Training Guide to Provision and Manage Services Using

Vertical Telecom Softswitch

September 2013

Table of Contents

Introduction-

This guide updates the previous version done for PortaOne MR 22.5. It's purpose is to give you an understanding of the functional areas within your administrative portal so that you can learn how to manage your VoIP services and customers who use those services with minimal effort. As with anything, practice and repetition is the best teacher. This guide and our staff will help you along that path.

Until your own domains are set up, you can access your admin portal using our secure domain.

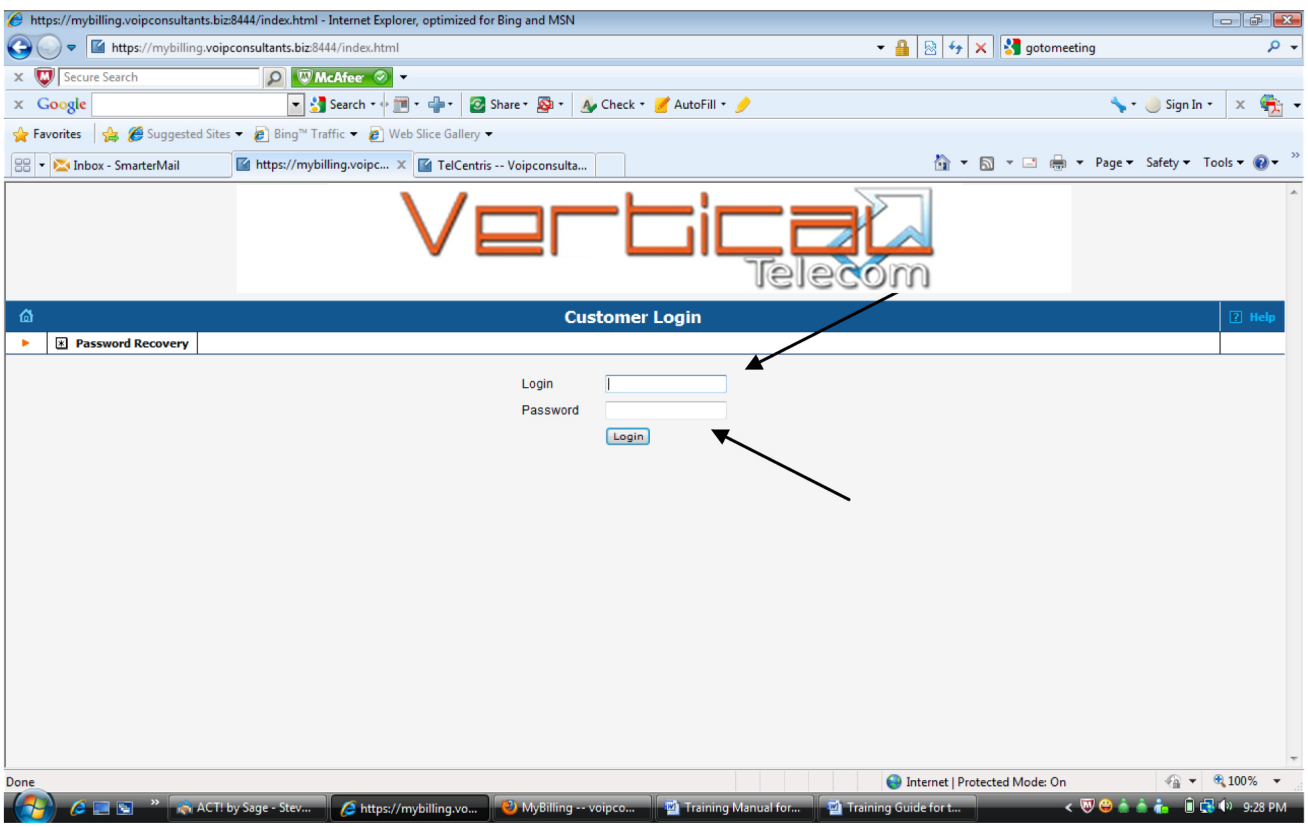


Fig. 1

Fig. 2

1. **Getting Started**.
   Figure 2 shows you what the home page looks like. In your portal you will notice there are two toolbars across the top of the page. One is blue, the other white. From your home page, look to the left and you will see many icons that reside in the blue toolbar. Those icons are the same ones you are viewing on the home page. They can be used to quickly navigate from one area to another. Therefore, blue toolbar = navigation from one functional area to another. The white toolbar will be used to help you edit and save changes. Therefore, white toolbar = editing. PortaOne portals are laid out using a tabular design. When you are in a area adding information you will always see a series of tabs. Each tab has a purpose in terms of information to be added. The tab you are working in has a white background with black letters, while the other tabs remain light blue with dark blue letters. Let's begin by going to the link that says 'Customer Info'. Click on it. When the page opens you can see several tabs of information (Fig. 3). You are on the Address Info tab.

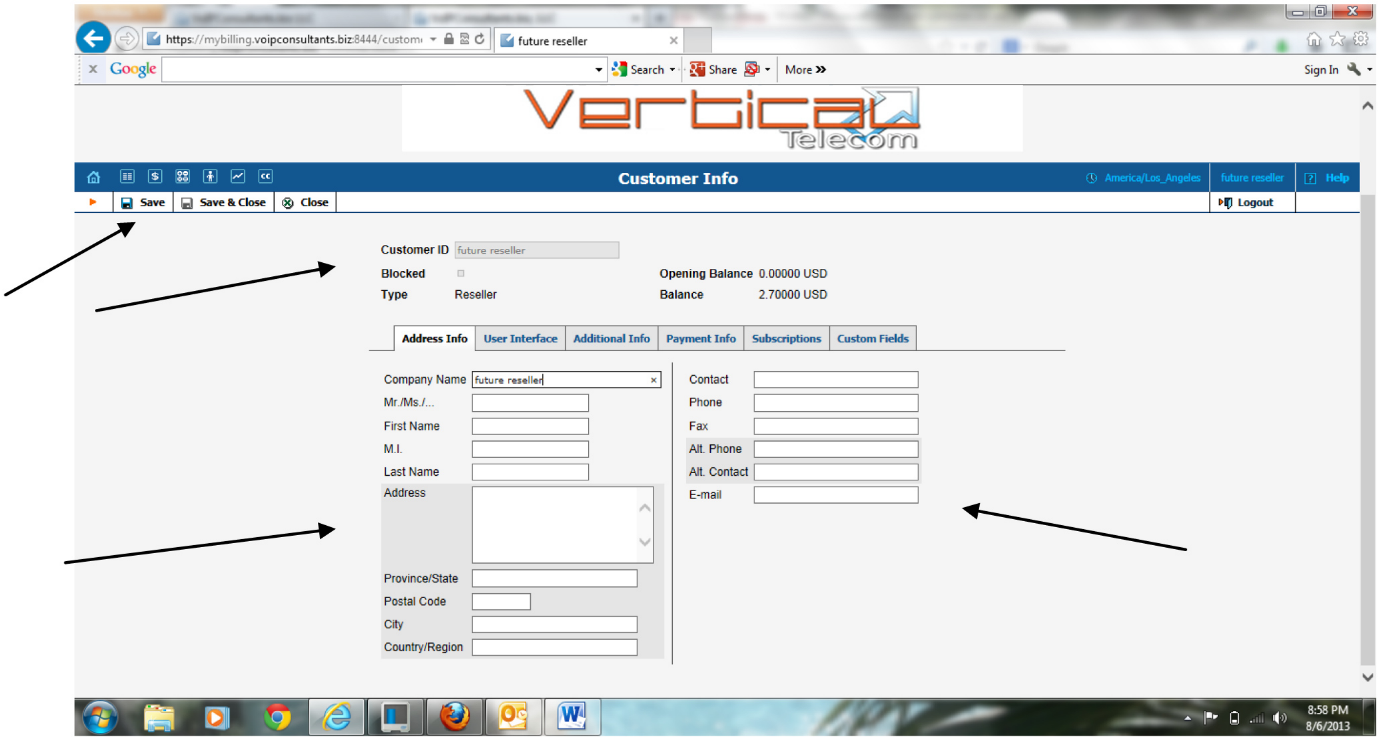


Fig. 3

You can tell you are on the Address Info tab because it's background color is white with black letters and the other tabs are light blue background and dark blue letters. So in the Address Info tab make sure your company name and address are loaded and correct. Also make sure your email address is already loaded. Whenever we post a payment or send a notice to you, it will be sent to that email address. Click 'save' when done. To save information you have added go to the white toolbar, find 'save' and click on it. The white toolbar has the commands that allow information or changes you make to information to be saved. When you have finished you can return to the home page by clicking on the icon in the blue toolbar that resembles a house. Now you should be back at the home page.

Fig. 4

Let's go to another area. Find the icon that looks like a $ sign and look for 'Payments'. Click on the word 'Payments'. The payments tab is where you set up your credit card processor. To add your merchant it must be one from our list of integrated API. Linkpoint/FirstData and Authorize.net are the two most popular choices. To add a merchant click on the 'Add' button in the white toolbar. When you do the row will open (Fig. 5). In the column called 'name' give your processor a name. In the next column called 'processor' access the pull-down menu and find your processor (Note: Linkpoint/First Data must be set up using the older Virtual Terminal service offered by First Data. We do not support Global Gateway at this time). Under the 'login' column enter the user name your processor gave you. The same goes for the password column. Select the credit cards, check test mode and check the box to take recurring payments. Look it over and then click on 'save'. (Note: we also offer PayPal as an option. If you provide us with your PayPal information we can set that up on the customer portal. This option only exists for your customers. We do not accept PayPal as a method of payment for our services.

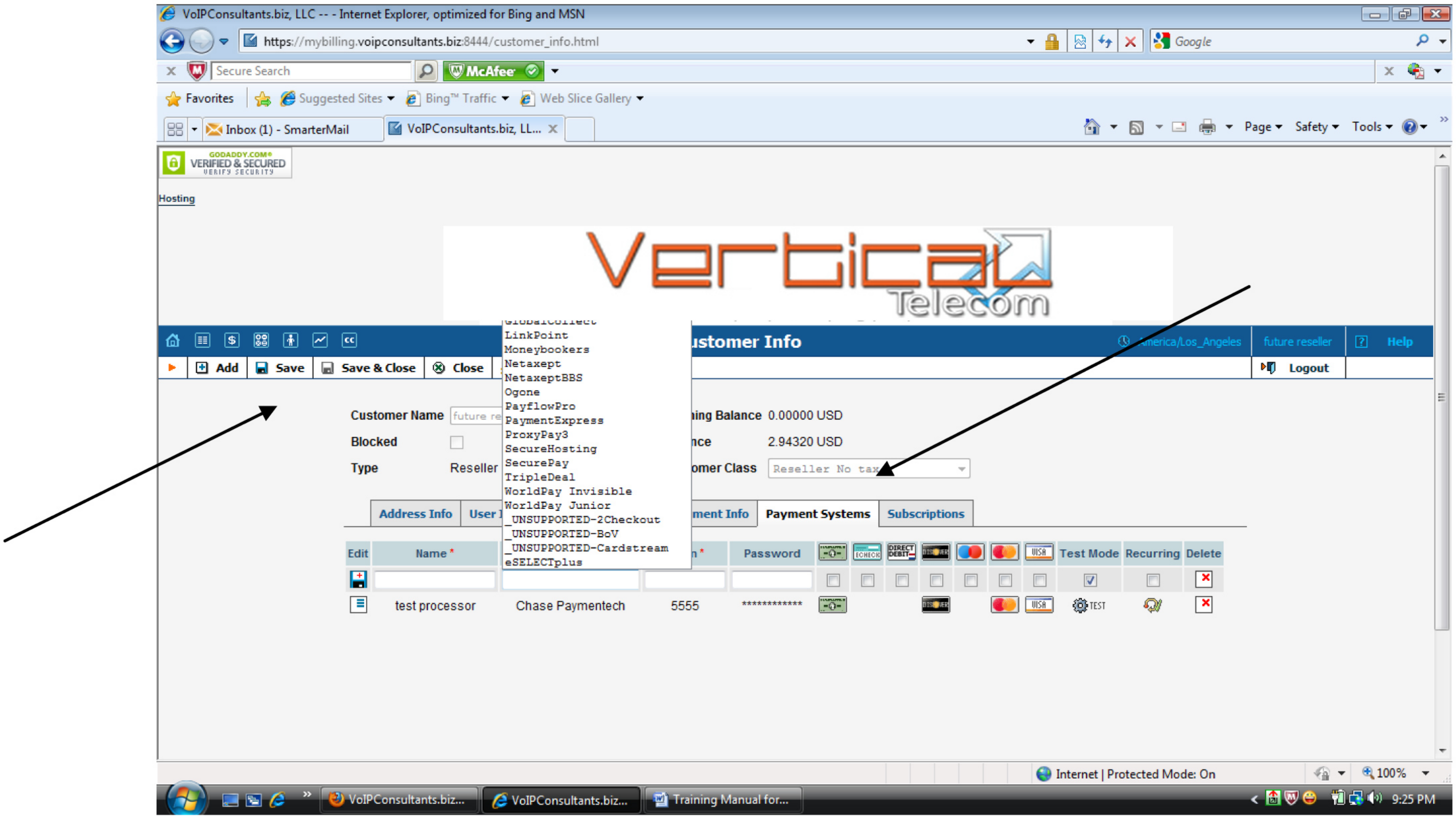


Fig. 5

Remember, when you add and want to save information you will rely on the white tool bar. The white tool bar is where the command buttons reside. These command buttons allow you to do things like add, save, save and close and close. Click 'add' when you need to add new information. Other times you will click on the edit icon column to open a line of data that needs to be added or updated. Otherwise you can simply type the information in the tab you are working on and then click 'save' to save that information. I prefer to use save and then separately close the tab when I'm done because it allows me to make sure my changes were saved correctly. Clicking 'save and close' will save the information and then go back to the page you were at previously. Test. It looks like Fig. 6.

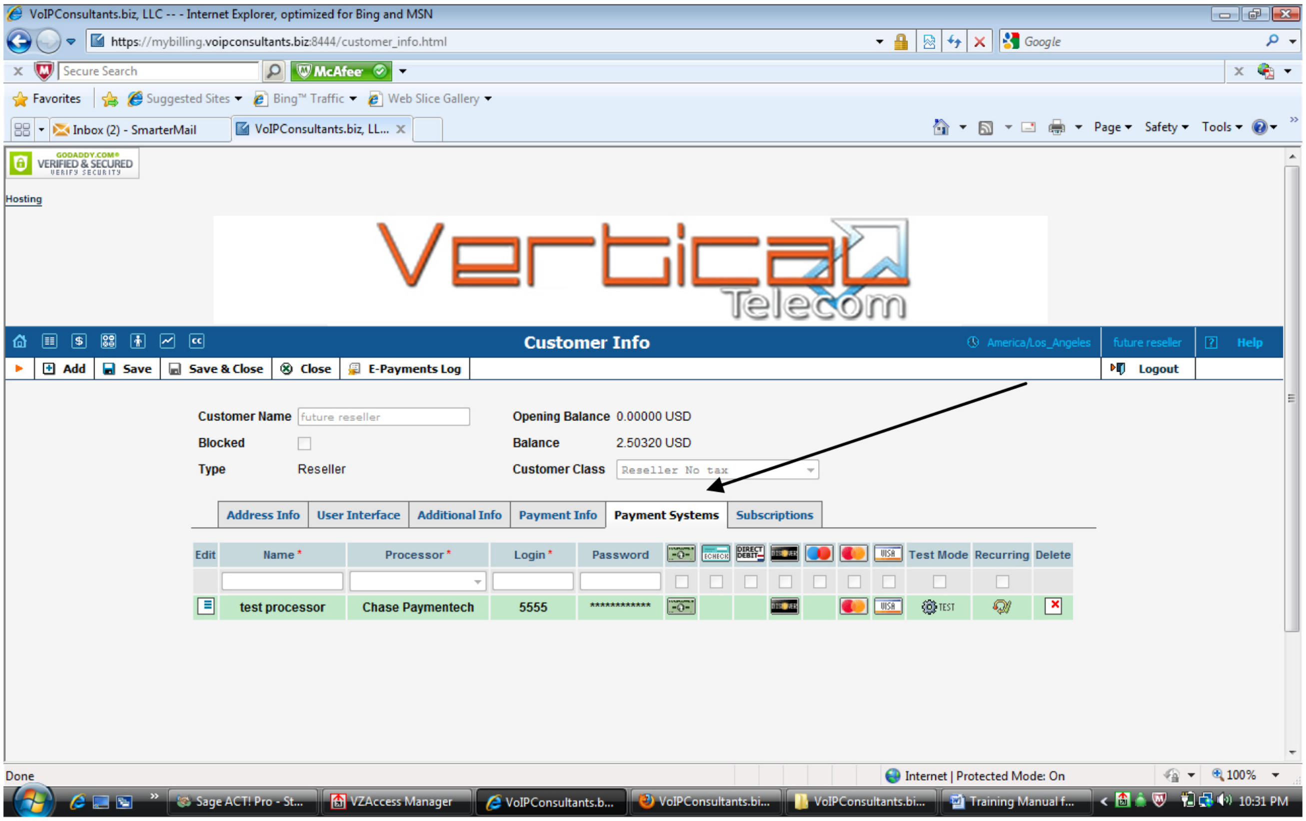


Fig. 6

To complete the merchant set up we need to do one more thing. We need to assign a currency to it. To add a currency go to the home page. Go to the area where the $ icon is located. Select and click on ‘Currencies’. All US based companies will use USD or US dollars. Click on edit icon and you can use the pull down menu to assign the name you gave your processor in the preceding step, along with the minimum payment you will accept from your customers. Then click ‘save’. It will look like Fig. 7 when done.

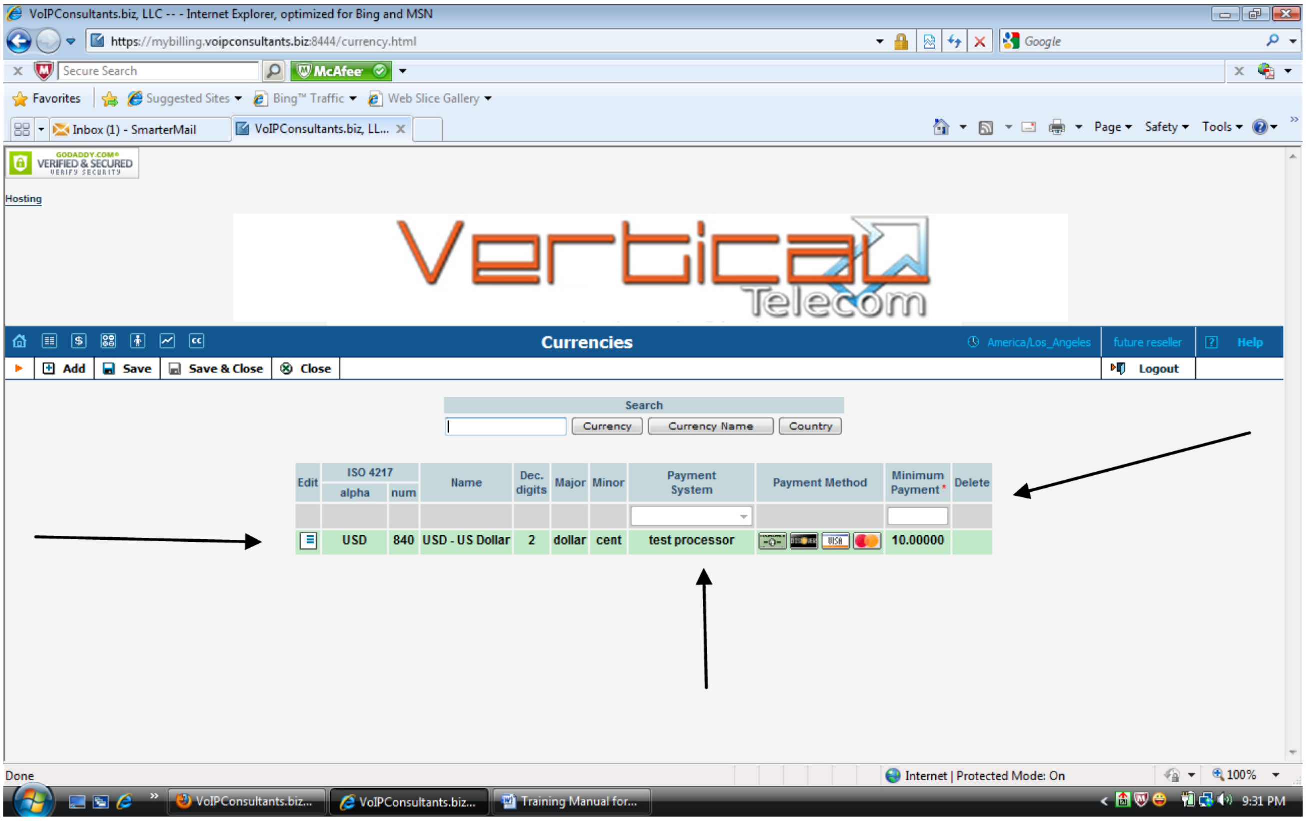


Fig. 7

Head back to the home page by clicking on the icon that looks like a house in the blue toolbar. It's on the far left-hand side. From the home page let's check out another feature that you will use a lot. In that same section where the $ icon is, click on the 'Purchase DID' link. This is one of our signature features we offer our resellers. Purchase DID allows you to access our DID provider in real time to order NEW DID inventory. When you order from this portal, each DID is activated and put into your inventory in minutes. To use this feature requires you know the exact rate center in the state you want to order DID. To find the rate center, you can open a browser and go to;

http://www.localcallingguide.com/lca_prefix.php

You can input the area code and prefix of the rate center to learn the name of the rate center. (Fig.8).The result in Fig. 9 identifies the rate center and now you can use this to order in the DID purchase portal.

