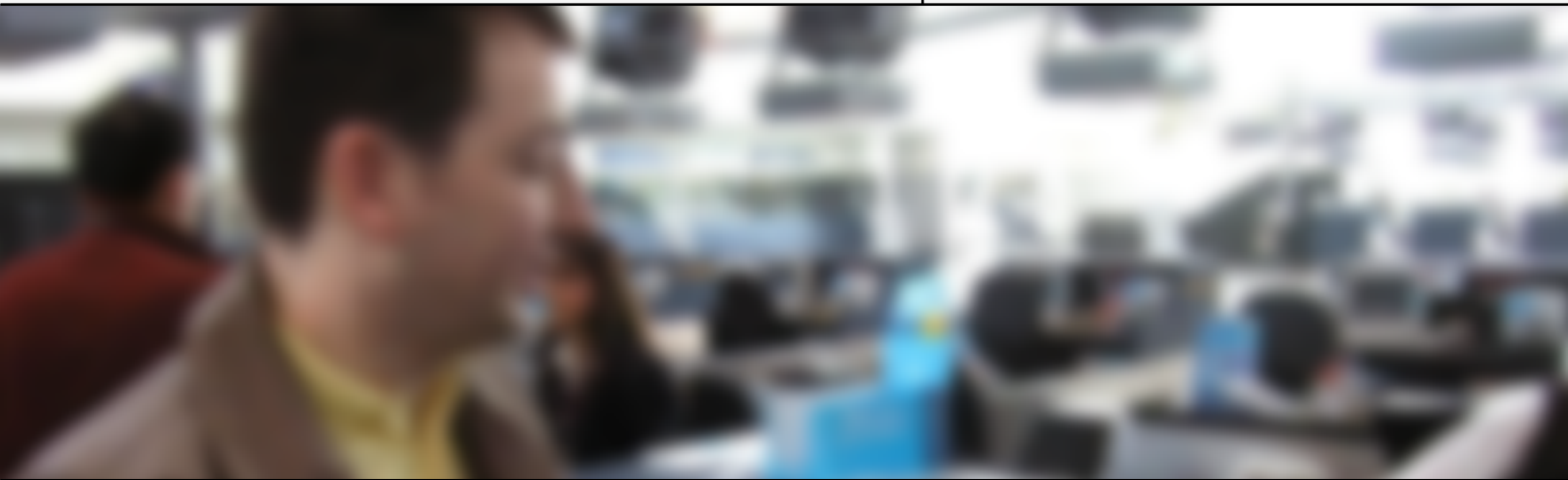


PORTA  Billing 100[®]



**Customer Self-Care
Interface**

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PortaBilling100, November 2002

Please address your comments and suggestions to Sales Department,
PortaOne, Inc., Suite 400, 2963 Glen Drive, Coquitlam, BC, V3B 2P7,
Canada

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Preface

This document provides a general overview of the PortaBilling100 Customer Self-Care web interface.

Where to get the latest Version of this guide

The hard copy of this guide is updated at major releases only and does not always contain the latest material for enhancements occurring between minor releases. The online copy of this guide is always up-to-date and integrates the latest changes to the product. You can access the latest copy of this guide at www.portaone.com/solutions/billing/docs.

Conventions

This publication uses the following conventions:

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



Caution means ‘reader be careful’. You are capable of doing something that might result in program malfunction or loss of data.

NOTE: Means *reader take note*. Notes contain helpful suggestions or references to materials not contained in this manual



Timesaver means the described action saves time. You can save time by performing the action described in the paragraph.



Tips Means the following information might help you solve a problem

How to get Technical Assistance

The dealer that you purchased this product from is the **FIRST** place you should go for technical assistance. The dealer is usually the most qualified source of help, and is most familiar with your system and how this product should be installed. Many dealers have customer service and technical support programs with varying levels of support offered, and are suitable depending on your needs and computer knowledge.

If your dealer can't assist you

If you cannot get assistance from your dealer, the vendor provides varying levels of technical assistance.

The PortaOne Customer Support Service (e-mail: support@portaone.com) can supply quick answers to specific inquiries regarding product features and technical questions. You can visit our Internet Web site (<http://www.portaone.com>) for more information.

You can also send fax inquiries to +1 604 692 6116.

