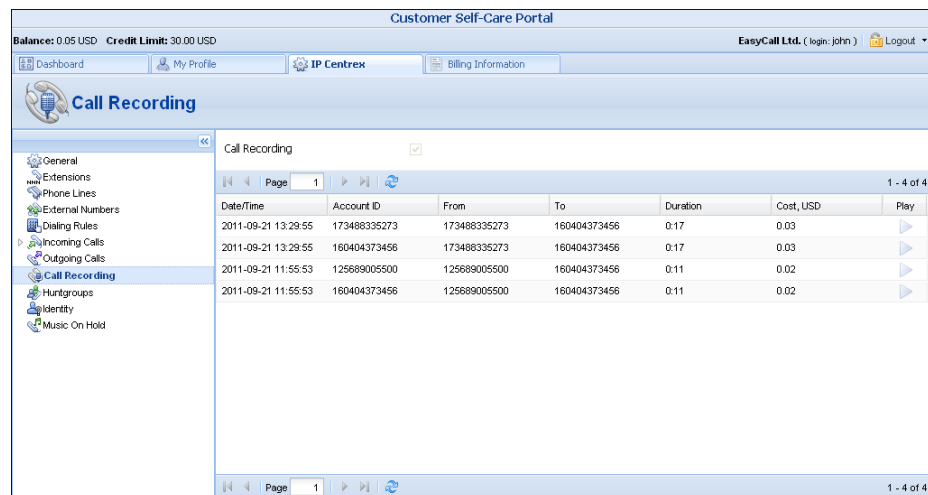






Column	Description
Limit Simultaneous Calls	This shows whether there is a limit on the number of concurrent calls that can be made by your phone lines.
Max Number of Simultaneous Calls	This shows the maximum number of concurrent calls permitted for your phone lines.

Call Recording

With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback.

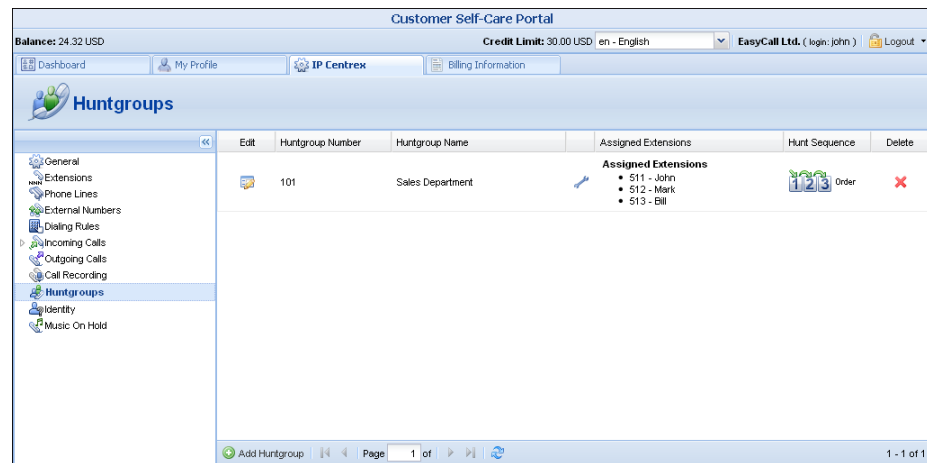
Here you can check whether the **Call Recording** feature is enabled or not. When it is enabled, you can view information about calls and listen to recordings.



Date/Time	Account ID	From	To	Duration	Cost, USD	Play
2011-09-21 13:29:55	173488335273	173488335273	160404373456	0:17	0.03	
2011-09-21 13:29:55	160404373456	173488335273	160404373456	0:17	0.03	
2011-09-21 11:55:53	125689005500	125689005500	160404373456	0:11	0.02	
2011-09-21 11:55:53	160404373456	125689005500	160404373456	0:11	0.02	

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.



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.)

