

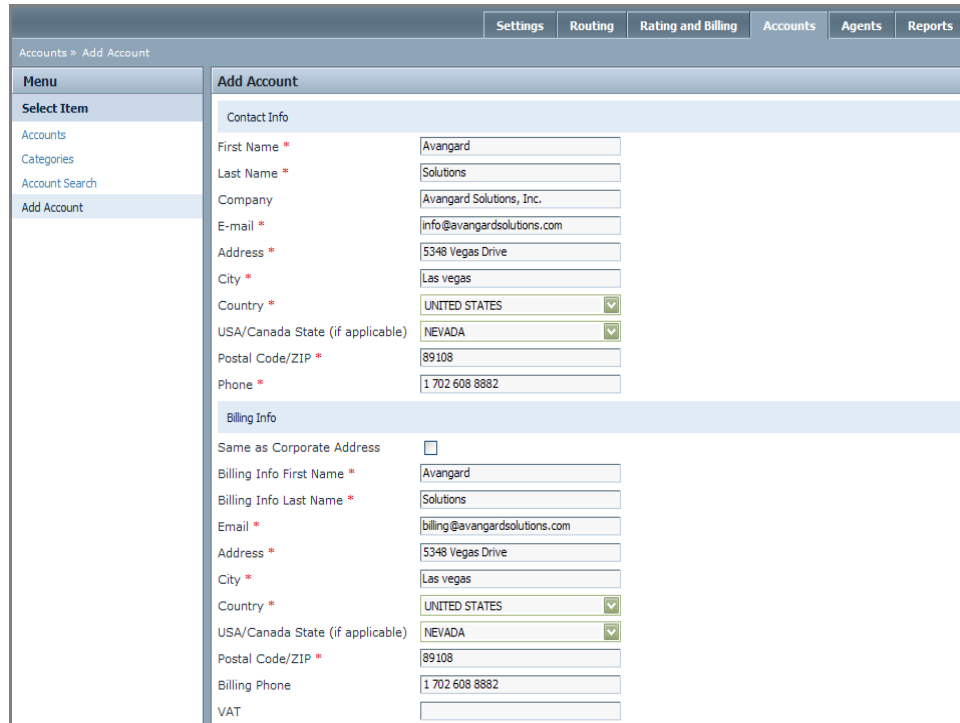
How to Create Customer Accounts

The term "Account" refers to every customer account in the system. This is the main billing unit in the system – all call usage is performed by account members.

1. Create Accounts

Accounts can be created manually by users, automatically from PINs, and automatically from the CRM portal using web services.

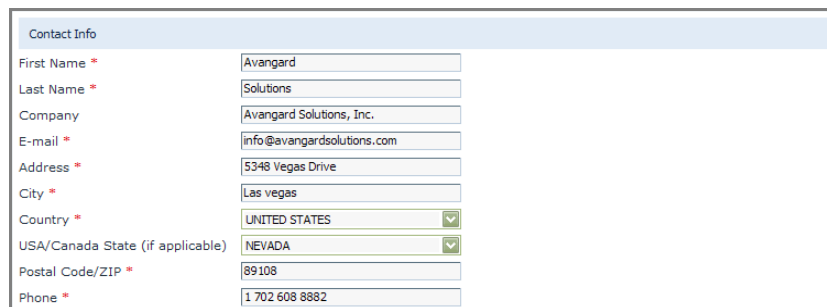
Accounts > Add Account



Menu	Add Account
Select Item	Contact Info
Accounts	First Name * Avangard
Categories	Last Name * Solutions
Account Search	Company Avangard Solutions, Inc.
Add Account	E-mail * info@avangardsolutions.com
	Address * 5348 Vegas Drive
	City * Las vegas
	Country * UNITED STATES
	USA/Canada State (if applicable) NEVADA
	Postal Code/ZIP * 89108
	Phone * 1 702 608 8882
	Billing Info
	Same as Corporate Address <input type="checkbox"/>
	Billing Info First Name * Avangard
	Billing Info Last Name * Solutions
	Email * billing@avangardsolutions.com
	Address * 5348 Vegas Drive
	City * Las vegas
	Country * UNITED STATES
	USA/Canada State (if applicable) NEVADA
	Postal Code/ZIP * 89108
	Billing Phone 1 702 608 8882
	VAT

Accounts have several sections – contact information, billing information, tax jurisdiction, account settings, and CRM settings.

Contact Information



Contact Info	
First Name *	Avangard
Last Name *	Solutions
Company	Avangard Solutions, Inc.
E-mail *	info@avangardsolutions.com
Address *	5348 Vegas Drive
City *	Las vegas
Country *	UNITED STATES
USA/Canada State (if applicable)	NEVADA
Postal Code/ZIP *	89108
Phone *	1 702 608 8882

Enter full customer related contact information here – name, company, email address, city, country, etc.

Billing Information

Billing Info	
Same as Corporate Address	<input type="checkbox"/>
Billing Info First Name *	Avangard
Billing Info Last Name *	Solutions
Email *	billing@avangardsolutions.com
Address *	5348 Vegas Drive
City *	Las Vegas
Country *	UNITED STATES
USA/Canada State (if applicable)	NEVADA
Postal Code/ZIP *	89108
Billing Phone	1 702 608 8882
VAT	

Billing information will be displayed on the customer invoices - it can be copied from the contact information by selecting the "Same as Corporate Address" check box - it can also be entered manually if different from contact information.

Tax Jurisdiction

Tax Jurisdiction	
Account is Taxable	<input checked="" type="checkbox"/>
Federation (optional) *	UNITARY STATE
State (Country) *	NEVADA
County *	CLARK COUNTY
City *	LAS VEGAS
Billing to Prefix	-- Ignore Prefix --
Customer Type	Company
Regulated	<input checked="" type="checkbox"/>
City Incorporated	<input checked="" type="checkbox"/>
Exempt	<input type="checkbox"/> Federal <input type="checkbox"/> State <input type="checkbox"/> County <input type="checkbox"/> City

If you want to make the account taxable select the "Account is Taxable" check box and choose the applicable federal, state, county and city taxes from the drop down menus -

These taxes must first be created in Rating and Billing > Taxes and Localities > Localities. For more details about this topic, please refer to the file "How to use Taxes".

You have also to choose the customer type, whether it is regulated, city incorporated, and federal/state/county/city exempt.

Please note that these should match exactly the settings in the tax, which is assigned to the subscription plan and which later you can assign to this account from the account context.

Account Settings

Here you have to select the account subscription plan, route set, and agent.

You can choose from the followings account status: active, locked, and inactive.

Please note that the account must be "Active" in order to terminate traffic.

Account Settings	
Subscription Plan *	Subscription Plan
Route Set	AVS Route Set
Agent	Agent One
Status	Active
Currency	
Date Created	02/19/2013 0:00:00
Beginning balance	0.00

When the account is "Locked" it has access to limited system services: it cannot make calls but can still login in to the CRM portal, it can make payments, it continues to get charged and its invoices continue to be generated. The account status will be changed to "Locked" automatically when its prorated balance reaches 0 (for prepaid) or when it reaches its credit limit (for postpaid).

Please note that a "Locked" account cannot be activated as long as its balance is negative or smaller than the credit limit. Also, on deactivation of an account the system always generates an invoice.

When account is "Inactive" it cannot use the services at all.

The account currency is be populated from the chosen plan.

You also have the option to choose a beginning balance to the account – this is the initial balance of the account.

Please note that prepaid accounts must have positive balance in order to make calls while postpaid accounts can be negative or positive balance but it must always be greater than the credit limit.

CRM Settings

CRM Settings	
Login Name *	Login_Name
Password *	••••••
Confirm Password *	••••••
CRM Language *	English
Invoice Language *	English
<input type="button" value="Submit"/>	

Here you have to enter the username and password to be used to login in the CRM portal.

Also you have to select the default CRM and Invoice language for this customer.

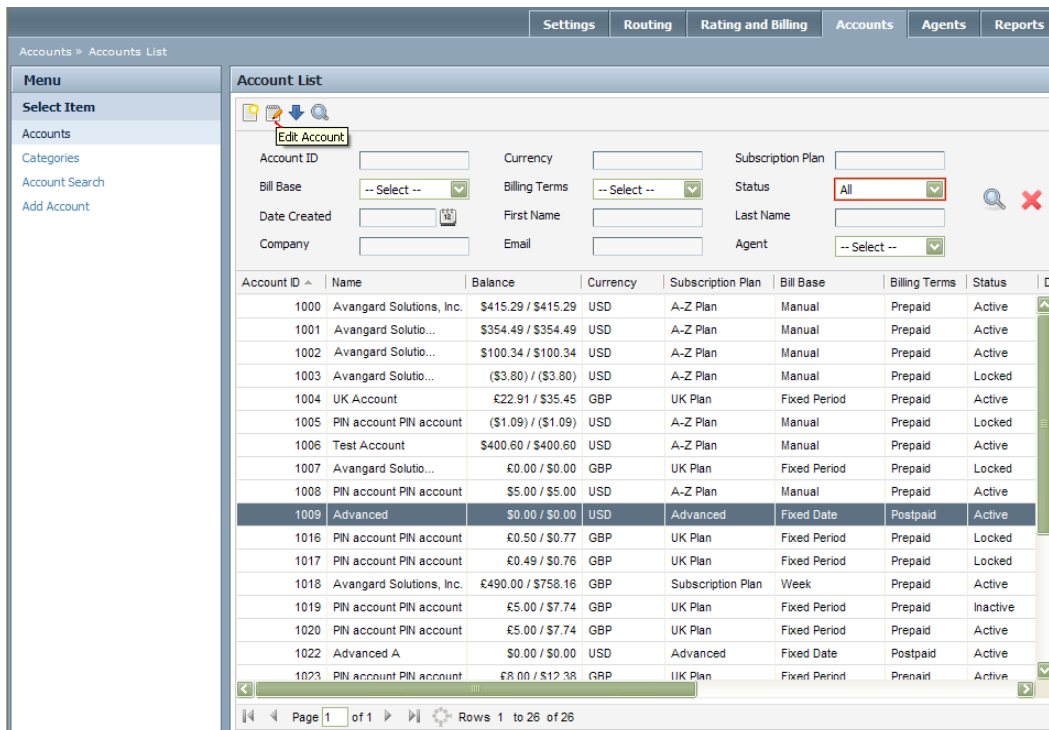
2. Manage / Edit Accounts

All active customer accounts in the system are displayed in the Account List.

Please note that in order to see inactive and suspended accounts you must use the Search Filter (select the Status "Inactive", "Suspended, or "All").