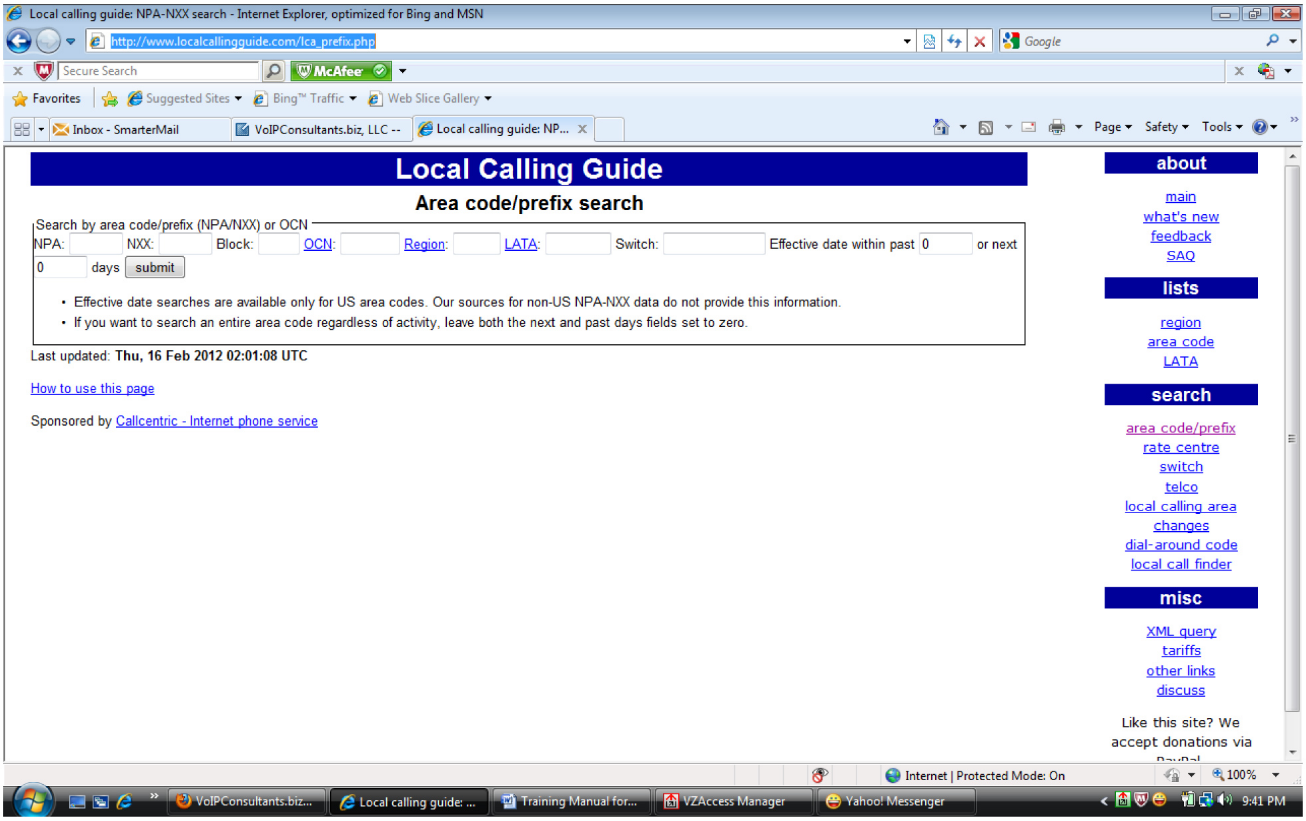
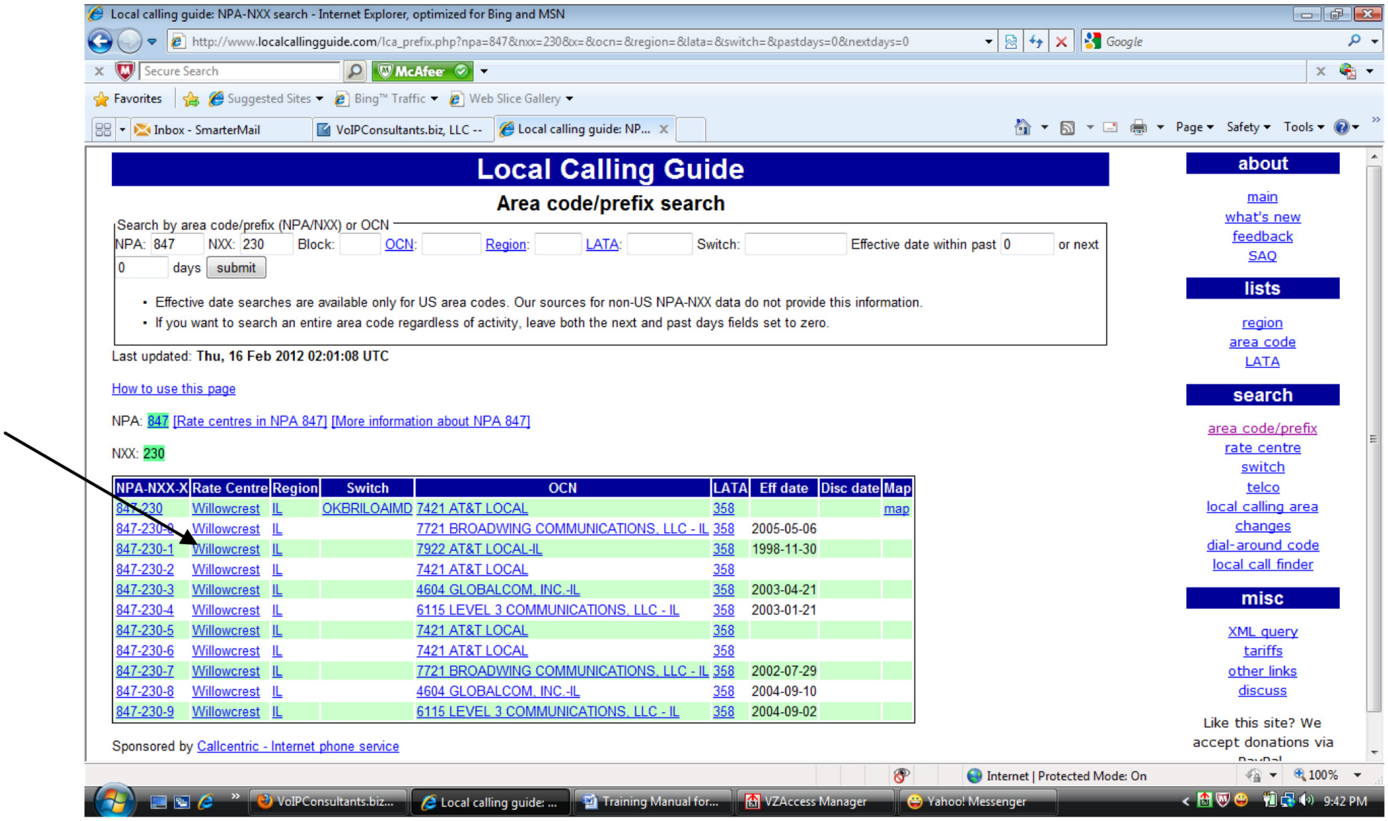

Local calling guide: NPA-NXX search - Internet Explorer, optimized for Bing and MSN
http://www.localcallingguide.com/lca_prefix.php
Local Calling Guide
Area code/prefix search
Search by area code/prefix (NPA/NXX) or OCN
NPA: NXX: Block: OCN: Region: LATA: Switch: Effective date within past 0 or next 0 days submit
• Effective date searches are available only for US area codes. Our sources for non-US NPA-NXX data do not provide this information.
• If you want to search an entire area code regardless of activity, leave both the next and past days fields set to zero.
Last updated: Thu, 16 Feb 2012 02:01:08 UTC
How to use this page
Sponsored by Callcentric - Internet phone service
about
main
what's new
feedback
SAQ
lists
region
area code
LATA
search
area code/prefix
rate centre
switch
telco
local calling area
changes
dial-around code
local call finder
misc
XML query
tariffs
other links
discuss
Like this site? We accept donations via
Internet | Protected Mode: On
100%
VoIPConsultants.biz...
Local calling guide: ...
Training Manual for...
VZAccess Manager
Yahoo! Messenger
9:41 PM

Fig. 8



Local calling guide: NPA-NXX search - Internet Explorer, optimized for Bing and MSN

http://www.localcallingguide.com/lca_prefix.php?npa=847&nxx=230&x=&ocn=&region=&lata=&switch=&pastdays=0&nextdays=0

Local Calling Guide

Area code/prefix search

Search by area code/prefix (NPA/NXX) or OCN

NPA: 847 NXX: 230 Block: OCN: Region: LATA: Switch: Effective date within past 0 or next 0 days submit

- Effective date searches are available only for US area codes. Our sources for non-US NPA-NXX data do not provide this information.
- If you want to search an entire area code regardless of activity, leave both the next and past days fields set to zero.

Last updated: **Thu, 16 Feb 2012 02:01:08 UTC**

How to use this page

NPA: 847 [Rate centres in NPA 847] [More information about NPA 847]

NXX: 230

NPA-NXX-X	Rate Centre	Region	Switch	OCN	LATA	Eff date	Disc date	Map
847-230	Willowcrest	IL	OKBRILOAIMD	7421 AT&T LOCAL	358			map
847-230-0	Willowcrest	IL		7721 BROADWING COMMUNICATIONS, LLC - IL	358	2005-05-06		
847-230-1	Willowcrest	IL		7922 AT&T LOCAL-IL	358	1998-11-30		
847-230-2	Willowcrest	IL		7421 AT&T LOCAL	358			
847-230-3	Willowcrest	IL		4604 GLOBALCOM, INC.-IL	358	2003-04-21		
847-230-4	Willowcrest	IL		6115 LEVEL 3 COMMUNICATIONS, LLC - IL	358	2003-01-21		
847-230-5	Willowcrest	IL		7421 AT&T LOCAL	358			
847-230-6	Willowcrest	IL		7421 AT&T LOCAL	358			
847-230-7	Willowcrest	IL		7721 BROADWING COMMUNICATIONS, LLC - IL	358	2002-07-29		
847-230-8	Willowcrest	IL		4604 GLOBALCOM, INC.-IL	358	2004-09-10		
847-230-9	Willowcrest	IL		6115 LEVEL 3 COMMUNICATIONS, LLC - IL	358	2004-09-02		

Sponsored by Callcentric - Internet phone service

about: main, what's new, feedback, SAQ

lists: region, area code, LATA

search: area code/prefix, rate centre, switch, telco, local calling area, changes, dial-around code, local call finder

misc: XML query, tariffs, other links, discuss

Like this site? We accept donations via

Fig. 9

Fig. 10

Now go back to the Purchase DID portal (Fig. 10) and select the state where you want to buy your DID using the pull down menu. In this example select Illinois and click on the search button. Next the pull down menu reveals all the available rate centers that have DID available in Illinois. Let's say you want the Roselle rate center. From the pull down menu scroll until you see Roselle and click the search button. The screen changes to reveal all DID in the rate center. Find the one(s) you wish to get, check the box next to each DID and when you are ready, click 'order DID' (Fig. 11). WARNING: when you order a DID you agree to pay the activation fee associated with ordering the number. **If you have any questions or doubts on how to use this feature, call us first!**

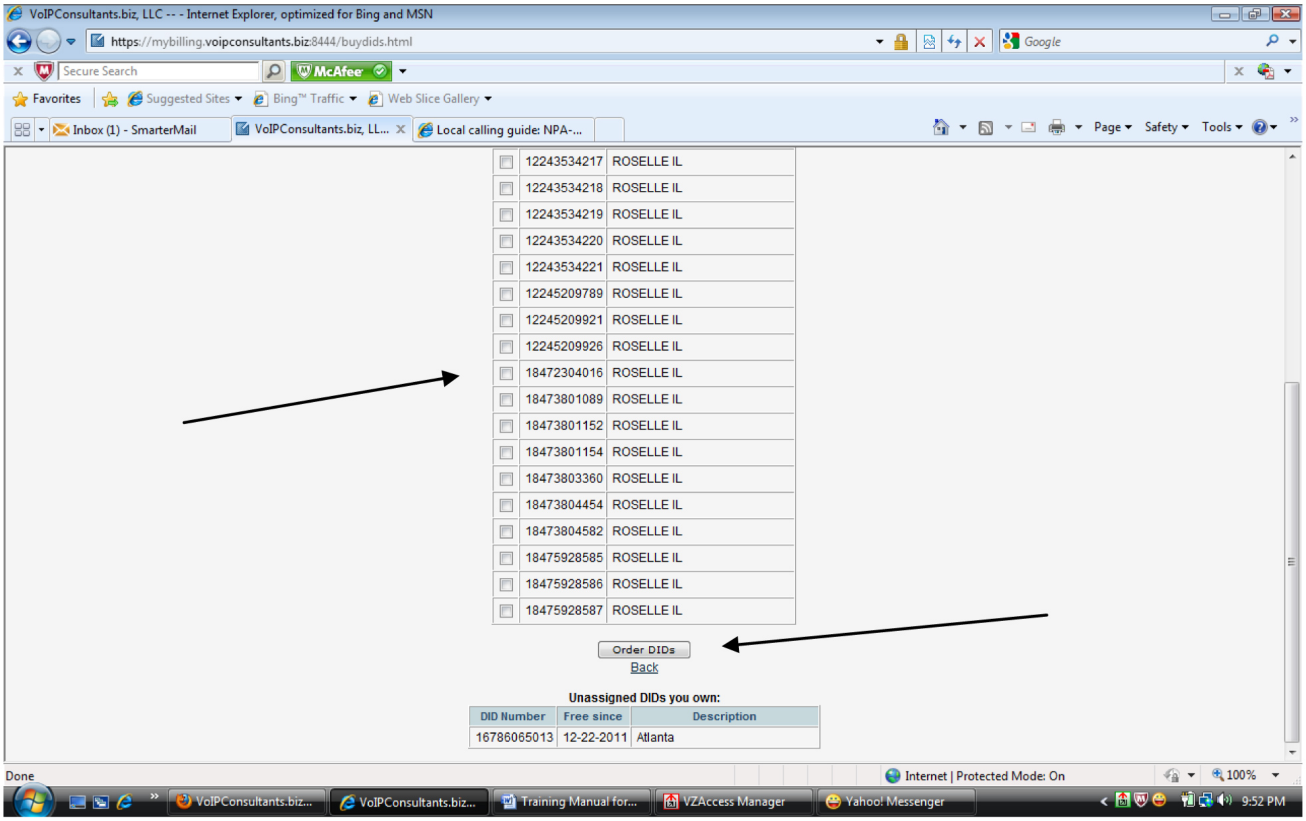


Fig. 11

Okay, so much for the basics. Now we are ready to set up customers. Go back to the home page.

2. **Setting up customers**.
When you set up customers and accounts you need to remember that our PortaOne network is a rules-based network. To process your customers calls and use the features the network provides will be based on the rules you set up for your customers during the steps we are about to take. The first step is to create a customer record. The customer record allows you to program rules and features that apply to every account the customer has in use. Rules that govern how a customer will dial a phone number, access voicemail, creating extensions, hunt groups, setting billing periods and more. After we complete programming the customer record, we will create the actual accounts. Accounts allow a person with a device (IP phone, ATA, soft phone, IP-PBX) to make and receive calls as well as enjoy the

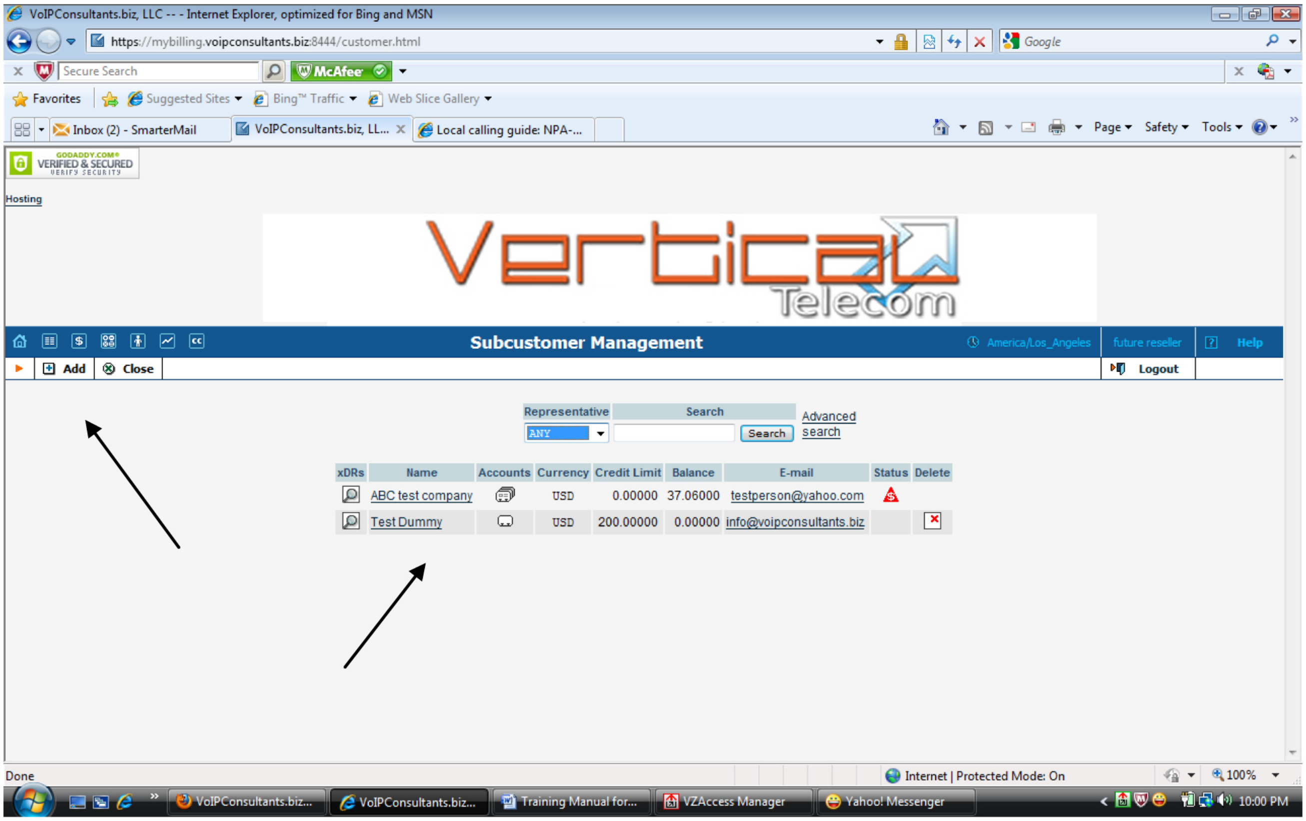


Fig. 12

features available to them. Accounts are also used to set up ring groups and auto attendants. Think of accounts as the users and enablers of service and the customer as setting the general rules of how accounts use the service. Accounts belong to customers.

To create a customer record click on ‘Subcustomers’ from your home page. If you already have customers, you will see them listed as you do in Fig. 12. If there are none the screen will be blank. Click on the ‘add’ button in the white toolbar (remember we are now editing/creating information). A new template screen opens (Fig. 13).