Customer Self-Care Portal

Balances: 24.32 USD Credit Limit: 30.00 USD en - English EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Huntgroups

General Extensions Phone Lines External Numbers Dialing Rules Incoming Calls Outgoing Calls Call Recording Huntgroups Identity Music On Hold

Edit	Huntgroup Number	Huntgroup Name	Assigned Extensions	Hunt Sequence	Delete
	202	Support Department	Empty Huntgroup	Random	
	101	Sales Department	<input type="button" value="Update"/> <input type="button" value="Cancel"/> Extensions <ul style="list-style-type: none"> • 512 - Mark • 513 - Bill 	Order	

1 - 1 of 1

Customer Self-Care Portal

Balances: 24.32 USD Credit Limit: 30.00 USD en - English EasyCall Ltd. (login: john) Logout


Dashboard My Profile IP Centrex Billing Information

Huntgroups

General Extensions Phone Lines External Numbers Dialing Rules Incoming Calls Outgoing Calls Call Recording Huntgroups Identity Music On Hold

Edit	Huntgroup Number	Huntgroup Name	Assigned Extensions	Hunt Sequence	Delete
	101	Sales Department	Assigned Extensions <ul style="list-style-type: none"> • 511 - John • 512 - Mark • 513 - Bill 	Order	
	202	Support Department	Empty Huntgroup	Random	

1 - 2 of 2

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.

Customer Self-Care Portal

Balances: 24.32 USD Credit Limit: 30.00 USD en - English EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Huntgroup


Huntgroup Number: 202
Huntgroup Name: Support Department
Hunt Sequence: Random


Assigned Extensions **Assigned Huntgroups**

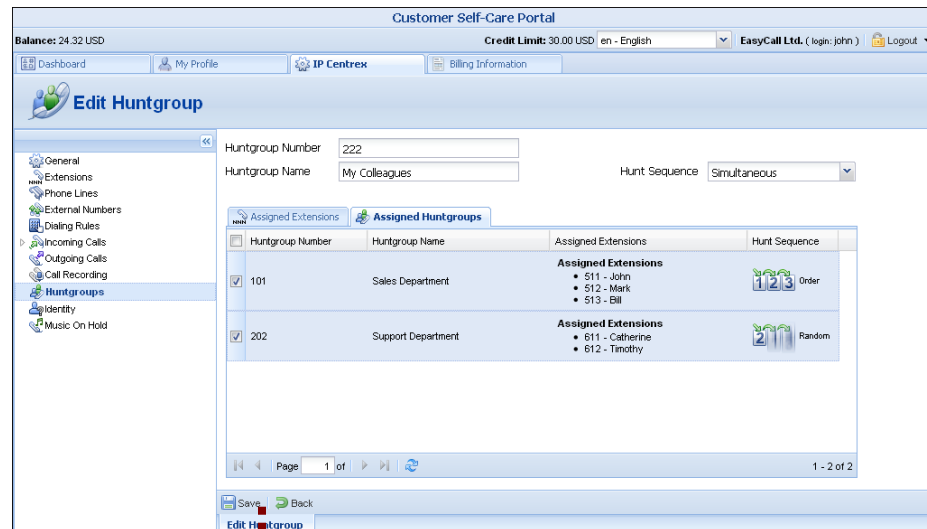
Extension Number	Extension Name	Assigned To Phone Line
<input type="checkbox"/> 511	John	16045550001
<input type="checkbox"/> 512	Mark	16045550003
<input type="checkbox"/> 513	Bill	16045550007
<input checked="" type="checkbox"/> 611	Catherine	16045550008
<input checked="" type="checkbox"/> 612	Timothy	16045550009

All Page 1 of 5 1 - 5 of 5

Save Back Edit Huntgroup

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**.



Customer Self-Care Portal

Balance: 24.32 USD Credit Limit: 30.00 USD en - English EasyCall Ltd. (login: John) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Huntgroup

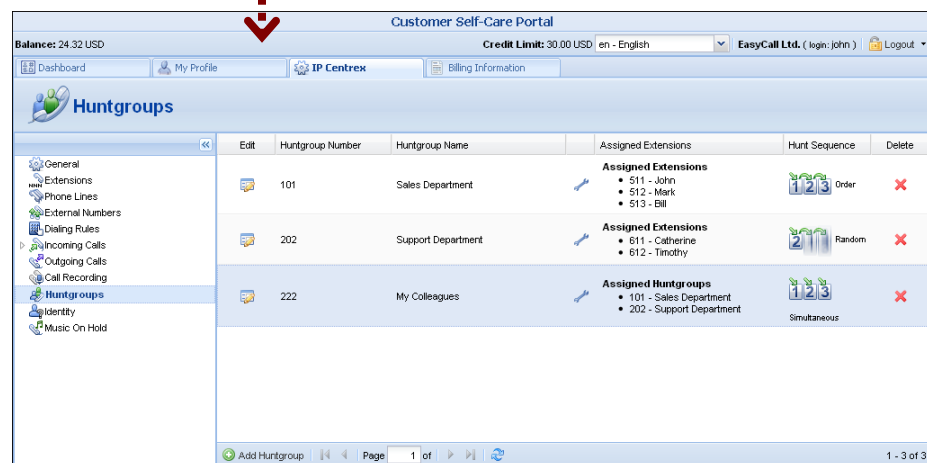
Huntgroup Number: 222 Huntgroup Name: My Colleagues Hunt Sequence: Simultaneous