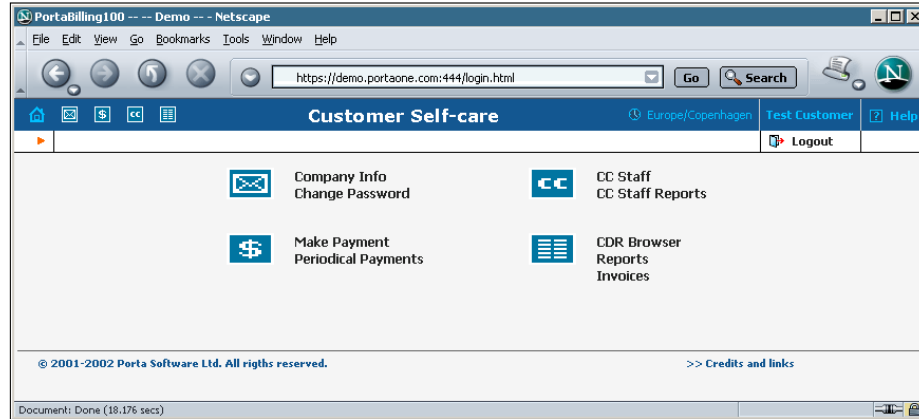
Hardware and software requirements

Client System Recommendations

- OS: Windows 95-XP, UNIX or Mac OS
- Browser: Internet Explorer 5 or higher, Netscape 6.2 or higher supporting DOM and with enabled JavaScript.
- Spreadsheet processor (MS Excel)
- Display Settings:
 - Min Screen Resolution: 1024 x 768
 - Color Palette: 16 bit color (minimum)

NOTE: To view downloaded CDR files in Windows please do the following: My Computer -> Control Panel -> Regional Settings -> Number -> List Separator type “;” to match PortaBilling default list separator.

1 ■ Introduction



The front-end design and functionality of PortaBilling are simple and intuitive. The pure web interface of the PortaBilling Customer Self-Care home page is the main door to all the objects and tools of this part of the system. Divided into four functional blocks, the links load pages containing tools for managing the system, helping customers, and generating statistics. Each second level page contains a link back to the home page.

The four functional areas are:



Management

Normal system maintenance tasks, such as the addition of administrative users, registering new nodes (network endpoints) into the system, maintenance of currencies and exchange rates, and maintenance of the destinations database.



Payments

Tasks related to billing, such as customer, vendor and account management, and rate plan definition.



Customer Care

Tasks available to members of the Customer Care to help troubleshoot problems which clients may inquire about.

NOTE: Customer Care functionality is only available for wholesale customers.



Statistics

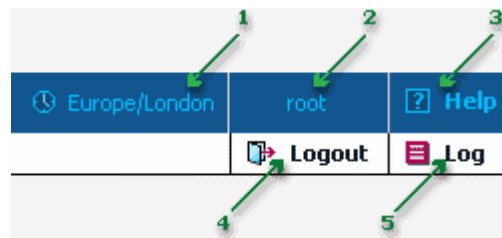
A variety of statistics and reports available, which reflect on the status of the system or information provided about call records, costing, and revenue.

Common Features

All of the functions available from the home page are also available from the drop down menus:



The right top side of the interface provides user with following information:



1. Time Zone where the current user operates
2. Login name of the currently logged in user
3. Context help for the current screen. Clicking this link will pop-up help window
4. Logout button. Used to finish current session or when necessary to re-login as another user
5. View Log. This link is only present for users with corresponding access rights. Clicking it will pop up a window with all logged activities ever performed on the current screen

Also on the toolbar is often a list of available actions to take relevant to the current page:



This toolbar acts as the equivalent of the “File” menu of the application as it is the usual location for “Save”, “Close”, and “Add New” operations.

Sorting Tables

on	 Connect Time	 Disconnect Time	 Duration, min:sec	 Acc
atch es	24 Aug 2002 01:35:35	24 Aug 2002 01:35:35	0:00	
atch es	23 Aug 2002 20:51:50	23 Aug 2002 21:30:12	38:22	
atch	23 Aug 2002	23 Aug 2002		





This feature is available for all CDR browsers where it is necessary to sort viewed information by different criteria. Table header cell with orange triangle shows the sorted row. Triangle down represents descending order, and triangle directed up means ascending.

The sorting is available for all columns with bi-directional white arrow in the top left corner of the header cell. To sort a column, simply click on the header. Click the same column again for the opposite sorting order.

Another cool feature of sorting tables is that table header is always visible.