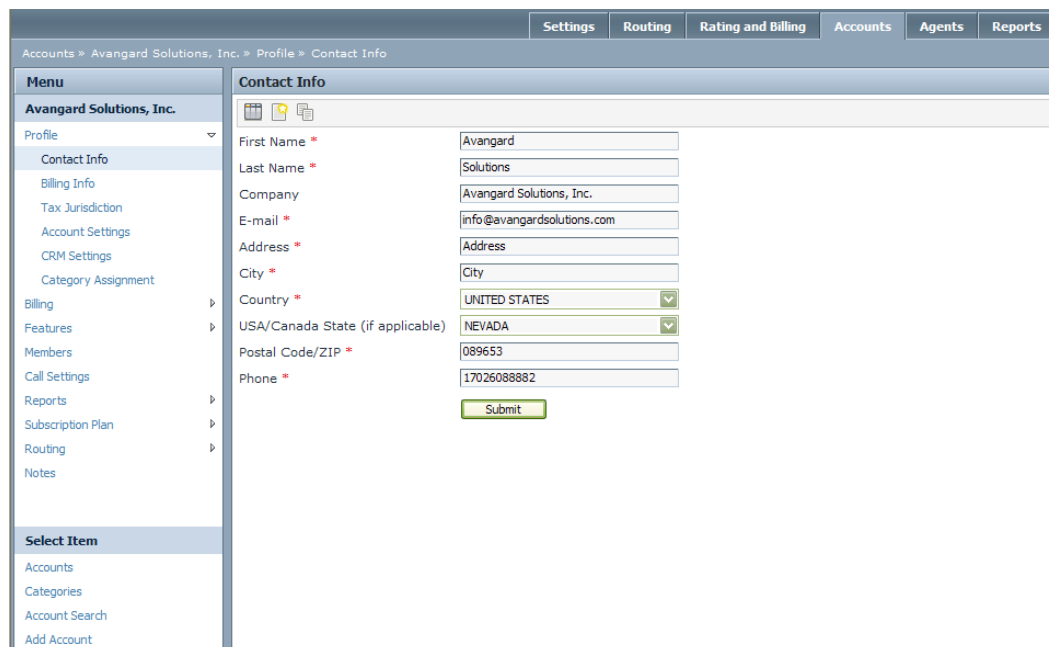
In order to edit an account double click its name from the list – alternatively you can select it and click the "Edit Account" button.

From here you can manage the account features, change and update details, add agents, create specific account charges, view invoices, check account and member reports, add SIP devices, assign call forwarding, etc.



2.1. Accounts > Account Name > Profile

From this menu you can change the current account details - contact and billing information, tax jurisdiction, account and CRM settings.



2.2. Accounts > Account Name > Billing

You can change all billing related account characteristics from this menu – billing settings, invoices, transactions, credit/debit, etc.

Accounts > Account Name > Billing > Billing Settings

Accounts > Avangard Solutions, Inc. > Billing > Billing Settings																																																													
Menu Avangard Solutions, Inc. Profile Billing Billing Settings Invoices Transactions Scheduled Transactions Unbilled Charges Credit/Debit Features Members Call Settings Reports Subscription Plan Routing Notes Account Accounts Categories Account Search Add Account	<table border="1"> <thead> <tr> <th>Settings</th> <th>Routing</th> <th>Rating and Billing</th> <th>Accounts</th> <th>Agents</th> <th>Reports</th> </tr> </thead> <tbody> <tr> <td colspan="6">Billing Settings</td> </tr> <tr> <td>Payment Method</td> <td colspan="5">Prepaid</td> </tr> <tr> <td>Critical Balance (£) *</td> <td colspan="5">10.00</td> </tr> <tr> <td>Credit Limit (£) *</td> <td colspan="5">1,000.00</td> </tr> <tr> <td>Minimum Balance to Make Calls (£) *</td> <td colspan="5">0.05</td> </tr> <tr> <td>Automatically email invoices to billing contact</td> <td colspan="5"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Send Critical Balance Notification</td> <td colspan="5"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Send Unpaid Invoice Notification</td> <td colspan="5"><input type="checkbox"/></td> </tr> <tr> <td colspan="6" style="text-align: center;"><input type="button" value="Submit"/></td> </tr> </tbody> </table>	Settings	Routing	Rating and Billing	Accounts	Agents	Reports	Billing Settings						Payment Method	Prepaid					Critical Balance (£) *	10.00					Credit Limit (£) *	1,000.00					Minimum Balance to Make Calls (£) *	0.05					Automatically email invoices to billing contact	<input checked="" type="checkbox"/>					Send Critical Balance Notification	<input checked="" type="checkbox"/>					Send Unpaid Invoice Notification	<input type="checkbox"/>					<input type="button" value="Submit"/>					
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Initially all accounts inherit the default billing settings from the Subscription plan - however you can change these settings and make them custom for each account here.

Please note that the default settings are inherited only on new account creation – you cannot change in bulk the settings of all accounts from the system settings or subscription plan.

Configure the billing settings of the account from here:

- Payment method – chose payment terms (prepaid or postpaid)
- Critical balance – this is the threshold which triggers the notification for low account balance to the billing e-mail address
- Credit limit – this is the credit limit for postpaid accounts: when the balance reaches this limit all calls will stop to connect
- Minimum balance to make a call – this is the minimum balance which a prepaid account should have in order to be able to make calls
- Automatically email invoices – if this check-box is selected the system will automatically send all new invoices to the customer's billing email address
- Send Critical Balance Notification – check this to enable the notification for low account balance (when it reaches the critical balance set above)
- Send Unpaid Invoice Notification – if this is checked the system will send a notification to all postpaid accounts which have unpaid invoices after the invoice grace period is over

Please note that you cannot change the payment method of an account from postpaid into a prepaid if the account has a negative current balance - all amounts due must be paid first before the payment method can be changed.

Accounts > Account Name > Billing > Invoices

Accounts > Avanguard Solutions, Inc. > Billing > Invoices						
Settings Routing Rating and Billing Accounts Agents Reports						
Menu						
Avanguard Solutions, Inc.						
Profile						
Billing						
Billing Settings						
Invoices						
Transactions						
Scheduled Transactions						
Unbilled Charges						
Credit/Debit						
Features						
Members						
Call Settings						
Reports						
Subscription Plan						
Routing						
Notes						
Account						
Accounts						
Categories						
Account Search						
Add Account						
Invoice Number	Invoice Date	Start Date	End Date	Invoice Amount	Invoice Ending Balance	Invoice Remaining Due
Total				\$22,711.89		\$155.68
Uninvoiced Activity		02/18/2013	02/19/2013	\$83.34	\$(239.00)	
1008-20130218	02/18/2013	02/11/2013	02/17/2013	\$493.48	\$(155.66)	\$155.68
1008-20130211	02/11/2013	02/04/2013	02/10/2013	\$725.46	\$(725.46)	\$0.00
1008-20130204	02/04/2013	01/28/2013	02/03/2013	\$337.37	\$(324.17)	\$0.00
1008-20130128	01/28/2013	01/21/2013	01/27/2013	\$857.72	\$(910.34)	\$0.00
1008-20130121	01/21/2013	01/14/2013	01/20/2013	\$567.84	\$(252.62)	\$0.00
1008-20130114	01/14/2013	01/07/2013	01/13/2013	\$585.24	\$(585.24)	\$0.00
1008-20130107	01/07/2013	12/31/2012	01/06/2013	\$739.82	\$(1,056.14)	\$0.00
1008-20121231	12/31/2012	12/24/2012	12/30/2012	\$1,395.40	\$(316.33)	\$0.00
1008-20121224	12/24/2012	12/17/2012	12/23/2012	\$2,319.18	\$(996.81)	\$0.00
1008-20121217	12/17/2012	12/10/2012	12/16/2012	\$2,301.57	\$(697.16)	\$0.00
1008-20121210	12/10/2012	12/03/2012	12/09/2012	\$2,357.23	\$(605.01)	\$0.00
1008-20121203	12/03/2012	11/26/2012	12/02/2012	\$1,891.27	\$(1,290.58)	\$0.00
1008-20121126	11/26/2012	11/19/2012	11/25/2012	\$1,532.66	\$(604.41)	\$0.00
1008-20121119	11/19/2012	11/12/2012	11/18/2012	\$1,242.08	\$(573.96)	\$0.00
1008-20121112	11/12/2012	11/05/2012	11/11/2012	\$1,256.37	\$(232.96)	\$0.00
1008-20121105	11/05/2012	10/29/2012	11/04/2012	\$1,542.03	\$(483.09)	\$0.00
1008-20121029	10/29/2012	10/22/2012	10/28/2012	\$997.90	\$(981.41)	\$0.00
1008-20121022	10/22/2012	10/15/2012	10/21/2012	\$784.28	\$(869.27)	\$0.00

The invoice grid shows a list of all invoices issued for the account - the charges that have not been invoiced yet are shown as un-invoiced activity (below the total line).

The invoice ending balance is the account balance at the date the invoice was issued while the invoice remaining due is the current amount due at the time the report is viewed.

With the functional buttons you have the options to check invoice details, view the selected invoice as PDF files, download CDRs for each invoice, review transactions from the invoice, view only taxes for the invoice, and send invoices as an email.

There is also a possibility to close an invoice - in this case the invoice current due is reduced to 0 and a previous period adjustment is posted in the current period.

You have the option to filter the list by specific parameters.

Accounts > Account Name > Billing > Transactions

You can see all usage charges, adjustments, custom charges, payments, refunds, etc. for the account from here - the system displays the transaction ID, the date when the transaction was created, the description you entered, the amount (positive and negative), and how much was allocated to each transaction.

Payments are allocated to invoices (they pay and close invoices) while refunds are allocated to payments. The columns "Allocated" and "Unallocated" show what amount from a particular payment was allocated and what part is not used and still unallocated.

You have the option to view/print receipts for your payments from here - to do that select the payment from the list, click on the "View as .pdf" button, and save/print your receipt.

You can also review the details for each transaction, reverse transactions, switch between base and account currency, and filter the list by specific parameters.

Accounts > Avangard Solutions, Inc. > Billing > Transactions							
Menu							
Avangard Solutions, Inc.							
Transactions							
Transaction ID	Type	Date	Description	Amount	Allocated	Unallocated	
Total				\$43.00	\$12.02	\$42.98	
9	Custom Charge	04/07/2013	Number	(\$2.00)	\$0.00	\$0.00	
8	Custom Charge	04/07/2013	Line	(\$5.00)	\$0.00	\$0.00	
7	Custom Charge	04/07/2013	Member	(\$3.00)	\$0.00	\$0.00	
3	Refund	04/05/2013	Refund: [Refund]	(\$2.00)	\$0.00	\$0.00	
2	Invoice Payment	04/05/2013	Payment [Payment]	\$5.00	\$2.00	\$3.00	
1	Beginning Accou...	04/05/2013	Beginning Account Balance	\$50.00	\$10.02	\$39.98	

Please note that you can only reverse transactions that have not been invoiced yet - once a transaction is included in an Invoice, you cannot delete it anymore.

Accounts > Account Name > Billing > Scheduled Transactions

Accounts > Advanced A > Billing > Scheduled Transactions							
Menu							
Advanced A							
Scheduled Charges							
ID	Quantity	Unit	Amount	Date	Type	Description	
33	1		\$10.00	02/27/2013 12:11:04	Current Period A...	Adjustment: [Credit]	
32	1		(\$50.00)	02/27/2013 12:10:53	Current Period A...	Adjustment: [Debit]	
11	1		(\$2.00)	02/25/2013 13:21:10	Current Period A...	Adjustment: [Debit]	
10	1		(\$7.00)	02/25/2013 00:00:00	Custom Charge	Manual Charge [02/25/2013 13:19:57]	
9	1		\$1.00	02/25/2013 13:15:03	Current Period A...	Adjustment: [Credit]	

This is applicable only for accounts with "Advanced" subscription plans (with invoices generated at the start of the billing cycle).

The system lists here all custom charges and adjustments which were booked during the current period for which an invoice has already been generated - these transactions are scheduled to be invoiced at the next invoice date and will be included in the following

invoice. Thus the new invoice will cover all charges from the past period which were not invoiced before and all the new charges which are effective for the upcoming period.