Assigned Huntgroups

Huntgroup Number	Huntgroup Name	Assigned Extensions	Hunt Sequence
101	Sales Department	Assigned Extensions • 511 - John • 512 - Mark • 513 - Bill	Order
202	Support Department	Assigned Extensions • 611 - Catherine • 612 - Timothy	Random

Page 1 of 2

Save Back









Customer Self-Care Portal

Balance: 24.32 USD Credit Limit: 30.00 USD en - English EasyCall Ltd. (login: John) Logout

Dashboard My Profile IP Centrex Billing Information

Huntgroups

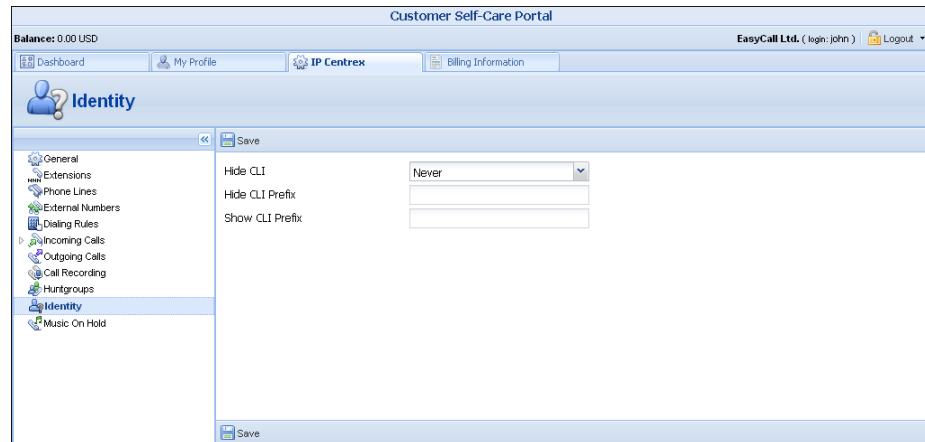
Edit	Huntgroup Number	Huntgroup Name	Assigned Extensions	Hunt Sequence	Delete
	101	Sales Department	Assigned Extensions • 511 - John • 512 - Mark • 513 - Bill	Order	
	202	Support Department	Assigned Extensions • 611 - Catherine • 612 - Timothy	Random	
	222	My Colleagues	Assigned Huntgroups • 101 - Sales Department • 202 - Support Department	Simultaneous	

Add Huntgroup Page 1 of 3

NOTE: Extension and huntgroup numbers must be different.

Identity

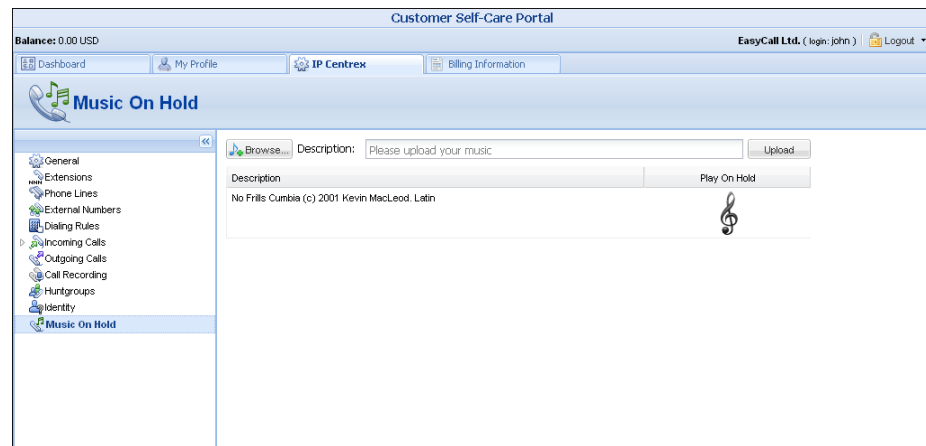
It is possible to set up the following options for handling **Identity** information:




Column	Description
Hide CLI	Removes CLI (ANI) information for outgoing calls. You can choose one of the following options: <ul style="list-style-type: none"> • 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.



