

Setup Guide

for EZ Calling Card Platform



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For use with Calling Card and SIP End-User Admin UI
at <http://reseller.ezcallinc.com>

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EZ Calling Card Setup Guide

Introduction

EZ Call, Inc. is pleased to make a Reseller Admin Panel for Calling Card and SIP End-User management available to its customers. The Reseller Admin Panel will enable you to sell your users prepaid and post-paid accounts, which are fully controlled and managed by you. There is no extra cost to use this robust and expertly managed platform. Just maintain a pre-paid calling account balance as usual and you will automatically get access to all its advanced features. To get started, simply follow the instructions contained in this guide.

Platform Description

The Reseller Admin Panel is part of a multi-service software system developed and hosted by EZ Call, Inc. Designed to provide a flexible yet resilient real-time service deployment environment, it offers a single point from which to manage and charge for many types of IP services. The Reseller Admin Panel consists of modularized components that have been designed to handle the most demanding real world environments, and are currently processing millions of call transactions per day.

Features of the Calling Card module include:

- Fully hosted platform that requires no additional equipment or software in your premises.

- Compatible with any SIP-compatible (RFC 3261) gateway or user device

- Real-time charging of pre-paid or post-paid accounts

- Complete control of all service parameters:

- Create your own rate table and surcharges
- Create unlimited PIN accounts
- Create unlimited User accounts

- Delegated administration allows you to assign specific tasks to your staff

- Online management tool for your customer service agents.
- Online reporting tools for trouble-shooting and problem diagnosis.

- Easily customizable

- Support for multiple languages and currencies.

- Customizable voice prompts for interactive voice response (IVR) allows you to create a uniquely branded service
- Support for open source SIP developers with the EZ Call - sponsored Open SIP Stack project.
- EZ Call provides an End User Portal that you can make available to your customers. Using the portal your customers can purchase new service and manage their account.
- You can create your own End-User Web Interface using EZ Call's published SOAP-XML Web services

Getting Support

The Reseller Admin Panel is operated and maintained by EZ Call Inc. EZ Call, Inc. has arranged to make it available to you at no additional cost. While the EZ Call support engineers will make every effort to assist you, you should not expect them to be able to answer all of your questions or to resolve issues that are primarily related to Reseller Admin Panel. As a result, the primary channel for technical support will be limited to the Reseller Admin Panel at support@ezcallinc.com.

Configuring Your SIP Proxy or Gateway

Call Flow

The EZ Calling Card is a fully hosted service provided by EZ Call, Inc for GRNVoice Customers. To use the service, all you need is a SIP compatible gateway, proxy or device. As depicted in Image 1, below, the components that your equipment will communicate with include a SIP proxy and media server.

One of the best features of this service is that the media (RTP) is not proxied through our network after the IVR prompts are finished. This means that your call will be re-INVITED to connect directly to the media gateway of the underlying carrier, thereby removing the possibility of tromboning RTP and the related latency and packet loss that might occur.