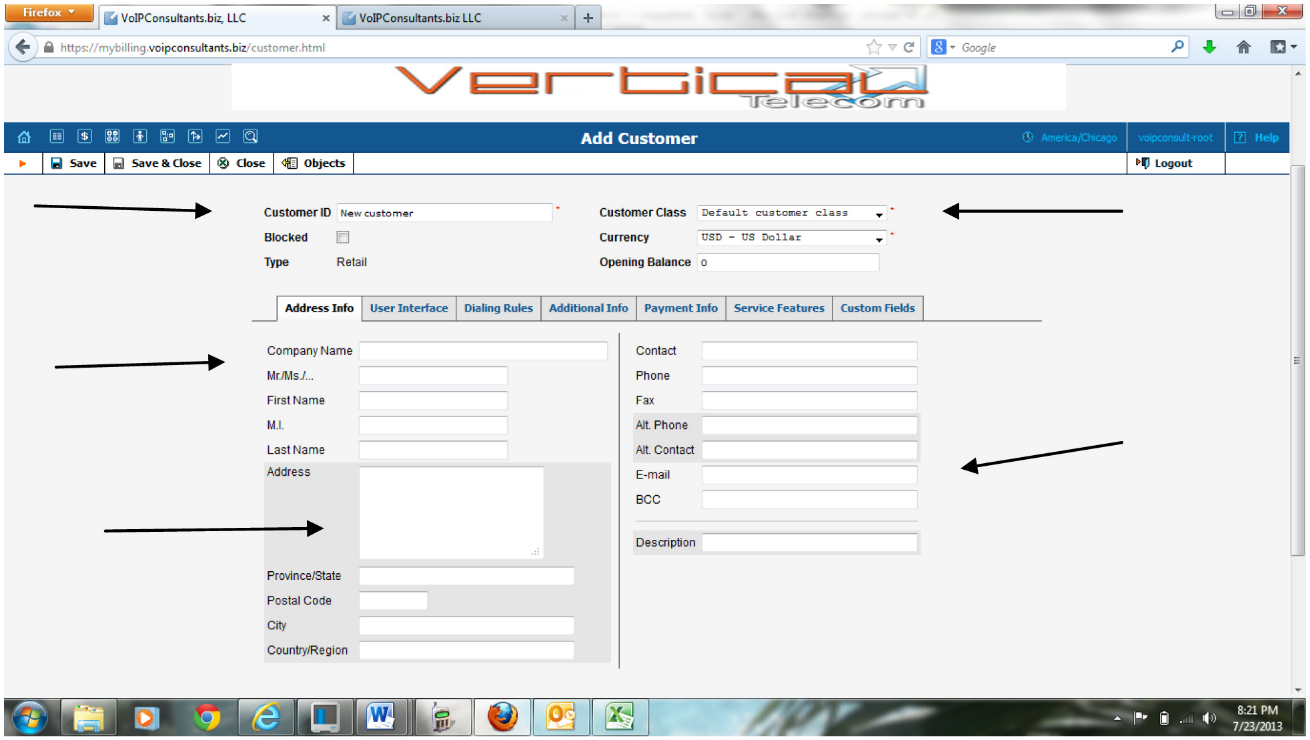


Fig. 13

In this area add the customer's name, address and other contact information. Note that the address window is oversized. That is where you put the entire address for the customer (street address, city, state, zip). You do this because if you use our invoice, the billing system takes the information in this field and puts it on the invoice. Be sure to populate the email address of the administrator for the customer. This email is critical to sending communications from your network to your customer for things like credit limit warnings and payments posting to their account. (WARNING: Do not select 'blocked' unless you want to block service to your customer and all their accounts!)

The next tab to program is called 'User Interface' (Fig. 14).

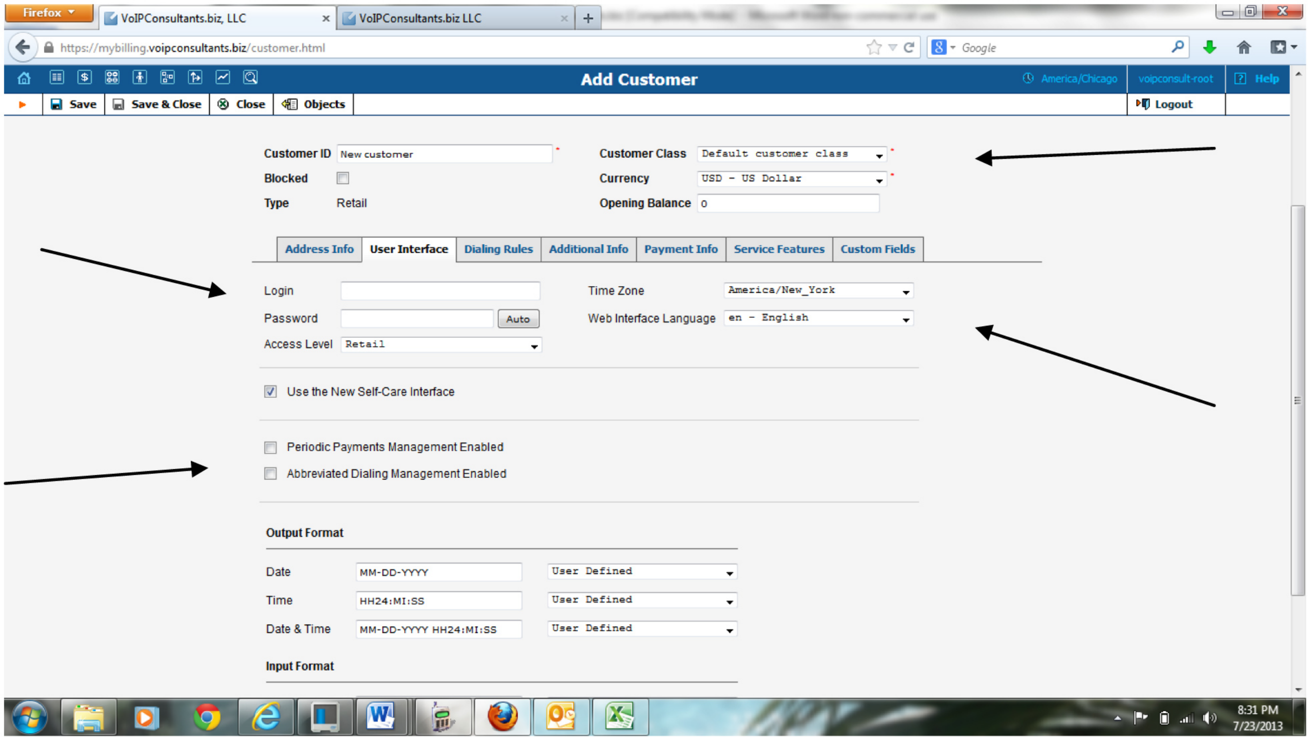


Fig. 14

This tab gives login credentials to your customer contact that wants to see all the accounts, change extensions and pay their bill. Check the boxes to use the new self-care interface, periodic payments and abbreviated dial. Periodic payments feature allows you to automatically take a payment from a customer when a certain level of usage is reached. Abbreviated dial allows you to set a 3 digit extension number that forwards to an external number like a cell phone.

Next up is the ‘Dialing Rules’ tab (Fig. 15).

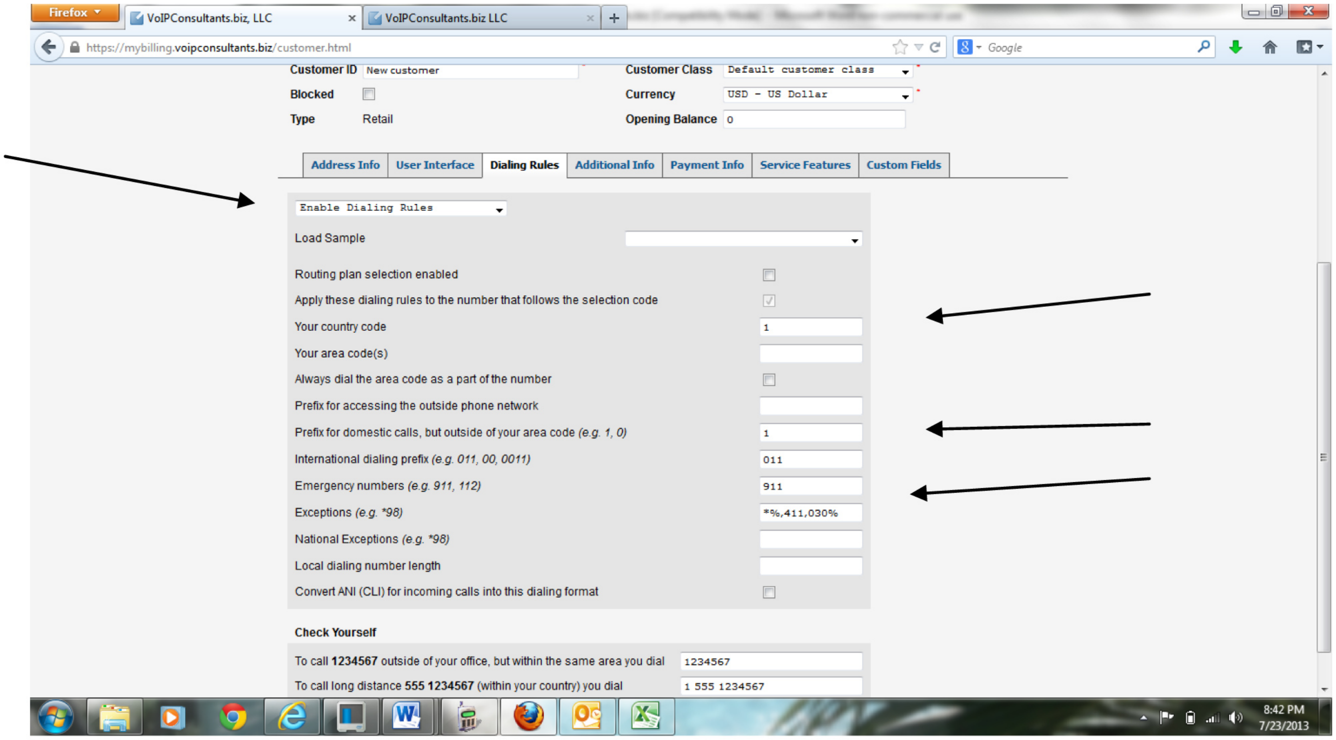


Fig. 15

The ‘Dialing Rules’ tab determines how the users (accounts) will dial to make a phone call. To begin, go to the pull-down menu that says ‘disable dialing rules’ and select ‘enable dialing rules’. Your country code for the USA is 1. Prefix for domestic calls, enter 1. Prefix for international calls, enter 011. Emergency numbers enter 911. Exceptions are meant to allow certain number combinations not found in your tariff. *98 for voicemail is one example, 030% allows the use of our internal numbering plan, 411 to dial information and *% is a wild card setting. Input all four and separate them with a comma, i.e., (*98, 030%, 411, *%). You may need to add more exceptions for some of the other features as well.

The ‘Additional Info’ tab (Fig. 16) is the next tab.

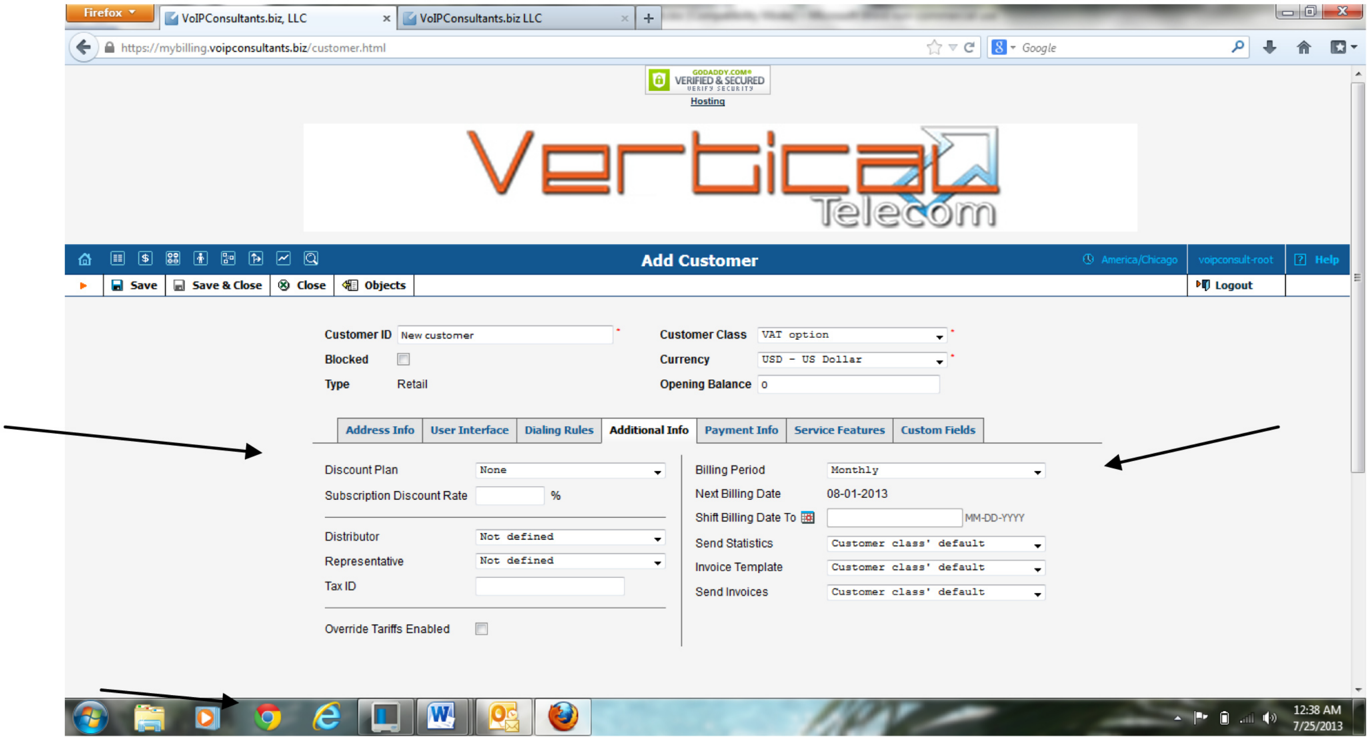


Fig. 16

The ‘Additional Info’ tab allows you to assign things like discount plans (discount plans) that can be used by every account. You also set the billing period in this area. Billing options are; daily, weekly, bi-weekly, monthly, monthly anniversary and 30 days. Daily billing is just as it sounds. Weekly billing sends a bill once a week on Monday. Bi-weekly bills every other week. Monthly bills on the 1st of the month. Monthly anniversary bills on the anniversary date you set up the customer. If you set up a customer using ‘monthly anniversary’ customers that are set up on the 29th or 30th of the month will be invoiced on the 28th of the month. If they are set up on the 31st, the billing will occur on the 1st. This is to account for February’s short month.

The next tab is the ‘Payment Info’ tab (Fig. 17).

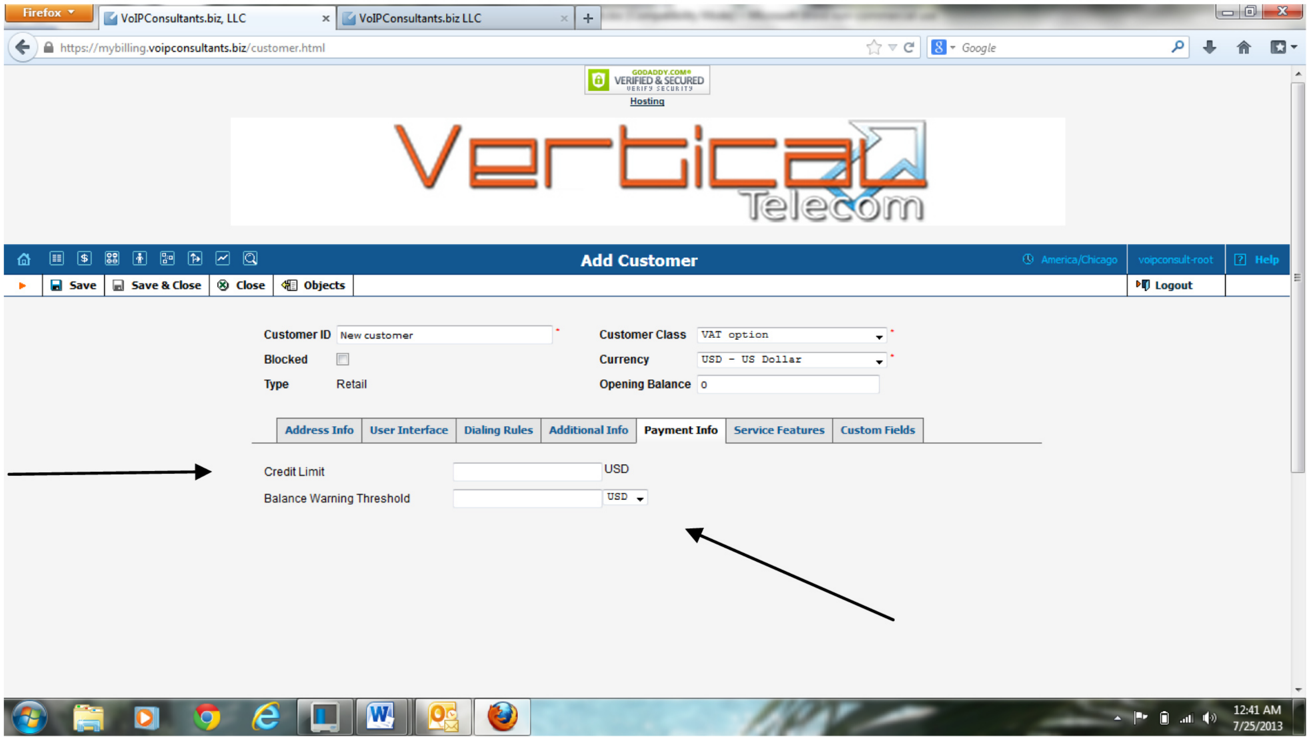


Fig. 17

The 'Payment Info' tab allows you to set up a credit limit for your customer and store credit card information if you have a merchant processor set up and the customer desires automatic billing.

A credit limit defines how much a customer can spend before you shut off service. Once they reach the limit, it suspends their service. The balance warning level is an amount less than the credit limit. Once that is reached, it will send an email to the key customer contact notifying them that their credit limit is about to be reached. Once you 'save' the settings you will come back to this screen if you want to enter customer credit card information. By doing so you can automatically bill the customers' credit card at the end of the billing period, or when a certain level of usage has been reached.

Next up is the 'Service Features' tab (Fig. 18).

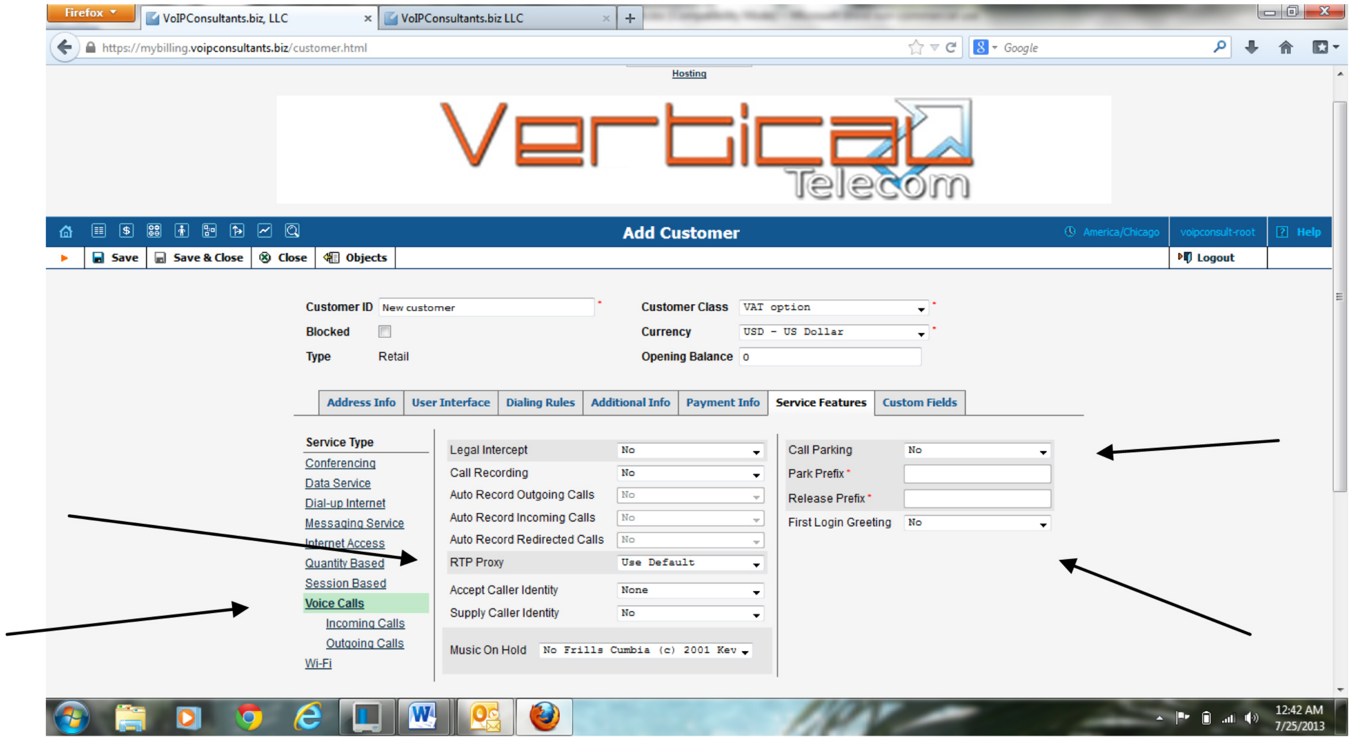


Fig. 18

The ‘Service Feature’ tab allows you to program features that all accounts will use. In the voice calls section (highlighted in green on the left-hand side), you need to set the RTP Proxy setting. This helps with firewall issues. To set the proxy, go to the pull down menu and select ‘On Nat’. Call Record is a feature that allows you to record incoming and outgoing calls. We recommend you do not make the selection here, as it will result in every account recording those conversations. Call Park is a feature that allows customers to take an active call and park it, so another user can pick up the call from another phone by entering a code number. To enable the feature, choose Yes from the Call Parking pull down menu. Create a 3 digit code to park and release. ‘111’ and ‘999’ are examples of codes to use. Be sure your codes do not conflict with your extension numbering plan. You will need to add both codes to the exceptions under the dialing rules tab.