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

Customer Self-Care Portal

Balance: 1.28 USD Credit Limit: 30.00 USD EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Billing Summary

Summary

- Subscriptions
- Transactions
- Invoices
- Make a Payment

Brief Billing Information

Balance: 1.28 USD
Credit Limit: 30.00 USD

Transactions Totals Information

From	2011-06-22 00:00:00
To	2011-09-22 14:30:56
Usage Charges	0.65 USD
Payments	-35.63 USD
Subscriptions	11.26 USD
Credits / Refunds	25.00 USD
Total	1.28 USD
Total Sessions	57
Total Transactions	57

Invoices Information

Amount: 1.28 USD
Due on: 2011-09-23 [Make a Payment](#)

View	Payment Status	Due Date	Amount Due
	Unpaid	2011-09-23	1.28 USD

[See All Invoices](#) [Refresh](#)

Active Subscriptions

Subscription	Discount Rate	Activation Date	Billed Date
EasyCall Subscription	2.00	2011-09-20	2011-09-21
Offratel - VoIP Monthly fee	1.00	2011-09-20	2011-09-21

[Refresh](#)

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.

Customer Self-Care Portal

Balance: 0.00 USD EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Subscriptions

Summary

- Subscriptions
- Lines Subscriptions
- Transactions
- Invoices
- Make a Payment

Subscription	Discount Rate, %	Start Date	Activation Date	Finish Date	Billed Date
EasyCall Subscription	2.00	2011-09-20	2011-09-20		2011-09-20
Offratel - VoIP Monthly fee	1.00	2011-09-20	2011-09-20		2011-09-20

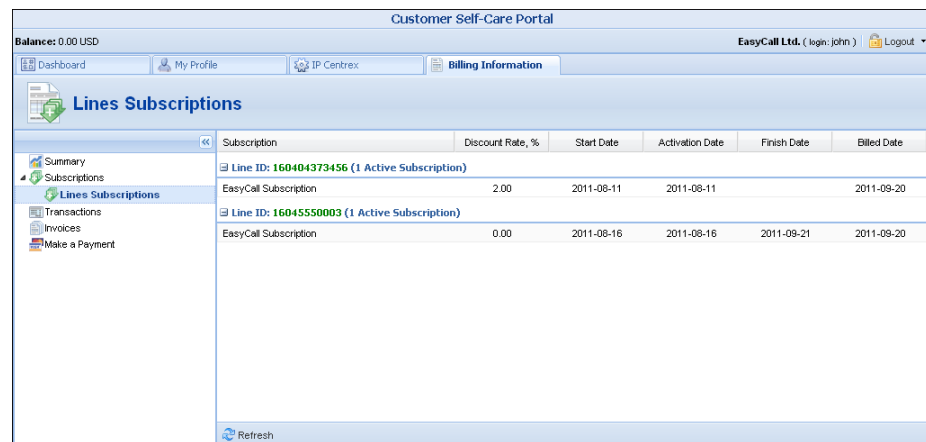
[Refresh](#)

Subscription	Subscription plans being applied to you.
---------------------	--

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).



Subscription	Discount Rate, %	Start Date	Activation Date	Finish Date	Billed Date
Line ID: 160404373456 (1 Active Subscription)					
EasyCall Subscription	2.00	2011-08-11	2011-08-11		2011-09-20
Line ID: 1604550003 (1 Active Subscription)					
EasyCall Subscription	0.00	2011-08-16	2011-08-16	2011-09-21	2011-09-20