Graphs

The default time frame for all graphs is 30 hours. The dates above the graph are the boundary time frame for the current graph. If a graph is presented in more than one color, the legend for the color usage will be displayed under the graph. If there are two graphs, captions on the left side will be provided. Usage of the navigation is explained in the table below.

Icon	Description
	Zoom Out. Click the icon or the top part of the Graph to see 50% longer time interval
	Zoom In. Click the icon or the bottom part of the Graph to see 50% shorter time interval, and more detailed graph
	Back in time. Click the icon or the left part of the Graph to move back in time for 50% of the current time frame
	Forward in time. Click the icon or the right part of the Graph to move forward in time for 50% of the current time frame

Reports

The middle portion of report screens is a one-year calendar. PortaBilling keeps reports for one year, and after that the reports are removed from the system. The current month is displayed in the bottom-right hand corner of the calendar.

Consider the following legend for the calendar:



1. If present, this arrow notifies the user that the report for this month is available for download by clicking the month link
2. Three-letter abbreviation of the month, followed by the year.
3. If present, this arrow notifies the user that two half-monthly reports are available and may be downloaded by clicking the links on the right.
4. Click this icon to download statistics for the first half of the month
5. Click this icon to download statistics for the second half of the month
6. Number of the week in the current year. No report was generated for this week, so there's no link.
7. Same as 6, but the report was generated and can be downloaded by clicking the link.
8. Day of the month. No report was generated. Link is inactive.
9. Day with linked reports are set off in bold and underscored. Click to download the report.

The right hand portion of the screen may contain links to Quarterly and semi-annual reports. If a report is available, the corresponding link is set off in bold and underscored.

Note: the links are not displayed if the reports are not configured.

2. System Management

PortaBilling Security

PortaBilling100 is compliant to Visa Security Standards.

User Interface

- Inactivity logout
- Unconditional logout

User Passwords:

- A minimum password length of six (6) characters.
- Passwords include both alphabetical and numerical components.
- Passwords are stored under irreversible encryption.
- It's required that the current password be used before allowing a new password to become effective.
- User's last four (4) passwords can't be re-used.
- It's prohibited changing a password within one (1) day of a previous change.
- Initial password must be change on first login.
- Passwords to be changed at least once in 30 days.
- Use dictionary checking to restrict selection of password

Credit Card information

- Credit card information is displayed as 1234xxxxxxx567
- Credit card information is stored using same encryption as merchant account password.

Company Info

The Company Info screens allow the administrator to maintain the corporate information relating to your firm. This data will be included on reports such as Invoices.

Address Info

The Company Info screens allow maintaining the corporate information relating to your firm. This data will be included on reports such as Receipts, Invoices, etc.

Field	Description
Company Name	The conventional form of your firm’s name.
Address	Street address of the firm.
Country	The country may be selected from a drop-down list.
Phone	Primary telephone number for the firm.
Fax	Primary fax telephone number.
Email	Primary email contact for the firm. (For example, “ info@easycall.com ”.)
Summary Only	When checked, the customer will only receive brief summary emails, rather than lengthy detailed reports as part of their regular service mails.

Additional Info

The Additional Information tab only allows you to enter information about your time zone.

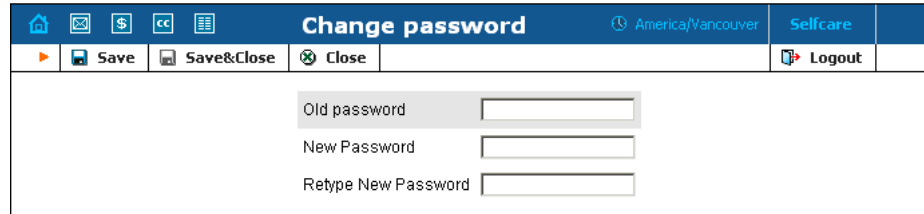
Field	Description
Time Zone	The time zone in which the customer resides.

Payment Info

Data contained within the Payment Info tab is used to store information about the Customer’s Credit Card that will be used for payments

Change Password

The Change Password screen allows the users to change the password required to access this interface. To change the password, the old one is required.



The screenshot shows a web browser window titled "Change password". The browser's address bar shows "America/Vancouver" and "Selfcare". The page has a blue header with the title "Change password" and a "Logout" button. Below the header is a toolbar with buttons for "Save", "Save&Close", and "Close". The main content area contains three text input fields: "Old password", "New Password", and "Retype New Password".