You can review the details for each transaction, reverse transactions, switch between base and account currency, and filter the list by specific parameters.

Accounts > Account Name > Billing > Unbilled Charges

Unbilled charges are all custom charges which were supposed to be applied to the account but were not because of insufficient balance.

Once the account balance is increased (e.g. as a result of a payment transaction) automatically these unbilled charges become transactions and update the account balance.

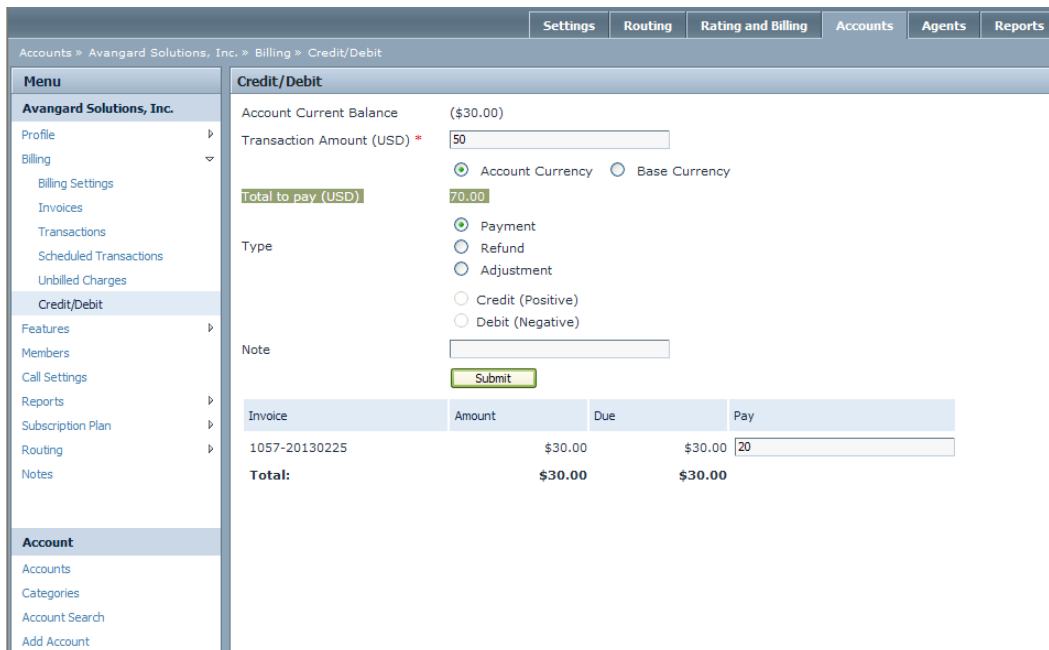
You can review the details for each transaction, reverse transactions, switch between base and account currency, and filter the list by specific parameters.

Accounts > Account Name > Billing > Credit/Debit

You can book the following transactions here:

- payments
- refunds
- credit (positive) adjustments
- debit (negative) adjustments

You also have the option to enter a short note for each transaction for future references.



The screenshot shows the 'Credit/Debit' form in the Global Sysconnect system. The breadcrumb trail is 'Accounts > Avanguard Solutions, Inc. > Billing > Credit/Debit'. The form includes a menu on the left with options like Profile, Billing, Invoices, Transactions, and Credit/Debit. The main form area contains the following fields and options:

- Account Current Balance: (\$30.00)
- Transaction Amount (USD): 50
- Account Currency: Account Currency, Base Currency
- Total to pay (USD): 70.00
- Type: Payment, Refund, Adjustment, Credit (Positive), Debit (Negative)
- Note: (empty text field)
- Submit button

At the bottom, there is a table with the following data:

Invoice	Amount	Due	Pay
1057-20130225		\$30.00	\$30.00
Total:		\$30.00	\$30.00

Transactions from type payments are used when you receive inflows from your customers (e.g. a bank wire, check, cash, or paypal payment) – they increase the account balance and are allocated to the outstanding invoices.

In order to enter a payment transaction you have to select the "Payment" radio button and enter the amount you have received in the "Transaction Amount (USD)" field at the top and in the "Pay" field at the bottom.

If you add an amount in the "Transaction Amount (USD)" field, the payment will be allocated as follows:

- for the postpaid account - starting from the oldest unpaid invoice
- for prepaid accounts - it will increase the account balance (all invoices are paid here)

If you add an amount in the "Pay" field for a specific unpaid invoice, the amount due for this invoice will be decreased with the amount you entered and this payment will be allocated to this specific invoice.

If the amount is equal to the invoice due amount, the invoice will be paid and it will disappear from this list – otherwise it will remain with the amount remaining due after the payment is applied.

Please note that you can use a combination of both – enter amounts both in "Transaction Amount (USD)" and "Pay" fields – however, in this case the total transaction amount will be equal to the sum of the amounts entered in all fields.

Refunds are "negative payments" – these transactions are used when you have to pay something back to your customer.

Please note that in order to make a refund there should be at least one payment in the account – also the refund amount cannot exceed the payment amount.

Adjustments can be positive (credit) or negative (debit) – these transactions are used for balance alignment in cases of booking mistakes, wrong billing, customer disputes, bad debt write-offs, etc.

Adjustments are different from payments or refunds despite the fact that they have the same effect on the balance – they also have nothing to do with credit limits.

Please note that you should never enter payments or refunds as adjustments.

Adjustments are charges and are added in the invoice amount - they are not a way to set the credit limit on the account. If you want to give credit to an account, please change its billing terms to postpaid and set his credit limit.

Please note that you should not use adjustment to increase/decrease credit limits.

When a positive adjustment is invoiced, there should be enough current period charges so that it can be allocated – if this is not the case this adjustment will always be shown as unallocated in the invoice grid.

Please review the file "How to Use Adjustments" for full details about this topic.

Accounts > Account Name > Billing > Generate Invoice

This is applicable for accounts with subscription plans whose billing cycle is "Manual".

In order to generate a manual invoice you have to choose the applicable billing period and click the "Submit" button.

The start date is always the day of the last generated invoice (if this is the first invoice for this account the start date will be date the account was created). The end date is any date from the unbilled period till today.

Please note that you can generate several invoices for the unbilled period by choosing different end dates.

Accounts > Avangard Solutions, Inc. > Billing > Generate Invoice

Settings Routing Rating and Billing Accounts Agents Reports

Menu

CRM Company

- Profile
- Billing
 - Billing Settings
 - Invoices
 - Transactions
 - Scheduled Transactions
 - Unbilled Charges
 - Credit/Debit
- Generate Invoice**
- Features
- Members
- Call Settings
- Reports
- Subscription Plan
- Routing
- Notes

Account

- Accounts
- Categories
- Account Search
- Add Account

Generate Invoice

Generate invoice for period: 02/18/2013 - 02/28/2013

Choose a date: February 2013

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

2.3. Accounts > Account Name > Features

You can add/change all features related to the services offered by the account from here – lines, endpoints, caller IDs, PINs, Voicemail boxes, numbers, and call forwarding rules.

Accounts > Account Name > Features > Lines

You can manage the number of lines for each account from here - the lines determine how many simultaneous calls the account can make (the maximum allowed concurrent calls per account).

Accounts > Avangard Solutions, Inc. > Features > Lines

Settings Routing Rating and Billing Accounts Agents Reports

Menu

Avangard Solutions, Inc.

- Profile
- Billing
- Features
 - Endpoints
 - Numbers
 - PINs
 - Speed Dials
 - Caller IDs
 - Lines**
 - Call Forwarding Rules
 - Voicemail Boxes
- Members
- Call Settings
- Reports
- Subscription Plan
- Routing
- Notes

Account

- Accounts
- Categories
- Account Search
- Add Account

Lines

Available Lines 10

Select Action Add Lines Remove Lines

Quantity

Allocate lines to default member

Message from webpage

The action will charge 2 lines to your account. Do you wish to continue?

By adding or removing lines you increase or decrease the number of account lines. Select the appropriate action (add or remove), enter the quantity you want to add or remove, select the check-box if you want to assign the lines to the account Default Member, and then push the "Submit" button.

A message will appear asking you to confirm the changes you made.

If you have set triggered Line Recurring Charge in the subscription plan of the account (Rating and Billing > Subscription Plan > Custom Charge), the system will generate a charge in the invoice according to the number of Lines in the account. If no Line Recurring Charges are created, there will be no additional charge for Lines in the invoice.

For full details about custom charges please review the file "How to Create Subscription Plan".

Accounts > Account Name > Features > Endpoints > Add Endpoint

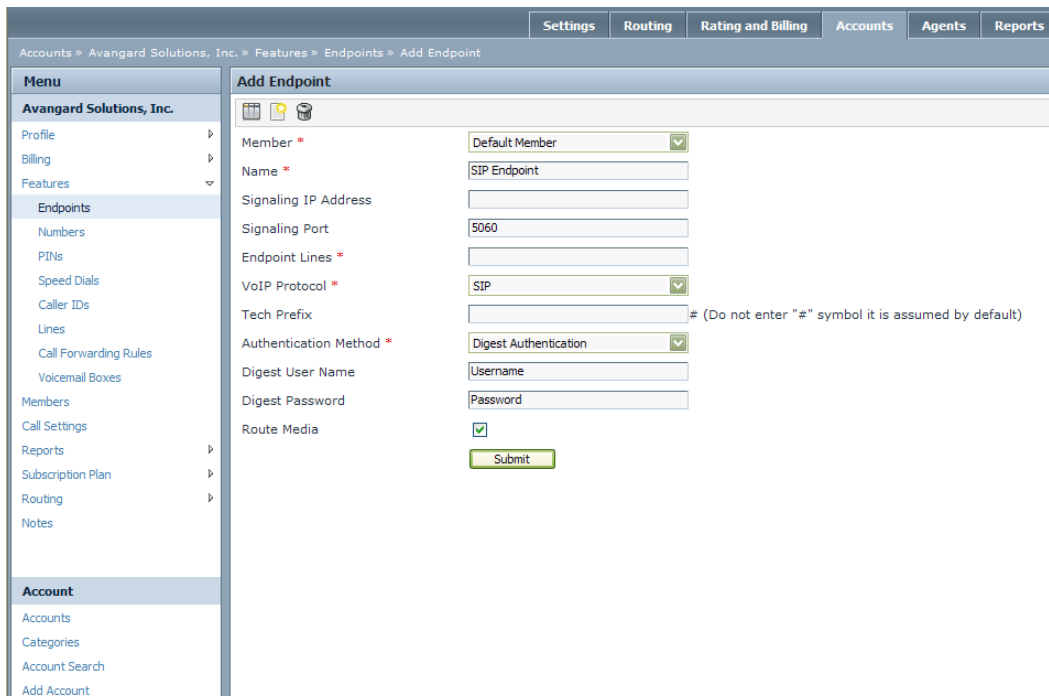
Each endpoint belongs to a member from the account - one endpoint can be assigned to only one member while one member can have several endpoints.

You have to choose the Member this endpoint will belong to - give a unique name to each endpoint.

The signaling IP address is the IP address from which the customer will send traffic - this is necessary when the authentication method is by IP address and by IP and Tech Prefix. If an IP is entered, the system will authenticate the calls to this account member only if they are coming from this IP.

Signaling Port is the port on which the system will listen for SIP calls (for SIP the standard port is 5060) if no port is entered the system will listen on all ports.