Music on Hold is another feature customers like to use and should be set to yes. You need music on hold for many reasons; it plays during a call transfer and when you put somebody on hold. There is a default program already loaded. You can add your own music as long as the file is not

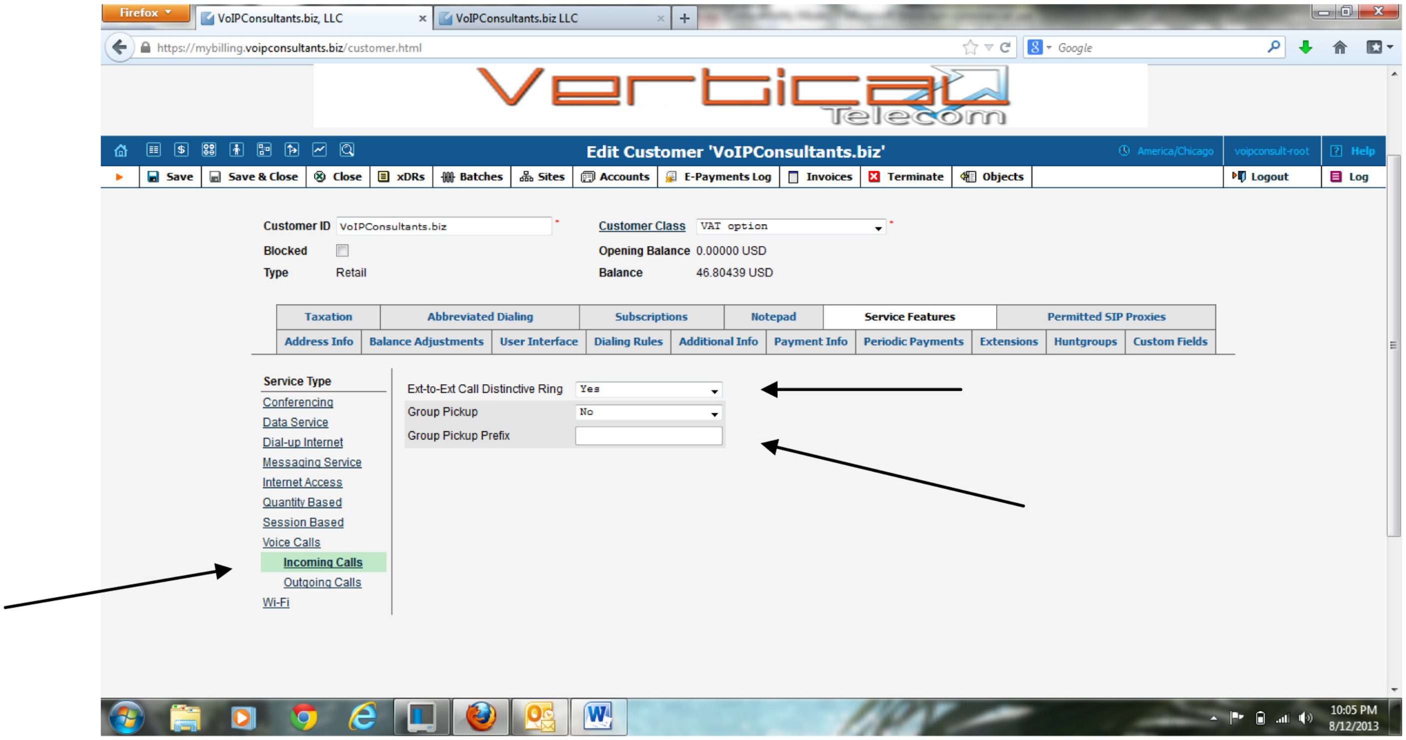


Fig. 19

larger than 5MB and is either a .wav or mp3 format. Click ‘save’ when done to keep your choices. Once the information is saved you will now see several more tabs. We will cover those momentarily.

Continuing under the service features tab, select ‘Incoming calls’ underneath ‘Voice Calls’ (Fig. 19). Group Pickup is a feature that allows any user to answer a call no matter what phone it’s ringing at. Select ‘Yes’ from the pull down menu and assign a 3 digit code to use the feature. Remember to add this code to the exceptions on dialing rules. Note that if more than 1 call is coming in at a time, the group pickup feature will grab the call that came in first. Click save.

Selecting Outgoing calls reveals other global features (Fig. 20).

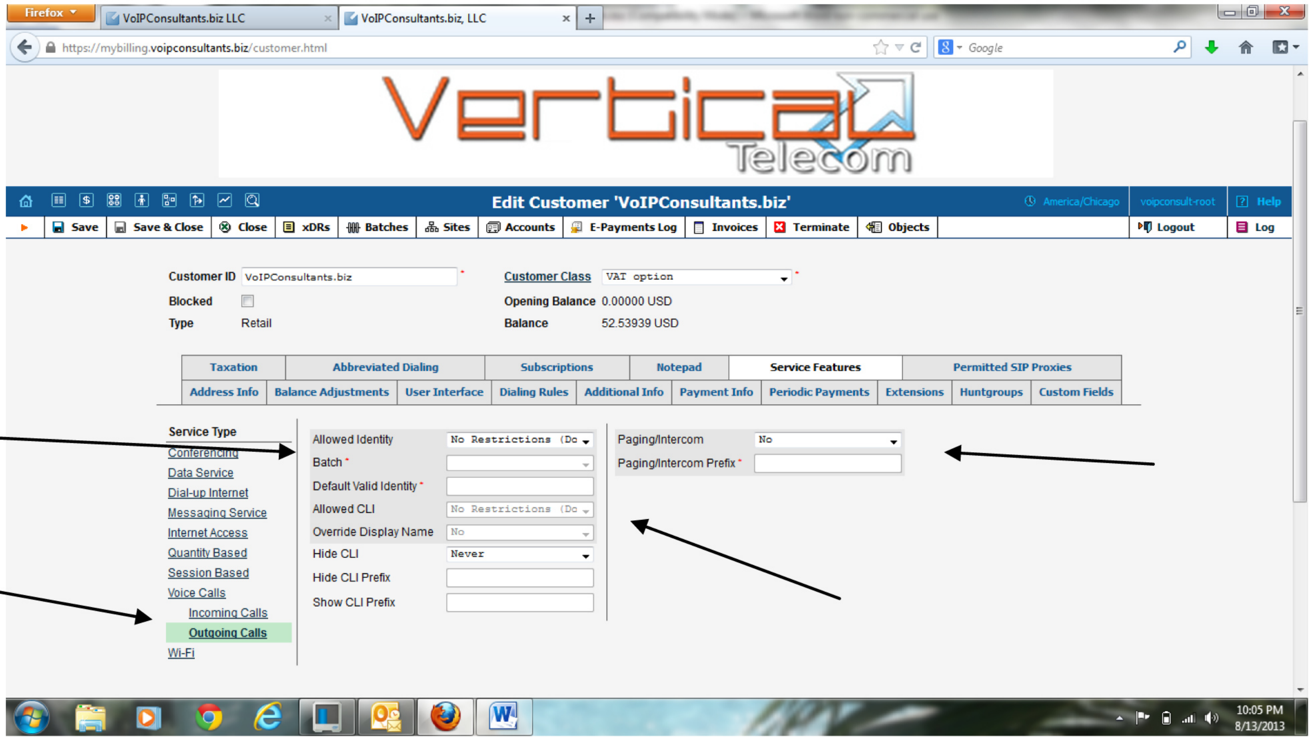


Fig. 20

You can set a default Caller ID for all accounts to broadcast when your accounts/users make calls. This is very important. The telephone number that has been programmed for 911 MUST be the Caller ID being sent by all phones. To set this select ‘specified number only’ from the Allowed CLI pull down menu. Enter the telephone number including 1 in the ‘default valid identity’. Next under the ‘allowed CLI’ menu choose ‘fix to identity’. If you want to limit the number of concurrent calls your customer can make you do so using the ‘limit simultaneous calls’ menu. Select ‘yes’. Then select the number of simultaneous calls. This is popular for our resellers who are selling SIP trunking service and are billing for a set number of trunks.

Another feature you may choose to program on this page is ‘paging/intercom’. This feature allows you to page an individual phone. It will not page all phones.

WARNING: limiting simultaneous calls applies to all outbound calls AND any forwarded calls. We do not recommend this feature be used in hosted PBX applications.

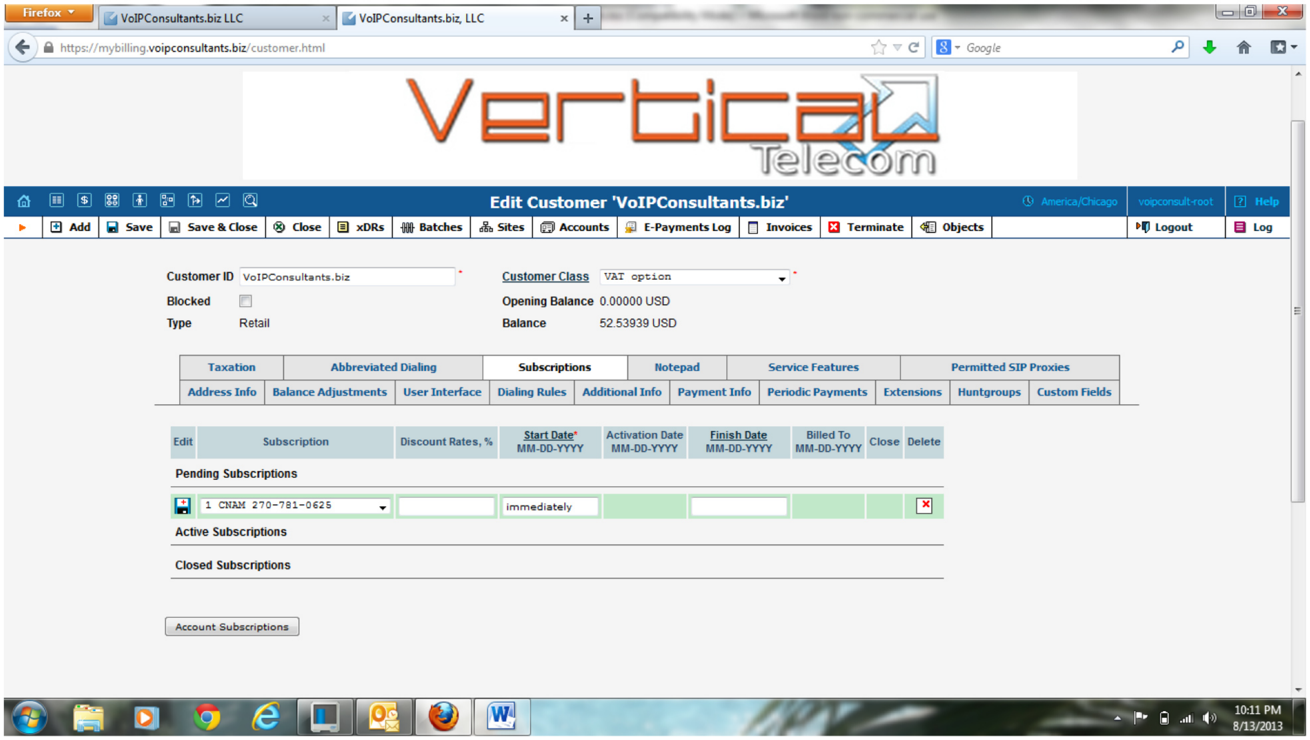


Fig. 21

The ‘Subscription” tab is next (Fig. 21). Sometimes you may want to charge a fee to your customer that is not included in the product used by the accounts. These are called subscriptions. To add a subscription to the customer click on the ‘add’ button in the white toolbar. Access the drop down menu and find your subscription. Then click on the icon in the ‘edit’ column to save it.

Now proceed to the ‘Abbreviated Dial’ tab.

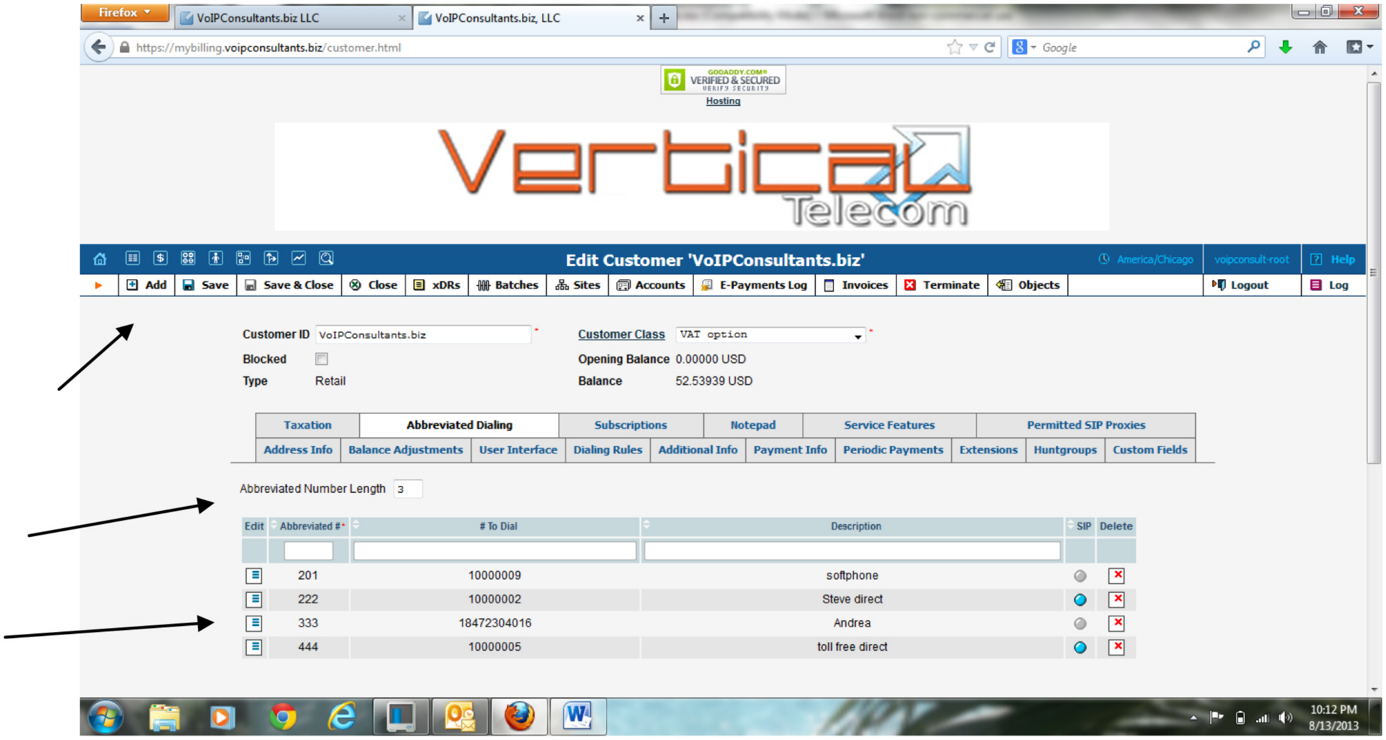


Fig. 22

The ‘Abbreviated Dial’ tab (Fig. 22) used to be where you created all extensions. With the upgrade to MR 24.8 its purpose is to create extensions for off net numbers. An example would be to create a 3 digit extension to call a cell phone. Begin by opening the tab. First define the length of digits in the Abbreviated Number Length box. Three is common. Click ‘save’. Now click add and a row opens. Put the desired extension number in the ‘abbreviated number’ column. In the ‘number to dial column’ put the off net telephone number. Be sure to use the format of 1+ area code + number. Click ‘save’ again. Test it by dialing the extension number from a phone.

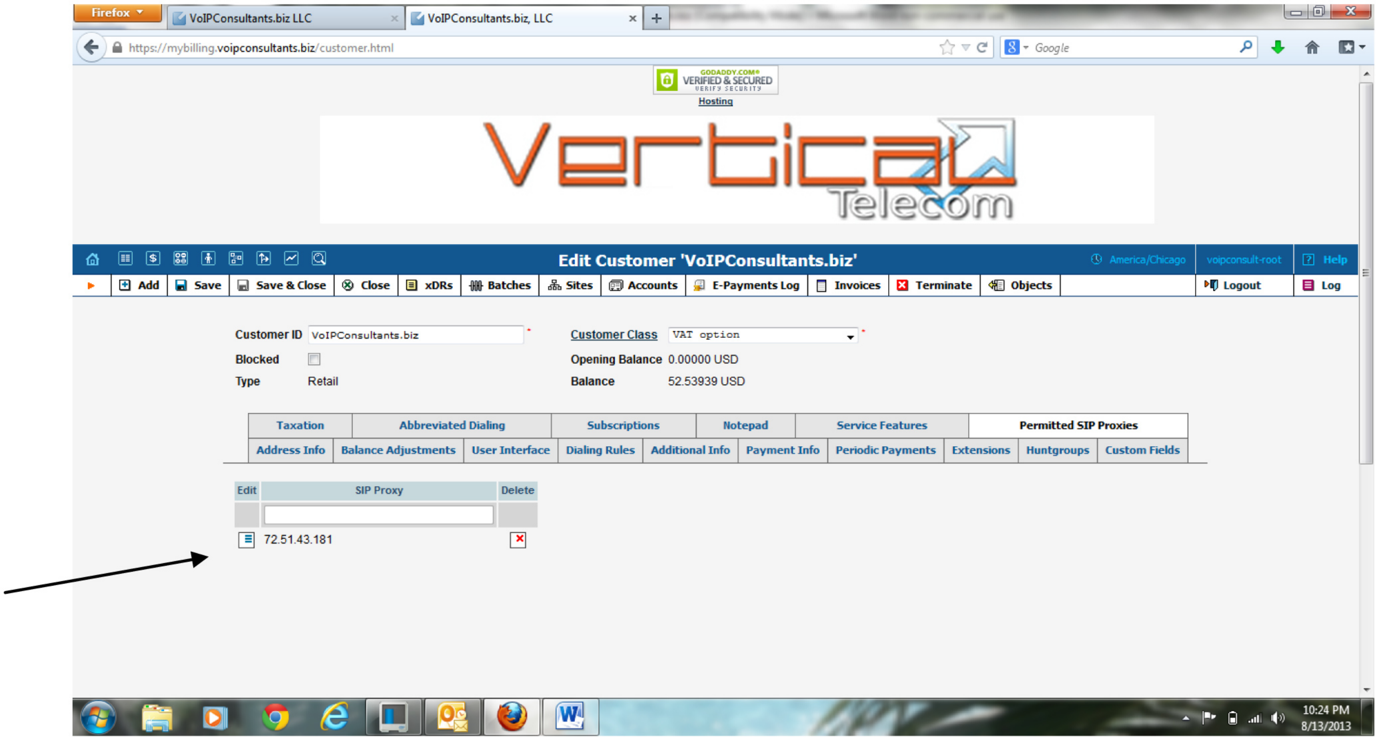


Fig. 23

Permitted SIP Proxies (Fig. 23) is where you would add the IP address of an Asterisk server or other gateway your customer is using. This enables that IP address to be authenticated in the network as a valid IP address allowed to send calls to the network.

Click on ‘add’ and the row opens up. Enter the IP address in the SIP Proxy box and click save.

This IP address must be present on an account in the Account ID field in order for it to function properly.