Change password		America/Vancouver	Selfcare
▶ Save	Save&Close	Close	Logout
Old password	<input type="text"/>		
New Password	<input type="text"/>		
Retype New Password	<input type="text"/>		

3. Payments


Make Payment

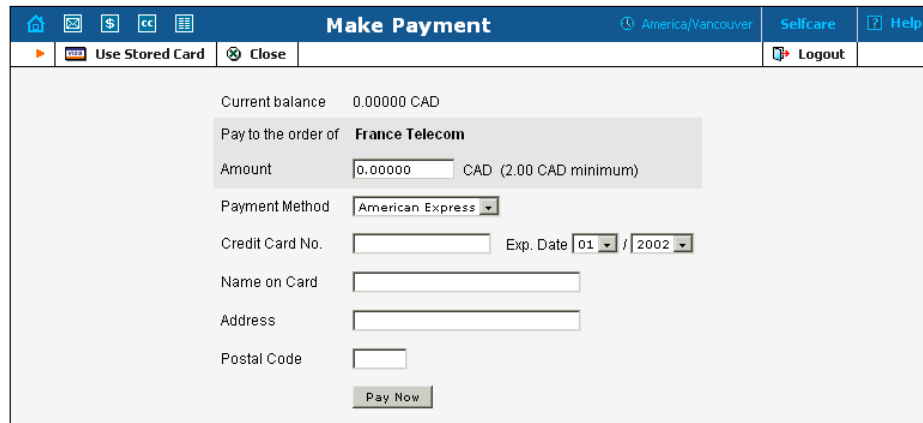
Make Payment screen allows Customer to see the current balance and top it up with a credit card. When the screen is loaded, the Amount field contains the amount necessary to equalize the balance. The credit card set up in the Company Info screen is used by default.



The screenshot shows the 'Make Payment' interface with the following details:


- Navigation icons: Home, Email, Dollar sign, Credit Card, and List.
- Page Title: Make Payment
- Location: America/Vancouver
- Links: Selfcare, Help, Logout, Close, Use Other Card.
- Current balance: 0.00000 CAD
- Pay to the order of: France Telecom
- Amount: 0.00000 CAD (2.00 CAD minimum)
- Using my **Master Card** Card #: 1234123412341234
- Pay Now button.

Change the Amount if needed and click Pay now button to proceed with the payment. An alternative card can be used by clicking the  Use Other Card link.



The screenshot shows the 'Make Payment' interface with the following details:

- Navigation icons: Home, Email, Dollar sign, Credit Card, and List.
- Page Title: Make Payment
- Location: America/Vancouver
- Links: Selfcare, Help, Logout, Close, Use Stored Card.
- Current balance: 0.00000 CAD
- Pay to the order of: France Telecom
- Amount: 0.00000 CAD (2.00 CAD minimum)
- Payment Method: American Express
- Credit Card No. [input field] Exp. Date: 01 / 2002
- Name on Card [input field]
- Address [input field]
- Postal Code [input field]
- Pay Now button.

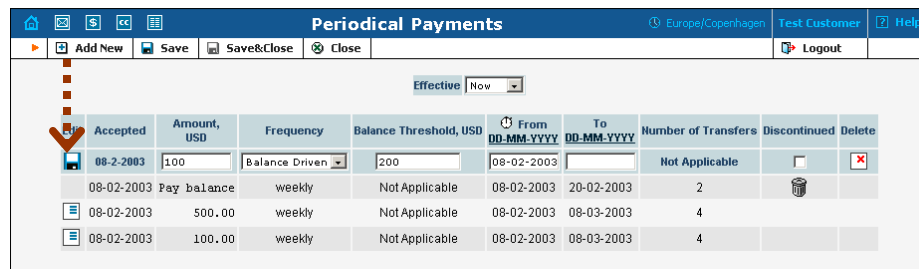
User can return from that screen using  Use Stored Card link.



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



Periodical Payment

Listed are all the registered payments for the Customer. The Effective drop-down allows you to declare whether only current payments ("Now"), or all payments ever processed ("->Now") will be shown. Choose ("Now->") to see the "future" payments, or "All" to list all the payments. ("Now") is the default value for this filter.


In the payments listing, the information in the chart below is provided. To add a new payment, click  **Add New** button.