Endpoint Lines are the number of concurrent calls that are allowed from this endpoint - these lines cannot exceed the member lines.



Menu	Add Endpoint
Avangard Solutions, Inc.	Member * <input type="text" value="Default Member"/>
Profile	Name * <input type="text" value="SIP Endpoint"/>
Billing	Signaling IP Address <input type="text"/>
Features	Signaling Port <input type="text" value="5060"/>
Endpoints	Endpoint Lines * <input type="text"/>
Numbers	VoIP Protocol * <input type="text" value="SIP"/>
PINs	Tech Prefix <input type="text"/> # (Do not enter "#" symbol it is assumed by default)
Speed Dials	Authentication Method * <input type="text" value="Digest Authentication"/>
Caller IDs	Digest User Name <input type="text" value="Username"/>
Lines	Digest Password <input type="text" value="Password"/>
Call Forwarding Rules	Route Media <input checked="" type="checkbox"/>
Voicemail Boxes	<input type="button" value="Submit"/>
Members	
Call Settings	
Reports	
Subscription Plan	
Routing	
Notes	
Account	
Accounts	
Categories	
Account Search	
Add Account	

Enter the VoIP protocol - SIP or H323.

Tech Prefix is the prefix the called destination number will be sent with.

Please note that the tech prefix must be separated from the called number with the “#” symbol so that the system can differentiate the number from the prefix and authorize the customer by the IP and Tech Prefix – e.g. if you choose tech prefix 123 your customers should send the calls with tech prefix 123#.

You have to select the authentication method to be used – there are three different options for the system to authorize the customer’s calls: IP Address, IP and tech prefix, and Digest Authentication.

Enter the digest user name and password if the authentication method is digest authentication – these are credentials the system will use to authorize the sip device.

Please note that if you want to create multiple SIP accounts, you have to give to your customer the username, the password and the IP of your switch.

The “Route Media” check-box should be selected if the endpoint is behind NAT or if you want to route the media through your system when making calls from this endpoint.

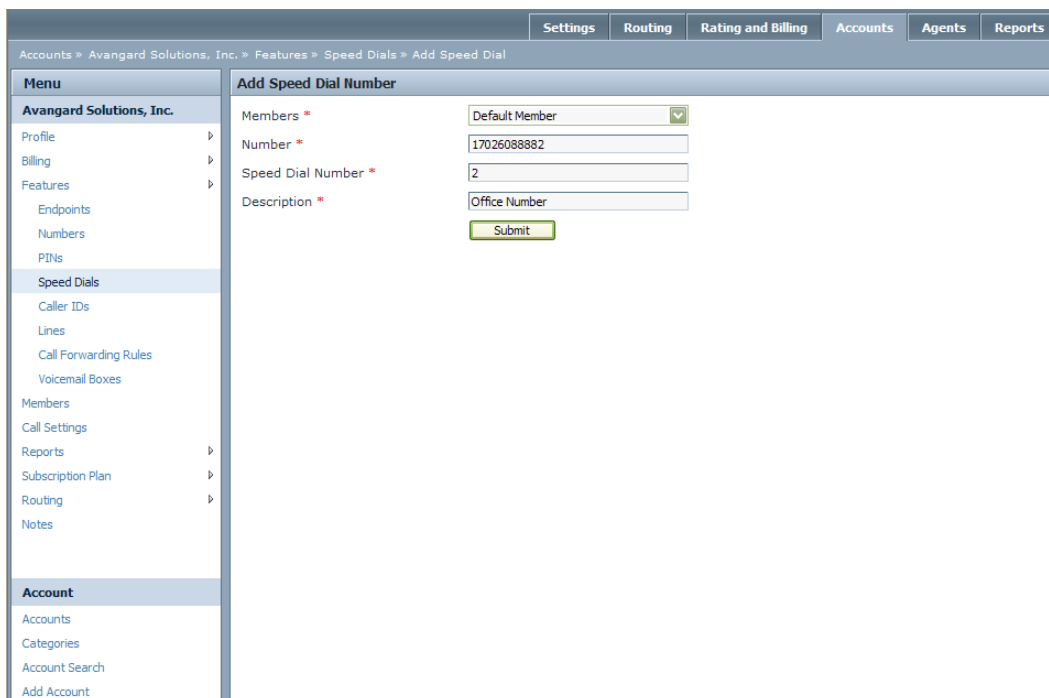
Accounts > Account Name > Features > Speed Dials > Add Speed Dial

Speed Dials are used in IVR applications for quicker dialing of specific numbers - instead of entering every time the whole destination number, the customer can enter only a one digit number and the system automatically will dial the number.

Every Speed Dial should be assigned to an account member.

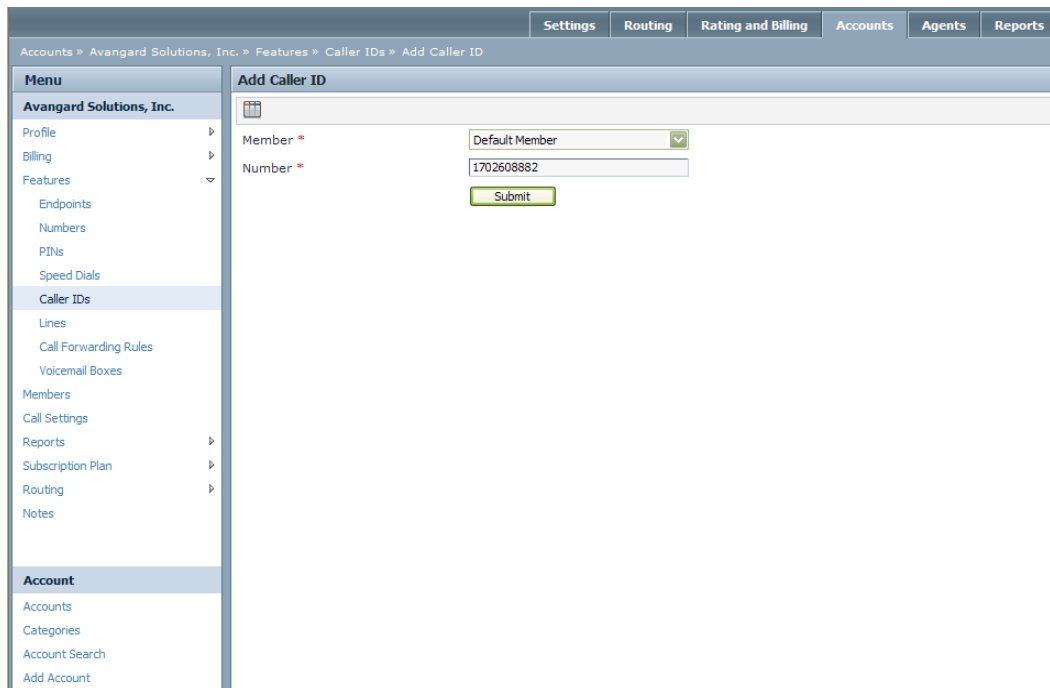
Enter the destination number in E.164 format in the “Number” field and the digit that the customer will use in the “Speed Dial Number” field.

The Description is a text which you can use for recognizing the number.



Accounts > Account Name > Features > Caller IDs > Add Caller ID

Caller IDs are used only for authentication purposes in some applications like PIN-less calling cards, Callback, for authentication of incoming call by outgoing caller id, etc.



Each Caller ID belongs to a member and is unique for the system.

The format of the number should be the same as the Caller ID is received in the system.

Accounts > Account Name > Features > PINs > Add PIN

You can assign PINs to the account from here – they can be created manually or selected from existing PIN batches.

In order to create a PIN manually, you have to enter the number (it should be unique for the system because will be used for authentication), assign it to an account member, and select the effective and expiration dates. The Effective Date is the date after which the PIN can be used, while the Expiration Date is the end of the effectiveness of the PIN. You can also limit the period a PIN can be used by entering Expiration days after activation – e.g. if you choose 90 days the PIN cannot be used from day 91 on.

Please note that when you manually create PINs, they will be associated with the System batch.

PIN numbers are stored in PIN batches – they are created in Rating and Billing > PIN Batches. When you choose to add PIN from already created Batch, then you have to select the member to which the PIN will be assigned, select the Batch (it should be already assigned to the Subscription plan of the account), and then enter how many PINs you want to add to the member.

Please note that every PIN from a Batch has face value and the account balance will be increased with the face value amount.

Settings		Routing		Rating and Billing		Accounts		Agents		Reports	
Accounts > Avangard Solutions.com > Features > PINs > Add PIN											
Menu		Add PIN									
Avangard Solutions.com											
Profile											
Billing											
Features											
Endpoints											
Numbers											
PINs											
Speed Dials											
Caller IDs											
Lines											
Call Forwarding Rules											
Voicemail Boxes											
Members											
Call Settings											
Reports											
Subscription Plan											
Routing											
Notes											
Account											
Accounts											
Categories											
Account Search											
Add Account											

Profile		Create PIN manually									
Member *		Default Member									
PIN *		66558223642893									
PIN Effective Date *		3/1/2013									
PIN Expiration Date *		3/1/2014									
Expiration days after activation		90									
		<input type="button" value="Submit"/>									
Profile		Select PIN from batch									
Member *		Default Member									
Select Batch with available PINs		Batch test 2 (89)									
Number of PINs to add		1									
		<input type="button" value="Submit"/>									

Once PIN numbers are assigned to accounts, they are used for authentication for Calling Cards and/or Callback applications. It is also possible when a user calls and enters the PIN for the first time the system to create automatically an account and assign it this PIN.

Please review the file "How to Create PINs for Calling Cards" for full details about this topic.

Accounts>Account Name>Features>Voicemail Boxes>Add Voicemail Box

You can add Voicemail boxes to the account from here.

Settings		Routing		Rating and Billing		Accounts		Agents		Reports	
Accounts > Avangard Solutions.com > Features > Voicemail Boxes > Add Voicemail Box											
Menu		Add Voicemail Box									
Avangard Solutions.com											
Profile											
Billing											
Features											
Endpoints											
Numbers											
PINs											
Speed Dials											
Caller IDs											
Lines											
Call Forwarding Rules											
Voicemail Boxes											
Members											
Call Settings											
Reports											
Subscription Plan											
Routing											
Notes											
Account											
Accounts											
Categories											
Account Search											
Add Account											

Profile		Add Voicemail Box									
Voicemail Box Name *		Office									
Voicemail Pin *		2468									
Is Active		<input checked="" type="checkbox"/>									
		<input type="button" value="Submit"/>									

Enter the Name of the box- this should be something recognizable for the account member who will use this voicemail box.

Next, add the Voicemail PIN - this will be used for authentication when the member wants to hear the messages left in the voicemail box.

Check "Active" if you want to activate the particular voicemail box.

Accounts > Account Name > Features > Numbers >Add Number

Numbers can be DID's, inbound numbers, numbers used for call forwarding, numbers used for on-net calling.

In order to use certain numbers in an account you need to add them to this account – this is done by clicking on the "Add Number" button.

Numbers are stored in Number Sets – they are created in Routing > Number Sets.

Please note that in order to assign a number to the account, the Number Set it belongs to should be assigned to the Subscription Plan of that account.

The upper part from the page is the search filter, which you can use to find the number(s) you want to add to the specific account.

You can search numbers by location and pattern. If you search by location you have the option to choose country, state, city or postal code. If you search by pattern you have the option to enter it in the "Pattern" field and the system will display all numbers containing this string.

