



35

Maintenance Release

Account Self-care Interface

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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 8.0 (or higher), Mozilla Firefox 3.6 (or higher)
- JavaScript and cookies enabled in web browser
- Display settings:
 - Minimum screen resolution: 1024 x 768

1 ■ Introduction

Login to the Account Self-care Interface

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

Overview

The Account self-care interface was designed for end-users to access their profile data, check billing information, make mobile payment transfers and, most importantly, manage their IP Centrex settings. The front-end design offers simple and intuitive navigation. This includes an easy-to-use structure of menus and controls, graphic icons and improved presentation of information.

For your convenience, the account self-care interface is divided into four tabbed sections:


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

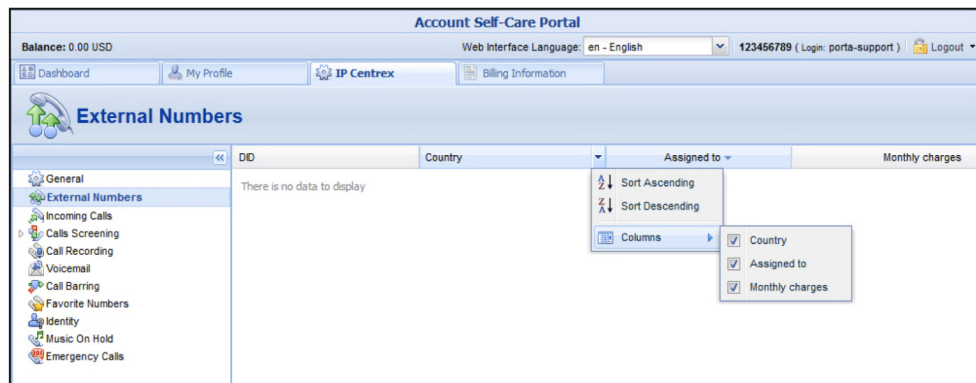
The screenshot displays the 'Account Self-Care Portal' interface. At the top, it shows 'Available Funds: 252.00 USD' and 'Web Interface Language: en - English'. The user is logged in as '123456789 (Login: Frank)' with a 'Logout' button. The 'Dashboard' tab is selected, showing a 'Dashboard' header with a 'Dashboard' icon. Below this, the 'AccountID: 123456789' is displayed, along with an 'Offline' status indicator. The main content area is divided into several sections: 'Contact Information' (George E. Smith, Harbor Dr. Street, My_mail@portacore.com), 'Brief Billing Information' (Type: Credit, Available Funds: 252.00 USD, Refunds: 132.00 USD, Non Call Related Charges: 0.00 USD), 'Recent Calls' (a table of call records), 'Member of Huntgroups Information' (Group Name: There is no data to display), and 'Product & Discounts Information' (Product: 123test, Destination..., Service, Peak Level, Threshold, Used, Current Di..., Next Disc...). The 'Recent Calls' table has columns for Date/Time, From, To, Duration, Cost, USD, and Play.

Date/Time	From	To	Duration	Cost, USD	Play
2012-10-03 12:45:20	000999216	000999217	1:00	0.00	▶
2012-10-03 12:45:16	000999216	000999215	1:00	0.00	▶
2012-10-03 12:44:12	000999216	000999215	1:00	0.00	▶
2012-10-03 12:42:05	000999215	000999216	0:29	0.00	▶
2012-10-03 12:33:10	000999217	000999216	0:21	0.00	▶
2012-10-03 12:32:39	000999215	000999216	0:37	0.00	▶
2012-10-03 12:29:35	000999215	000999216	0:26	0.00	▶

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

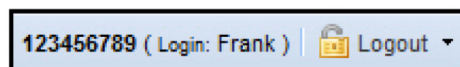
Common Features

Most of the data on the self-care 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:

Account Self-Care Portal

Available Funds: 252.00 USD Web Interface Language: en - English 123456789 (Login: Frank) Logout

Dashboard

AccountID: 123456789 Offline

Contact Information

Contact: George E. Smith
Address: Harbor Dr. Street
Email: My_mail@portone.com

Brief Billing Information

Type: Credit
Available Funds: 252.00 USD Recharge Using Voucher
Refunds: 132.00 USD
Non Call Related Charges: 0.00 USD

Recent Calls

Date/Time	From	To	Duration	Cost, USD	Play
2012-10-03 12:45:20	000999216	000999217	1:00	0.00	▶
2012-10-03 12:45:16	000999216	000999215	1:00	0.00	▶
2012-10-03 12:44:12	000999216	000999215	1:00	0.00	▶
2012-10-03 12:42:05	000999215	000999216	0:29	0.00	▶
2012-10-03 12:33:10	000999217	000999216	0:21	0.00	▶
2012-10-03 12:32:39	000999215	000999216	0:37	0.00	▶
2012-10-03 12:29:35	000999215	000999216	0:26	0.00	▶

Member of Huntgroups Information

Group Name: There is no data to display

Product & Discounts Information

Product: 123test
Destination... Service Peak Level Threshold Used Current DL... Next Disc...
There is no data to display

Column	Description
Brief Billing Information	This reflects thumbnail billing information such as your available funds (or balance), refunds and charges information.
Contact Information	Here you can view your contact info such as address, email, etc.
Member of Huntgroups Information	This shows whether your extension belongs to any of the huntgroups.
Product & Discount Information	Here you can find all the necessary information concerning your product and available discounts.
Recent Calls	This table lists the most recent calls and call details. It also gives you the ability to listen to recorded calls (if any were recorded).
Status	Indicates whether the phone is online or offline at the moment.

My Profile tab

The **My Profile** tab allows you to view and change your personal details such as contact information, personal info, password, etc.:

Account Self-Care Portal

Balance: 999.03 USD Web Interface Language: en - English 000111 (Login: 000111) Logout

Dashboard My Profile IP Centrex Billing Information

General

General
Additional Information
Settings
Change Password

Personal Information

Company Name
Mr./Ms./...
First Name
M.I.
Last Name

Address Information

Address
Province/State
Postal Code
City
Country/Region

Contact Information

Contact
Phone
Fax
Alt. Phone
Alt. Contact
Email
Description

Save

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

IP Centrex Tab

This tab allows you to view your external numbers, and configure call screening, voice mail and other services.