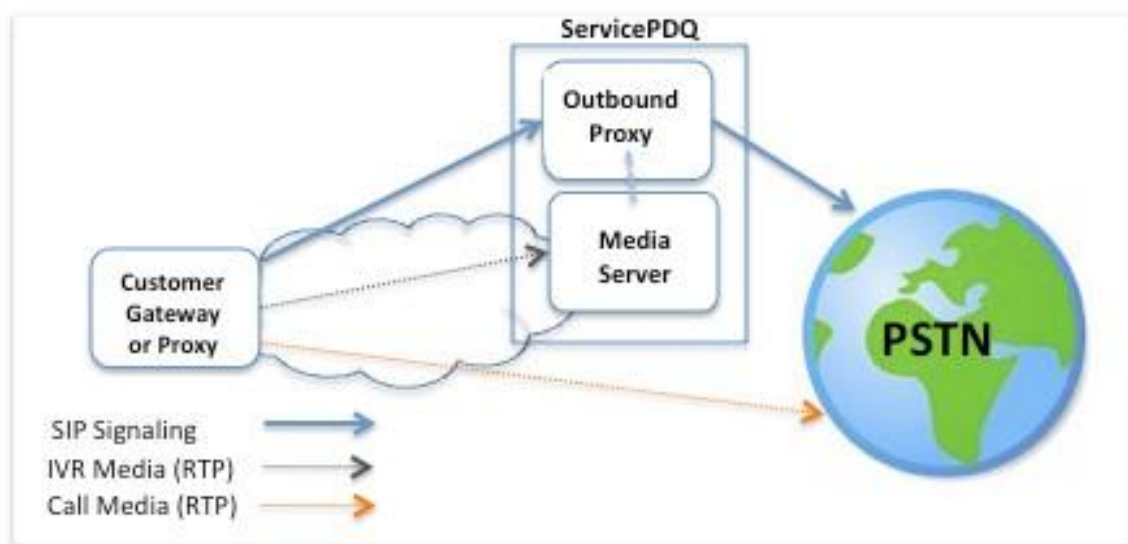


Image 1

Basic Configuration Guidelines

The key to configuring your SIP server or device to use the EZ Calling Card platform is the ability to route calls to our Outbound Proxy (sip:cc.ezcallinc.com) and SIP Server (also called SIP Domain) using your assigned domain (when you sign-up you will be assigned a domain in the format nnn.grnvoip.com, where nnn is equivalent to your Brand ID). With these two parameters in place, any number that you dial will be connected to the Calling Card IVR prompts. From there, your users will be able to enter a unique PIN number and the destination number they wish to reach. Calls will be completed using EZ Call's premium PSTN termination routes.

Asterisk Configuration Example

The following sip.conf file will work with an Asterisk server:

```
canreinvite=no
context=from-trunk
fromdomain=<brandid>.grnvoip.com
host=brandid.grnvoip.com
outboundproxy=cc.ezcallinc.com insecure=very
type=peer
allow=ulaw&g729
```

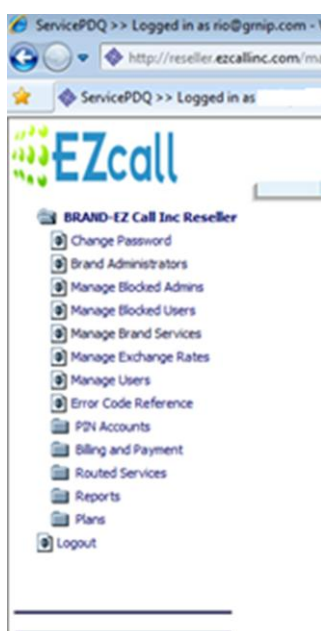
Codecs and DTMF

The EZ Call Inc, Calling Card platform supports G.729 and G.711 codecs. These two codec's will be available for the playing of IVR prompts. After IVR prompts are finished, your call will be re-INVITED to connect directly to the media gateway of the underlying carrier (media (RTP) will not be proxied at this point). DTMF must be set to RFC 2833.

Configuring the Reseller Admin Panel

Your account has been preconfigured for access to the calling card application. Getting started is as simple as creating PIN accounts and configuring your DID gateway to connect calls to the IVR platform. The power of the platform lies in the flexibility it allows for you to create and manage multiple services. The rest of this Setup Guide will describe the major features available to you.

Using the Reseller Admin Panel Web UI



All functions related to management of your calling card and sip end-user service are available online from the EZ Call Reseller Admin Panel at <http://reseller.ezcallinc.com>. Log-in to the system using the Username and Password that you received when your account was created (you must have an EZ Call wholesale termination account in order to access the Calling Card platform).

Once you have logged-in to the Reseller Admin Panel web UI, the navigation menu will be displayed on the left side of your browser window.

In many tasks described in this setup guide, you will be instructed to choose menu commands that look like this:

Reports>Routed Services>Search

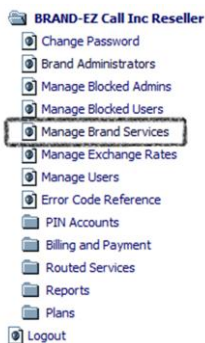
The first word refers to the menu item shown in the left-side navigation menu. The next word[s] refer to a sub-item in the navigation menu, or a choice that is displayed within the main screen.

Editing the Rate Table

We created a default Rate Table when your account was provisioned. You may use the rate table as it is, or edit it to change the rates that will charge your customers.