You also have the option to upload numbers from a file - in this case you have to select a CSV file.

In all of the above cases you can choose:

- Number Set – the set from which the system to display the results
- Number Status – Released or Free
- Max Results – the number of rows to have in the search results

In the result section the system displays the numbers which match the search criteria.

If you don't choose any search criteria, the system will display the first numbers available from the number set with the highest priority in the subscription plan.

Check the number(s) that you want to add to the account. You can add Tags to numbers – this is a recognizable word used for searches in the system. If you select the "Do not bill" check-box, the number(s) selected in the grid will not be assigned with a custom charge triggered by number.

To add the number(s) push the "Submit" button.

You can manage the numbers assigned to the account from the Numbers menu. Use the "Tag Numbers" button to add tags to a number from the grid. Using the "Remove Numbers from the Member" button you can un-assign a number from a call forwarding rule. You can change the status of the number from Reserved to Released with the "Release Numbers" button.

Please note that Released numbers are not billed to the account but they can be purchased only by this account. Reserved are numbers which are not associated with any call forwarding rule and they are billed to the account.

Accounts > Avangard Solutions.com > Features > Numbers > Add Numbers

Settings Routing Rating and Billing Accounts Agents Reports

Accounts > Avangard Solutions.com > Features > Numbers > Add Numbers

Menu

- Avangard Solutions.com
- Profile
- Billing
- Features
 - Endpoints
 - Numbers**
 - PINs
 - Speed Dials
 - Caller IDs
 - Lines
 - Call Forwarding Rules
 - Voicemail Boxes
- Members
- Call Settings
- Reports
- Subscription Plan
- Routing
- Notes

Add Numbers

Select Numbers by

- by location
- by pattern
- upload numbers

Number Set: DID Number Set

Number Status: Free

Number is Toll Free:

Country: UNITED STATES

USA/Canada State (if applicable): -- Select Item --

City:

Postal Code:

Max Results: 3

Result

<input type="checkbox"/>	Number	Toll Free	Number Status	Country	State	City	Pa
<input type="checkbox"/>	18881231234	Yes	Free	UNITED STATES	Unknown		
<input type="checkbox"/>	19253940284	No	Free	UNITED STATES	CALIFORNIA		
<input type="checkbox"/>	14152942282	No	Free	UNITED STATES	FLORIDA		

Page 1 of 1 Rows 1 to 3 of 3

Tags:

Do not bill:

Accounts > Account Name > Features > Call Forwarding Rule > Add Call Forwarding Rule

Call Forwarding Rules are used to forward incoming calls to one or more registered devices or to one or more landline or mobile phones.

In order to create a forwarding rule there should be at least one number assigned to the account.

To add a rule click on the "Add Call Forwarding Rule" button - you have to choose the account member and enter the rule name (which should be a recognizable text string).

The incoming calls can be forwarded either simultaneously to all destination targets (option "all at once") or consecutively to targets based on forwarding priority (option "one at time").

You have to also enter the Ring Duration which is the time (in seconds) the system will wait for the destination to answer the call.

Select the "Authenticate Incoming Calls" check-box if you want to authenticate incoming calls only from a specific caller ID - in this case you will have to enter the outgoing Caller ID.

Please note that the Caller ID should be present in the Account > Features > Caller IDs as well.

Outgoing Caller ID is used if you want to translate the Incoming Caller ID when the call is forwarded to a destination.

In the "Member received calls on number" section you have to add a number - a pop-up menu will appear and you have to select one or more of the numbers assigned to the account.

Accounts » Avangard Solutions.com » Features » Call Forwarding Rules » Add Call Forwarding Rule

Settings | Routing | Rating and Billing | Accounts | Agents | Reports

Menu

- Profile
- Billing
- Features
 - Endpoints
 - Numbers
 - PINs
 - Speed Dials
 - Caller IDs
 - Lines
 - Call Forwarding Rules**
 - VoiceMail Boxes
- Members
- Call Settings
- Reports
- Subscription Plan
- Routing
- Notes

Add Call Forwarding Rule

Members: *

Name: *

Ring Destinations: one at a time all at the same time

Ring Duration (sec):*

Authenticate Incoming Calls:

Outgoing Caller ID:

Member receives calls on number:

Id	Number	Toll Free	Country	State	City	Postal Code
<input type="checkbox"/>	19258083735	No	UNITED STATES	CALIFORNIA	Concord	94521

Page 1 of 1 | Rows 1 to 1 of 1

Forward calls to destination:

Priority 1: PH:1702608882

Priority 2: EP:gwww|IP Address|192.168.102.100

You click the "Add Number" button, "Close" and return to "Add Call Forwarding Rule".

Accounts » Avangard Solutions.com » Features » Call Forwarding Rules » Add Call Forwarding Rule

Settings | Routing | Rating and Billing | Accounts | Agents | Reports

Menu

- Profile
- Billing
- Features
 - Endpoints
 - Numbers
 - PINs
 - Speed Dials
 - Caller IDs
 - Lines
 - Call Forwarding Rules**
 - VoiceMail Boxes
- Members
- Call Settings
- Reports
- Subscription Plan
- Routing
- Notes

Add Call Forwarding Rule

Add Number

Number Set: Tags:

Country: Region/State:

City: ZIP/Postal Code:

Status: Prefix:

Toll Free

Number	Toll Free	Country	State	City	Postal Code
<input type="checkbox"/>	14152942282	No	UNITED STATES	FLORIDA	

Page 1 of 1 | Rows 1 to 1 of 1

Now that you have the numbers in the list you have to select a destination to which the calls will be forwarded – possible options are:

- Phone – a regular PSTN Number
- Device – an endpoint from this account (usually with Digest Authentication)
- Voicemail – a voicemail box from this account

With the “Move Up” and “Move Down” buttons you can arrange the order of the destinations. The “Delete Selected” button is used when you want to remove destinations.

When you push the “Submit” button the rule is created and the account can receive incoming calls (on-net calls, DID forwarding, etc.)

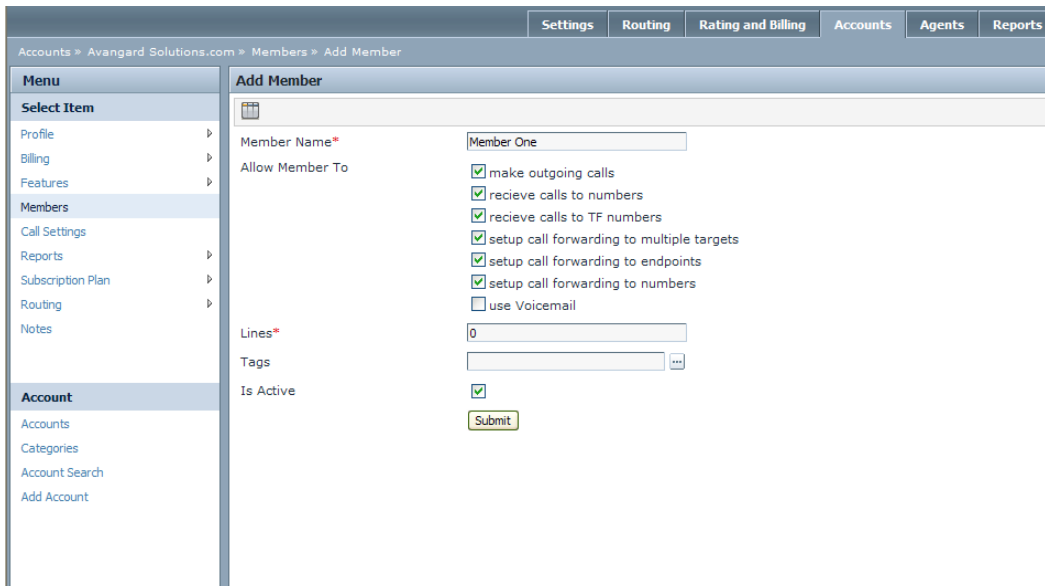
2.4. Accounts > Account Name > Members

Members are system entities which use service features such as calling, numbers, voicemail, subscriptions, etc. Members represent sets of features, access and routing rules which define how end users associated with the account can use the provided services.

There is always at least one member called Default Member which inherits all current account features. For the Residential business cases accounts usually need only one member while for the enterprise business case accounts can have a lot of members.

Accounts > Account Name > Members > Add Member

To add a member, enter its name and select the services this member will support.



Menu	Add Member
Select Item	Member Name* Member One
Profile	Allow Member To
Billing	<input checked="" type="checkbox"/> make outgoing calls
Features	<input checked="" type="checkbox"/> receive calls to numbers
Members	<input checked="" type="checkbox"/> receive calls to TF numbers
Call Settings	<input checked="" type="checkbox"/> setup call forwarding to multiple targets
Reports	<input checked="" type="checkbox"/> setup call forwarding to endpoints
Subscription Plan	<input checked="" type="checkbox"/> setup call forwarding to numbers
Routing	<input type="checkbox"/> use Voicemail
Notes	Lines* 0
Account	Tags
Accounts	Is Active <input checked="" type="checkbox"/>
Categories	<input type="button" value="Submit"/>
Account Search	
Add Account	

Available options are:

- make outgoing calls
- receive incoming calls to DID number
- receive calls on Toll Free number
- setup call forwarding to multiple destinations (phones, endpoints, voicemail)
- setup call forwarding to devices (endpoints)
- setup call forwarding to numbers (phones)
- use Voicemail

Each member should have lines greater than 0 in order to be able to receive/send calls - the number of lines cannot be greater than the account Lines.

You can add tags to members.

You should check "Is Active" in order to activate the member.

Accounts > Account Name > Members > Edit Member

You can change the settings for each member from here.

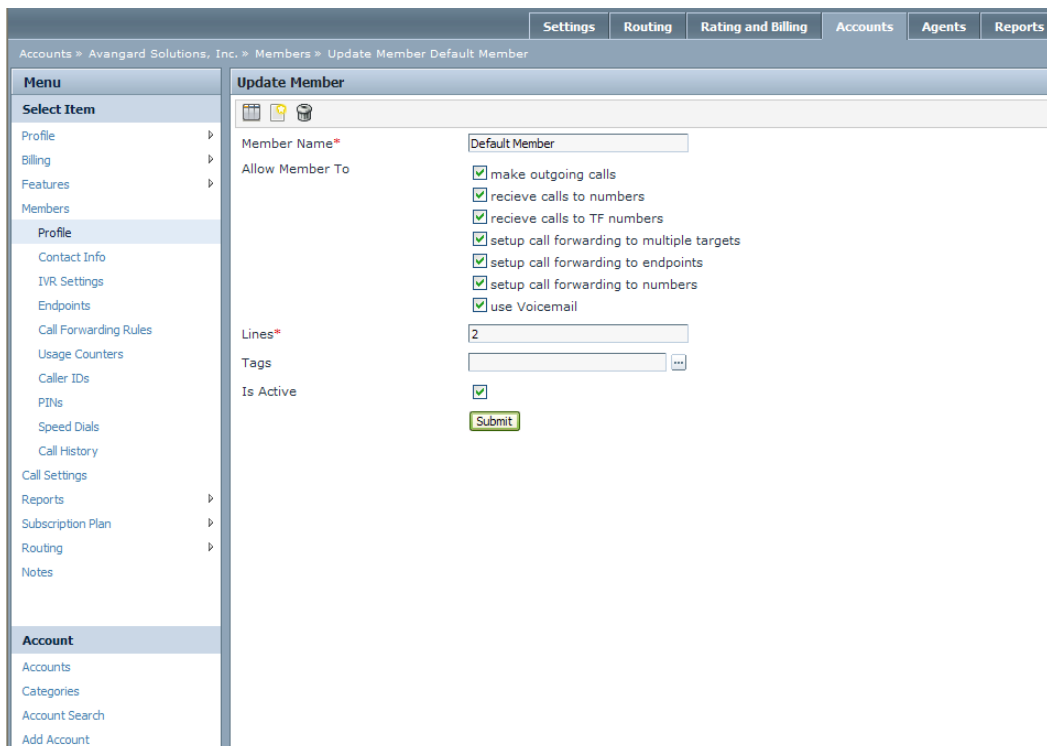
The settings for endpoints, call forwarding rules, speed dials, PINs, and caller IDs are the same as the ones in features.