General

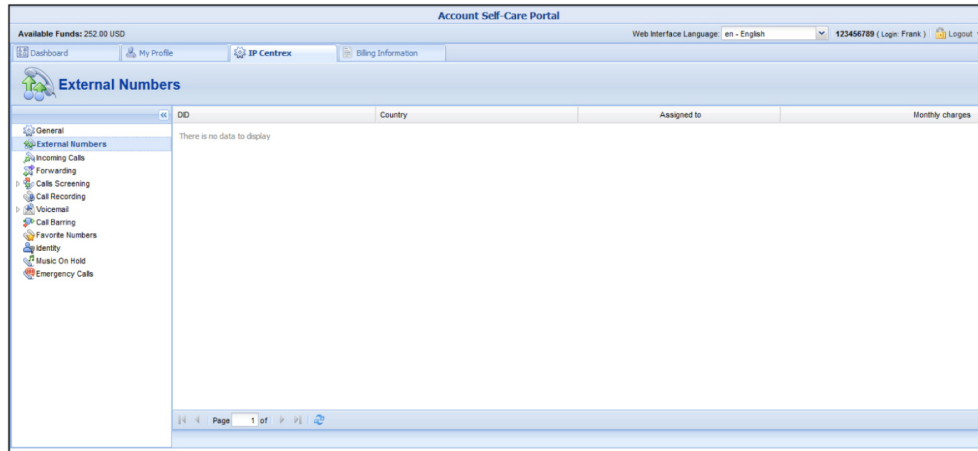
The screenshot shows the 'Account Self-Care Portal' interface. At the top, it displays 'Available Funds: 252.00 USD' and 'Web Interface Language: en - English'. The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'General' tab is selected, showing a sidebar with options: General, External Numbers, Incoming Calls, Forwarding, Call Screening, Call Recording, Voicemail, Call Barring, Favorite Numbers, Identity, Music On Hold, and Emergency Calls. The main content area for 'General' has two fields: 'Associated Number' (a text input field) and 'Preferred IVR Language' (a dropdown menu currently set to 'en - English'). A 'Save' button is located at the bottom left of the form.

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

External Numbers

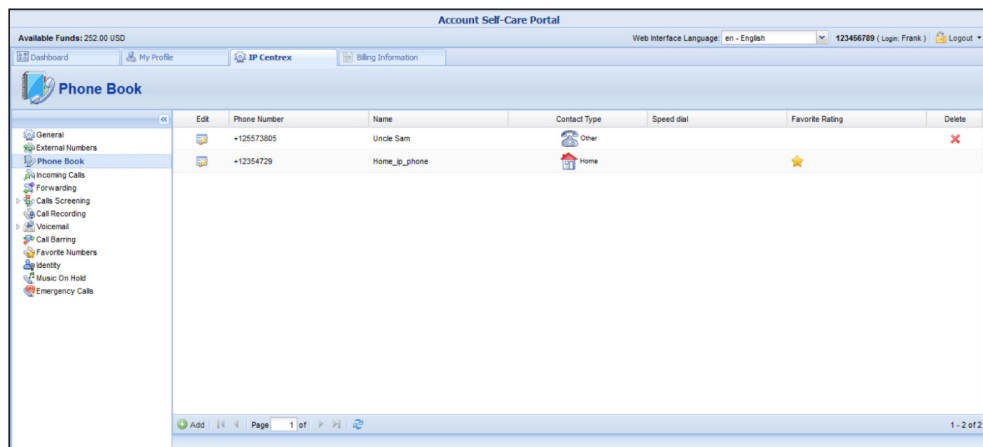
In addition to being assigned your main phone number, you can have multiple alternate DID (direct inward dialing) phone numbers assigned.

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



Phone Book

This tab will only be available if your provider has activated the **Phone Book** feature for you. This allows you to maintain your own set of frequently dialed numbers, assign speed dial codes to them and define a list of favorite numbers.



Speed Dial

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

Favorite Rating

If your provider makes the **Favorite Rating** service available, you have the option to mark which numbers will be charged according to a special rate. Ask your provider about the maximum amount of numbers that you can mark as favorite numbers and about the patterns to be used for favorite numbers.

Incoming Calls

Here you can set the parameters for incoming calls.

Available Funds: 252.00 USD

Account Self-Care Portal

Web Interface Language: en - English 123456789 (Log: Frank) Logout

Dashboard My Profile IP Centrex Billing Information

Incoming Calls

- General
- External Numbers
- Incoming Calls**
- Forwarding
- Call Screening
- Call Recording
- Voicemail
- Call Barring
- Favorite Numbers
- Identity
- Music On Hold
- Emergency Calls

Default Answering Mode: Ring, forward, voicemail

Ext-to-Ext Call Distinctive Ring: Yes

Caller Info: ☒

Call Waiting: ☒

Save

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

Forwarding

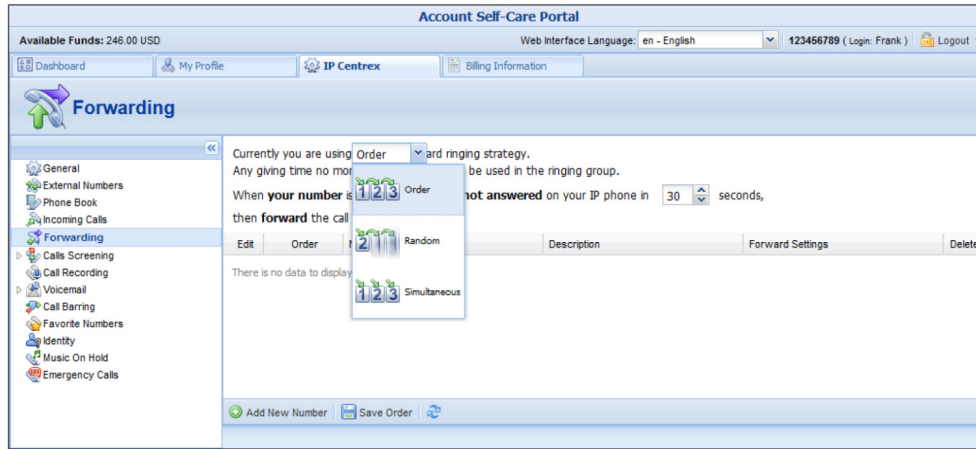
Forwarding allows you to redirect all calls to another telephone number.

What Call Forwarding Does for You:

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

There are several types of forwarding:


- Follow-me
- Advanced Forwarding Mode
- Simple Forwarding

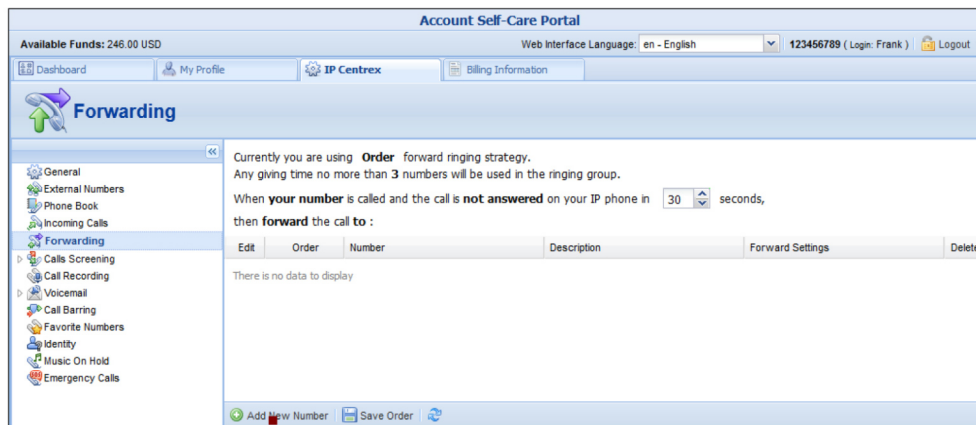


You may change the mode (order, random or simultaneous) for your forward ringing strategy on this page. The configuration for **Forwarding** is only available for the phone if it is enabled by your provider. See the screenshot above


Follow-me


If the **Follow-me** option is set for you by your provider 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. 999000777).
- **Description** – A short description for this number.
- **Ring for** – If a call is not answered, set the number of seconds that it will ring for until it is forwarded to the next number on the list.
- **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 (e.g. 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 to...](#) section for more information.


