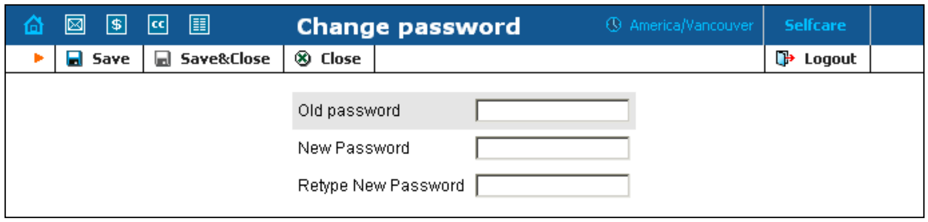
Change Password

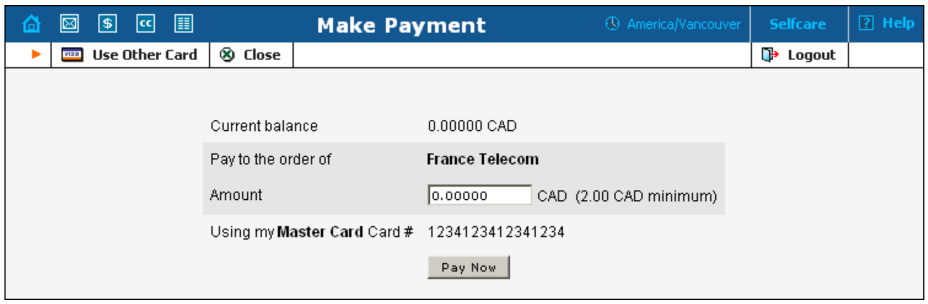
The Change Password screen allows the users to change the password required to access this interface. To change the password, the old one is required.



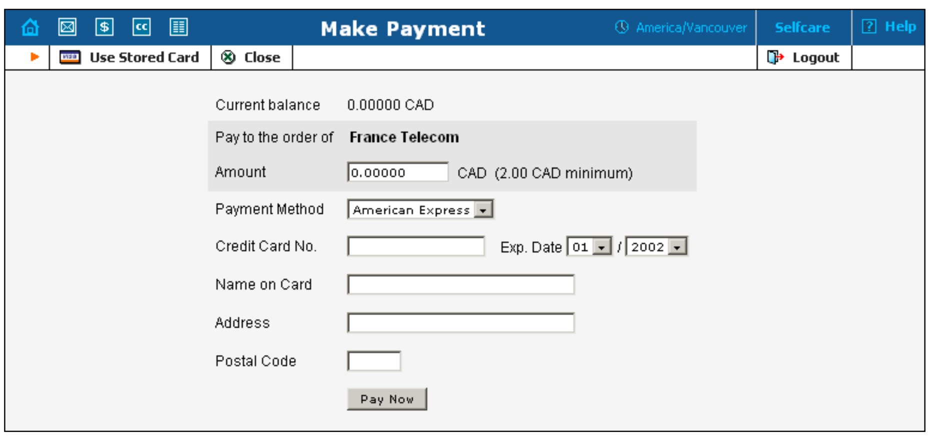
3. Payments

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.



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.



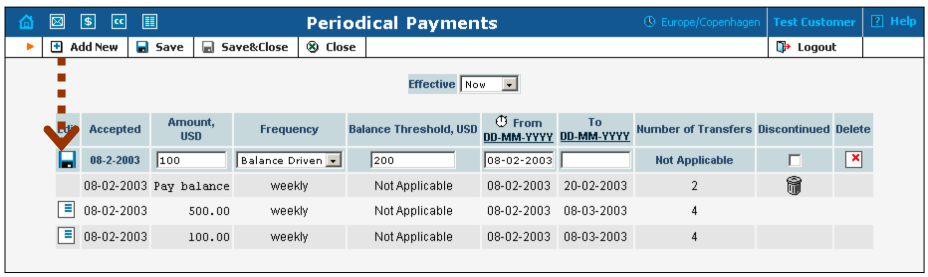
User can return from that screen using **Use Stored Card** link.

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.