1. Editing the Rate Table

- a. By default, your calling card or sip end-user service will contain the face value of rates that you are being charged (these rates do not reflect any discount/bonus that you may receive at the wholesale level). In the system, these rates are contained in a logical grouping called a **Brand Service**. You may edit the **Brand Service** to include the mark-up (or profit) that you will charge to your customers.
- b. The Brand Service contains a **Brand Products** table, which represents each destination for which you may have a specific rate. It is recommended that you do not modify the country and city destinations. However, you may edit this file to reflect the rates that you wish to charge your retail users for each destination.



From the left side menu, navigate to **Manage Brand Services** screen

Depending on the number of originating hosts that you have configured, there will be at least 6 other Brand Services listed in the main screen. Do not modify these or your wholesale services may cease to work.

- c. You will see an item with the Brand Service name format of DB:nnn.grnvoip.com where 'nnn' will be the brand ID number that the system assigned to your account (this is your assigned domain).

BRAND SERVICES						
Brand ID: 9925440 Brand Name: EZ Call Inc Reseller						
6 Brand Services Retrieved.						
Add						
ID	Brand Service Name	Group Service	Description	Currency	Maximum Transaction Quantity (minutes)	Actions
510421	DB:sip:9925440.grnvo.....	EZ Call Premium	Calling Card	USD	120	Chargetype IVR Balance Brand Products View CDR Accounts

Image 2

- d. Click on the Brand Products link. This link leads to the rate table that controls your calling card or sip end-user service. See Image 3, below.

BRAND PRODUCTS								
Brand Service ID: 510421 Brand Service Name: DB:sip:9925440.grnvoip.com								
4852 Brand Products Retrieved.								
Back Add Remove Remove All Download Upload Import								
Showing Page: 1 of 486 pages Go NEXT						DISPLAY 10		
Product Code	Group Product	Description	Use in Plan	Min. Chargeable	Billing Block	Uses Group Baserates	Initial Baserate	Actions
<input type="checkbox"/> 1129	1129	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1139	1139	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1171	1171	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1186	1186	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1204	1204	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1226	1226	CANADA REG	no	1	60	yes	0.007	\$
<input type="checkbox"/> 1242	1242	BAHAMAS REG	no	1	60	yes	0.1247	\$
<input type="checkbox"/> 1242357	1242357	BAHAMAS RM	no	1	60	yes	0.224	\$
<input type="checkbox"/> 1242359	1242359	BAHAMAS RM	no	1	60	yes	0.224	\$
<input type="checkbox"/> 1242375	1242375	BAHAMAS RM	no	1	60	yes	0.224	\$

Image 3

- e. There are two ways to edit the Brand Products
 - i. Click on the '\$' icon to edit individual rates one at a time, using the web UI; or
 - ii. Click the DOWNLOAD button to download a copy of the rate table to your PC. You may edit the rate table using Microsoft

Excel. When finished, you may upload the rate table to overwrite the existing rates. A description of the column headers in the downloadable file is contained in Exhibit A.

2. Editing Rates for Destinations

- a. The Brand Product rates dictate the charges applied per minute for each destination. The system finds the longest matching prefix to determine which Brand Product controls any given call.
- b. Each brand Product may have multiple increments, and each increment may have a different rate. These increments may be seen by clicking on the '\$' icon. The example displayed in Image 4, below, shows a the rate for Product Code '1' (which is the U.S. country code) with a first increment of 30 seconds, and a subsequent increment of 6 seconds. The rate for both increments in the example is \$0.02, however it is possible to have different rates for each increment. It is also possible to have additional increments defined for any Brand Product.

Product Code: 1		Minimum Chargeable Duration: 1.0		
	Initial Quantity: SECONDS Quantity (SECONDS)		Increment Quantity (SECONDS)	Rate (\$ per 60.0 SECONDS)
	FROM	TO		
<input type="checkbox"/> 1	0	30	30	0.02
<input type="checkbox"/> 2	30	~	6	0.02

Image 4

- c. To change a rate, you may edit any of the fields shown in Image 4> Be sure to click the SAVE button when you are finished.
- d. It is easier to edit the rate table by downloading the file, and editing it in a spreadsheet program such as Microsoft Excel. Appendix B contains a description of Brand Products file headers.