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

Edit	Order	Number	Description	Forward Settings	Delete
		999000777	My second alternative no.	Time restrictions: None Ring for: 15 sec	

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

Advanced Forwarding Mode

This type of forwarding is only available when your provider has established the **Advanced Forwarding** mode for you. This is similar to the **Follow-me** mode, but has some extra options that allow you to route calls to SIP URI. To do this, follow the steps below:

1. In the **IP Centrex** section, choose **Advanced Forwarding**.
2. Click  **Add New Number** to add the number that you wish to receive forwarded calls.
3. Enter the necessary information. The fields are very similar to those for adding a **Follow-me** number as described above, but additional fields that are not available when adding a **Follow-me** number are located below:
 - **SIP Proxy** – Select a proxy server from the dropdown list that forwarded calls can be routed to (the list of allowable SIP proxy addresses is managed by your provider).
 - **Keep Original CLD** – Check this option to ensure that the originally dialed number is present in the call information when forwarding a call to SIP URI.
 - **Calling Party Display** – Choose how to display the caller's info during forwarding:
 - Select **Caller Number and Name** to see the phone number and the name of the original caller.
 - If you choose **Caller Number and Forwarder Name**, then the phone number of the caller and the forwarder's name will be displayed.
 - To see the phone number and the name of the forwarder, select **Forwarder Number and Name**.
 - **Transport Protocol** – This enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications with PBXs that do not support UDP.

Account Self-Care Portal

Available Funds: 246.00 USD Web Interface Language: en - English 123456789 (Login: Frank) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Advanced Forwarding

General

External Numbers

Phone Book

Incoming Calls

Advanced Forwarding

Calls Screening

Call Recording

Voicemail

Call Barring

Favorite Numbers

Identity

Music On Hold

Emergency Calls

Number: 999000777 Description: My second alternative no.

Ring for: 15 seconds SIP Proxy: 192.168.192.43

Use this number

☒ Always

☐ Only at the following time interval

with the following settings:


Keep Original CLD ☒

Calling Party Display: Caller Number and Name

Transport Protocol: UDP

Save Back

Advanced Forwarding

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

Simple Forwarding

The simplest type of forwarding is to specify a single phone number that all calls will be sent to (must be determined by your provider).

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.

Account Self-Care Portal

Available Funds: 252.00 USD Web Interface Language: en - English 123456789 (Login: Frank) Logout

Dashboard My Profile IP Centrex Billing Information

Simple Forwarding

General

External Numbers

Incoming Calls

Simple Forwarding

Calls Screening

Call Recording

Voicemail

Call Barring

Favorite Numbers

Identity

Music On Hold

Emergency Calls

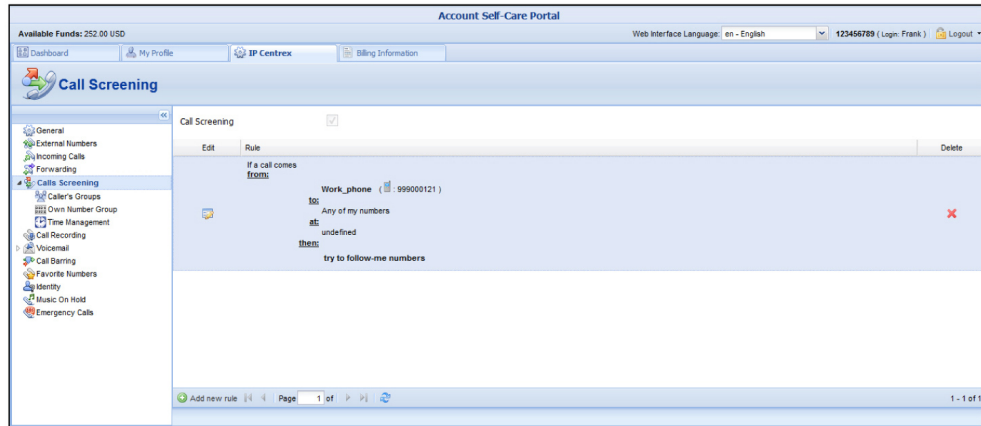
Forward To: 999000333

Save

3. Click the  **Save** icon.

Call Screening

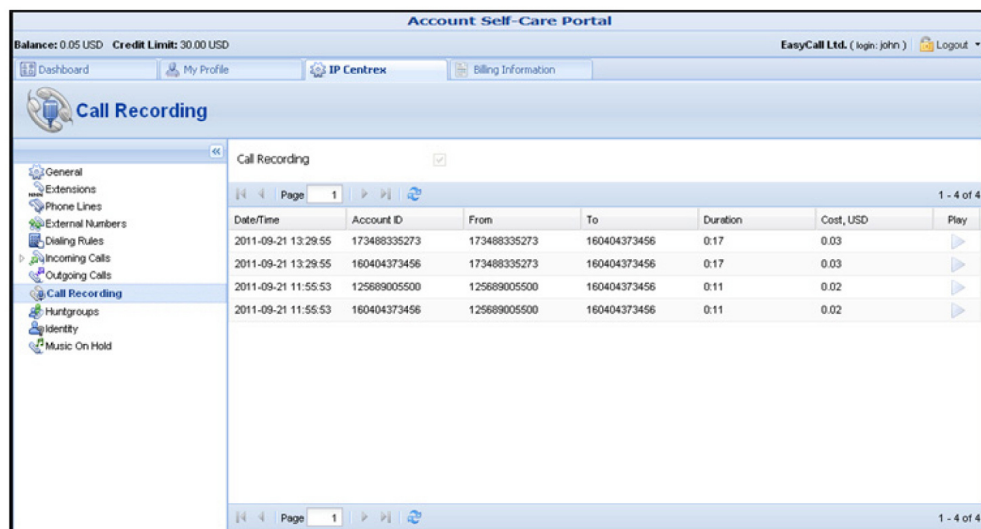
This tab allows you to view a list of rules for handling incoming calls.



NOTE: Some features such as **Call Screening** are not yet available on the new self-care interface. You can only see the active settings for this function; you cannot modify them.