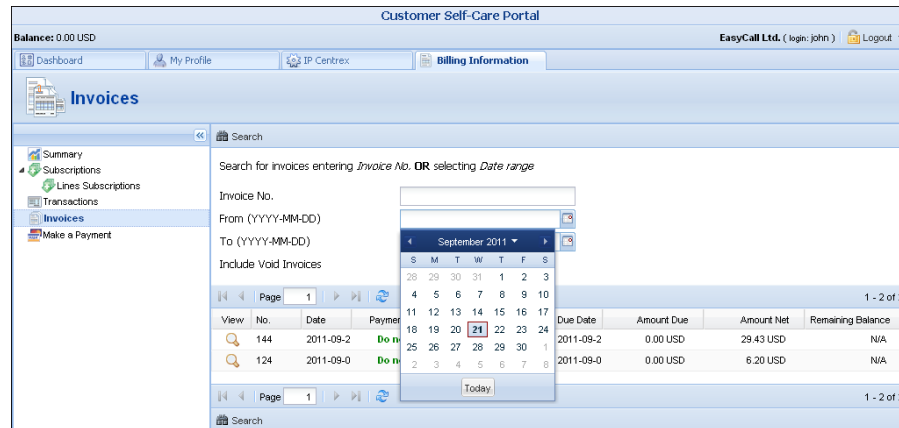
Transactions

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.

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.



Due Date	Amount Due	Amount Net	Remaining Balance
2011-09-2	0.00 USD	29.43 USD	N/A
2011-09-0	0.00 USD	6.20 USD	N/A

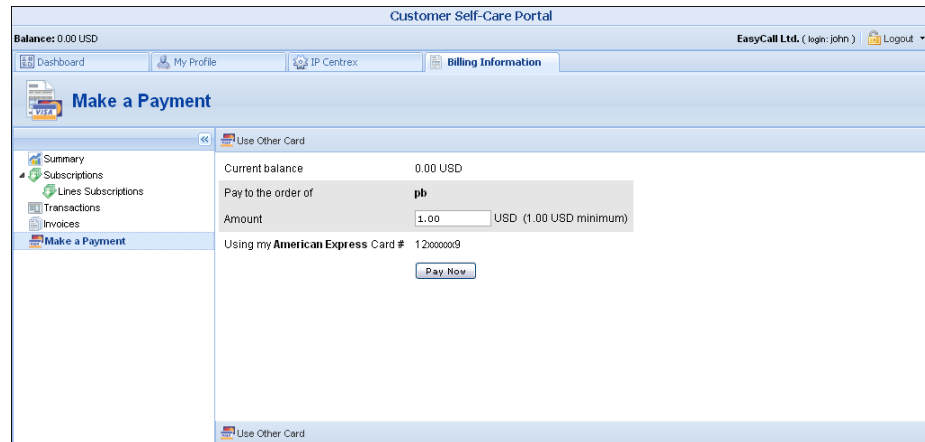
Invoices cover these parameters:

- **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.



Customer Self-Care Portal

Balance: 0.00 USD

EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Make a Payment

Summary Subscriptions Lines Subscriptions Transactions Invoices **Make a Payment**

Use Other Card

Current balance 0.00 USD

Pay to the order of pb

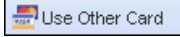
Amount 1.00 USD (1.00 USD minimum)

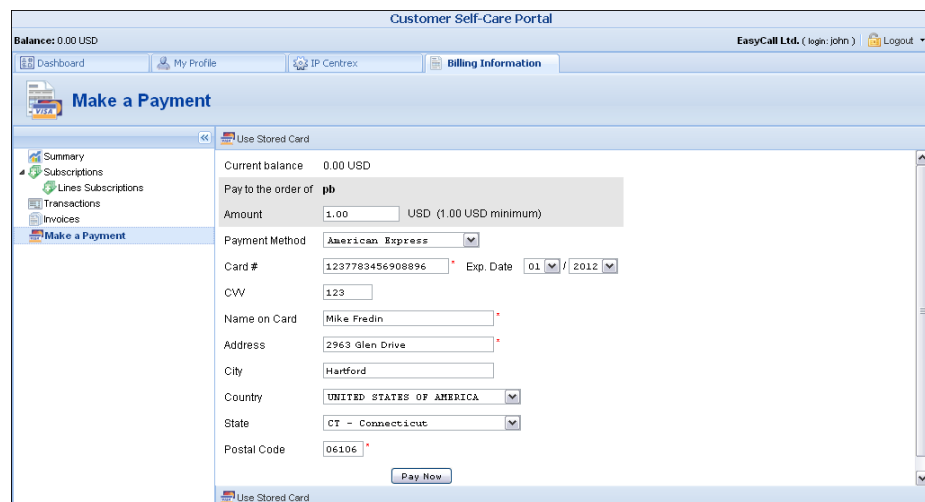
Using my American Express Card # 12000009

Pay Now

Use Other Card

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.