Creating Session Surcharges (optional)

In addition to the Brand Product rates, which are applied per-minute, it is possible to create surcharges that are applied on a per-call basis. These operations are referred to as "Chargetypes," and may be edited through the web interface by clicking on the CHARGETYPE link as seen in Image 5 below.


ID	Brand Service Name	Group Service	Description	Currency	Maximum Transaction Quantity (minutes)	Actions
510421	DB:sip:9925440.grnvo.....	EZ Call Premium	Calling Card	USD	120	Chargetype IVR Balance Brand Products View CDR Accounts 

Image 5

- e. Navigate to **Manage Brand Services>Chargetypes**
- f. The default calculation for calculating a call charge is shown in the screenshot below (Image 6).

CHARGETYPE OPERATIONS

BRAND SERVICE: DB:sip:9925440.grnvoip.com

Apply Charge Type Operation before the call

	Description	Formula
	BASIC	QUANTITY*RATE
	TOTAL	BASIC

Add
Save
Reset
Test Operations
Basic Mode

Image 6

- g. You may modify the call charge by adding additional lines containing formulas that you define. For example, the screenshot below (Image 7) shows a surcharge equivalent to 10% of the Brand Product rate (C1) and another surcharge (C2) equivalent to 0.15 being added to each call if the account was previously used (the ACT1USED keyword can be used to apply charges depending on whether the PIN Account has been used to make any calls previously). The TOTAL charge is expressed as BASIC+C1+C2. Note that the description can be anything alphanumeric string and the formula can be any argument using any supported keywords.
- h. A list of all supported keywords with usage examples is contained in Exhibit C.

	Description	Formula
	BASIC	QUANTITY*RATE
<input type="checkbox"/>	C1	BASIC*.10
<input type="checkbox"/>	C2	if ACT1USED=true, return .15
	TOTAL	BASIC+C1+C2

Remove Add Save Reset Test Operations Basic Mode

Image 7

Creating Additional Rate Tables (optional)

You may create new rate tables by making additional Brand Services in the system. If you have multiple Brand Services, you may then assign PIN accounts to a specific Brand Service, to control the rates that apply to each PIN account.

1. Create a New **Brand Service** by clicking on the ADD button from the Manage Brand Services screen.



Image 8

2. In the resulting screen, enter values for the fields described in Image 9 and then click SUBMIT.

ADD BRAND SERVICE	
Brand Service Name:	<input type="text"/>
*** Note that this is the value as the)	
Group Service	<input type="text" value="0"/> ...
Brand Service Description:	<input type="text"/>
Max Transaction Quantity (mins):	<input type="text" value="0.0"/>
Currency:	<input type="text" value="AUD"/> ▼
Use ANI Billing:	<input type="checkbox"/>
Service Type :	<input type="text" value="DB"/> ▼
Host	
<input type="checkbox"/>	
...	

Image 9

Brand Service Name – Leave this field empty. It will be populated by the system when the page is saved

Group Service – This will allow you to choose the rates and routes that the service will use. To select a rate table, click the ellipses button [...] and double click on the rate selection in the pop-up box that appears . Typically, you will be able to choose between EZ Call's Standard, Premium or Special rates.

Brand Service Description - Enter a friendly description of the rate table for your future reference.

Max Transaction Quantity – This is the maximum number of minutes allowed for any call using this Brand Service.

Currency – If you have created multiple currencies, you may choose among them from this drop-down box. The default currency is U.S. Dollars (USD).

Use ANI Billing – Do not check this box.

Service Type – Choose DB for this option, denoting that calls will use the retail billing module.

Host – Click the ellipses button and double-click the host name with the format nnn.domain.com.

DNIS – This field can contain any numeric value, but must be unique for each rate table you create. If you are unsure of what to do, enter '2' for your second rate table, '3' for your third rate table, and so on for each additional rate table.

3. Create specific rates (referred to as **Brand Products**) using the same procedure described in the section on Editing the Rate Table, above. You may find it easiest to download the Brand Product table from the default Brand Service, and then upload to your newly created Brand Service.
4. Once the new Brand Service is created, you may assign a PIN account to is using the procedure described in the PIN section below.

Creating DID Charges (optional)

It is common for calling cards to apply an additional charge for the inbound leg of the call. This is usually done when the inbound leg incurs a per minute cost, such as with toll free numbers. To configure a DID charge use these steps:

1. Edit the Brand Service Config section by clicking on the pencil icon (see Image 10) for the Brand Service to which the DID surcharge should apply.