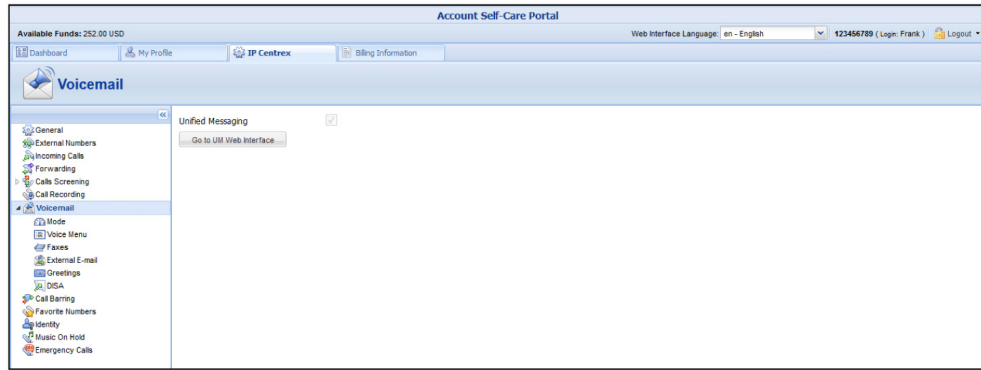
Call Recording

With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback. When this feature is enabled, you can view information about calls and hear recordings.



Voicemail

Voicemail gives you the capability to view messages left by callers in your mailbox. Once you choose the **Voicemail** tab you will be prompted to go to the **Unified Messaging (UM) Web Interface** to check your mailbox.



You will also find these tabs under **Voicemail**:


- Mode
- Voice Menu
- Faxes
- External E-mail
- Greetings
- DISA
- Mailbox Display Options
- Message Display Options
- Folder Preferences
- Auto Attendant

The **Mode** tab allows you to define the call transfer destination after timeout of an incoming call. It gives you a choice of Voicemail, Auto Attendant or Fax-only.

The **Voice Menu** tab allows you to set options for your mailbox, such as:

- **Password**
- **Always Ask for Password**
- **Prompt Levels (Standard, Extended, Rapid)**
- **Announce Date & Time**
- **Auto Play**

The **Faxes** tab gives you an opportunity to choose one of the output formats (one PNG file per page, one TIFF file per page, single TIFF file or single PDF file).

The **External E-mail** tab allows you to forward messages to an external email box. When a new message arrives to your mailbox, a full copy of the message or simply a short notification can be sent to your other email address. To do this, specify an email address, define one of the actions (**Forward, Forward as Attachment, Copy, Notify or Voice To Text**), choose an appropriate voice message audio format and click  **Save**.

The **Greetings** tab allows you to customize your personal greetings for your voicemail. The **Standard** option is set by default. You may upload or record greetings specifically for **Extended Absence**, **Personal** and **Name**.

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

The **Mailbox Display Options** tab supplies with the following options:

- **Number of Messages per Page** – This defines the number of messages that will be shown in a given folder on a single page. If the folder contains more than this number, you will see “Previous” and “Next” links above and below the list, taking you directly to the previous or next message.
- **Enable Page Selector** – When you check this box, page numbers will be shown above and below the message list, allowing you to quickly jump to a specific message page.
- **Maximum Number of Pages to Show** – Defines the number of pages to be displayed above and below a message list.
- **Length of From / To Field** – Defines the number of characters that will be displayed in the **From / To** field. If you enter 0, then the full name will be visible.
- **Length of Subject Field** – Defines the number of characters that will be displayed in the subject field. If you input 0, then the full subject will be visible.

The **Message Display Options** tab:

- **Wrap Incoming Text At** – Defines how many characters to allow before wrapping text. This prevents messages from scrolling far off the screen. 86 is usually a good number to enter here, but you may change this as you desire.
- **Width and Height of Editor Window** – Defines how wide and high your message box will be. This indicates the number of characters per line you will be able to type before wrapping occurs in Compose.
- **Show HTML Version by Default** – If a message you receive is in both text and HTML format, you can choose to see the HTML version (Yes) or the text version (No) by default.
- **Include Me in CC when I Reply All** – “Reply All” sends a reply to all recipients of the original message, including yourself. To leave your own email address out, uncheck this box.

- **Enable Mailer Display** – When viewing a message, this option displays which email service or client was used by the sender.
- **Display Attached Images with Message** – Displays the images attached to a message right as you view the message.
- **Enable Printer Friendly Clean Display** – Cleans up the message so the printed version looks nicer.
- **Enable Mail Delivery Notification** – Enables (or disables) automatic notification that a message has been delivered.
- **Prepend Signature before Reply / Forward Text** – Attaches the signature you defined under the Signature tab in Personal Information.
- **Sort by Received Date** – Sorts all the messages by the order they were received.

The **Folder Preferences** tab:

- **Trash Folder** – Specifies which folder messages will go to when you delete them.
- **Draft Folder** – Specifies which folder messages you save as drafts will go to.
- **Sent Folder** – Specifies the folder where sent items are saved.
- **Enable Unread Message Notification** – This option specifies how to display unseen (unread) messages in the folder list in your browser window. If you set this to “No Notification”, you will not be notified of unseen messages. If you set it to “Only INBOX”, the inbox heading will become bold when you have new messages, and a number will appear to the right of it indicating how many new messages are in it. If you set this to “All Folders”, the same will happen in all folders. If you notice that the folder list is loading very slowly, setting this to “Only INBOX” or “No Notification” should speed it up.
- **Unread Message Notification Type** – When new messages are in a folder, this option indicates whether to display the number of new messages only, or the total number of messages in that folder as well.
- **Enable Cumulative Unread Message Notification** – This controls the behavior of the message counter that is displayed next to each folder in the folder list. If the box is checked and the folder contains sub-folders, then once it is collapsed, the message count will include all of the messages within all of the sub-folders of that folder.
- **Memory Search** – If you search a mailbox, the search can be saved for quick access later. This option defines how many mailbox searches will be saved.

The Auto Attendant tab



Auto Attendant is a flexible utility designed to greet callers and transfer them either to an existing accounts, or to your current phone system.


Basic Concept:

- The Media Server's auto attendant is composed of a set of menus.
- All the menus are identical in every respect, except for the ROOT menu, which is always present and cannot be deleted, and whose name cannot be changed.
- When a caller dials the system, auto attendant will answer (connect) the call and proceed to the ROOT menu.
- If a user tries to access a menu which is not currently active, the action specified in the Not Active configuration parameter will be performed; for instance, the user may be automatically forwarded to an "after hours" menu.

Add/Edit menu

The Auto Attendant is composed of a set of menus.

The main screen lists all the menus available. You can modify one of the existing menus by clicking the Edit  icon or by simply double-clicking it. To add a new menu, click the  Add button and enter the following information:

- **Name** – A logical name for the menu, i.e. Sales for a sales department.
- **Active** – Time definition when the current menu is active. To set the menu as always active, select the **Always** option. But you can define a time period by yourself by choosing the option **Only at the following time interval** and clicking the  icon.