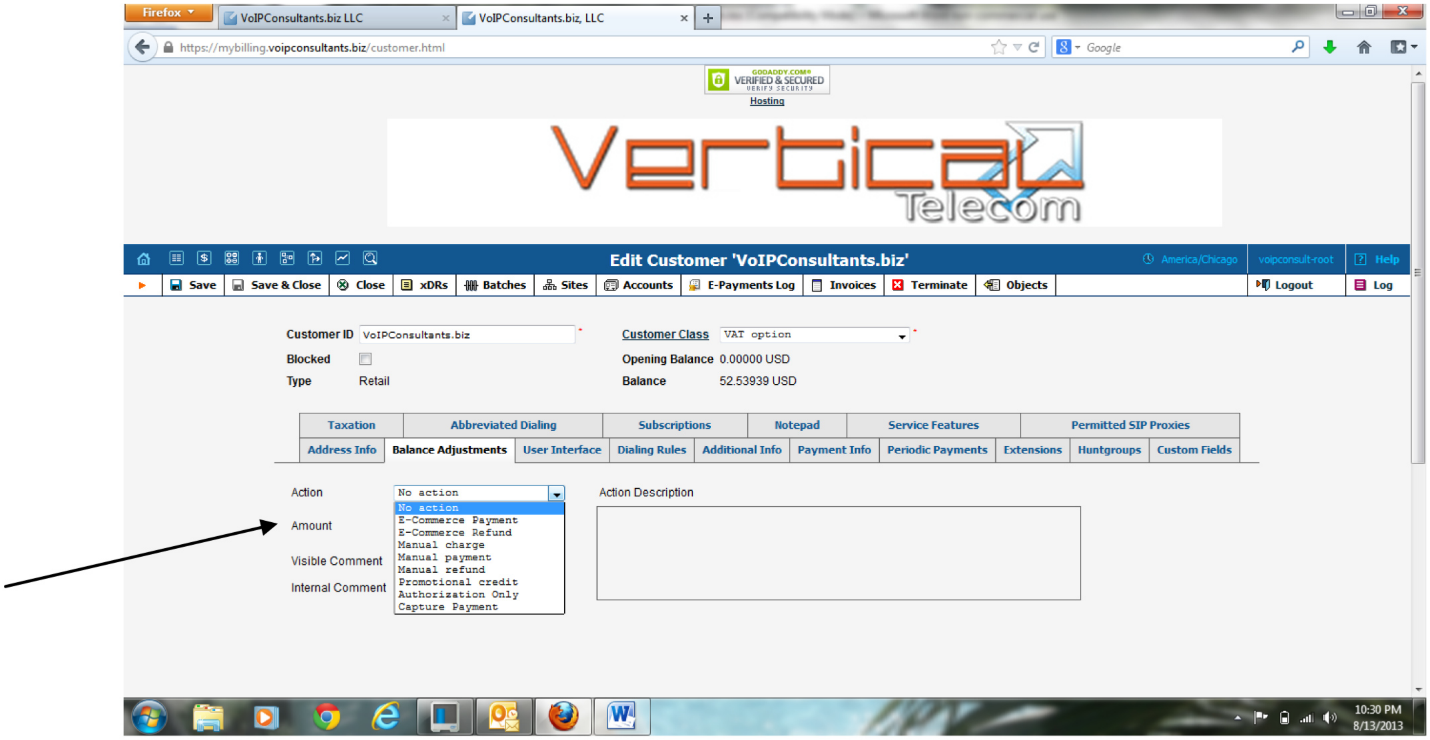


Fig. 24

The ‘Balance Adjustments’ tab is used to apply payments to the customer. There are many types of payments that you can make but Manual Payment and Manual Charge are the two you will use most often. If a customer has their credit card on file in the ‘Payment Info’ tab you can also use E-Commerce Payment to apply a payment.

To apply a $200 payment to your customer, begin by selecting Manual Payment. Then enter the amount in the amount field (Fig. 25) The proper format for a $200 payment is 200.00. Do not use the dollar sign.

Fig. 25

Next let’s go to the ‘Periodic Payments’ tab.

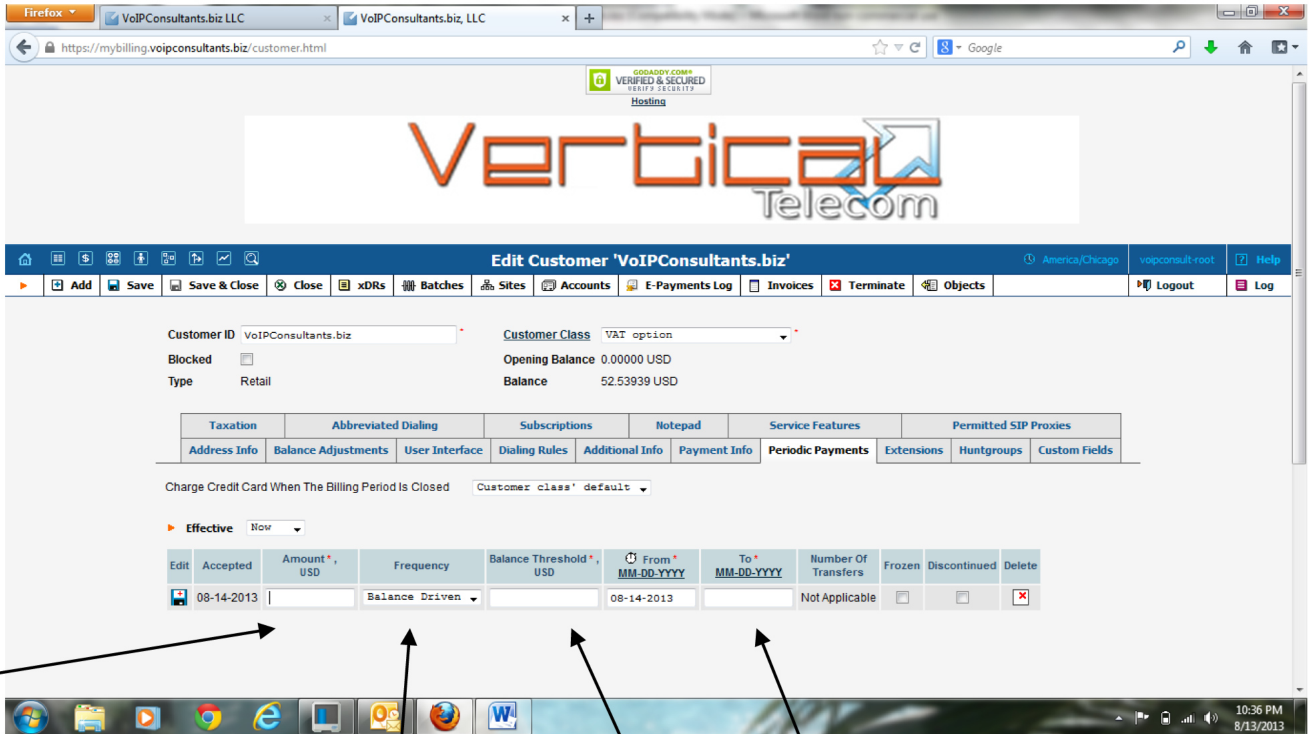


Fig. 26

The ‘Periodic Payments’ tab (Fig. 26) is where you can program an automatic payment to a customer’s credit card based on a certain level or threshold of usage being achieved.

To program the periodic payment function, click ‘add’ and enter the amount of payment to be taken in the column ‘amount USD’. Select the frequency of the payment. Usually you use ‘balance driven’ as the trigger. Using weekly or monthly doesn’t work well and the payments happen too randomly to suit us. Next set the balance threshold. The balance threshold is the balance that will cause the payment to occur. The last two columns set the date the feature will begin and the date it will end. Save your settings by clicking on save in the ‘edit’ column.

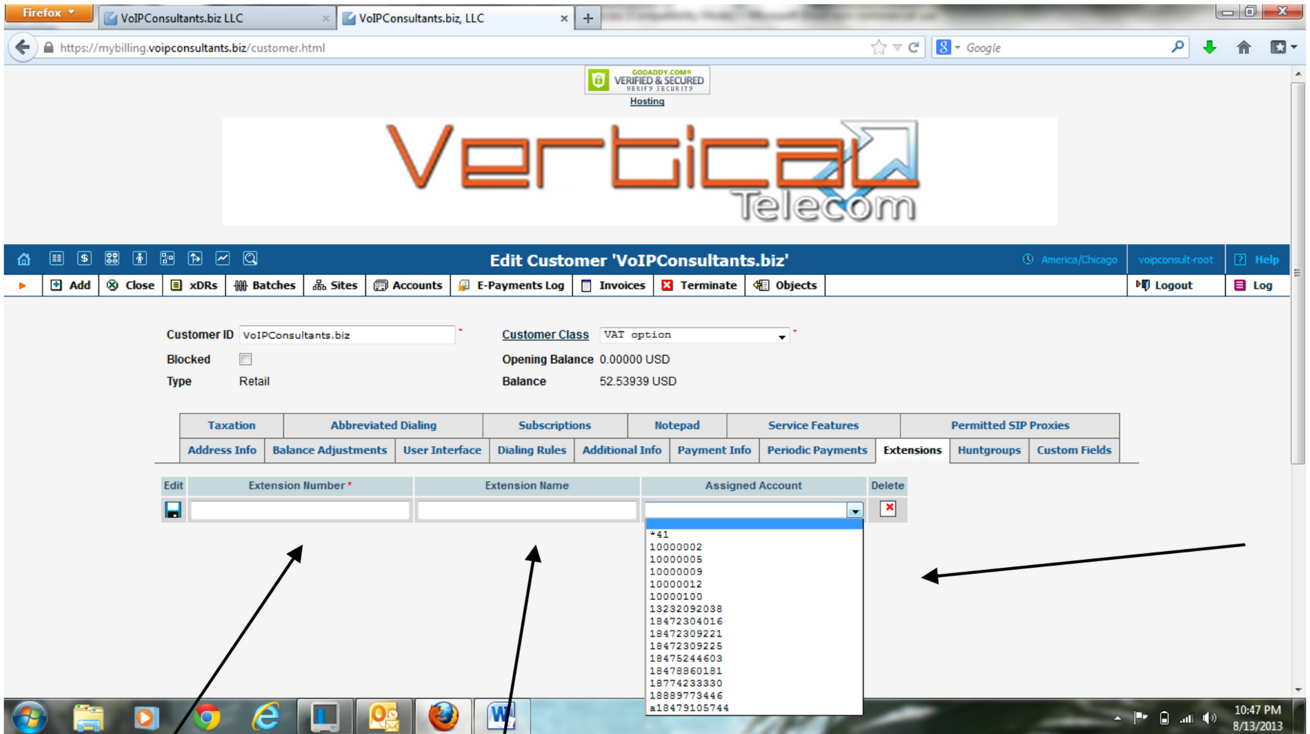


Fig. 27

Next up is the ‘Extension’ tab. This area allows you to create the extensions for your customers IP phones and ATA’s in their office. Remember that the abbreviated dial tab creates extensions or speed dials for number outside the office. Extensions create those for office phones.

To create an extension, click ‘add’ from above. Enter the extension number you wish to assign to the phone, i.e., 201. Input the name of the person’s phone, i.e., John, and then using the pull down menu select the account you wish to assign to this extension number.

Note: make sure you have defined the number of digits in the abbreviated dial tab to the number of digits you are using here.

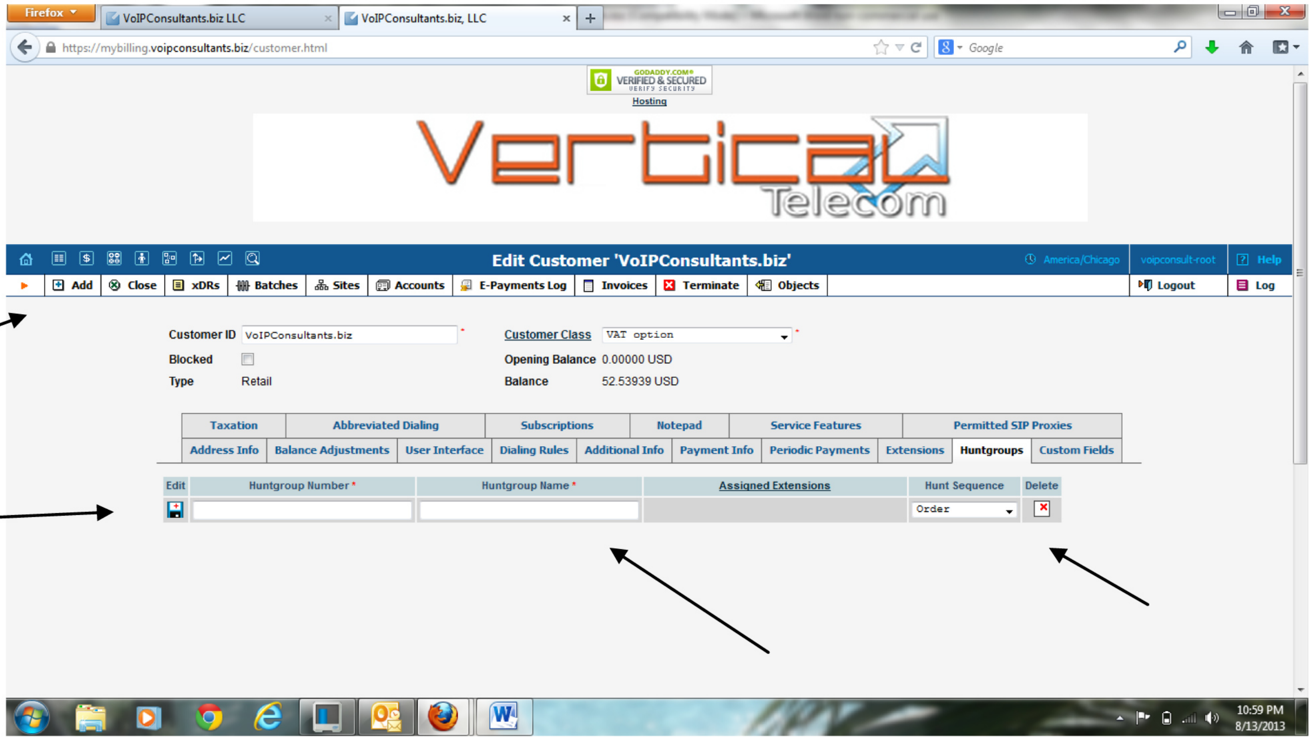


Fig. 28

The ‘Huntgroups’ tab is the last tab. Its purpose is to allow you to assign accounts to a hunt group. A hunt group rings more than one phone simultaneously. This is a popular feature for busy departments like customer service or support. Start by creating an extension number that end users will dial to access the hunt group. Then give it a name. Click on the ‘Assigned Extensions’ tab to add extensions to the hunt group. To finish the set up determine how you want the Assigned Extensions to ring. Click save.

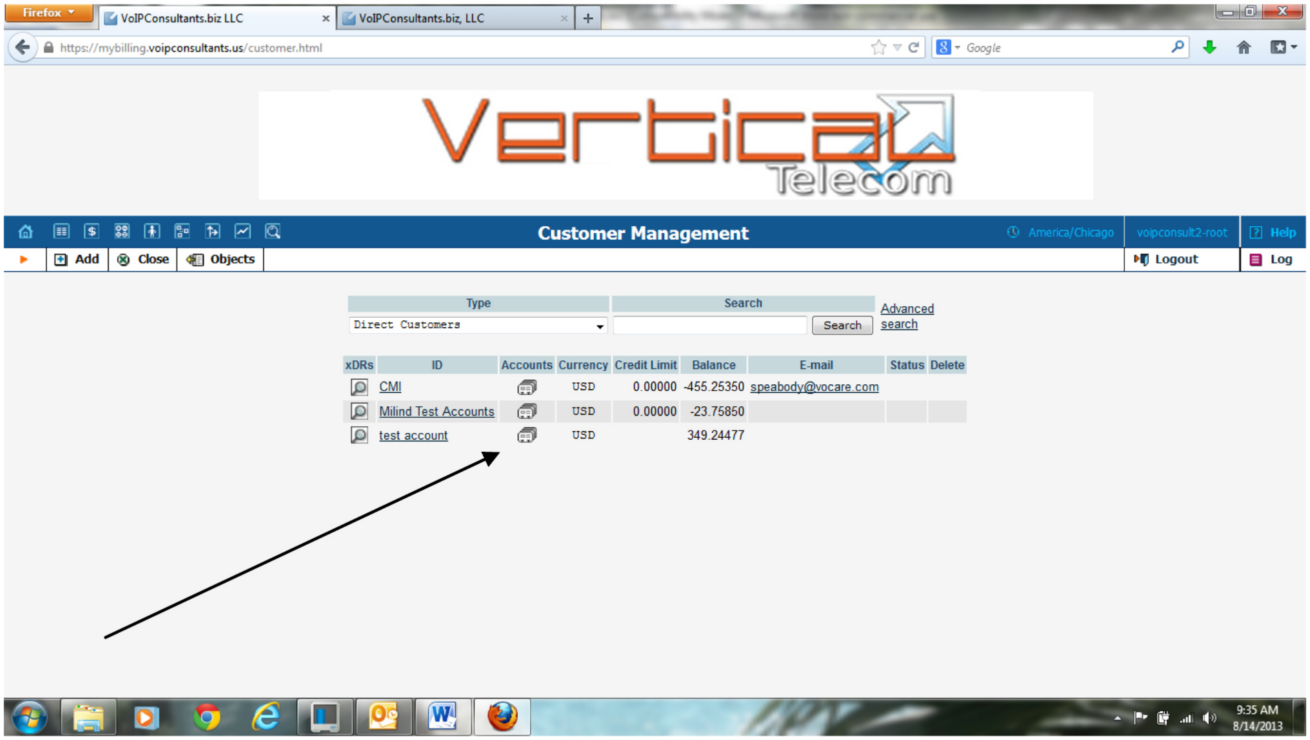


Fig. 29

3. Setting up accounts.

Once you have set the features and finished programming the Customer, now it's time to program the accounts, or users of the service. If you are adding accounts after finishing your customer set up, you can access the account screen by clicking on 'accounts' in the white toolbar. The other way to get to the account screen is to click on 'subcustomers' from the home page. The next page displays a list of your customers. To the right of the customer's name you wish to add accounts, click on the 'icon' in the account column (Fig. 29).

After clicking on the icon, you are now on the account summary page. The first time you add an account for your customer the page will be blank. To add an account, click on the 'add' button in the white toolbar. For now

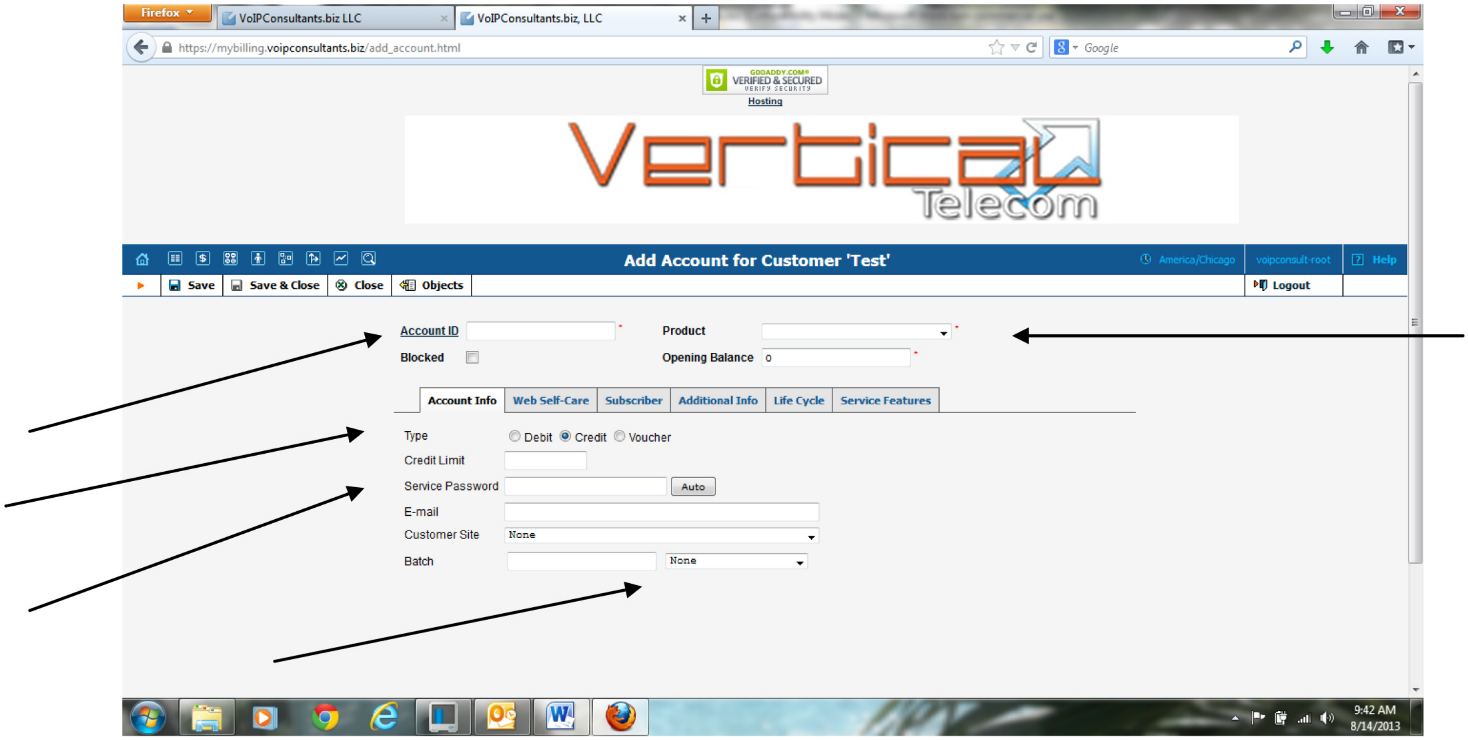


Fig. 30

ignore the account generator tab as it is for a limited number of applications. You have opened a new account record and we can begin programming (Fig. 30)

The ‘Account Info’ tab is important because it sets the credentials for the user to register a device to make calls. The Account ID field is the first item to program. The Account ID can be a telephone number, or a Porta internal number. A Porta internal number begins with 030 or 040 and is used primarily for hosted PBX customers. The internal number is an 8-digit number. We use them because it’s free and saves you from having to purchase a telephone number. Each of you has been assigned a range of internal numbers when you signed up for service. Most of your residential customers will use a telephone number as their Account ID.

There are other applications and services we provide that will use other types of Account ID. If you are selling Pin-less dialing services, your Account ID will be the customers telephone number preceded by a lower case letter ‘a’ without parenthesis (a18475551212). If you are selling Callback services the Account ID is the telephone number preceded by lower case letters ‘cb’ without the parenthesis (cb18475551212). In some instances a SIP trunking customer may have the PBX or Asterisk servers IP address as the Account ID. Whenever you are using a telephone number as the Account ID you must remember to put a 1 in front of the number. An example is 18475551212. The reason for this is the telephone number vendor inserts a ‘1’ in front of the telephone numbers as calls are routed into the network and if you do not input the Account ID correctly the caller will hear an error saying “the account number is not valid”.