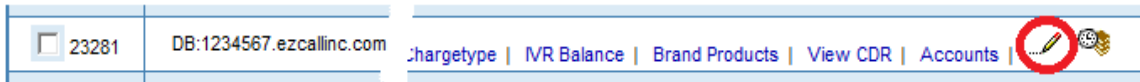


Image 10

- The Config section will contain several key value pairs which control the way that your calling card service will operate. The default values for this section are shown in Image 11. Note that a full description of all the key value pairs in this section is contained in Exhibit C.

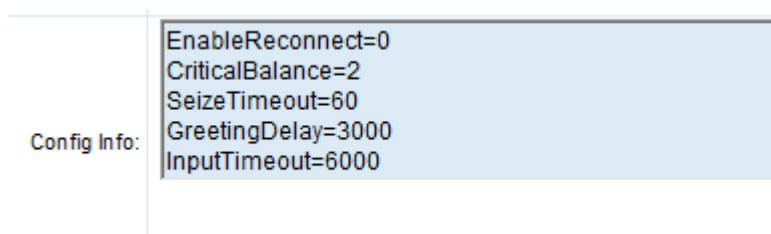


Image 11

- Enter a new line in this field with the value `BS_INBCHARGE2=true`. The result should appear as depicted in Image 12.
- Click Submit to save your changes to the Brand Service Config.

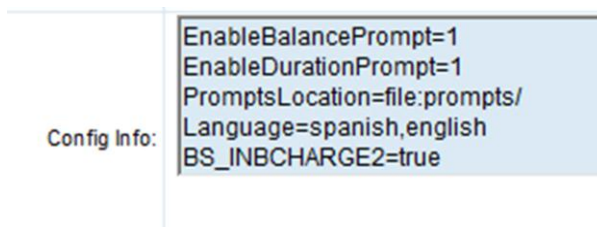


Image 12

- Create a new Brand Product for each DID that you use with the Brand Service in question. The rate for the Brand Product will be applied for each minute that the DID is connected after the PIN Account is entered and validated.














① **If you activate the `BS_INBCHARGE` feature, then you MUST have a matching Brand Product for the DID, otherwise the call will fail.**

PIN Accounts

A PIN Account ID represents each PIN used by users of your calling card service. This is the number that a customer must enter when prompted to “Please enter your PIN number.” The terms PIN Account and Account ID are used interchangeably in the Reseller Admin Panel system and in this setup guide.

① There are three types of Accounts: Prepaid Transient; Prepaid Rechargeable and Postpaid Subscription. Prepaid Accounts begin with a positive balance that is debited until it reaches zero. Postpaid Accounts begin with a zero balance that is credited until it reaches the credit limit. Prepaid Transient accounts are of one time use and can not be reloaded.

BRAND-EZ Call Inc Reseller

-  Change Password
-  Brand Administrators
-  Manage Blocked Admins
-  Manage Blocked Users
-  Manage Brand Services
-  Manage Exchange Rates
-  Manage Users
-  Error Code Reference
-  **PIN Accounts**
-  Generate PIN Accounts
-  Create A Vanity PIN Account
-  Manage PIN Accounts
-  Upload/Report

Navigate to the PIN Accounts folder

All PIN related functions are managed from the menu items in this folder

Functions available from this folder include PIN creation, viewing PIN balance history, viewing PIN call history, adjusting PIN balance, applying charges to a single PIN or a series of PINs

1. Create PIN Accounts

a. Creating Random PIN Accounts.

- i. **Go to Brand>PIN Accounts>Generate PIN Accounts.**
- ii. Choose the type of Account(s) you wish to create from the three templates available (Prepaid Transient, Prepaid-Rechargeable, or Subscription).
- iii. Enter the number of Accounts desired in the Quantity field marked.
- iv. Enter the format desired for the PIN Accounts you are creating. Use the numeral '9' for a numeric PIN. For example, entering 9999

in this field will create a random 4 digit PIN such as 6145
(entering ten 9s in this field (9999999999) will result in random
10-digit PINs).