After you have saved the menu, you can define separate **prompts**.

To upload a prompt, select the **Browse...** button. The native audio file format for the system is the following:

Type: NeXT/Sun (Java) file .au

Format: G.711 u-Law

Attributes: 8,000 Hz, 8-bit, Mono

Type: NeXT/Sun (Java) file .au

Format: G.711 u-Law

Attributes: 8,000 Hz, 8-bit, Mono

Here's a short list of supported audio file formats:

Type	Description
.aiff	AIFF files used on Apple IIc/IIs and SGI.
.au	SUN Microsystems AU files.
.gsm	GSM 06.10 Lossy Speech Compression
.mp3	MP3 Compressed Audio
.ogg	Ogg Vorbis Compressed Audio.
.raw	Raw files (no header).
.wav	Microsoft .WAV RIFF files.

- The **Intro** prompt (e.g. “Welcome to PortaOne, a VoIP solutions company!”) is played when a user enters a menu for the first time.
- After this, the **Menu** prompt will be played, listing all the available options (e.g. “Press 1 for sales, press 2 for technical support”), and auto attendant will collect the digits dialed by the user on his phone touchpad.
- If no input is received (timeout), the **Default** prompt is played and the dialog reverts to the previous step (i.e. plays the **Menu** prompt and collects the user’s input).
- The user’s input will be matched with the corresponding menu items, and the action associated with this item will be performed. The following **actions** are possible:

- **Default** – Plays the **Default** prompt from the current menu and returns to the “Play Menu prompt” step (this is the action used for all menu items where the initial value has not been modified).
- **Transfer** – Transfers the call to a given telephone number or extension. The phone number should be entered in the same format as the customer would use to dial it from an IP phone in his IP Centrex environment; for example, to transfer a call to extension 123, simply enter 123.
- **Transfer to E.164 Number** – Transfers the call to a given number. The number should be specified in E.164 format: the country code, followed by the area code, and then the number (e.g. 16045551234 for Canada).
- **Transfer to Extension** – Transfers the call to an extension number entered by the caller from his phone. To prevent abuse (e.g. someone attempting to enter a long-distance number in this way), you can specify the maximum allowed number of digits in an extension (**Max Size**).
- **Transfer to Voicemail** – Switches to voicemail mode. This should be designated as an action for the “Fax” event, in order to allow storage of received faxes.
- **Menu** – Transfers the user to the selected menu.
- **Directory** – Launches this company’s dial-by-name directory.
- **Queue** – Transfers the call to the specified call queue.

- You may select whether the corresponding Before Action prompt is to be played prior to the action.

Actions

Column	Description
Event	Not Active – When the current menu is not active (see the period definition wizard above). 0-9, #, * – User selection on telephone keypad. Timeout – No selection received from user. Fax – Fax CNG tone detected.
Action	See the description of available actions in the Basic Concept section above.
Play Before Action	Check this box if the corresponding prompt is to be played before an action is performed.
File	File name and path for the prompt file.

Call Barring

This tab displays destinations that you are not allowed to call. The information regarding prohibited destinations will only be available when the **Call Barring** feature has been activated by your provider, otherwise the **Call Barring** checkbox will be empty.

Favorite Numbers

This is the list of phone numbers for outgoing calls that will be charged according to a special rate. This list of favorite numbers can only be defined by your provider.

Identity

Hide CLI

This tab displays your **Hide CLI** status and is defined by your provider. The following options are available:

- **Never** – Always shows your **CLI**. The privacy service is not available to you and therefore, your phone number will be displayed to the called party.
- **Always** – Always hides your **CLI**. Privacy service is permitted and in effect. Your number will not be displayed to the called party; it will be shown as an empty line on the called UA (all calls are private).

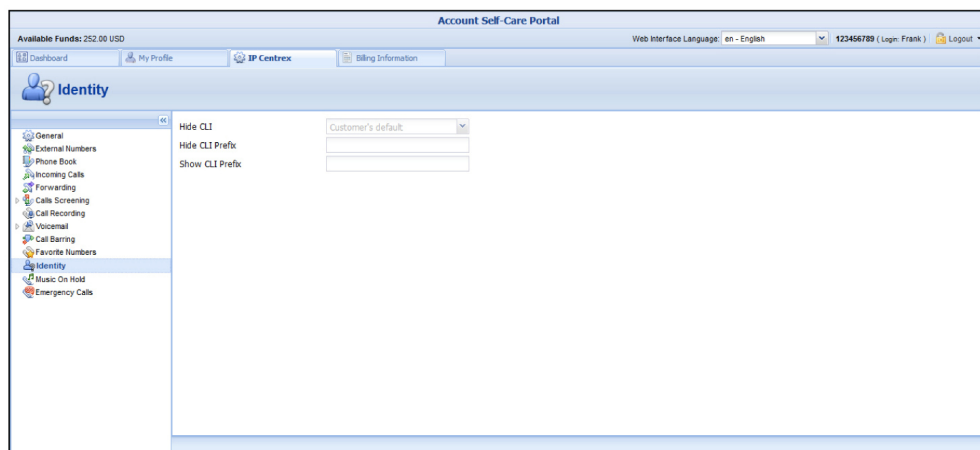
- **Automatic** – This allows you to flexibly configure CLI hiding. This option will depend on the prefix number dialed and the privacy headers provided by the UA.

Hide CLI Prefix

This is the prefix to be dialed before an outgoing number in order to prevent the called party from seeing your phone number (Only available when the **Hide CLI** option is set to “Automatic”).


Show CLI Prefix

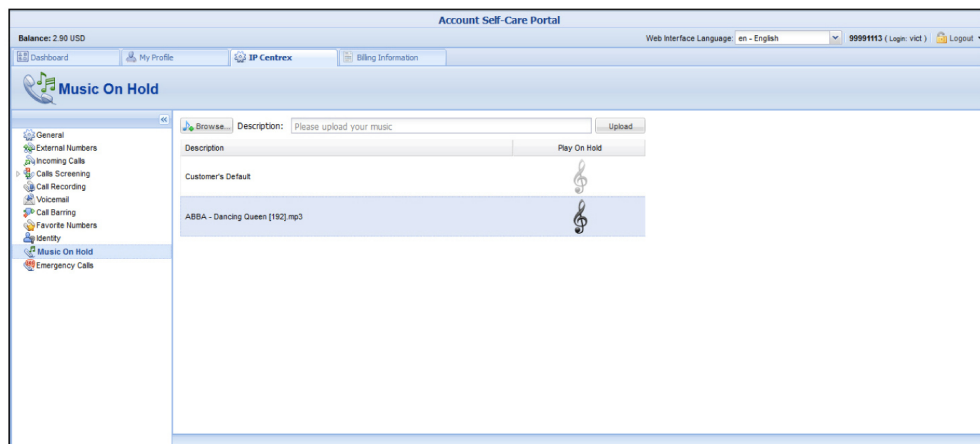
The prefix to be dialed before an outgoing number in order to allow the called party to see your phone number (Only available when **Hide CLI** option is set to “Automatic”).