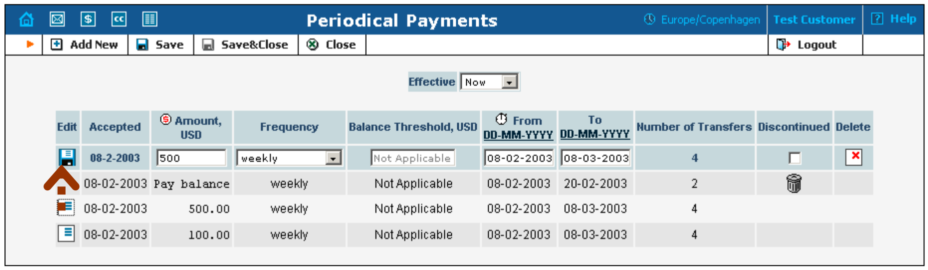
In the payments listing, the information in the chart below is provided. To add a new payment, click **Add New** button.



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.



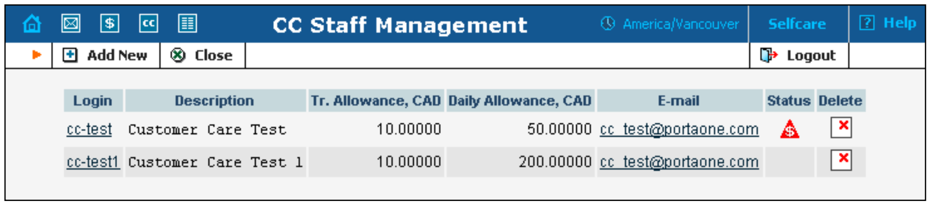
Field	Description
Amount	Specify fixed amount to be paid, or click **Pay** icon **Balance** (not available when the frequency is Balance Driven) to pay the current balance with certain periodicity
Frequency	Balance driven, weekly, or monthly
Balance Driven	Only available when the frequency is balance 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.



The user list table contains the following information and operations.

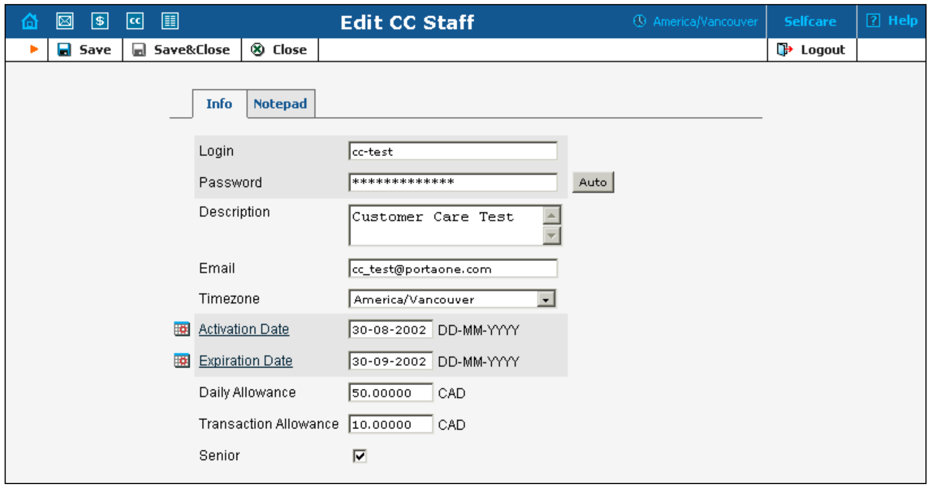
Field	Description
Login	The user name used for logon and user identification. The user name is a link to the edit screen for the particular user.
Description	A short description associated with the user.
Transaction Allowance	Maximum refund per one transaction.
Daily Allowance	Maximum refund per day.
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.

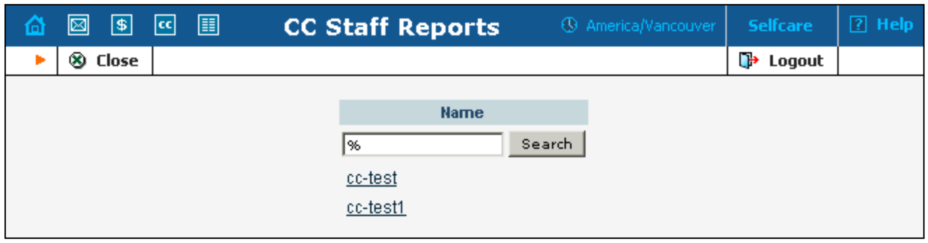


When CC Staff is editing the user information, the following parameters are available:

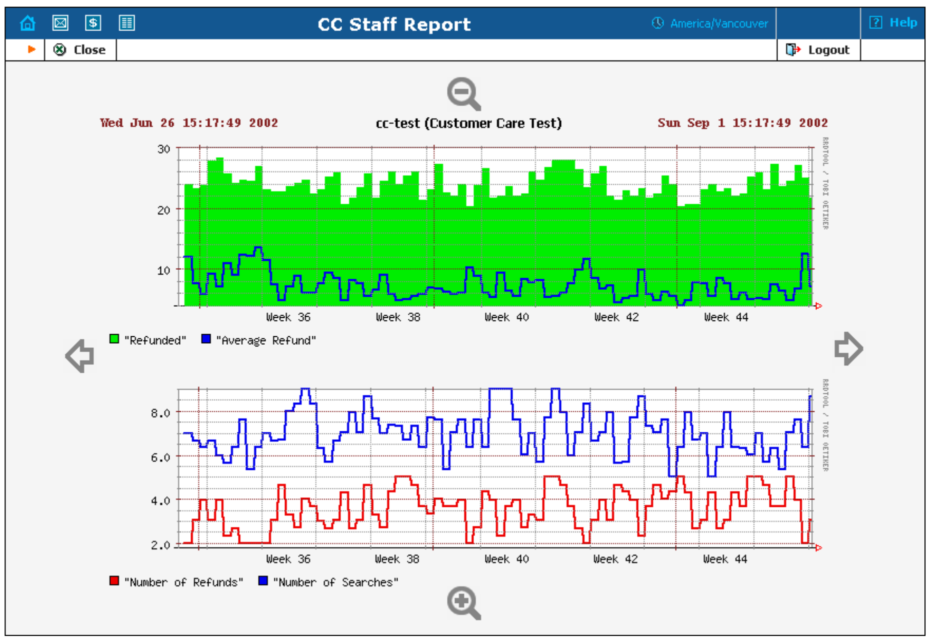
Field	Description
Login	The user name used for logon and user identification.
Password	An easy to remember password may be automatically generated by pressing the "Auto" button. (It is recommended that you augment this password with a number in order to increase the password security.)
Description	A 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.

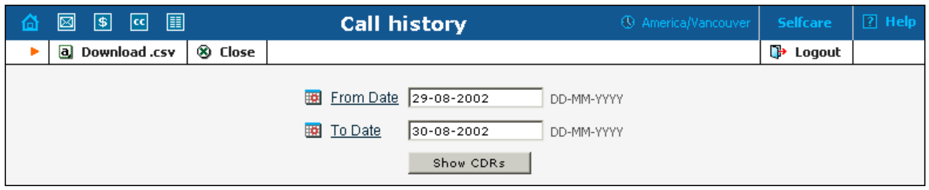


For each Customer Care Staff member, two graphs are generated. The top graph containing two curves displays refunded amount, and average refund; the bottom graph shows number of refunds during the last week.