Accepted	Amount, USD	Frequency	Balance Threshold, USD	From	To	Number of Transfers	Discontinued	Delete
08-2-2003	100	Balance Driven	200	08-02-2003		Not Applicable		
08-02-2003	500.00	weekly	Not Applicable	08-02-2003	08-03-2003	4		
08-02-2003	100.00	weekly	Not Applicable	08-02-2003	08-03-2003	4		

Field	Description
Accepted	Date when the payment was created
Amount	Specify fixed amount to be paid
Frequency	Could be either Weekly, Monthly or Balance Driven
Balance Threshold	Only applicable when Balance Driven. Payment will be processed automatically as soon as the balance reaches the threshold level
From, To	Time frame when the current payment is active
Number of Transfers	Only applicable when the Payment Frequency is not Balance Driven. Indicates total number of transfers
Discontinued	This icon  will appear if the payment has been discontinued
Delete	The delete icon  allows removal of the current payment. This icon is only present for the "future" payments



Edit Periodical Payment

To edit existing payment click the  **Edit** button as shown on the screenshot below. This will copy the row in the form, where it can be edited.

Periodical Payments Europe/Copenhagen Test Customer Help

Effective:


Edit	Accepted	Amount, USD	Frequency	Balance Threshold, USD	From DD-MM-YYYY	To DD-MM-YYYY	Number of Transfers	Discontinued	Delete
	08-2-2003	<input type="text" value="500"/>	<input type="text" value="weekly"/>	<input type="text" value="Not Applicable"/>	<input type="text" value="08-02-2003"/>	<input type="text" value="08-03-2003"/>	4	<input type="checkbox"/>	<input type="checkbox"/>
	08-02-2003	<input checked="" type="checkbox" value="Pay balance"/>	weekly	Not Applicable	08-02-2003	20-02-2003	2	<input type="checkbox"/>	<input type="checkbox"/>
	08-02-2003	500.00	weekly	Not Applicable	08-02-2003	08-03-2003	4	<input type="checkbox"/>	<input type="checkbox"/>
	08-02-2003	100.00	weekly	Not Applicable	08-02-2003	08-03-2003	4	<input type="checkbox"/>	<input type="checkbox"/>

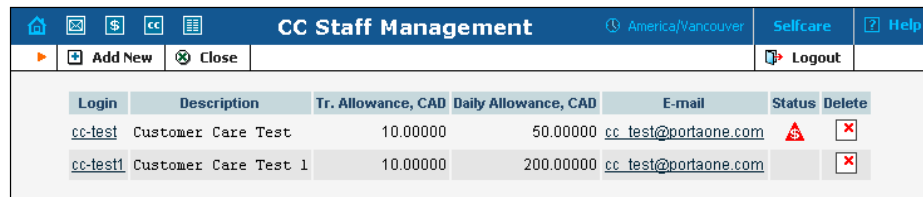
Field	Description
Amount	Specify fixed amount to be paid, or click  Pay icon Balance (not available when the frequency is Balance Driven) to pay the current balance with certain periodicity
Frequency	Balance driven, weekly, or monthly
Balance Driven	Only available when the frequency is balance driven
From, To Dates	Dates when the payment will remain active. Click the  Stop Watch icon to make the payment active immediately. Leave To empty to set the payment active for indefinite period of time
Discontinued	Check the box to discontinue the edited payment





To save changes select  **Save** or  **Save&Close** button.

4. Customer Care




Customer Care Staff

The CC Staff screen shows existing Customer Care users registered for the current customer. It also allows the CC Staff member to edit current user information, and the ability to add and delete users. To add a new user, click the  **Add New** button.






Login	Description	Tr. Allowance, CAD	Daily Allowance, CAD	E-mail	Status	Delete
cc-test	Customer Care Test	10.00000	50.00000	cc_test@portaone.com		
cc-test1	Customer Care Test 1	10.00000	200.00000	cc_test@portaone.com		

The user list table contains the following information and operations.

Field	Description
Login	The user name used for logon and user identification. The user name is a link to the edit screen for the particular user.
Description	A short description associated with the user.
Transaction Allowance	Maximum refund per one transaction.
Daily Allowance	Maximum refund per day.
E-mail	E-mail contact for the user. For convenience, it is provided as a link, so you may send email to the user directly from this screen.
Status	 - limit exceeded  - expired  - not active
Delete	A delete button will appear next to all users. This will permanently delete the user from the system.

Add/Edit CC Staff

The Add/Edit CC Staff screen allows creation and editing Customer Care users registered for the current customer, as well as allowing editing current user information, and the ability to add and delete users.