Music on Hold

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

The music will be enabled within 10 minutes. Click the treble clef  to enable / disable this feature.



Emergency Calls

This tab contains the information about your location. In case of an emergency call, this information will be processed by the PSAP and the police / fire department / ambulance will receive all required information about your location.

Account Self-Care Portal

Available Funds: 252.00 USD

Web Interface Language: en - English 123456789 (Login: Frank) Logout

Emergency Calls

First Name: George

Last Name: Smith

Address: Harbor Dr. Street

Province/State: FL

Postal Zip: 20175

City: Leesburg

Country/Region: USA

Phone: (352) -999-1092-435

Save

Billing Information tab

Summary

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

- Brief Billing Information
- Transactions Totals Information
- Active Subscriptions
- Product & Discounts Information

Account Self-Care Portal

Available Funds: 252.00 USD

Web Interface Language: en - English 123456789 (Login: Frank) Logout

Billing Summary

Brief Billing Information

Type	Credit
Available Funds	252.00 USD
Refunds	132.00 USD
Non Call Related Charges	0.00 USD

Recharge Using Voucher

Transactions Totals Information

from	to	Usage Charges	Payments	Total
2012-07-10 00:00:00	2012-10-10 15:14:39	0.00 USD	-126.00 USD	-132.00 USD
Total Transactions				3

Active Subscriptions

Subscription	Discount Rate, %	Activation Date	Billed Date
123test	%	YYYY-MM-DD	YYYY-MM-DD

There is no data to display

Product & Discounts Information

Product	Destination	Service	Peak Level	Threshold	Used	Current Disc	Next Disc
123test	%	%	%	%	%	%	%

There is no data to display

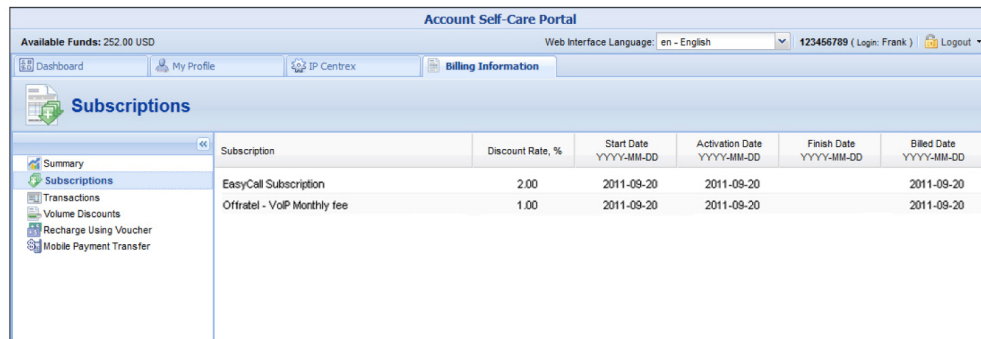
Brief Billing Information

This reflects billing information such as available funds, etc.

Transactions Totals Information	This reflects your total transactions (calls, payments, refunds, subscription charges, etc.).
Active Subscriptions	This shows you the subscription plans that currently apply to you.
Product & Discount Information	This displays information about your current product and discounts.

Subscriptions

This tab displays the subscription plans that currently apply to you.



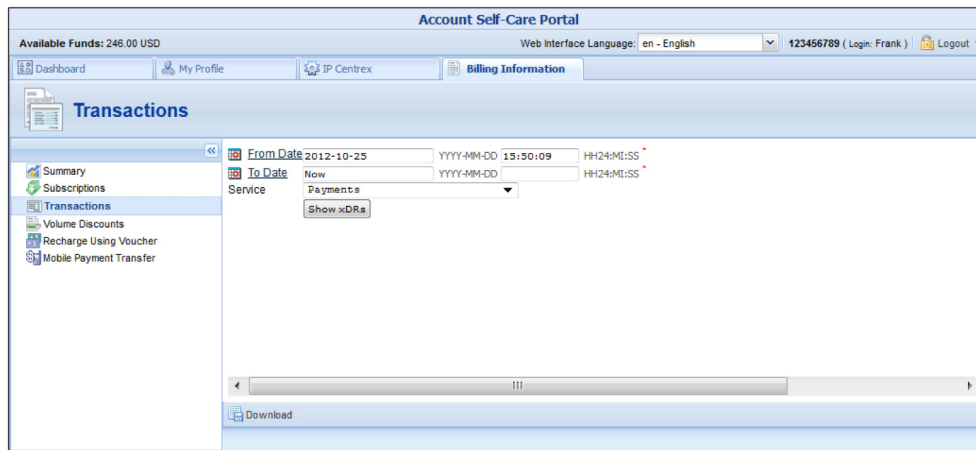
Subscription	Discount Rate, %	Start Date YYYY-MM-DD	Activation Date YYYY-MM-DD	Finish Date YYYY-MM-DD	Billed Date YYYY-MM-DD
EasyCall Subscription	2.00	2011-09-20	2011-09-20		2011-09-20
Offratel - VoIP Monthly fee	1.00	2011-09-20	2011-09-20		2011-09-20

Subscription	Subscription plans that apply to you.
Discount Rate, %	Amount of discount applied for this subscription.
Start Date	Subscription activation date.
Activation Date	This displays the date that the subscription was activated.
Finish Date	This shows the date that this subscription will be automatically canceled.


Transactions


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

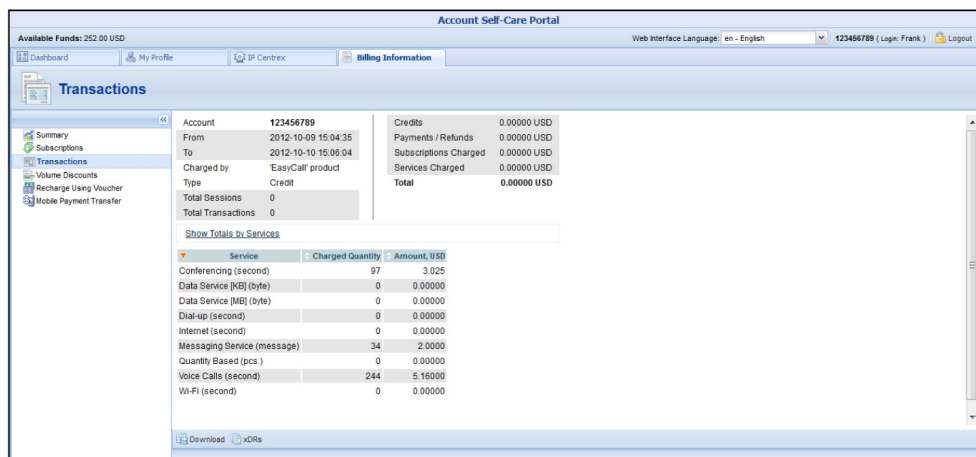
This screen allows you to view and download transaction records – xDRs (eXtensible Detail Records) for any desired time period.