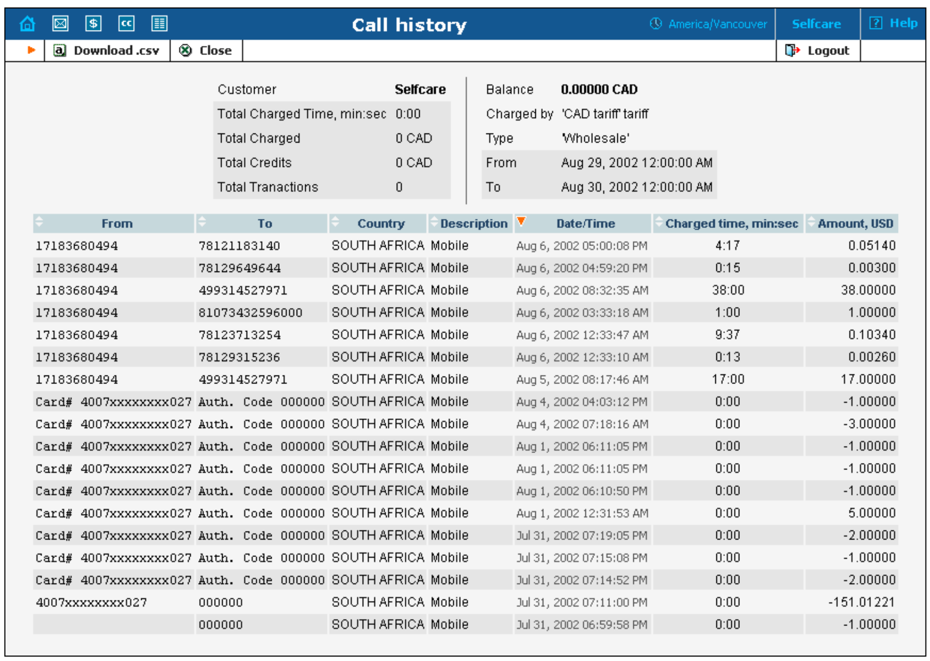
5. Statistics

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.



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.



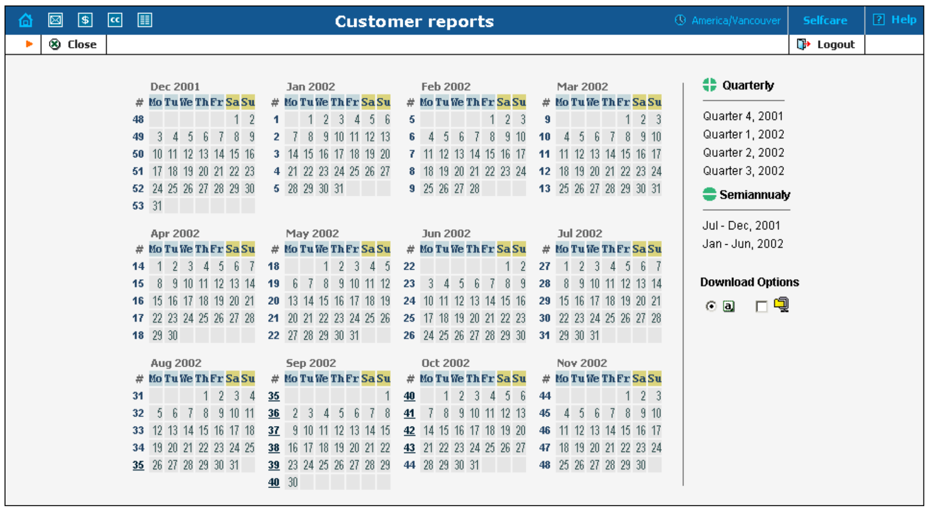
From	To	Country	Description	Date/Time	Charged time, min:sec	Amount, USD
17183680494	78121183140	SOUTH AFRICA	Mobile	Aug 6, 2002 05:00:08 PM	4:17	0.05140
17183680494	78129649644	SOUTH AFRICA	Mobile	Aug 6, 2002 04:59:20 PM	0:15	0.00300
17183680494	499314527971	SOUTH AFRICA	Mobile	Aug 6, 2002 08:32:35 AM	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.

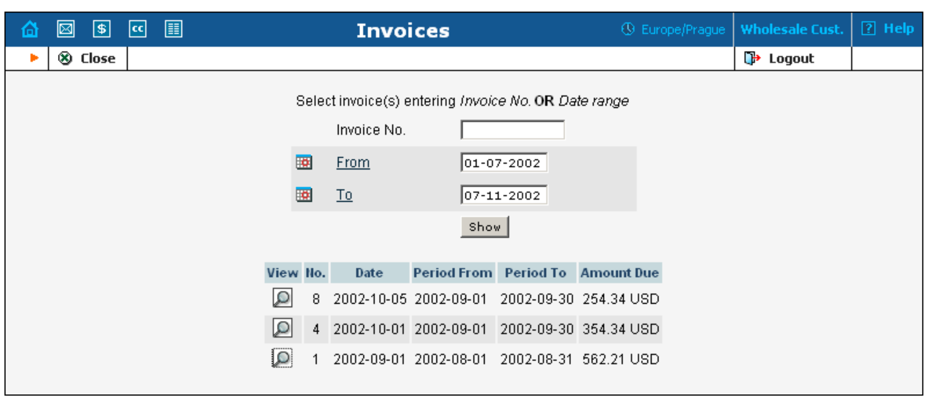
The right part of the screen contains links to Quarterly and semi-annual reports. If report is available corresponding link is set off in bold and underscored.

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.



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