Customer Self-Care Portal

Balance: 0.00 USD

EasyCall Ltd. (login: john) Logout

Dashboard My Profile IP Centrex Billing Information

Make a Payment

Summary Subscriptions Lines Subscriptions Transactions Invoices **Make a Payment**

Use Stored Card

Current balance 0.00 USD

Pay to the order of pb

Amount 1.00 USD (1.00 USD minimum)

Payment Method American Express

Card # 1237783456908896 * Exp. Date 01 / 2012

CVV 123

Name on Card Mike Fredin *

Address 2963 Glen Drive *

City Hartford

Country UNITED STATES OF AMERICA

State CT - Connecticut

Postal Code 06106 *

Pay Now

Use Stored Card

The user can return from that screen by clicking the  icon.

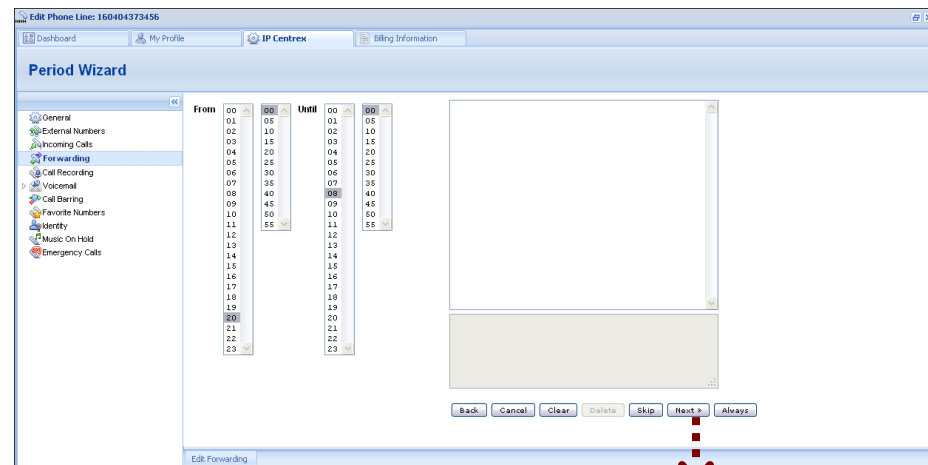
NOTE: If the card information has not been stored, only the Alternative Payment screen will be displayed.

3. How to...

... define a time period using the wizard?

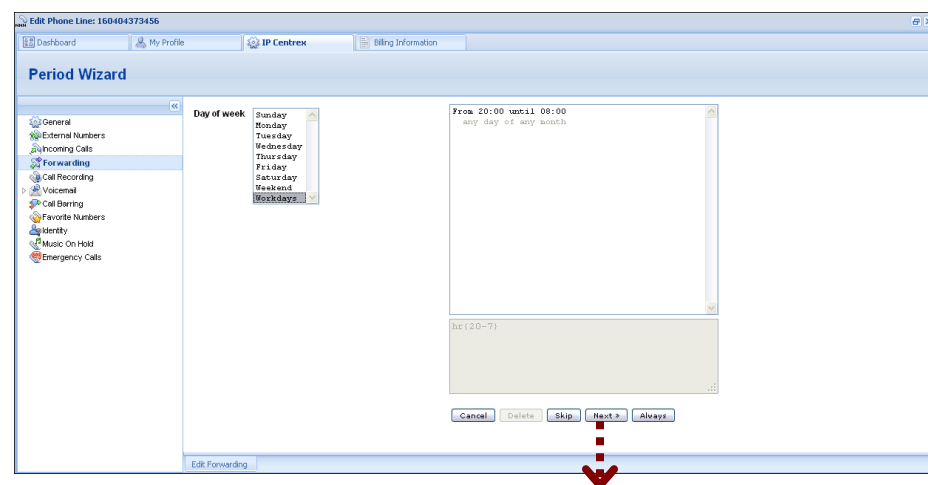
With the period definition wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based on a 24-hour clock, i.e. 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**.