However, there are some new services which are setup only in the member context.

Accounts > Account Name > Members > Update Member Name

In the member profile menu you can change the permissions to the services and features of this member.

The settings are the same as the ones from Add Member page.



Accounts > Account Name > Members > Member Contact Info Member Name

You can change the member contact details here:

- E-mail
- Address
- Country
- State
- Phone

Settings		Routing		Rating and Billing		Accounts		Agents		Reports	
Accounts > Avangard Solutions, Inc. > Members > Member Contact Info Default Member											
Menu		Member Contact Info									
Select Item											
Profile	>	E-mail	info@avangardsolutions.com								
Billing	>	Address	5348 Vegas Drive								
Features	>	City	Las Vegas								
Members		Country	UNITED STATES								
Profile		USA/Canada State (if applicable)	NEVADA								
Contact Info		Postal Code/ZIP	89108								
IVR Settings		Phone	1 702 608 8882								
Endpoints		<input type="button" value="Submit"/>									
Call Forwarding Rules											
Usage Counters											
Caller IDs											
PINs											
Speed Dials											
Call History											
Call Settings											
Reports	>										
Subscription Plan	>										
Routing	>										
Notes											
Account											
Accounts											
Categories											
Account Search											
Add Account											

Accounts > Account Name > Members > IVR Settings

The IVR settings menu allows you to choose which language to be used when a call is made to the IVR application from this member. You can also choose if you want the IVR to play the account balance, the available time, or both.

Settings		Routing		Rating and Billing		Accounts		Agents		Reports	
Accounts > Avangard Solutions, Inc. > Members > IVR Settings											
Menu		IVR Settings									
Select Item											
Profile	>	Preferred Prompt Language	Portuguese								
Billing	>	Play Account Balance	<input type="checkbox"/>								
Features	>	Play Available Time	<input checked="" type="checkbox"/>								
Members		<input type="button" value="Submit"/>									
Profile											
Contact Info											
IVR Settings											
Endpoints											
Call Forwarding Rules											
Usage Counters											
Caller IDs											
PINs											
Speed Dials											
Call History											
Call Settings											
Reports	>										
Subscription Plan	>										
Routing	>										
Notes											
Account											
Accounts											
Categories											
Account Search											
Add Account											

Address: 5348 Vegas Drive Las Vegas, Nevada 89108, USA
 T 1 702 608-8882, F 1 702 447-8006, E sales@globalsysconnect.com

Accounts > Account Name > Members > Member Name > Assign Usage Counter

Usage Counters enable you to use custom volume and/or occurrence counters - they are used for setting up different subscriptions like unlimited calling or fixed limit per month for example.

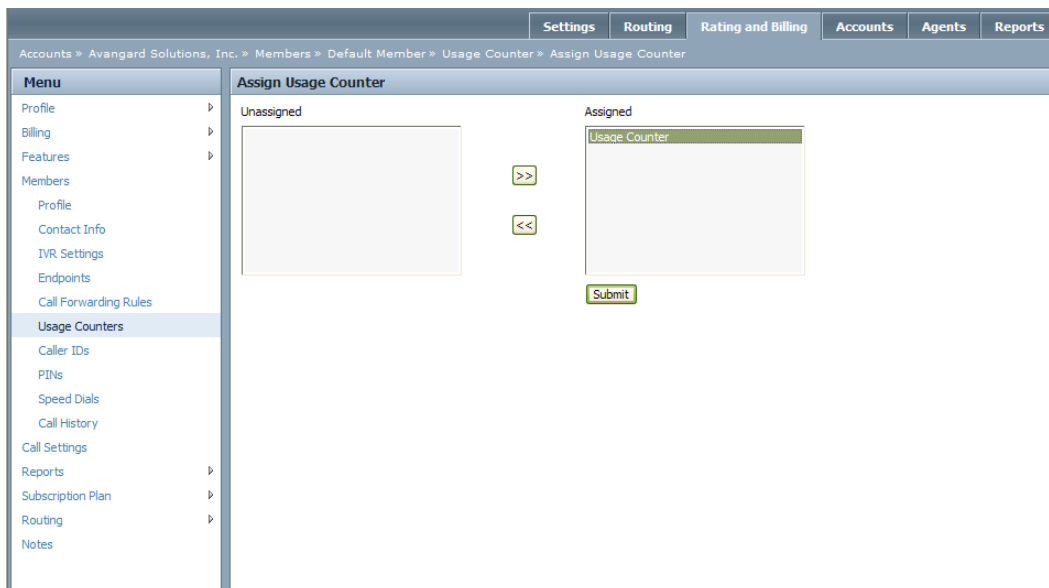
One such example is a subscription with a flat monthly fee which includes a cheap calling up to a certain fixed volume limit. When this limit is reached the accounts using this subscription will make calls based on the standard outgoing rates in the plan. Based on the subscription configurations users can carry over the unused minutes from one month to another.

Another example is a subscription with a flat monthly fee which includes unlimited calling for a certain destination. For all other destinations the accounts using this subscription will make calls based on the standard outgoing rates in the plan.

The first step is to create the usage counters in the subscription plan of the account - after that the counter should be purchased in Account > Subscription plan.

Next the counter must be assigned to a particular account member here.

Select the counter you want from the "Unassigned" box, move it with the arrows to the "Assigned" box, and push the "Submit" button.



Accounts > Account Name > Members > Member Name > Call History

You can check each member's call usage from here - you can drill down the call history per month or day. The day history can be accessed when you click on the month and then on the particular day you're interested in. The report shows total calls, successful calls, ASR, ACD, charge, call and charge duration. The charge information is available in base or account currency (to switch the currency push the "Switch to currency" button).

The data is aggregated and only the details for successful calls can be checked with the "Show detailed CDRs" button.

Accounts > Avangard Solutions, Inc. > Members > Default Member > Call History > March 2013								
Member Call History								
Day	Total Calls	Successful Calls	Call Duration (mm:ss)	Charge Duration (mm:ss)	Charge	ASR (%)	ACD (mm:ss)	
21 Mar 2013	162	21	107:02	107:02	\$9.28	12.96	5:06	
20 Mar 2013	311	46	265:29	265:29	\$23.20	14.79	5:46	
19 Mar 2013	322	51	205:20	205:20	\$17.88	15.84	4:02	
18 Mar 2013	232	40	92:49	92:49	\$8.10	17.24	2:19	
17 Mar 2013	280	59	258:41	258:41	\$22.53	21.07	4:23	
16 Mar 2013	179	18	51:23	51:23	\$4.42	10.06	2:51	
15 Mar 2013	491	73	80:56	80:56	\$7.64	14.87	1:07	
14 Mar 2013	430	117	284:15	284:15	\$26.85	27.21	2:26	
13 Mar 2013	304	47	246:21	246:21	\$22.99	15.46	5:14	
12 Mar 2013	223	19	46:48	46:48	\$4.29	8.52	2:28	
11 Mar 2013	249	0	0:00	:00	\$0.00	0.00	0:00	
10 Mar 2013	277	0	0:00	:00	\$0.00	0.00	0:00	
09 Mar 2013	199	16	54:28	54:28	\$4.98	8.04	3:24	
08 Mar 2013	146	0	0:00	:00	\$0.00	0.00	0:00	

Page 1 of 1 Rows 1 to 14 of 14

2.5. Accounts > Account Name > Call Settings

You can set the minimum billing call duration and the maximum authorized call duration from here. Initially all accounts inherit the default call settings from the system settings - however you can change these and make them custom for each account from here.

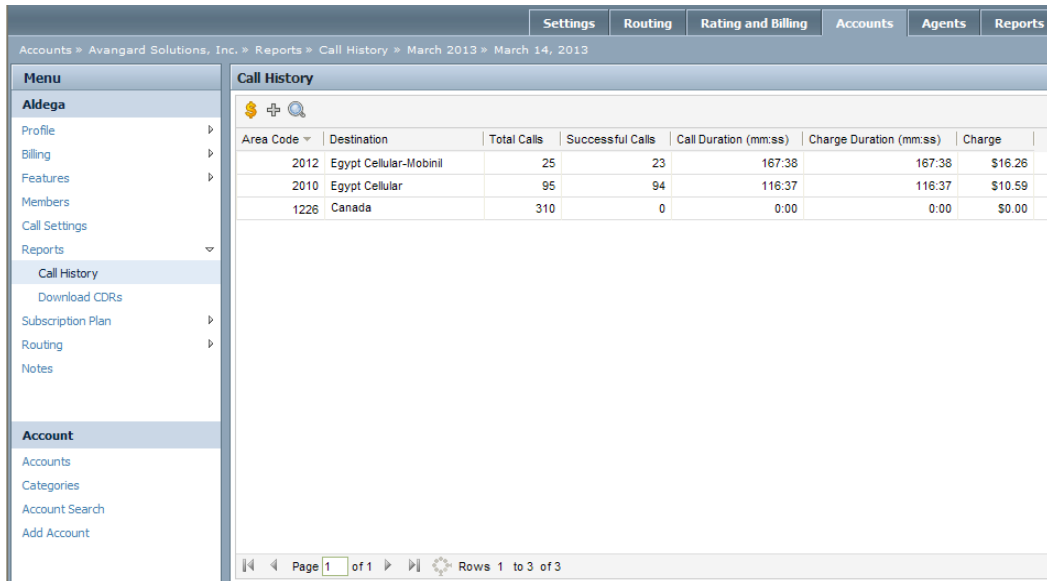
Please note that default system settings are inherited only on new account creation and you cannot make bulk changes of existing accounts from the system settings menu. However, this is not valid for the Maximum Call Duration- if at any time you change the system value to be lower than the one you have added here in any account, the system will use the system setting and stop calls after they have reached the Maximum Authorized Call Duration from System Settings.

Accounts > Avangard Solutions, Inc. > Call Settings	
Menu	Call Settings
Avangard Solutions, Inc.	Minimum Billing Call Duration (sec) <input type="text" value="0"/>
Profile	Maximum Authorized Call Duration (sec) <input type="text" value="7200"/>
Billing	<input type="button" value="Submit"/>
Features	
Members	
Call Settings	
Reports	
Subscription Plan	
Routing	
Notes	
Account	
Accounts	
Categories	
Account Search	
Add Account	

2.6. Accounts > Account Name > Reports

Accounts reports are used to collect call data per account – you can view the call history or to download daily CDRs from here.