If not normal CC Staff member's status will be indicated on the top of the screen by one of the following icons:  Limit exceeded;  Expired;  Not active.

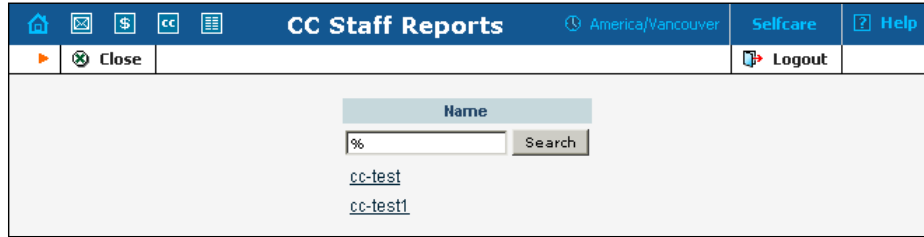
Default status for new user is limit exceeded.

When CC Staff is editing the user information, the following parameters are available:

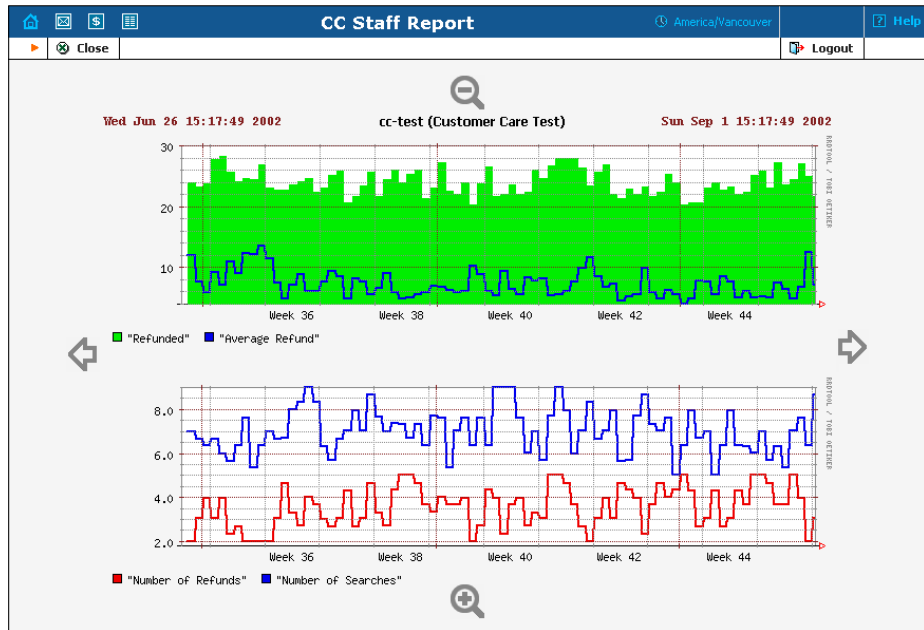
Field	Description
Login	The user name used for logon and user identification.
Password	An easy to remember password may be automatically generated by pressing the "Auto" button. (It is recommended that you augment this password with a number in order to increase the password security.)
Description	A short description of the user that will be visible from the main CC Staff screen.
E-mail	E-mail contact for the user.
Time Zone	The time zone in which this user will be operating.
Activation Date	Date when the account is activated.
Expiration Date	Date when this account expires. If this field is left empty the account never expires.
Daily Allowance	Maximum refund per day.
Transaction Allowance	Maximum refund per one transaction.
Senior	If checked this user will be able to create new Accounts

Customer Care Reports

CC Staff Graphs screen provides user with access to CC Staff Graphs.




Click CC Staff member name to see the graphs. If the desired name is not present on the screen, use pager or search functionality. For the search, the wild card symbol "%" can be used.



For each Customer Care Staff member, two graphs are generated. The top graph containing two curves displays refunded amount, and average refund; the bottom graph shows number of refunds during the last week.

5. Statistics

CDR Browser

The Call History screens allow the user to view and download CDRs for any desired period of time. Set dates by clicking the  icon and press **Show CDRs** button.