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

- A date and time range by clicking the 
- A certain service type

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 from 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.

Volume Discounts

This tab displays all the applicable special discounts offered to you in your product.

The screenshot shows the 'Account Self-Care Portal' with a top navigation bar containing 'Dashboard', 'My Profile', 'IP Centre', and 'Billing Information'. Below this is a 'Volume Discounts' section with a table of discount plans. The table has columns: Destination Group, Service, Peak Level, Threshold, Used, Remaining, Current Discount, and Next Discount Level. Two rows are visible: 'Brazil-mobile' and 'Brazil-Propor', both for 'Voice Calls' with 'N/A' for Peak Level and Threshold, and '0.00 USD' for Used and Remaining. The Current Discount is 6.00% for Brazil-mobile and 7.00% for Brazil-Propor. The Next Discount Level is 'N/A' for both. A left sidebar contains links: Summary, Subscriptions, Transactions, Volume Discounts (selected), Recharge Using Voucher, and Mobile Payment Transfer.

Destination Group	Service	Peak Level	Threshold	Used	Remaining	Current Discount	Next Discount Le...
Brazil-mobile	Voice Calls	N/A	N/A	0.00 USD	0.00 USD	6.00%	N/A
Brazil-Propor	Voice Calls	N/A	N/A	0.00 USD	0.00 USD	7.00%	N/A

Destination Group	The Destination Group this discount applies to.
Service	Type of services (voice calls, messaging, data transfer, etc.) that this volume discount applies to.
Peak Level	The type of peak level this discount applies to (peak, off-peak or 2nd off-peak). In case of N/A , no off-peak levels are defined for the Destination Group in this discount plan, and the same discount applies all the time.
Threshold	Defines the amount of money or the number of minutes for which the discount plan will be applied.
Used	Shows the amount of money spent or number of minutes used.
Remaining	The amount of money or number of minutes left before reaching the threshold.
Current Discount	Percentage deducted from your current rate for the service.
Next Discount Level	The discount percentage that will be applied after the threshold is crossed.

Recharge Using Voucher

On this screen you can recharge your phone (account) using a voucher. To do that, fill in a valid voucher number and click **Recharge**.

Mobile Payment Transfer

The **Mobile Payment Transfer** screen allows you to transfer funds from your phone (account) to mobile numbers all over the world. Please consult the [How to...](#) section for more information.

Make a Payment

This screen is available only if this functionality is enabled by your provider. On this page you can see your current balance and top it up by choosing one of the available payment methods.

Account Self-Care Portal

Balance: 2.35 USD

Web Interface Language: en - English 12457000911 (Login: 12457000911) Logout

Dashboard My Profile IP Centrex Billing Information

Make a Payment

Summary Subscriptions Transactions Volume Discounts Recharge Using Voucher Mobile Payment Transfer

Now your balance is 2.35 USD

Amount: 10

☐ Credit or Debit Card
Pay with your credit or debit card.

☐ Bank account (eCheck)
Paying from your checking Bank Account

☐ Direct Debit NL
A direct debit is a financial transaction in which you withdraws funds from a bank account.

☐ PayNearMe
With PayNearMe, you can now buy online and make payments with cash at more than 8,200 stores nationwide

☐ PayPal
Pay with PayPal, it is fast and easy and keeps your credit card information secret.

If you have a credit card with payment characteristics recorded in the system, it will be used by default. You can also enter the information for your credit card to make a payment. Change the amount if needed and click the **Pay Now** button to proceed.

Account Self-Care Portal

Balance: 2.35 USD

Web Interface Language: en - English 12457000911 (Login: 12457000911) Logout

Dashboard My Profile IP Centrex Billing Information

Make a Payment

Summary Subscriptions Transactions Volume Discounts Recharge Using Voucher Mobile Payment Transfer

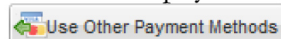
Now your balance is 2.35 USD

Amount: 10 USD (1.00 USD minimum)

☒ Credit or Debit Card
Pay with your credit or debit card.

Card Number: Address: Cardholder Name: William City: Start Date: mm / YYYY Postal code: Expiration Date: mm / YYYY Country: Please select a country CVV: What is this? State: Please select a state Issue No.: Phone: Save this information for future use. Pay Now

Alternative payment methods can be used by clicking the



Use Other Payment Methods icon. The **Preferred Payment Method** drop-down menu contains a list of available payment methods.

The list of currently supported payment methods is the following:

- **Credit or Debit Cards** – allows you to pay using your credit or debit card;
- **Bank account (eCheck)** – allows you to pay from your eCheck bank account;
- **Direct Debit NL** – allows you to perform financial transaction in which you withdraw funds from a bank account;
- **PayNearMe** – allows you to pay for services in cash at any 7-Eleven or ACE Cash Express store across the United States. You need to submit your email to receive the PayNearMe payment slip

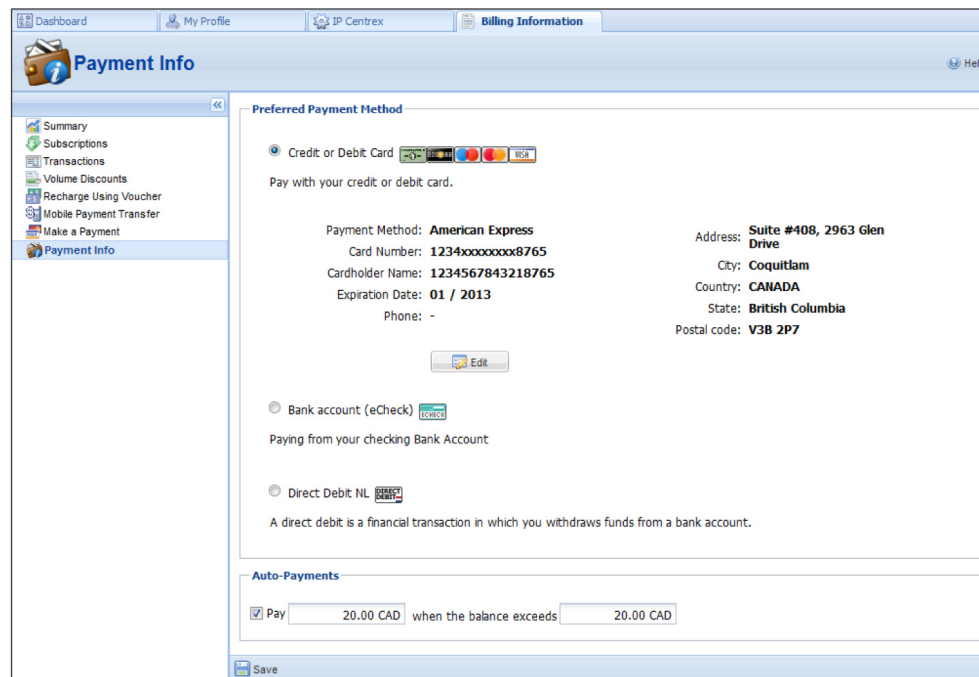
via email – and then print it. The payment slip contains a bar code to be scanned at a 7-Eleven or ACE Cash Express location. You pay cash to the store clerk, who then records the transaction – the payment information is immediately delivered to the service provider via the PayNearMe network. PortaBilling® records the transaction and updates your balance so you can immediately start using the service.