Accounts > Account Name > Reports > Call History



The screenshot shows the 'Call History' report for the account 'Aldega'. The interface includes a navigation menu on the left and a main data table. The table has columns for Area Code, Destination, Total Calls, Successful Calls, Call Duration (mm:ss), Charge Duration (mm:ss), and Charge. The data is summarized by area code.

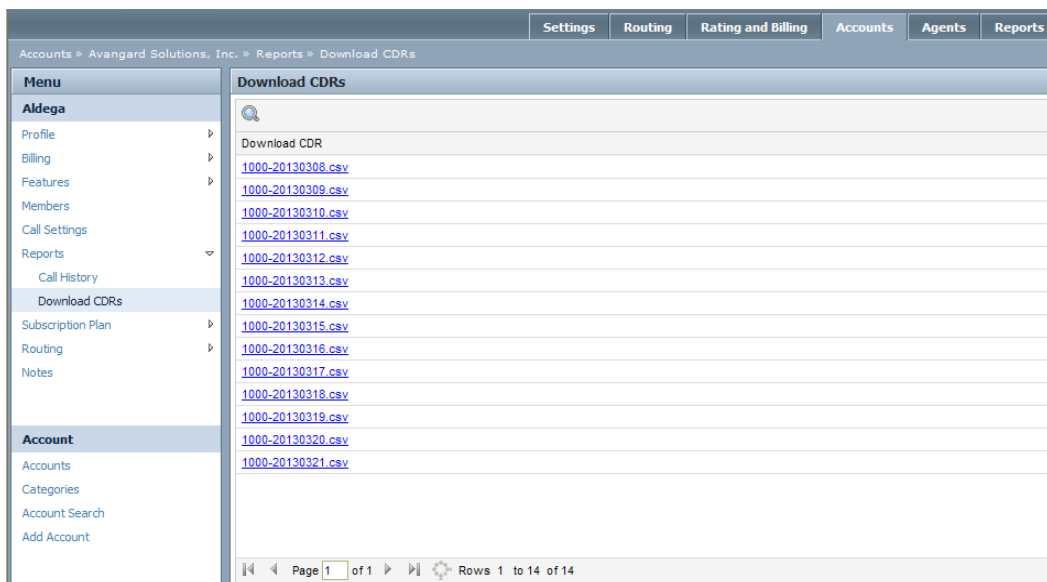
Area Code	Destination	Total Calls	Successful Calls	Call Duration (mm:ss)	Charge Duration (mm:ss)	Charge
2012	Egypt Cellular-Mobinil	25	23	167:38	167:38	\$16.26
2010	Egypt Cellular	95	94	116:37	116:37	\$10.59
1226	Canada	310	0	0:00	0:00	\$0.00

Page 1 of 1 | Rows 1 to 3 of 3

In the call history you can check summarized information (not as detailed as in the CDRs) about the calls - this is available immediately after the calls are finished. The calls and their parameters are summarized on a monthly and daily basis and by the area code.

Please note that the call history is for the whole account (from all account members).

Accounts > Account Name > Reports > Download CDRs



The screenshot shows the 'Download CDRs' report interface. It features a list of downloadable CSV files for various account numbers. The interface includes a navigation menu on the left and a main list area.

Download CDR
1000-20130308.csv
1000-20130309.csv
1000-20130310.csv
1000-20130311.csv
1000-20130312.csv
1000-20130313.csv
1000-20130314.csv
1000-20130315.csv
1000-20130316.csv
1000-20130317.csv
1000-20130318.csv
1000-20130319.csv
1000-20130320.csv
1000-20130321.csv

Page 1 of 1 | Rows 1 to 14 of 14

You can download the CDRs for the account as CSV files from here - every day a new CSV file is generated containing the CDRs from the previous day.

2.7. Accounts > Account Name > Subscription Plan

In this section you can check all plans details for the account, change the plan assigned to the account, add and manage custom charges, purchase subscriptions, check surcharges, etc.

Accounts > Account Name > Subscription Plan > Plan Details

You can check the details of the current account plan form here – e.g. what tariffs are assigned to the plan for the different zones. The name of the plan at the top is a link to the subscription plan – you can quickly go the plan’s settings by clicking on it. It is also possible to change the account subscription plan from here.

Please note that the subscription plan is changed only after an invoice is generated and cannot be changed with immediate effect!

If you want to change the subscription plan as soon as possible you must select the “Force change of Subscription Plan” check box – this way you will force the system to issue an invoice at midnight (GMT time) no matter what the billing period is and the new subscription plan will become effective from the next day.

If you do not select this check box, the new plan will take effect after the billing cycle of the current plan is over and the next invoice is generated.

Accounts > Avangard Solutions, Inc. > Subscription Plan > Subscription Plan Details																																																																					
Menu Avangard Solutions, Inc. Profile Billing Features Members Call Settings Reports Subscription Plan Plan Details Custom Charges Surcharges Taxes Usage Counters Invoice Message Notifications Routing Notes Account Accounts Categories Account Search Add Account	Subscription Plan Details Plan Information <table border="0"> <tr> <td>Current Plan</td> <td>A-Z Subscription Plan</td> <td>New Plan</td> <td>Standard SP - One Day</td> </tr> <tr> <td>Currency</td> <td>UNITED STATES(USD)</td> <td>Currency</td> <td>UNITED STATES(USD)</td> </tr> <tr> <td>Plan Type</td> <td>Fixed Date</td> <td>Plan Type</td> <td>Fixed Period</td> </tr> <tr> <td>Zone 1</td> <td>Local Calls - [not defined]</td> <td>Zone 1</td> <td>Local Calls - [not defined]</td> </tr> <tr> <td>Zone 2</td> <td>Intrastate Calls - [not defined]</td> <td>Zone 2</td> <td>Intrastate Calls - [not defined]</td> </tr> <tr> <td>Zone 3</td> <td>Interstate Calls - [not defined]</td> <td>Zone 3</td> <td>Interstate Calls - [not defined]</td> </tr> <tr> <td>Zone 4</td> <td>International Calls - A-Z Customer Tariff</td> <td>Zone 4</td> <td>International Calls - A-Z Customer Tariff</td> </tr> <tr> <td>Toll Free Call</td> <td>Toll Free Traiff</td> <td>Toll Free Call</td> <td>[not defined]</td> </tr> <tr> <td>On-Net Inbound Calls</td> <td>On-Net Inbound Tariff</td> <td>On-Net Inbound Calls</td> <td>[not defined]</td> </tr> <tr> <td>On Demand Session</td> <td>[not defined]</td> <td>On Demand Session</td> <td>[not defined]</td> </tr> <tr> <td>On-Net Outbound Calls</td> <td>On-Net Outbound Tariff</td> <td>On-Net Outbound Calls</td> <td>[not defined]</td> </tr> <tr> <td>Voice Applications</td> <td>[not defined]</td> <td>Voice Applications</td> <td>[not defined]</td> </tr> <tr> <td>Access Numbers</td> <td>[not defined]</td> <td>Access Numbers</td> <td>[not defined]</td> </tr> <tr> <td>Billing Cycle</td> <td>1 day of the month</td> <td>Billing Cycle</td> <td>1 days</td> </tr> <tr> <td>Grace Period</td> <td>3 days</td> <td>Grace Period</td> <td>1 days</td> </tr> <tr> <td></td> <td></td> <td>Max Number of Notifications</td> <td>4</td> </tr> <tr> <td></td> <td></td> <td>Notifications Interval (days)</td> <td>1</td> </tr> </table> Plan Selection Choose New Plan: <input type="text" value="Standard SP - One Day"/> <input type="button" value="v"/> Force change of subscription plan: <input checked="" type="checkbox"/> Choose New Agent: <input type="text" value="-- Select Item --"/> <input type="button" value="v"/> <input type="button" value="Submit"/>	Current Plan	A-Z Subscription Plan	New Plan	Standard SP - One Day	Currency	UNITED STATES(USD)	Currency	UNITED STATES(USD)	Plan Type	Fixed Date	Plan Type	Fixed Period	Zone 1	Local Calls - [not defined]	Zone 1	Local Calls - [not defined]	Zone 2	Intrastate Calls - [not defined]	Zone 2	Intrastate Calls - [not defined]	Zone 3	Interstate Calls - [not defined]	Zone 3	Interstate Calls - [not defined]	Zone 4	International Calls - A-Z Customer Tariff	Zone 4	International Calls - A-Z Customer Tariff	Toll Free Call	Toll Free Traiff	Toll Free Call	[not defined]	On-Net Inbound Calls	On-Net Inbound Tariff	On-Net Inbound Calls	[not defined]	On Demand Session	[not defined]	On Demand Session	[not defined]	On-Net Outbound Calls	On-Net Outbound Tariff	On-Net Outbound Calls	[not defined]	Voice Applications	[not defined]	Voice Applications	[not defined]	Access Numbers	[not defined]	Access Numbers	[not defined]	Billing Cycle	1 day of the month	Billing Cycle	1 days	Grace Period	3 days	Grace Period	1 days			Max Number of Notifications	4			Notifications Interval (days)	1
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		Max Number of Notifications	4																																																																		
		Notifications Interval (days)	1																																																																		

This is also the place where you assign an Agent to the account – you can do that by choosing from the available agents in the drop-down menu.

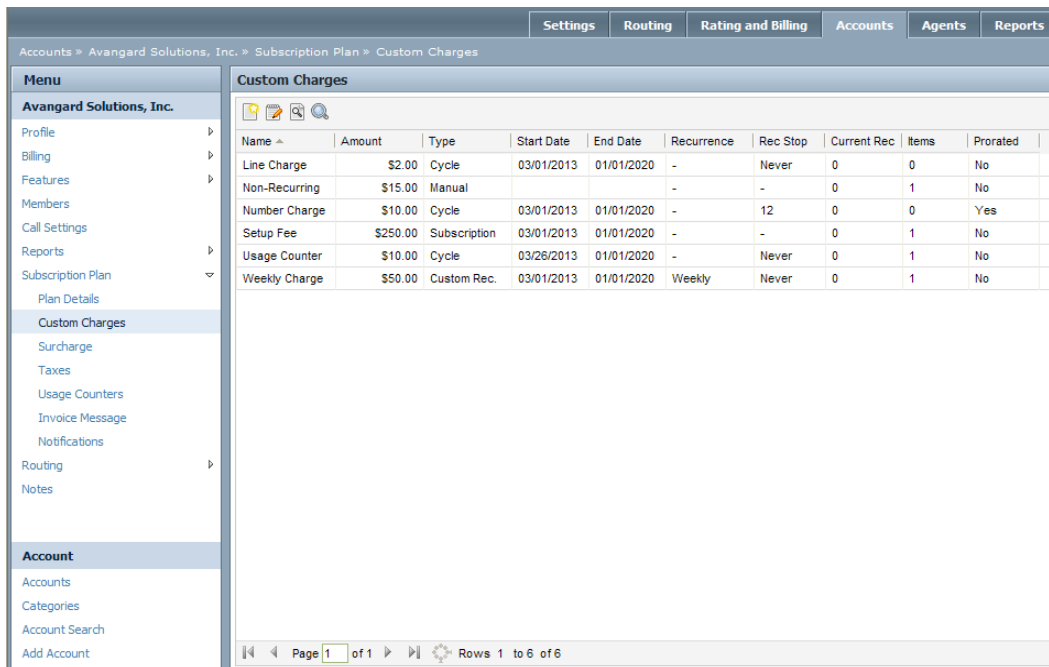
Please note that the Agent should be created in the Agent’s tab and the subscription plan should be assigned to the Agent before you can assign them to accounts.