- v. Click **GENERATE** to process your transaction and commit the generated accounts to the RTBE database. The system will respond by sending you an email confirmation of the accounts generated and the batch number(s) assigned.

PREPAID-TRANSIENT PINS	
Quantity:	<input type="text"/>
Account ID Format:	<input type="text"/> * X alpha, 9 numeric, ex: XXX9999
Expiration Date:	02/08/2010 (mm/dd/yyyy) <input type="button" value="15"/>
Usage Age:	<input type="text"/> day(s) <input type="checkbox"/> Unlimited
Currency:	CAD <input type="button" value="v"/>
Denomination:	<input type="text"/>
Initial Balance:	<input type="text"/>
Initial Status:	inactive <input type="button" value="v"/>
All Caps:	<input checked="" type="radio"/> yes <input type="radio"/> no
Simultaneous Access:	<input type="text"/> <input checked="" type="checkbox"/> Unlimited
Inactive Age Limit:	0 day(s)
AutoActivate:	<input type="radio"/> yes <input checked="" type="radio"/> no
Brand Service ID:	<input type="text"/> ...
Assign To User:	(none) <input type="button" value="view users"/>
Remarks:	<input type="text"/>
Priority:	0 (0 - lowest, 5 - highest)
Options:	<input type="checkbox"/> Send email notification to admin <input type="checkbox"/> Send email notification to user

Quantity – This is the number of PINs that you wish to create.

Account ID Format – Use this to specify the length of the PINs to be created. PINs may be 4-16 digits.

Expiration Date – PINs will expire on the date you specify here. Expired PINs are not useable.

Usage Age – This specifies the number of days that a PIN will remain active after the first usage.

Currency – This specifies the currency that calls will be charged in.

Denomination – This is the face value of the PIN account. It should be the same as Initial Balance.

Initial Balance – The the starting balance of the PIN.

Initial Status – This may be Active or Inactive, and can be changed at any time after the PINs are created.

Simultaneous Access – this should be set to '1'.

Inactive Age Limit – This is the number of days that an unused PIN will remain active after first use.

Auto Activate - This field may be ignored.

Brand Service ID – This field allows you to assign the PIN to a specific Brand Service (rate table)

Assign To User – This field is optional, and may be used to assign the PIN Account to a User.

Remarks – this field is optional

① When creating PIN Accounts using the "Generate PIN Accounts" page, the system will schedule a background batch process to fulfill the requested order. This may take several minutes to a few hours. The Admin will receive a system email notification when the job is complete. The accounts are not created immediately.

b. Creating a Vanity PIN Account

- i. Go to **Brand>PIN Accounts>Create A Vanity PIN Account**.
- ii. Select the appropriate type from the **Account Type** drop down list.
- iii. Complete all required fields of the form.
- iv. Click **GENERATE** to create the PIN. The web page will notify you immediately if the task was successfully completed.

2. Manage PIN Accounts

a. Search for a PIN Account to manage

- i. Navigate to PIN Accounts>Manage Pin Account
- ii. The main screen will display a search filter. From here you will be able to enter any known parameter of one or more PINs.
- iii. Click on SEARCH to find the PIN.
- iv. The results page will display a summary of all the PIN Accounts matching your search criteria. As seen in Image 13, below, the summary page will contain primary information about the account.

Serial Number	Batch Number	Account ID	Type	Status	AutoActivate	Plan Remaining Balance	First Day of Use	Currency	Plans	Assigned to User ID
6700448	929413	12345	prepaid-RECHARGEABLE	active	no	Remaining Balance =40.5711	Wed May 23 16:43:03 GMT 2007	USD	view	unassign

Image 13

- v. Click on the Account ID in order to see a detailed view of the PIN Account. The Account Detail page, seen in Image 14 below, allows you to perform all the tasks necessary to manage a PIN Account. This includes the following functions:
 1. View CDRs for the PIN
 2. View Balance History for the PIN
 3. View Plan History for the PIN
 4. Recharge the PIN
 5. View Recharge History for the PIN
 6. Change the Status of the Account
 7. Refresh the Plan Cycle Date