You 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.

Payment Info

This screen is available only if this functionality is enabled by your provider. This screen allows you to set up the following parameters for automated periodic payments.



The screenshot shows the 'Payment Info' web interface. At the top, there's a navigation bar with 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. Below this, the 'Payment Info' section is active. On the left, a sidebar lists options: Summary, Subscriptions, Transactions, Volume Discounts, Recharge Using Voucher, Mobile Payment Transfer, Make a Payment, and Payment Info. The main content area is titled 'Preferred Payment Method'. It has three radio button options: 'Credit or Debit Card' (selected), 'Bank account (eCheck)', and 'Direct Debit NL'. The 'Credit or Debit Card' section shows details for an American Express card: Card Number: 1234xxxxxxx8765, Cardholder Name: 1234567843218765, Expiration Date: 01 / 2013, and Phone: -. To the right, the address is listed: Suite #408, 2963 Glen Drive, Coquitlam, CANADA, British Columbia, V3B 2P7. There is an 'Edit' button below the card details. The 'Auto-Payments' section at the bottom has a checked 'Pay' checkbox, a field with '20.00 CAD', and a field with 'when the balance exceeds 20.00 CAD'. A 'Save' button is at the bottom left.

In the **Preferred Payment Method** block you can choose which type of payment method to use.

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

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 Period Wizard is intuitive and lets you configure multiple time intervals from a single page in just a few mouse clicks. The following example illustrates the process of creating a period within the Monday-Friday workweek that starts at 8pm and lasts until 8am the next morning:

1. On the **Period Wizard** page, select **20:00** in the **Start Time** box and **08:00** in the **End Time** box. In the block containing days of the week select *Monday, Tuesday, Wednesday, Thursday, Friday*. In the block containing months click the **Select All Months** button. Then click the **Include New Period** button and this time period will appear in the **Time Periods** window on the right side of the page.

The screenshot displays the 'Account Self-Care Portal' interface. At the top, it shows the user's balance (0.00 USD), language (en - English), and login information (160404373452). The main navigation bar includes 'Dashboard', 'My Profile', 'IP Centrex', and 'Billing Information'. The 'General' section is active, showing a sidebar with various settings like 'External Numbers', 'Incoming Calls', 'Forwarding', 'Calls Screening', 'Call Recording', 'Voicemail', 'Call Barring', 'Favorite Numbers', 'Identity', 'Music On Hold', and 'Emergency Calls'. The 'Forwarding' section is expanded, showing the 'Period Wizard' configuration. The 'Start Time' is set to 20:00 and the 'End Time' is set to 08:00. The 'Day of the Month' field is empty, with an example '1, 3, 7, 14-23' provided. Below this, there are two columns of checkboxes for days of the week and months. The 'Select All Months' button is highlighted. The 'Include New Period' button is visible. The 'Time Periods' window on the right shows 'There is no data to display'. At the bottom, there are 'Finish' and 'Cancel' buttons.

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

Account Self-Care Portal

Balance: 0.00 USD Web Interface Language: en - English 160404373452 (Login: 160404373452) Logout

Dashboard My Profile IP Centrex Billing Information

General

- General
- External Numbers
- Incoming Calls
- Forwarding**
- Calls Screening
- Call Recording
- Voicemail
- Call Barring
- Favorite Numbers
- Identity
- Music On Hold
- Emergency Calls

Start Time: 20 : 00
End Time: 08 : 00
Day of the Month:
Example: 1, 3, 7, 14-23

Select All Days Select All Months

☐ Sunday ☒ January
☒ Monday ☒ February
☒ Tuesday ☒ March
☒ Wednesday ☒ April
☒ Thursday ☒ May
☒ Friday ☒ June
☐ Saturday ☒ July
☒ August
☒ September
☒ October
☒ November
☒ December

Include New Period

Time Periods
From 20:00 Till 08:00,
on Monday-Friday,
of January-December

Finish Cancel

Edit Forwarding

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

Account Self-Care Portal

Balance: 0.00 USD Web Interface Language: en - English 160404373452 (Login: 160404373452) Logout

Dashboard My Profile IP Centrex Billing Information

Edit Forwarding

- General
- External Numbers
- Incoming Calls
- Forwarding**
- Calls Screening
- Call Recording
- Voicemail
- Call Barring
- Favorite Numbers
- Identity
- Music On Hold
- Emergency Calls

Number: 160404373761 Description: Please define the description here...

Ring for: 60 seconds

Use this number

☐ Always
☒ Only at the following time interval

From 20:00 Till 08:00,
on Monday-Friday,
of January-December

Save Back

Edit Forwarding

Account Self-Care Portal

Balance: 0.00 USD Web Interface Language: en - English 160404373452 (Login: 160404373452) Logout

Dashboard My Profile IP Centrex Billing Information

Forwarding

General
External Numbers
Incoming Calls
Forwarding
Calls Screening
Call Recording
Voicemail
Call Barring
Favorite Numbers
Identity
Music On Hold
Emergency Calls

Currently you are using **Order** forward ring strategy.
There are **no numbers** which will be used in the ring group.
When **your number** is called and the call is **not answered** on your IP phone in **31** seconds,
then **forward** the call to :

Edit	Order	Number	Description	Forward Settings	Delete
		160404373761	forwarding to home number	Time restrictions: From 20:00 Till 08:00, on Monday-Friday, of January-December Ring for: 60 sec	X

Add New Number Save Order

... transfer funds to mobile numbers?

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

Account Self-Care Portal

Balance: 55.00 USD Web Interface Language: en - English 12065551234 (login: 12065551234) Logout

Dashboard My Profile IP Centrex Billing Information

Mobile Payment Transfer

Summary
Subscriptions
Transactions
Volume Discounts
Recharge Using Voucher
Mobile Payment Transfer

Transfer To Number 628123456770 Get Info

Country -
Operator -

Amount To Transfer

Transfer

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

Account Self-Care Portal

Balance: 55.00 USD Web Interface Language: en - English 12065551234 (login: 12065551234) Logout

Dashboard My Profile IP Centrex **Billing Information**

Mobile Payment Transfer

[Summary](#)
[Subscriptions](#)
[Transactions](#)
[Volume Discounts](#)
[Recharge Using Voucher](#)
[Mobile Payment Transfer](#)

Transfer To Number: 628123456770 [Get Info](#)

Country: Indonesia

Operator: Telkomsel - Indonesia

USD	IDR
5.00000	50000
Amount To Transfer	
10.00000	100000


[Transfer](#)

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.