Accounts > Account Name > Subscription Plan > Custom Charge

You can see all custom charges created for the account subscription plan here:

- Name - the name of the charge.
- Amount – the amount of this custom charge.
- Type – cycle, manual, subscription, or custom recurrence.
- Start and End Dates - shows the effective period of the charge.
- Recurrence – the recurrence type of the charge.
- Current Rec – the total number of the current occurrence for this charge.
- Rec Stop – the number of occurrences before this custom charge will be stopped.
- Items –the current quantity of the charge.
- Prorated – shows whether the charge is prorated or not

By pressing the “Purchase” button you can change the quantity of charges from type “Occur every billing cycle on invoice generation” and/or purchase already created charges from type “Non Recurring/Manual”. You can also create an individual manual charge (immediate debit transaction) for the account by pressing the “Create Account Charge” button.



Name	Amount	Type	Start Date	End Date	Recurrence	Rec Stop	Current Rec	Items	Prorated
Line Charge	\$2.00	Cycle	03/01/2013	01/01/2020	-	Never	0	0	No
Non-Recurring	\$15.00	Manual			-	-	0	1	No
Number Charge	\$10.00	Cycle	03/01/2013	01/01/2020	-	12	0	0	Yes
Setup Fee	\$250.00	Subscription	03/01/2013	01/01/2020	-	-	0	1	No
Usage Counter	\$10.00	Cycle	03/26/2013	01/01/2020	-	Never	0	1	No
Weekly Charge	\$50.00	Custom Rec.	03/01/2013	01/01/2020	Weekly	Never	0	1	No

The “View Charge Details” button shows you the history of each charge – the dates the charge was applied, the amount and quantity, etc. You can filter the list by different parameters.

Please note that all custom charges are automatically shown as debit transactions in Accounts > Account Name > Billing > Transactions.

Accounts > Account Name > Subscription Plan > Surcharges

Accounts > Avangard Solutions, Inc. > Subscription Plan > Surcharges										
Menu Avangard Solutions, Inc. Profile > Billing > Features > Members Call Settings Reports > Subscription Plan > Plan Details Custom Charges Surcharge Taxes Usage Counters Invoice Message Notifications Routing > Notes Account Accounts Categories Account Search Add Account	Surcharges <table border="1"> <thead> <tr> <th>Surcharge Name ^</th> <th>Surcharge Type</th> <th>Surcharge Amount</th> </tr> </thead> <tbody> <tr> <td>Subscription Surcharge</td> <td>Flat</td> <td>\$10.00</td> </tr> <tr> <td>Usage Surcharge</td> <td>Percentage</td> <td>20.00 %</td> </tr> </tbody> </table>	Surcharge Name ^	Surcharge Type	Surcharge Amount	Subscription Surcharge	Flat	\$10.00	Usage Surcharge	Percentage	20.00 %
Surcharge Name ^	Surcharge Type	Surcharge Amount								
Subscription Surcharge	Flat	\$10.00								
Usage Surcharge	Percentage	20.00 %								
Page 1 of 1 Rows 1 to 2 of 2										

Here you can see the list with all surcharges created for the account subscription plan - these are automatically applied according to the surcharges settings.

For more details please check the file "How to create Subscription plans".

Accounts > Account Name > Subscription Plan > Taxes

You can see a list with all taxes assigned to the account subscription plan here.

Accounts > Avangard Solutions, Inc. > Subscription Plan > Taxes									
Menu Avangard Solutions, Inc. Profile > Billing > Features > Members Call Settings Reports > Subscription Plan > Plan Details Custom Charges Surcharge Taxes Usage Counters Invoice Message Notifications Routing > Notes Account Accounts Categories Account Search Add Account	Taxes <table border="1"> <thead> <tr> <th>Tax Name ^</th> <th>Tax Amount</th> <th>Tax Level</th> <th>Tax Status</th> </tr> </thead> <tbody> <tr> <td>Tax</td> <td>20.00 %</td> <td>Federation</td> <td>Active</td> </tr> </tbody> </table>	Tax Name ^	Tax Amount	Tax Level	Tax Status	Tax	20.00 %	Federation	Active
Tax Name ^	Tax Amount	Tax Level	Tax Status						
Tax	20.00 %	Federation	Active						
Page 1 of 1 Rows 1 to 1 of 1									

Please note that in order for these taxes to be applied to the account, you have to make it taxable from Account > Profile > Tax Jurisdiction menu.

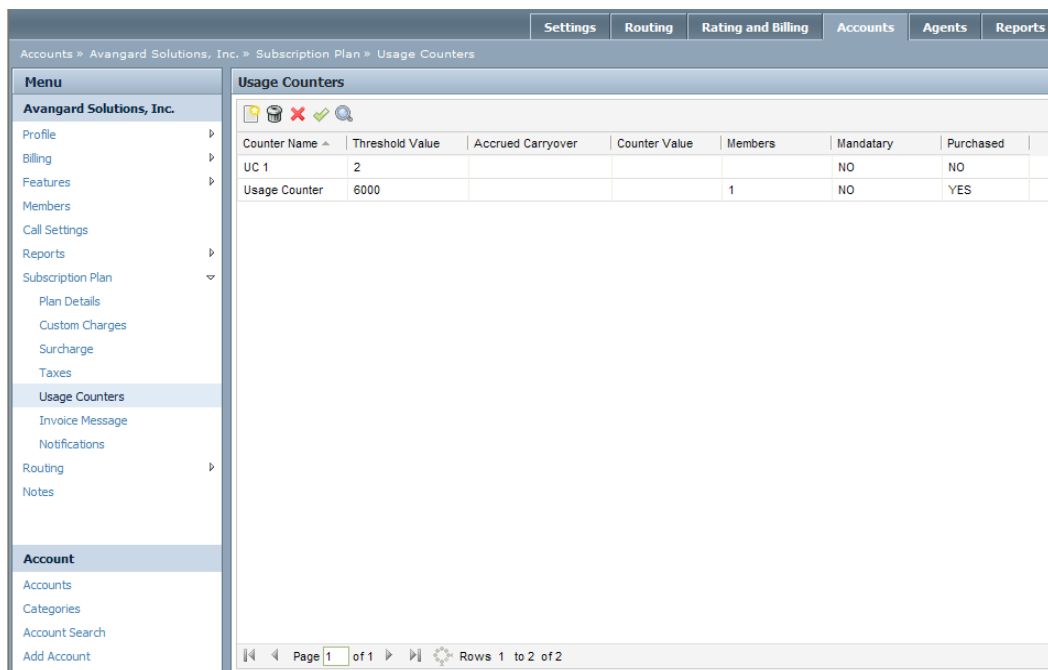
Accounts > Account Name > Subscription Plan > Usage Counter

The system displays a list of all usage counters assigned to the account subscription plan here. You can check the counters' threshold value, the current counter value (counter's threshold decreased with the used minutes matching the counter), the accrued carryover amount, the assigned members, whether the counter is mandatory for the account, and whether it was purchased.

In order the particular account to use any of the usage counters, the counter should be purchased. This is done with the button "Purchase Usage Counter". If you have created custom charge triggered by usage counter, when you purchase the counter, the charge will be applied in the account and will appear in the invoice.

You can reset the counter value, assign the counter to a member and remove it from the account. When you remove a counter, it will not disappear from the list, but the status in purchased will be changed to "NO".

Please note that if you have to define a new threshold you have to go back to Rating and Billing > Subscription Plans > Edit Subscription Plan > Usage Counters > Edit Counter > Enter Usage Counter New Threshold.



Counter Name	Threshold Value	Accrued Carryover	Counter Value	Members	Mandatory	Purchased
UC 1	2				NO	NO
Usage Counter	6000			1	NO	YES

If a counter is set to "Mandatory" in the subscription plan it will be assigned automatically to the default member of the account.

Accounts > Account Name > Subscription Plan > Invoice Message

If you have already added an invoice message in the subscription plan you can customize it for the account here.

Accounts > Account Name > Subscription Plan > Notification

If you have already enabled sending notifications in the subscription plan you can customize the maximum number of notifications and the day interval for the account here.

2.7. Accounts > Account Name > Routing > Settings

You can assign one of the existing route sets here - all calls coming from this account will be terminated according to this route set.

Please note that if no Route Set is assigned to the account it cannot make outbound calls.

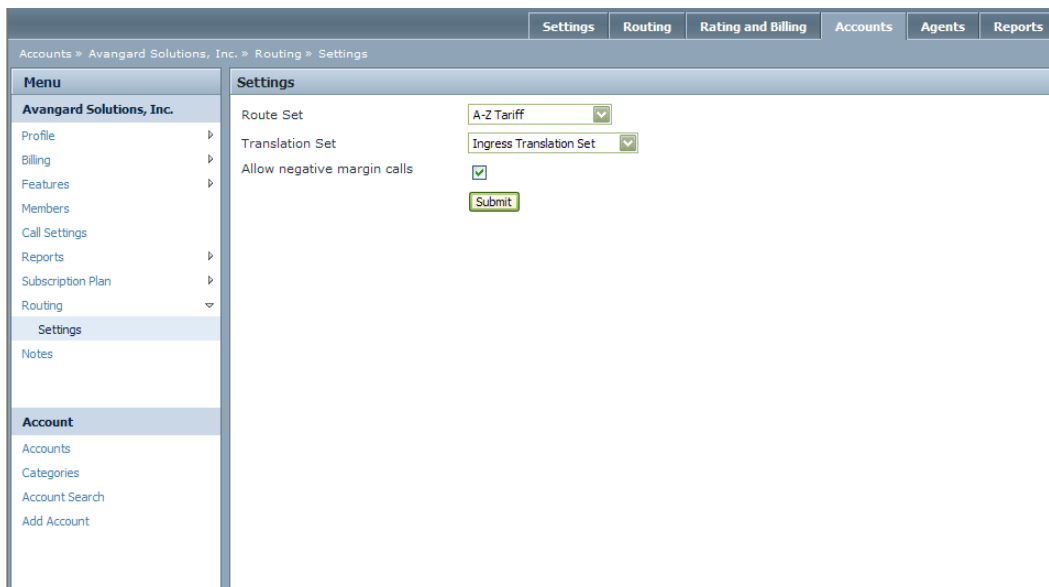
Please read the file "How to "Create Route Sets" for full details about this topic.

If you need to translate the called and/or the calling number for any account here you can assign any of the existing translation sets - the system will use the assigned translation set to change the numbers before they are sent for routing.

Please note that the so-called ingress translation is applied to all calls associated with this account.

Please read the file "How to Create Carriers" for full details about this topic.

If you want to allow negative margin calls, please select the check-box - otherwise the system will reject all such calls.



Menu	Settings
Avangard Solutions, Inc.	Route Set: A-Z Tariff
Profile	Translation Set: Ingress Translation Set
Billing	Allow negative margin calls: <input checked="" type="checkbox"/>
Features	<input type="button" value="Submit"/>
Members	
Call Settings	
Reports	
Subscription Plan	
Routing	
Settings	
Notes	
Account	
Accounts	
Categories	
Account Search	
Add Account	

2.8. Accounts > Account Name > Notes

You can add any notes related to the account here.

This option is useful to keep track of any technical or other issues the customer has faced.

Notes have subject, description, and status (Open, In Progress, Escalated or Resolved).

You can edit all fields of a note or delete it as needed.