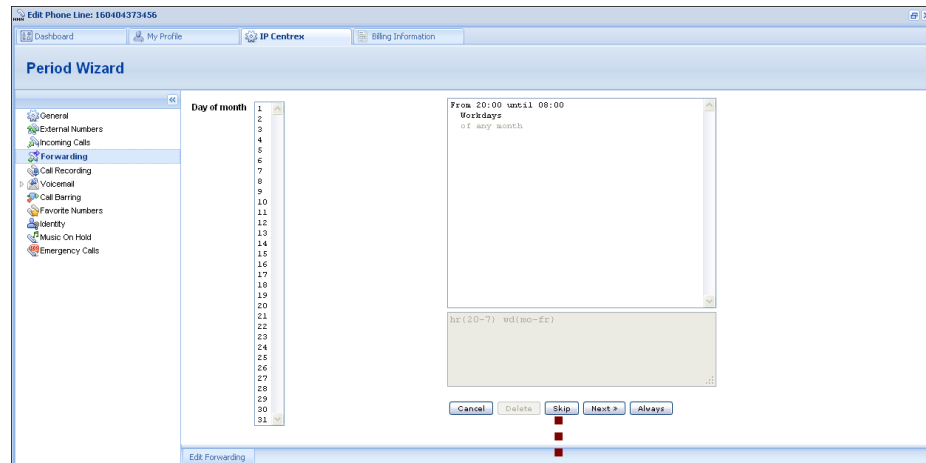
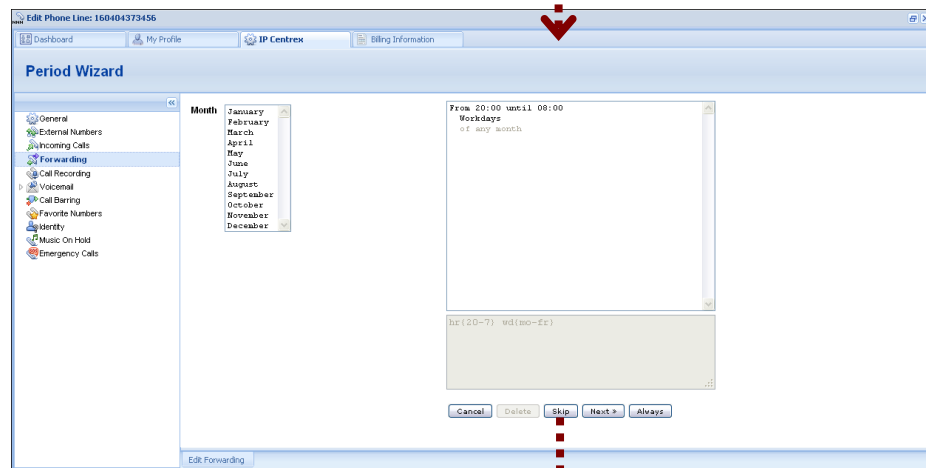
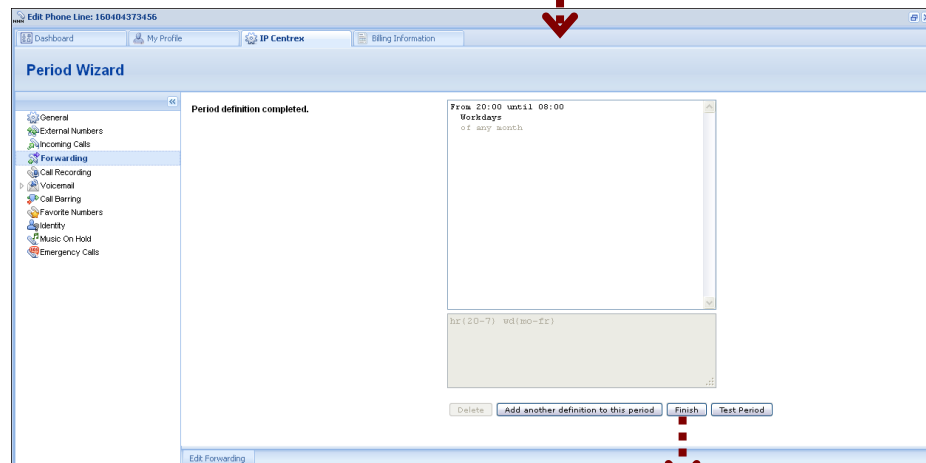
The screenshot shows the 'Period Wizard' interface. On the left is a sidebar with a tree view containing 'General', 'External Numbers', 'Incoming Calls', 'Forwarding', 'Call Recording', 'Voicemail', 'Call Barring', 'Favorite Numbers', 'Identify', 'Music On Hold', and 'Emergency Calls'. The 'Forwarding' option is selected. The main area has two columns: 'From' and 'Until'. Each column has a list of times from 00:00 to 23:00 in 15-minute increments. In the 'From' column, 08:00 is selected. In the 'Until' column, 08:00 is selected. At the bottom right, there are buttons: 'Back', 'Cancel', 'Clear', 'Delete', 'Skip', 'Next', and 'Always'. A red arrow points to the 'Next' button.