Call history America/Vancouver Selfcare Help

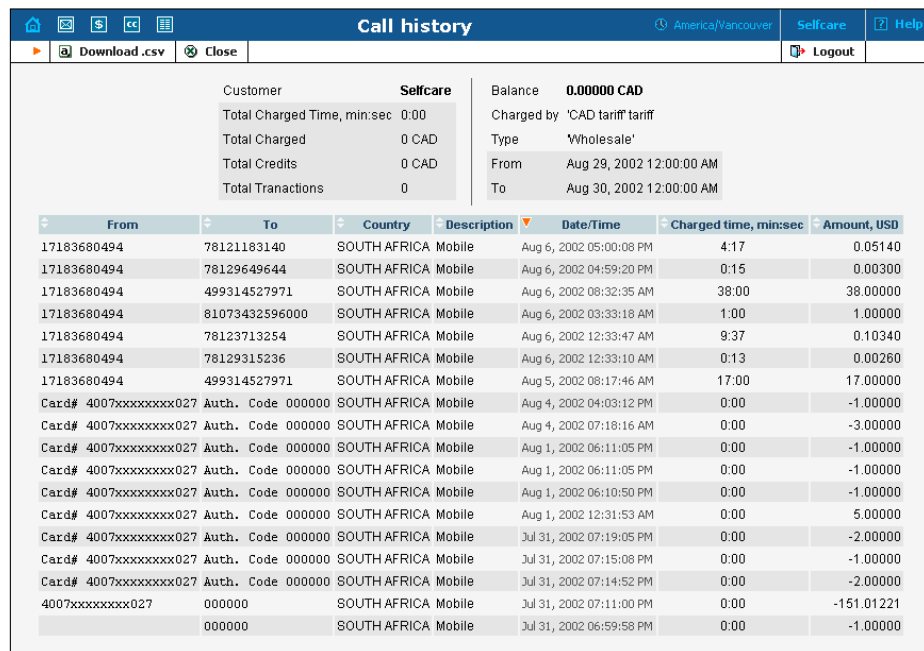
Download .csv Close Logout

From Date: DD-MM-YYYY

To Date: DD-MM-YYYY

Show CDRs

The results page contains a summary displayed on the top of the screen and table listing all calls and charges during the specified time period.




Call history America/Vancouver Selfcare Help

Download .csv Close Logout

Customer	Selfcare	Balance	0.00000 CAD
Total Charged Time, min:sec	0:00	Charged by	'CAD tariff' tariff
Total Charged	0 CAD	Type	'Wholesale'
Total Credits	0 CAD	From	Aug 29, 2002 12:00:00 AM
Total Transactions	0	To	Aug 30, 2002 12:00:00 AM

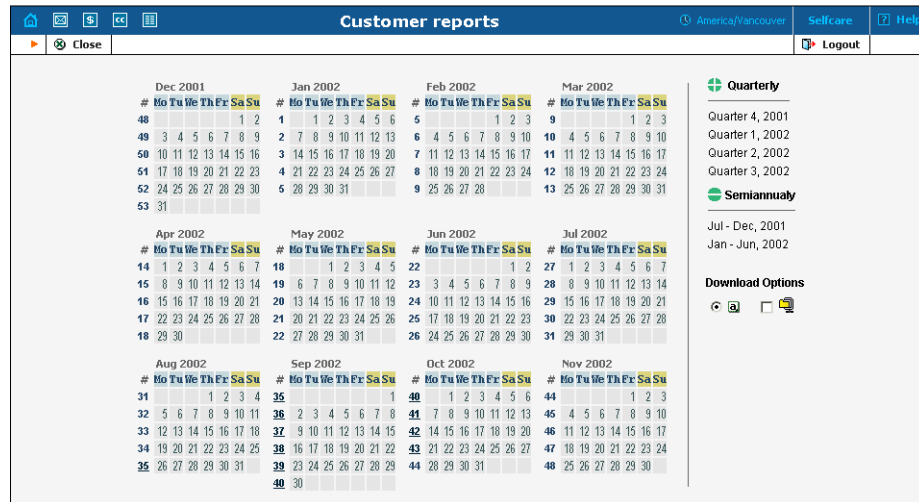
From	To	Country	Description	Date/Time	Charged time, min:sec	Amount, USD
17183680494	78121183140	SOUTH AFRICA	Mobile	Aug 6, 2002 05:00:08 PM	4:17	0.05140
17183680494	78129649644	SOUTH AFRICA	Mobile	Aug 6, 2002 04:59:20 PM	0:15	0.00300
17183680494	499314527971	SOUTH AFRICA	Mobile	Aug 6, 2002 08:32:35 AM	38:00	38.00000
17183680494	81073432596000	SOUTH AFRICA	Mobile	Aug 6, 2002 03:33:18 AM	1:00	1.00000
17183680494	78123713254	SOUTH AFRICA	Mobile	Aug 6, 2002 12:33:47 AM	9:37	0.10340
17183680494	78129315236	SOUTH AFRICA	Mobile	Aug 6, 2002 12:33:10 AM	0:13	0.00260
17183680494	499314527971	SOUTH AFRICA	Mobile	Aug 5, 2002 08:17:46 AM	17:00	17.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 4, 2002 04:03:12 PM	0:00	-1.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 4, 2002 07:18:16 AM	0:00	-3.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 1, 2002 06:11:05 PM	0:00	-1.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 1, 2002 06:11:05 PM	0:00	-1.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 1, 2002 06:10:50 PM	0:00	-1.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Aug 1, 2002 12:31:53 AM	0:00	5.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Jul 31, 2002 07:19:05 PM	0:00	-2.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Jul 31, 2002 07:15:08 PM	0:00	-1.00000
Card# 4007xxxxxxxx027	Auth. Code 000000	SOUTH AFRICA	Mobile	Jul 31, 2002 07:14:52 PM	0:00	-2.00000
4007xxxxxxxx027	000000	SOUTH AFRICA	Mobile	Jul 31, 2002 07:11:00 PM	0:00	-151.01221
	000000	SOUTH AFRICA	Mobile	Jul 31, 2002 06:59:58 PM	0:00	-1.00000