If the Account ID is going to be a telephone number and that number is in your inventory, you can assign that number by clicking on the Account ID link. When you do so it will open another window and reveal all the telephone numbers you have in your inventory. Find the one you want and click on it. It now is assigned as Account ID. Next, we need to assign a product to this account. Products and the components that are included in the product are discussed in the next section. What the product does is tell the account what it will charge the user (account) to use the service. It may have free minutes, a monthly charge, etc. The point here is that you will see all the products we have set up for you in the pull down menu and you need to assign the correct one to the account.

The next thing to do is to choose the ‘type’ of account. There are three choices; debit, credit and voucher. A debit account is used for Pin-less, calling card, callback customers and prepaid customers who will not receive an invoice from you. When a payment is applied to a debit account it posts as a positive balance. As usage occurs, the balance reduces until it gets to zero. A credit account is used for all hosted PBX, residential and SIP trunking customers. A credit account accumulates usage as it occurs. The balance starts at zero and increases as usage occurs. A voucher is a 10-digit Account ID that you assign a dollar value. $5 and $10 denominations are common. The voucher can be sold to a user who can then use the 10-digit voucher to add funds to his / her account.

After selecting the type of account you need to populate the service password. We always recommend you use the AUTO button to create this password. When you do is will create a very secure password (46rbits1). This password, the Account ID and the IP address of our Proxy server are

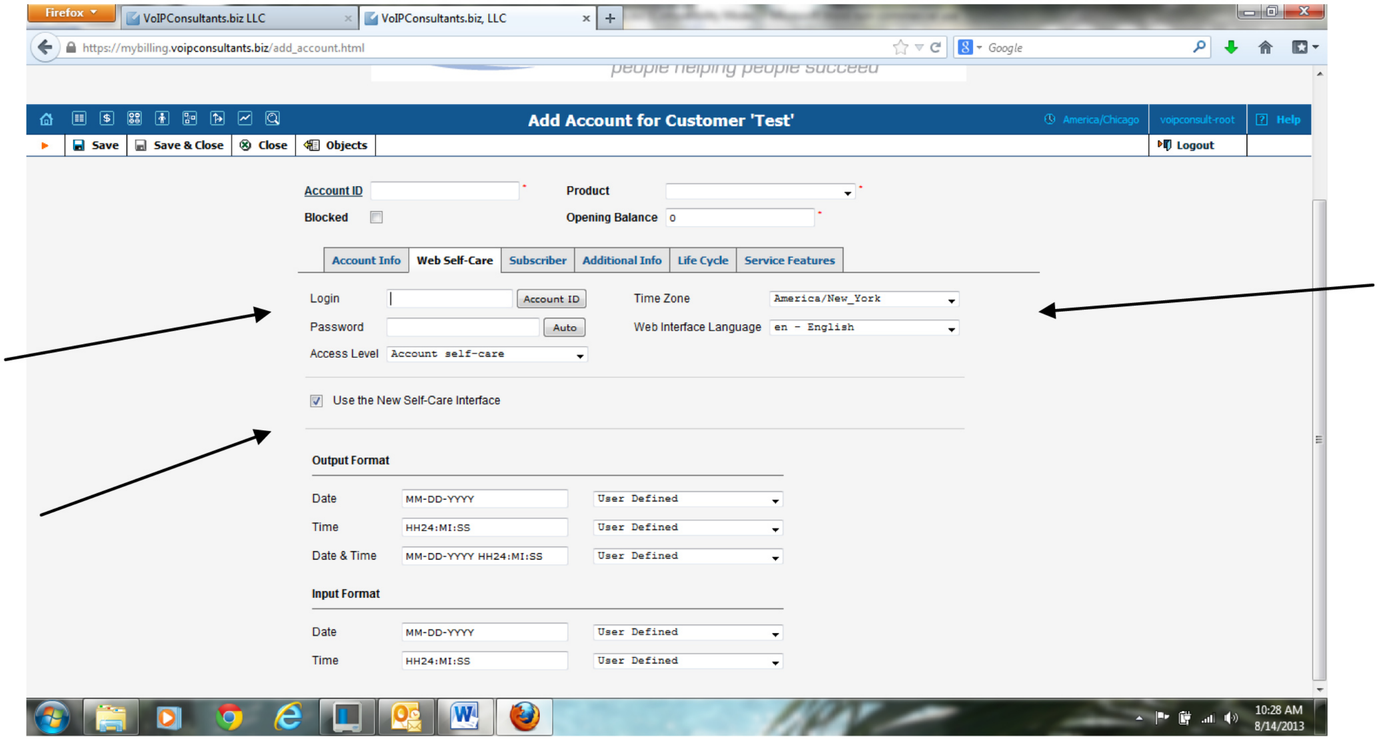


Fig. 31

the primary credentials you need to input into a device (ATA, softphone or IP phone) to register to the network to make and receive calls and use the features available to them.

Now click on the tab ‘Web Self-Care’ (Fig. 31). This tab sets the log-in credentials for the account web portal. That is the portal this user would go to in order to manage many of the features they use. Next to that is the time zone setting. This pull down menu has every time zone in the world. Just choose the one that appropriate for the user. Same goes for the user interface language. Last item here is to check the box to use the New Self-Care Interface.

The ‘Subscriber’ tab really isn’t used that much. It allows you to add customer specific information.

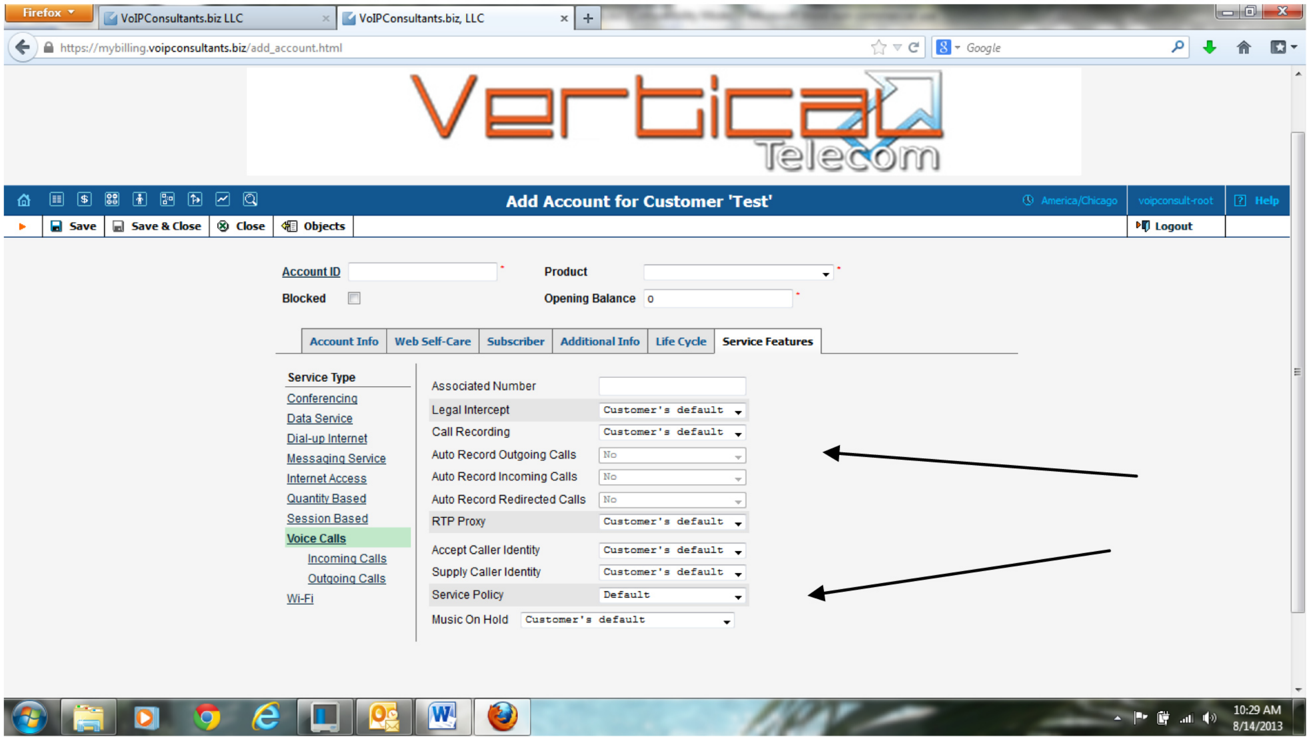


Fig. 32

Next we proceed to the tab called ‘Service Features’ (Fig. 32) where we will select the features for this account. On this screen the main items of interest are selecting music on hold, call recording or legal intercept if we have to comply with a warrant from law enforcement. Note that the limitation on file size for music on hold is 5MB. To enable call recording, select yes from the pull-down menu for Call Recording. Then proceed to select the types of calls you wish to record. Auto record outgoing and incoming refer to calls made and received by the account itself. Redirected calls are calls that come into the account and are then forwarded to another number. Make your choices from the pull-down menus for each and click save.

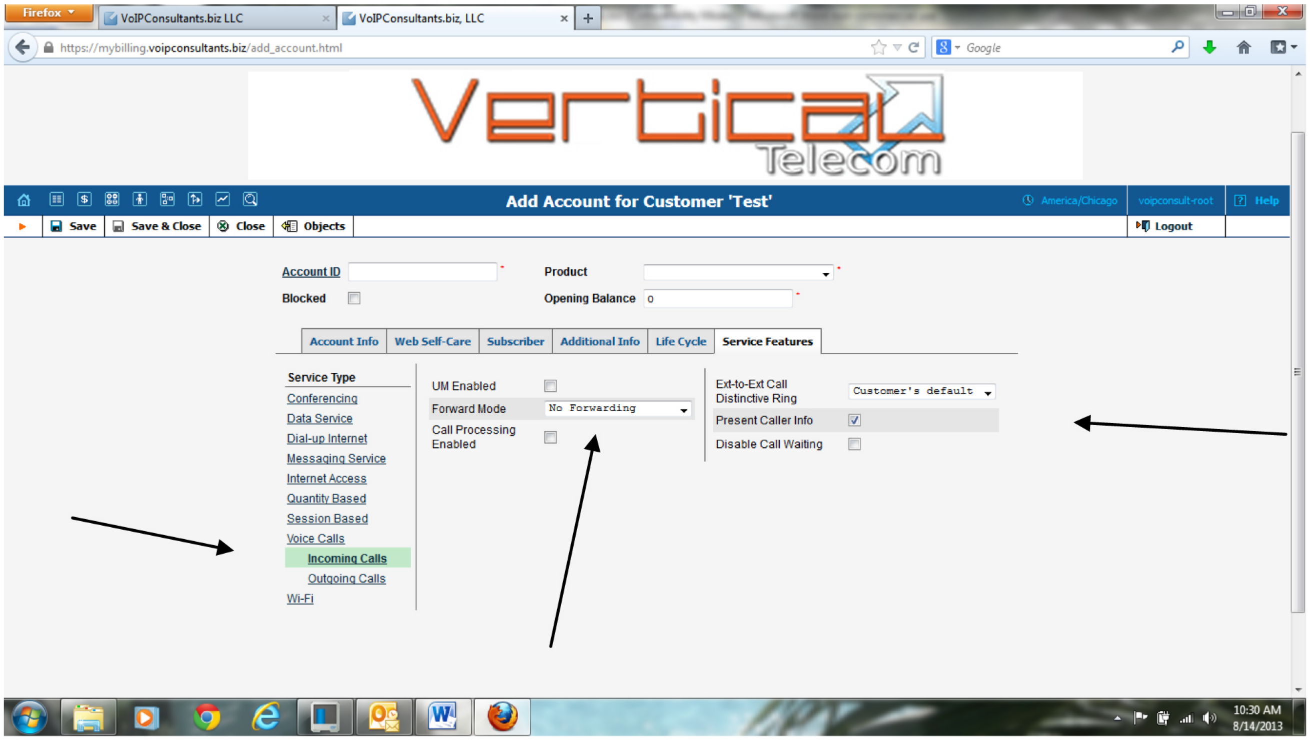


Fig. 33

Now click on the ‘Incoming Calls’ section under Voice Calls to continue programming your account settings (Fig. 33). Start by checking the box for UM Enabled. This activates unified messaging for the account. Now select the appropriate forward mode from the pull-down menu. Start by selecting Follow Me. (Note: to enter the UM portal requires you to enter values in the ‘Web Self-Care’ tab) Complete the programming, save and close out of the account. This will seed the login and password you set in the ‘Web Self Care’ tab). For accounts that have active telephone numbers that are being forwarded to an Account ID that uses an IP address, like with SIP trunking, the correct choice is ‘forward to sip uri’. If the account is for receiving inbound faxes or auto attendant, the correct choice is ‘no forwarding’. If all you want to do is forward to a single number then ‘simple forwarding’ is the choice. The Call Processing box is only used if you wish to deny certain types of incoming calls. Disable call waiting should only be selected if you do not want call waiting to work for this account. Save your choices.

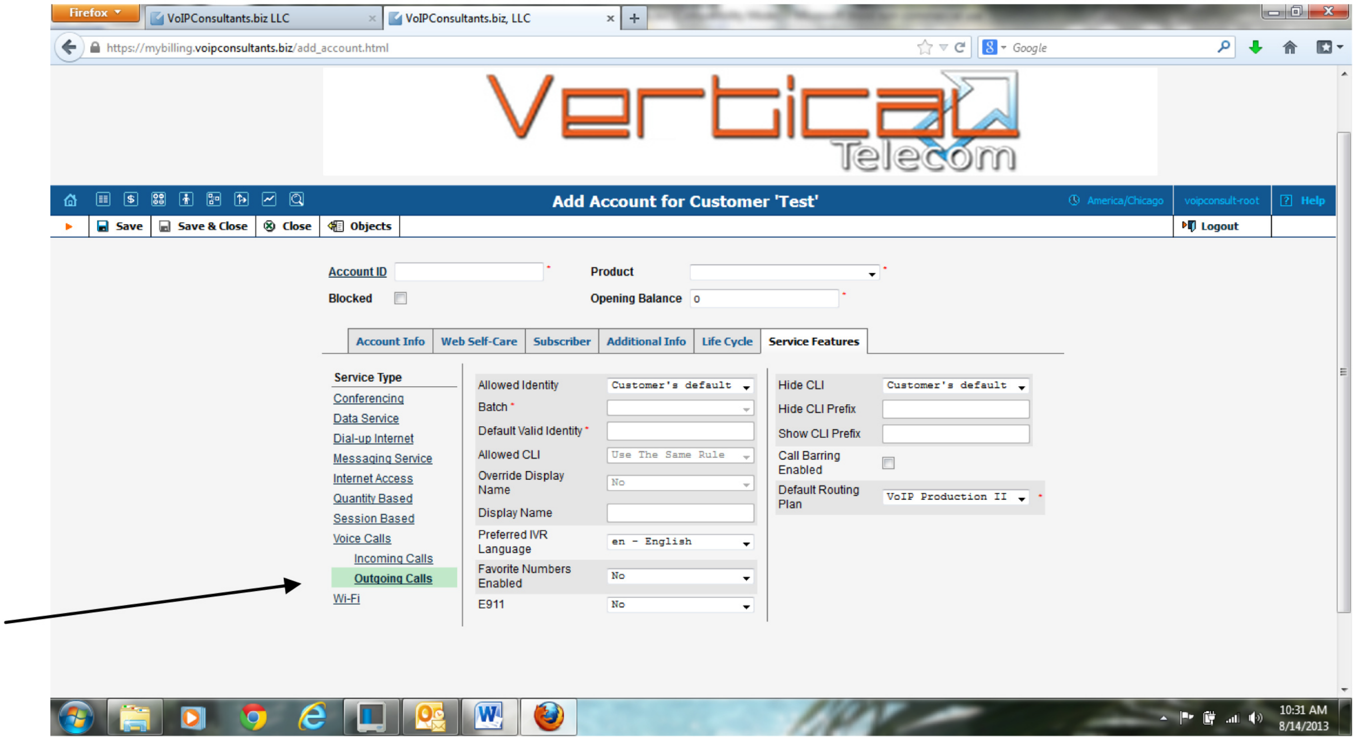


Fig. 34

Now proceed to the Outgoing Calls page (Fig. 34). There really isn't anything to worry about here until you have saved all the information on the account. Click save and close to save all information. You are now back to the page called Accounts for retail customer 'your customer's name' (Fig. 35).

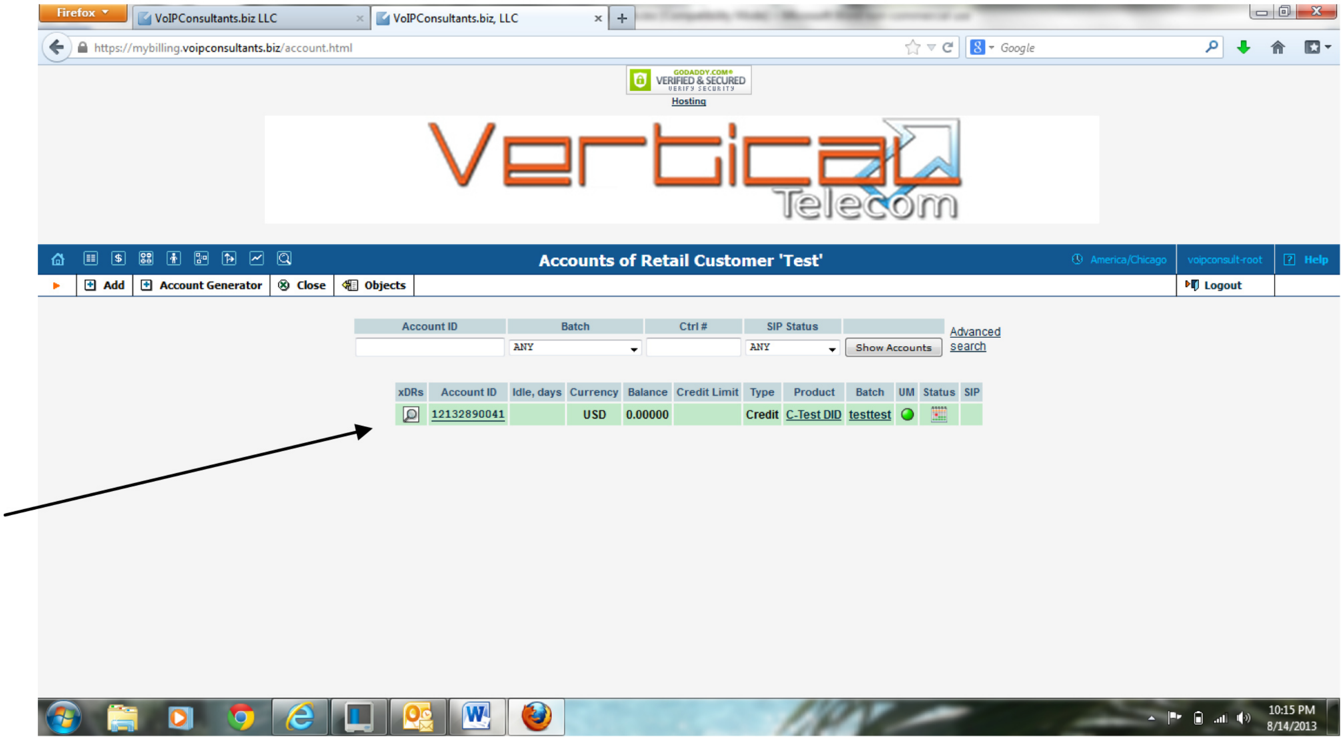


Fig. 35

Now click on the Account ID number to re-open the account so we can finish our programming. Go back to the 'Service Features' tab. Select the 'Incoming calls' so we can finish programming this section (Fig. 36).