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



The screenshot shows the 'Period Wizard' interface on the 'Day of week' page. The sidebar is the same as in the previous screenshot. The main area has a 'Day of week' dropdown menu with options: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, and Workdays. 'Workdays' is selected. To the right of the dropdown, there are two text boxes: 'From 20:00' and 'until 08:00', with the text 'any day of any month' below them. At the bottom right, there are buttons: 'Cancel', 'Delete', 'Skip', 'Next', and 'Always'. A red arrow points to the 'Next' button.

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

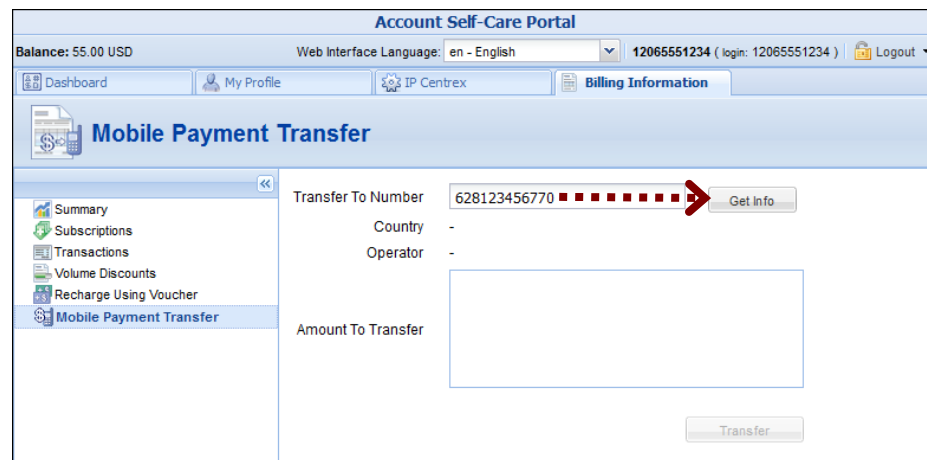




4. Click **Finish** to complete the period definition. If you wish to set one more definition for this period, click **Add another definition to this period**.

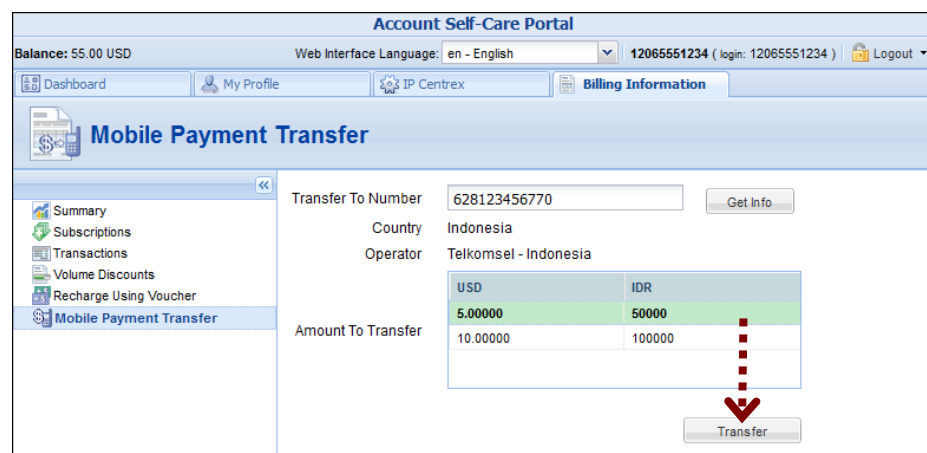
... transfer funds to mobile numbers?

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.



USD	IDR
5.00000	50000
10.00000	100000

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.