Click  **Download .csv** button to download CDRs in .CSV format

Customer Reports

The Customer Report screen presents the user with access to easy download of all reports that have been set for the Customer.

The left part of the of the screen is a one-year calendar. PortaBilling keeps reports for one year, and after that the reports are removed from the system. The current month is displayed in the bottom-right corner of the calendar.



Consider the following legend for the calendar:




1. If present, this arrow notifies the user that the report for this month is available for download by clicking the month link
2. Three-letter abbreviation of the month, followed by the year.
3. If present, this arrow notifies the user that two half-monthly reports are available and may be downloaded by clicking the links on the right.
4. Click this icon to download statistics for the first half of the month

5. Click this icon to download statistics for the second half of the month
6. Number of the week in the current year. No report was generated for this week, so there's no link.
7. Same as 6, but the report was generated and can be downloaded by clicking the link.
8. Day of the month. No report was generated. Link is inactive.
9. Day with linked reports are set off in bold and underscored. Click to download the report.

The right part of the screen contains links to Quarterly and semi-annual reports. If report is available corresponding link is set off in bold and underscored.

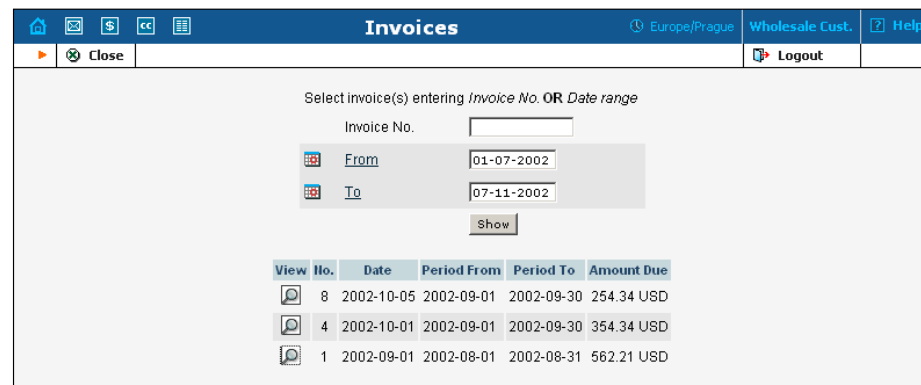
Download Options




Default download format is CSV. Some reports, especially quarterly and semi-annually can get pretty big, and for fast download it's recommended to check ZIP  box, to download zipped file.


Note: the links are not displayed if the reports are not set.

Invoices

The Invoices screen allows viewing of all invoices received by the Customer. Desired Invoice can be found by entering its number. Group of invoices can be searched by selecting the invoice number or a date range.



View	Ito.	Date	Period From	Period To	Amount Due
	8	2002-10-05	2002-09-01	2002-09-30	254.34 USD
	4	2002-10-01	2002-09-01	2002-09-30	354.34 USD
	1	2002-09-01	2002-08-01	2002-08-31	562.21 USD

Select **Preview**  icon to preview the invoice in browser window. The Invoice can be also printed selecting Ctrl-P on your keyboard.