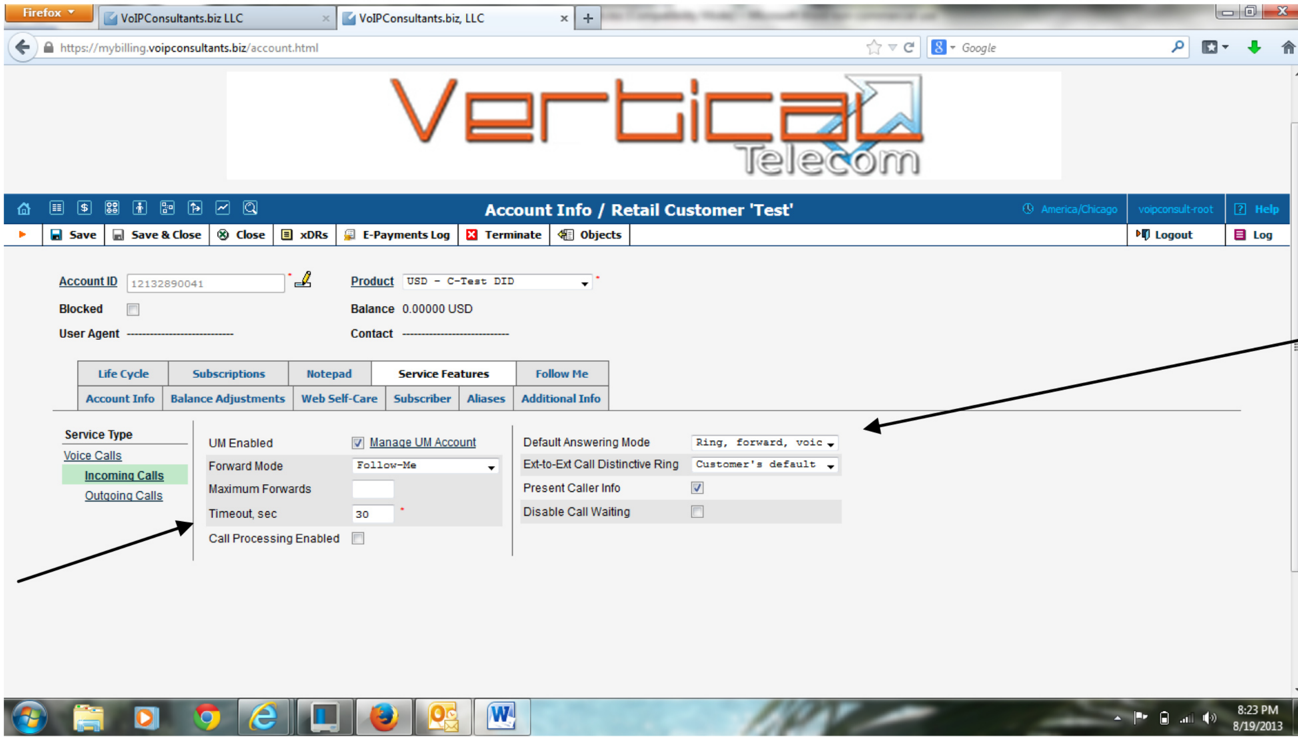


Fig. 36

Now you see a variable called, ‘Timeout, sec’ in the Incoming Calls section. This tells the account how many seconds a call will ring the device assigned to the account before it continues with the Default Answer Mode instructions. You can change this time settting. If this were a telephone number that was being forwarded to another account, the ‘Timeout, sec’ parameter should be set to 0 or 1. The reason being you don’t want the call to stay at the account, you want it to move on. Under the pull down menu for ‘Default Answer Mode’ there are eight (8) choices. Ring, forward, voicemail is the most common setting for a Hosted PBX user. This command stipulates the call will ring the device registered to the account for the length of time in the ‘Time out’ setting, then forward to another destination before coming back to be placed in the account’s voicemail. The other actions are as they seem. When you are setting up an Auto Attendant or an inbound fax service, the correct answer mode is ‘voicemail only’. The forward mode would be ‘no forwarding’.

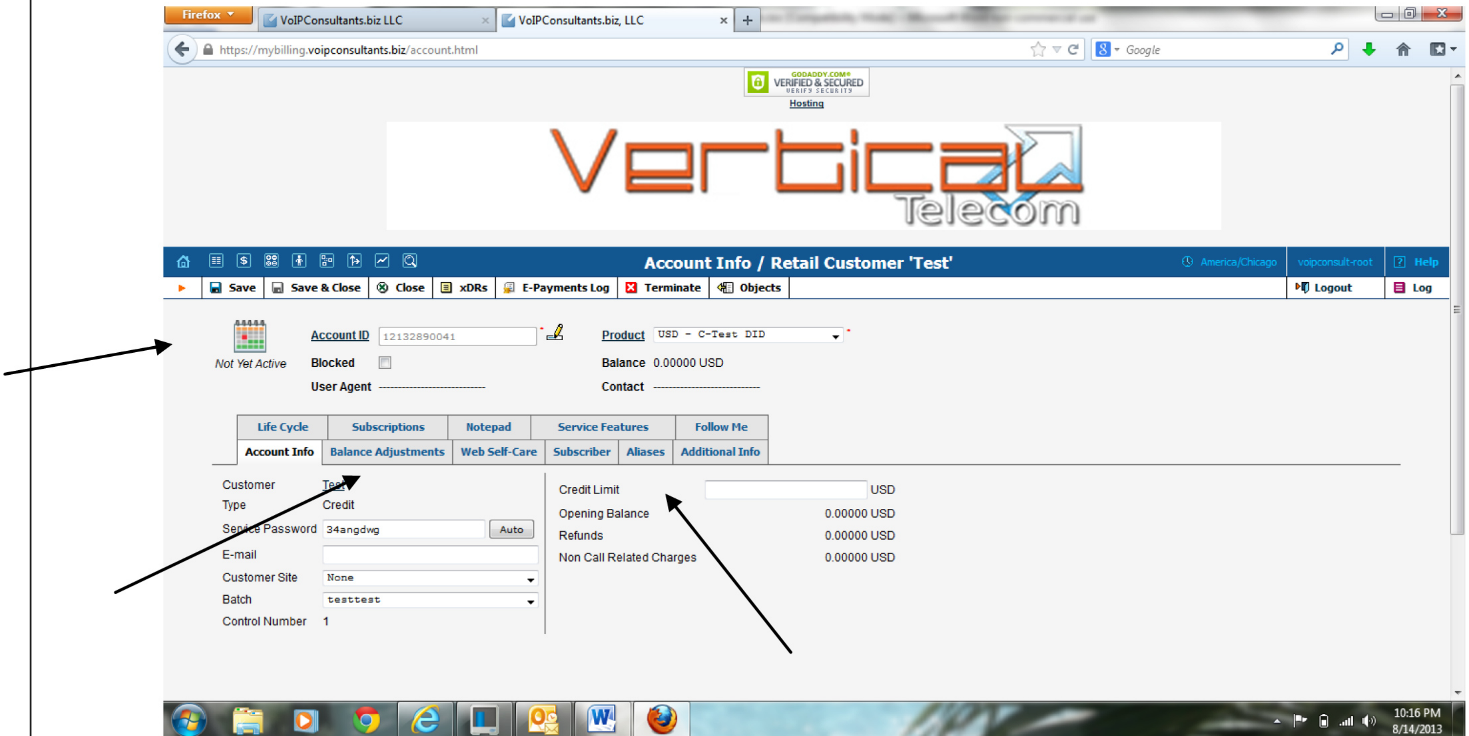


Fig. 37

Now that we completed programming the 'Service Features' section, we will discuss the new tabs that appeared after saving information. The 'Balance Adjustments' tab is for applying payments to an account. You will NEVER do this for a credit type account. Those payments are only made at the customer level. The only time you would make a manual payment to an account is if it's a Pin-less, Call-back, or Calling card account. The 'Alias' tab is an area of interest for those using SIP trunking or Pin-less dialing (Fig. 38).

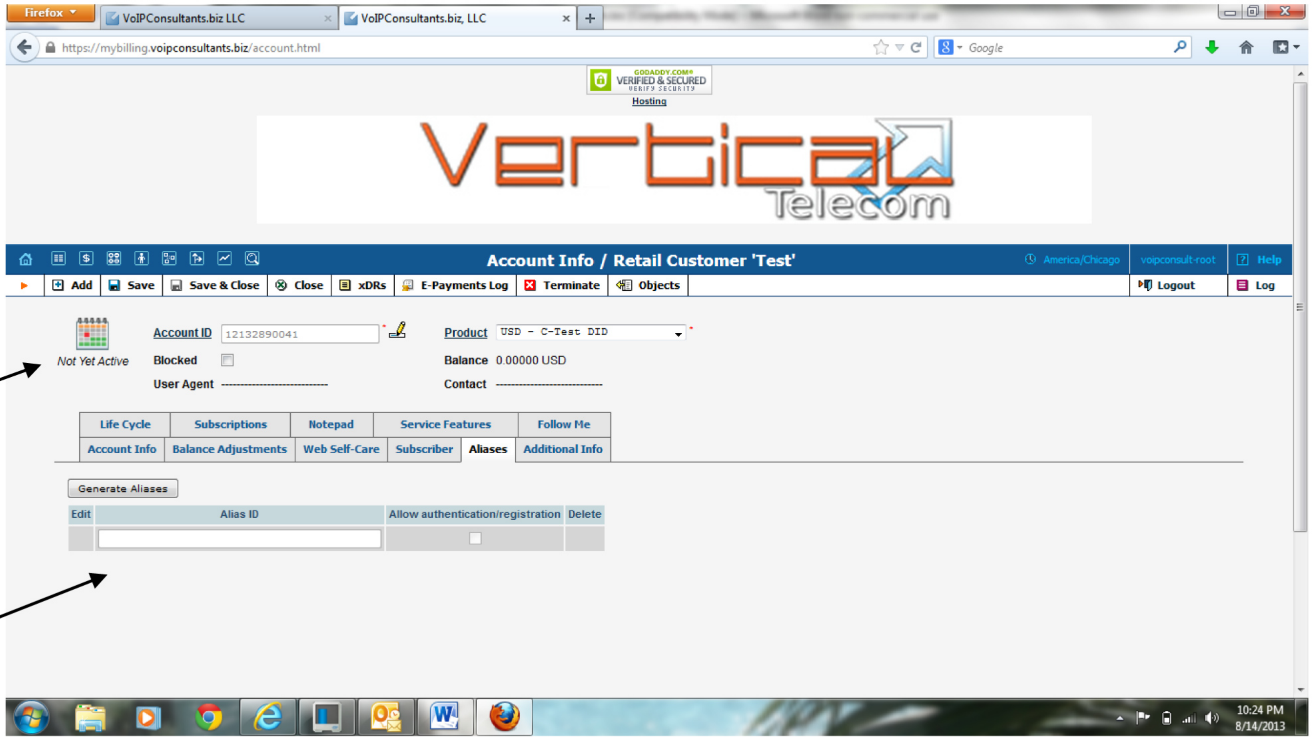


Fig. 38

The 'Alias' tab allows you to associate other telephone numbers to the Account. To add a number as an alias, click the 'add' button and enter the telephone number in the alias ID column. Do not check the box to allow authentication for customers of Hosted PBX and SIP trunking and then click save under the 'edit' column. If this is a Pin-less or Call back customer then you do check the box 'allow authentication/registration'.

The result for your Hosted PBX or SIP trunking customer is that when one of the alias numbers is dialed, it will route it to the Account ID. For Pin-less and Call back customers the result is they will authenticate in the IVR and be allowed to make calls using the balance on the Account ID. These numbers must be active on the network for this to work.

Pay attention to the icon that says, 'not yet active'. This occurs when accounts are created in the evening. If the account is not needed until the next day, the icon will go away after midnight. If you need it immediately, click on the 'Life cycle' tab and correct the 'use only after' date to the current date. Next tab is the 'Additional Info' tab.

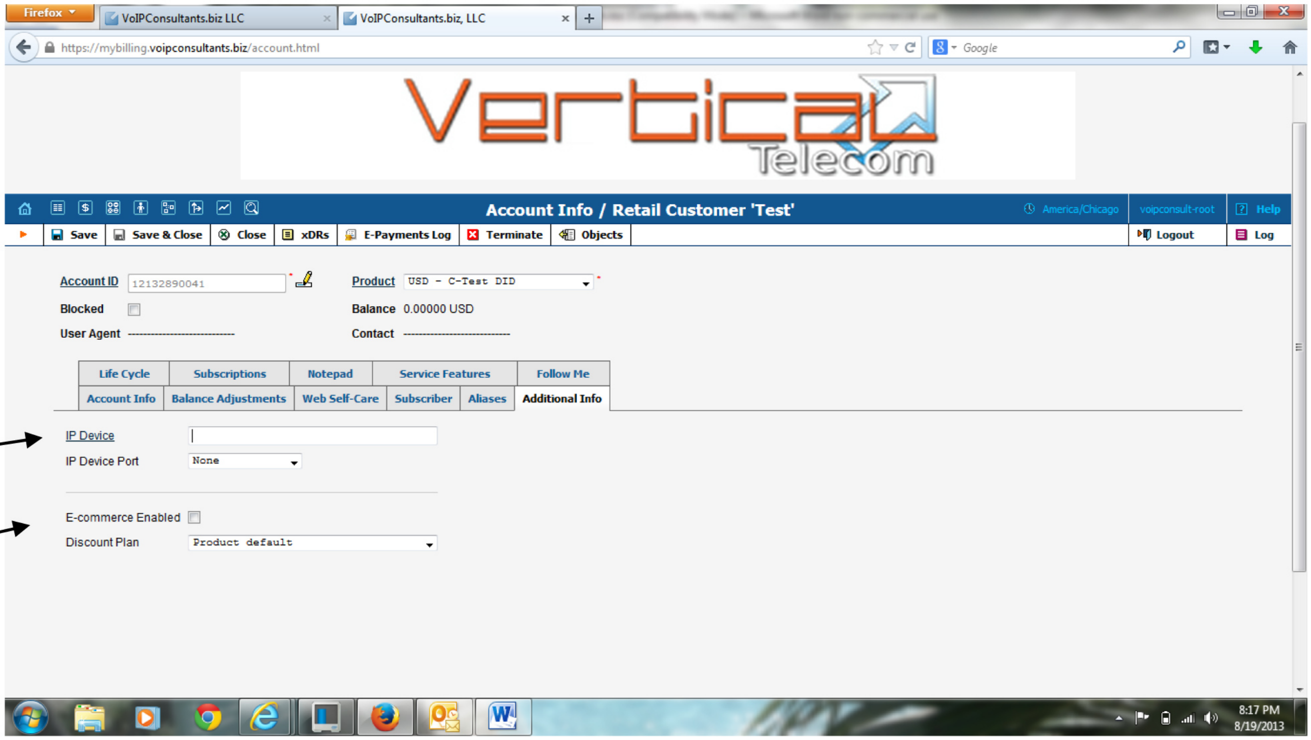


Fig. 39

The 'Additional Info' tab (Fig. 39) allows you to do a couple things. If you are using our provisioning server, this is the tab you use to assign your IP phone or ATA to the account. It's also where you can enable the account to make payments using a credit card. To do so you select the 'E-commerce Enabled' check box and always click save when done.

Next is the 'Follow me' tab (Fig. 40).

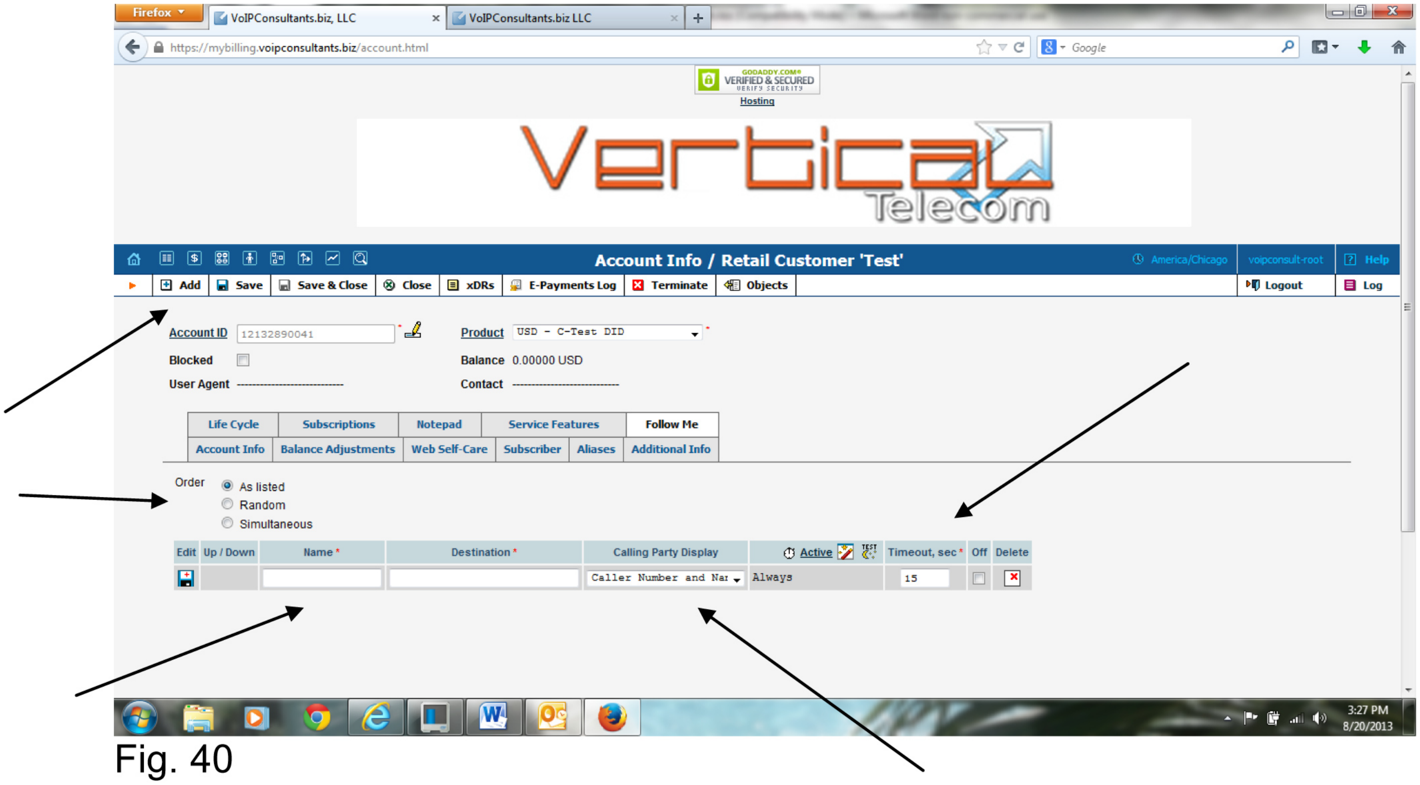


Fig. 40

This tab will set the rules on what number(s) you are forwarding calls to and in what sequence. To add a number to forward calls to select 'add'. It opens the row to be edited. Add a name, like 'Steve's cell phone', in the next column put the number (18475551212), taking care to make sure 1 is in front of the number, and select timeout seconds. This timeout seconds setting is very important as it will determine where any voicemails are left. If you want to have voicemail go back to the account, select a timeout setting that will pull the call back before the cell phone providers voicemail kicks in. (that is about 20 seconds). If you want voicemail to be left on the cell phone, then select an extreme setting, like 100 seconds to ensure the voicemail for the cell phone provider kicks in. One other feature worthy to mention in sound in the 'Calling Party Display' pull down menu. This offers three ways to send information to the number you are forwarding the call. The first is 'Caller name and number'. This sends the original caller's information. The second is 'caller number and forwarder name'. This sends the original caller's telephone number and the account's name. The third way is to send 'forwarder name and number'. This means the information for the account that is forwarding the call is what is sent. We will discuss the ‘active’ settings in the back of this under the advance programming section.

Sometimes when setting up service, you may want to ring multiple phones in some pre-determined order or even all at once. In this case, the account is now acting as a ‘ring group’. To set up a ring group, go back to the service features tab and select ‘UM enabled’ in the incoming calls section. change the timeout setting on the account to ‘0’. Set the answer mode to ‘forward only’. Then when you program the forwarding numbers, you repeat the steps mentioned earlier. Then select ‘simultaneous’ as the order in which the numbers are to be attempted. Click save.

4. **Products.**

To this point we have spent our time showing you how to set up service for your customers. Before you can set up service, you have to decide what you are going to charge your customers to use your service. Every time you set up an account for a customer, you assign what’s known as a ‘product’ to the account. That product contains the price you charge to make or receive a phone call as well as any free minutes or monthly charges. Those items are known as; tariffs, discount plans and subscriptions. Now let’s spend a few moments going over the items that go into your product(s).

The first component that goes into the product is also the one that is mandatory. It’s called a tariff. There are two. One for incoming calls and one for outgoing calls. These tariffs define where you can call and at what price. Those are known as destinations. Without tariffs, your customers would not be able to make phone calls.

The second component that can be used in a product is a discount plan. A discount plan is used to provide some amount of free minutes to a specific group of destinations, i.e. 500 free minutes to the US and Canada. The discount plan suppresses billing of the tariff to certain destinations. The US and Canada are the most commonly used. You will rarely provide free minutes to an international destination unless the price to that destination is very low cost.

The third component that can be used in a product is a subscription. A subscription is used when you want to charge a fee to use your service. It can be a one-time fee or a monthly recurring fee. Fees can be billed in advance or at the end of the billing cycle. Fees can be set at different amounts so if you wanted to have an introductory price of $9.95 for three months and then have it cost $24.95 after that, a subscription would allow you to do that. You may also charge a one-time fee, like installation or activation if you prefer.

Now that we are familiar with the basic building blocks that go into a tariff, let's discuss ways you can use each. This discussion applies to your Hosted PBX and SIP Trunking customers.

a. Classic 500 minute plan. You offer an unlimited service to your customers
b. Extension plan. In this example you charge a fee for every phone in the office. That product might be called 'extension'. It contains a tariff, free incoming minutes and uses a subscription. Then you sell the customer a 'bucket of minutes', maybe 5,000 or more that every single account can pull from when making calls.

It sets the price of those calls as well as the billing increment. **Volume discount plans** are used to give free minutes to a customer. Typically hosted pbx products include free minutes. You may also choose to sell a bucket of free minutes to your customer. In the latter example, the volume discount plan is applied to the subcustomer level, not the product. Lastly, the **subscription** is a charge you can levy to the customer. It can include an activation fee as well as monthly recurring charges. Monthly recurring charges can be billed in advance, progressively throughout the month, or at the end of the billing period. So in summary, a product must have a tariff(s) but may also include a volume discount plan and subscription. Now click on Products to view your products. (Fig. 33)

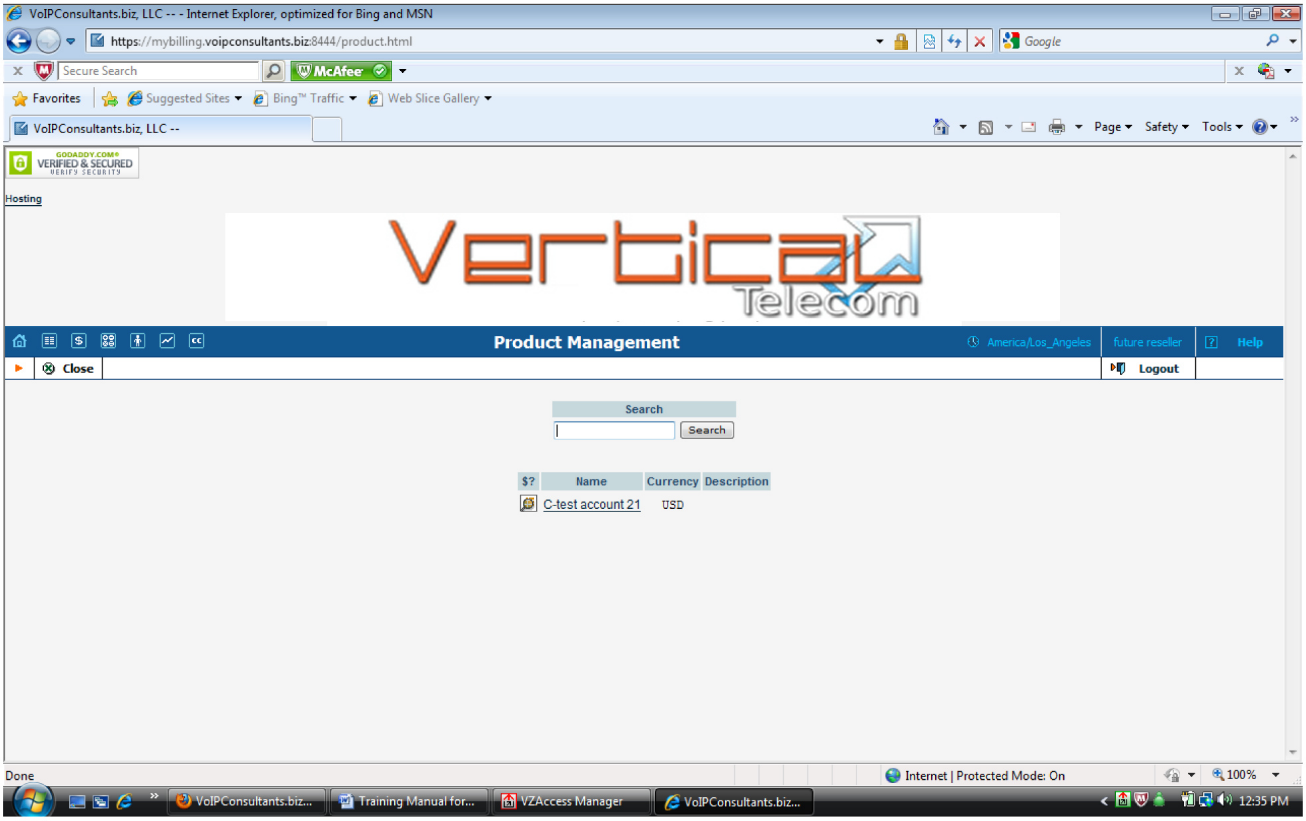


Fig. 33

Any customer products we have set up for you will now be visible on the screen. To see what's included in your product, click on its name. The general info tab is now visible. The first item you can see here is whether a discount plan is included. (Fig.34) The discount plan window is a pull down menu. If you wanted to change the discount plan you can do so by selecting another plan and clicking 'save'. (WARNING: if you change any element of a product, it will change for every user of that product).

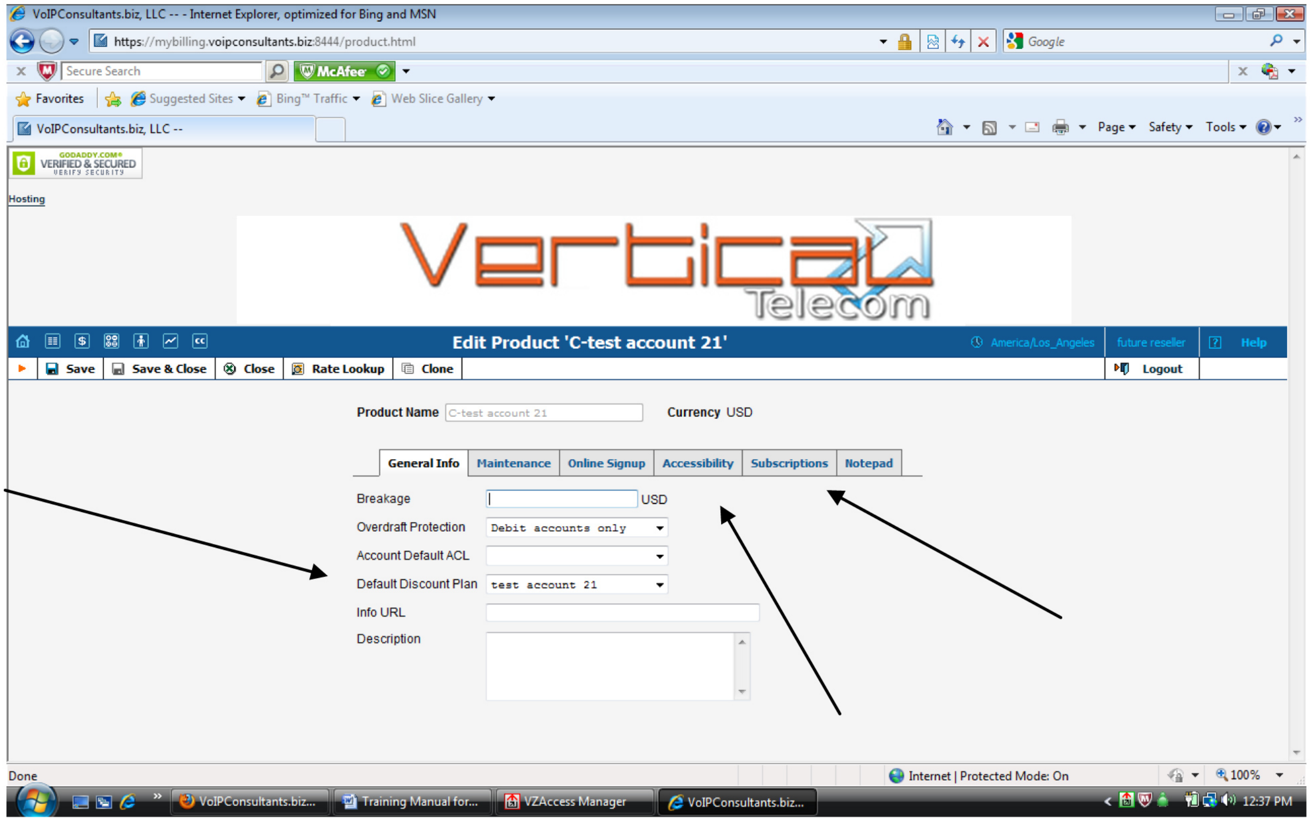


Fig. 34

To view the tariffs that are assigned click on the accessibility tab. To view any subscriptions, click on the subscription tab.

5. **Other Programming tips.**

Understanding the rules of our PortaOne softswitch makes programming a lot easier.

1. Account set up. There are many ways to set up an account based on what you are trying to do and what you need to do. First you need to determine the type of account structure, there are three. Debit, Credit and Voucher. Debit is used for prepaid customer's who pay their bill at the account level. These are calling card and pinless dial users. Credit is for customers who are paying their bill at the subcustomer level. If the customer is paying the bill at the subcustomer level, DO

NOT set a credit limit on the account. Set the credit limit on the subcustomer. A Voucher is for calling card and pinless users and is a means to apply a dollar amount to an account when no other means of payment exist.

Next, you have to determine the correct numbering for the account. There are four options. The first is to give a telephone number as the value of the Account ID. To do this, you simply click on the Account ID hyperlink and choose a DID from available inventory. Then select the DID and it applies itself to the Account ID field. The second way is to use Porta internal numbering. This is for your business customers who have 1 main number that rings into their company and have no need for giving each phone its own number. In this scenario you may choose to use an auto attendant to answer calls or have a receptionist answer the calls. Each extension is given an internal number but also programmed to broadcast the company's main number as it Caller ID. The third way is used for calling card accounts. Every account like this will begin with the lower case letters, 'cc' and then you put at least 6 digits behind it. It may look like this; 'cc123456'. In this set up, you MUST use a VoIP password of at least 4 digits because all calling cards must be a minimum of 10 digits and there must be a VoIP password used with every card. The use of 'cc' does not count in that total. Pinless dial accounts will begin their accounts with an 'a'. So if you manually add a user, it would look something like this; 'a13125551212'.

2. Forwarding. When you are going to allow an account to forward to another telephone number or internal number, we recommend you use 'FOLLOW ME' as your forward mode. The only exception to this is if you are forwarding a DID to an IP address, and then you use 'FORWARD TO SIP-URI'.
3. Timeout seconds. Based on what you want to do, timeout seconds can be set anywhere from '0' to '30'. If the account is a DID that is

forwarding to another account, set it to ‘0’. There is no reason to keep a call ringing on an account that will never answer the call. Sometimes when you use ‘0’, the system may make you try to save it several times. If it persists in keeping it at 30 seconds (the default) then use 1 as the value. If the account has an IP phone attached to it and you want it to ring the phone for at least 4 rings, choose a value of at least 20-25 seconds. This will give the person a chance to answer the call. When you set this parameter, think about what you are trying to do. The timeout seconds are especially important in the FOLLOW ME tabs. When you are in the FOLLOW ME tab and adding a number to forward your calls to, think about what you are doing. If you wish to forward a call to another number and have it stay at the other number and go to that numbers voicemail, then put a very high value, like 200 seconds. This will ensure that the call stays at the forwarded number until the voicemail of the forwarded number kicks in. If you want to forward to that same number but have it pull the caller back and put it into the voicemail for the account, then set the timeout seconds on the FOLLOW ME tab to more like 20 seconds. There is some experimentation with this as you need to know how long the number you are forwarding to will ring before it engages its voicemail.

4. Pinless dial accounts. When setting up a pinless dial customer you do not have to use a subcustomer record for each user. Many resellers will have 1 subcustomer record and then add pinless users under that subcustomer record. When adding an account manually, remember to put the letter ‘a’ in lower case in front of the 11 digit telephone number that goes into the account ID field. So, 847-555-1212 will be input as a18475551212. Then assign the appropriate product to the account and remember to enable the ecommerce button on the additional info tab so they can make payments via your end user portal.

5. Calling card accounts. When setting up credit card accounts you do not have to use a subcustomer record for each card user. Most resellers will have 1 subcustomer and then generate a batch of card numbers using the account generator. When setting these up the accounts must be DEBIT type because DEBIT accounts start with a balance and as usage occurs it reduces to zero. Put the letters ‘cc’ in front of the account number. All calling card accounts must have 8 digits in the Account ID field. This does not include the ‘cc’. Remember you must also use a 4 digit VoIP password that is numeric. The total digits cannot exceed 15. So an account ID might look like this, ‘cc12345678’ with a VoIP password of 1357. When the user goes to make a call, they enter 123456781357 as the card number. We further recommend that you use the account generator when producing many cards. We will provide training on using this template when needed.

6. Periodic Payment. This feature allows you to automate when your customer gets billed using their credit card on file. To use the feature, you must have a payment processor set up, make sure you enabled the Periodic Payments tab under the User Interface tab when you set up the Subcustomer record. Then add the customers credit card information under the payment tab. Once you do that the Periodic payment tab will become visible. Click add to program. Under the column ‘amount’ you can set an amount to be charged or balance driven. Next select the frequency of the payment. Then input the balance threshold. This is the amount of usage incurred by the customer that will trigger the amount to be paid. Then select the time frame that the periodic payment begins and ends. (Fig. 35).

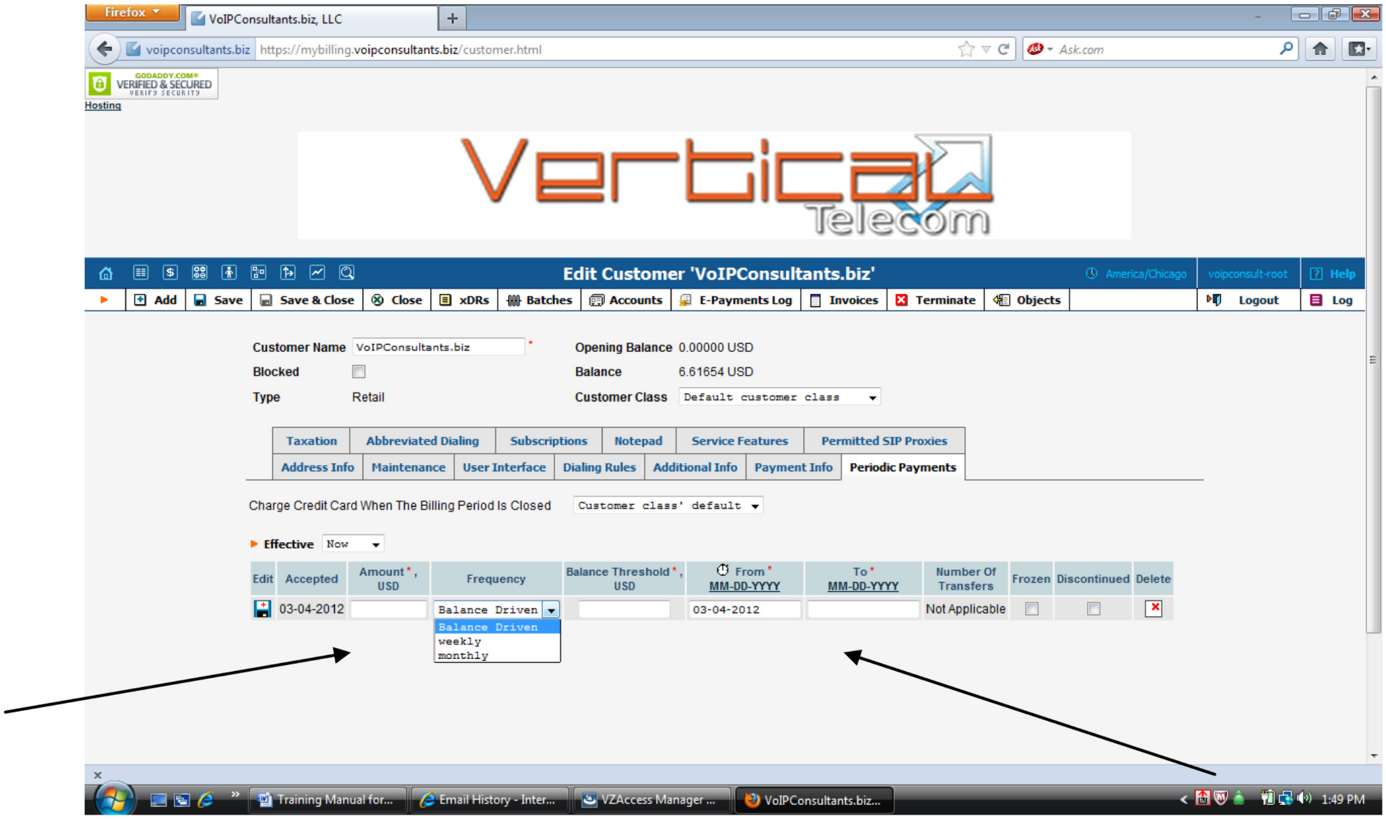


Fig. 35

7. Customer Class. This feature sets rules for whether you send an invoice to the customer and how frequently. It can also be used to trigger payments from the customer who has a credit card on file.

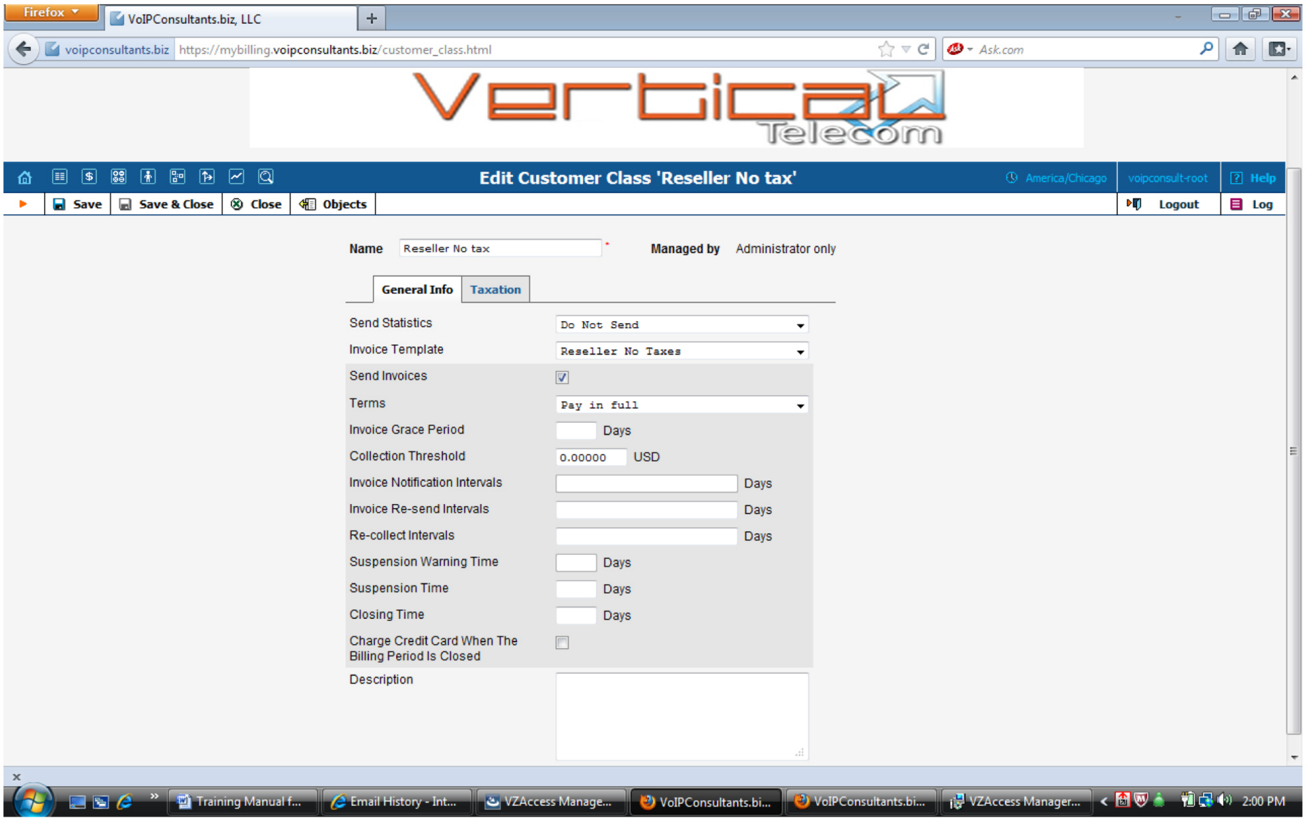


Fig. 36

The form is fairly straightforward. You can choose to send statistics (we recommend you do not), choose an invoice template, whether to send an invoice or not and various notification schemes.

8. Provisioning server. Our network contains the profiles for many of the popular ATA's and IP phones. These work via our provisioning server to assist in streamlining the programming of such devices. We currently have the following profiles in the network; Aastra 6753i & 6757i, Cisco 7940G & 7960G, Cisco ATA 186, Cisco ATA 7912G, Cisco SPA 303, 504G, 501G, 508G, 525G, Grandstream GXP 2010, 2020, 280 GXV 300x, GVW 400x, Grandstream HT 286, 486, 488, 496, 502, 502x, Linksys PAP2, RTP 300, SPA 2102, 3102, 921, 922, 941, 942, 962, WRT54GP2, Sipura 1001, 2000, 2002, 2100, 3000, Thomson TWG 850, Yealink T-20, T-22, T-28, VP-2009. Other models are in the works as well. In order to get your devices set up

via the provisioning server, we need to get a list of models and MAC address from you to build the profile and inventory for you. In each device, you will need to add the following inputs in the provisioning screen, usually found in ‘advanced’ mode;

1) "Provision Enable" and "Resync on Reset" are enabled
2) Profile Rule is set to: [--key $B]http://208.89.105.135/$A/$MA.cfg
3) GPP A is equal to 95.