VIEW ACCOUNTS			
Account ID:	12345	Group ID:	10022
Serial Number:	6700448	Brand ID:	115844
Batch Number:	929413	User ID:	<input type="text"/>
Plan:	plan not available	Type:	prepaid- RECHARGEABLE
Currency:	USD	Denomination:	1.0
Creation Date:	May 23, 2007 GMT-5		
Created By:	1-sysadmin (SYSADMIN)	Plan Remaining Balance:	<input type="text"/>
Rolled Over Value:	0.0	Current Period Free Value:	<input type="text"/>
Expiration Date:	--NA--	Initial Balance:	1.0
Roaming:	<input type="radio"/> yes <input checked="" type="radio"/> no	Remaining Balance:	<input type="text" value="40.5711"/>
Roaming Expiry:	<input type="text" value=""/> (mm/dd/yyyy)	Reason for Changing Current Balance: <input type="text" value=""/>	
Status:	<input type="text" value="active"/>	Usage Age:	Unlimited
Usage Date:	May 23, 2007 GMT-5	Call History Daily Call History Balance History Plan History View Recharge History Recharge Account View Ledger Account Usage Summary Manual Changes History	
Usage Expiration Date:	--NA--		
Last Used Date:	Nov 23, 2008 GMT-5		
Last Plan Refresh Date:	<input type="button" value="Refresh"/>		
Forced Plan ID:	<input type="text"/>	<input type="button" value="Subscribe"/>	view plan list
InactiveAge Limit:	<input type="text" value="0"/> day(s)		
AutoActivate:	<input type="radio"/> yes <input checked="" type="radio"/> no		
Brand Service ID:	--NA--		
Remarks:	<input type="text"/>		
		<input type="button" value="Submit"/>	<input type="button" value="Close Window"/>

Image 14

- b. Assign a PIN to a User.
 - i. To assign a Pin to a User, you must first create a User as described in Paragraph 3 of this Section (below).
 - ii. Find the Column marked "Assigned to User ID" and click on the ellipses button as seen in Image 15, below.

Serial Number	Batch Number	Account ID	Type	Status	AutoActivate	Plan Remaining Balance	First Day of Use	Currency	Plans	Assigned to User ID
6700448	929413	12345	prepaid-RECHARGEABLE	active	no	Remaining Balance =40.5711	Wed May 23 16:43:03 GMT 2007	USD	view	unassign

Image 15

- iii. In the resulting search box, Image 16, enter the Username, User ID, or the user's email address.

Search for User(s)

User ID:	<input style="width: 80%;" type="text"/>
Username:	<input style="width: 80%;" type="text"/>
E-mail Address:	<input style="width: 80%;" type="text"/>

Image 16

- iv. Click the Search button, and then click on 'assign' link in the results box that pops open.
- v. At the Accounts summary page, click the SAVE button to finalize your changes.

3. Assign PIN Account to a Specific Rate Table

- a. If you have created additional Brand Services (rate tables) you may link a PIN to a specific rate table when the PIN Account is created, or from the PIN Accounts > Manage PIN Accounts screen.
- b. You may view the assigned Brand Service for any PIN Account from the primary PIN Account results, as seen in Image 17 below.


Serial Number	Batch Number	Account ID	Type	First Day of Use	Currency	Plans	Assigned to User ID	Switch to this Brand Service ID
 6700448	929413	12345	prepaid-RECHARGEABLE	Wed May 23 16:43:03 GMT 2007	USD	<input type="text"/> view	<input type="text"/> ... unassign	<input type="text"/> ... unassign

Image 17

4. Create Users (optional)

A User is a billable entity that may be assigned one or more PIN Accounts. In addition, a SIP User Agent may submit the Username and Password of the User instead of entering a PIN number. Further, if you choose to create an end-use web interface, your users may also login with the same Username and Password.

- a. Creating a User Account
 - i. Navigate to **Manage Users>Add New User**
 - ii. When the notice is displayed concerning the User billing schedule, click **Continue**.
 - iii. Provide the information required by the form and click **SUBMIT**.

ADD USER	
Username:	<input type="text"/>
Password:	<input type="password"/>
ReType Password:	<input type="password"/>
Change password on next login:	<input type="checkbox"/> YES
Preferences:	<input type="text"/>
Expiration:	<input type="text" value="02/08/2010"/> (mm/dd/yyyy)
Settings	<input type="text"/>
Assign PAM Endpoint:	<input type="text" value="0"/> ... <input type="button" value="Add PAM Endpoint"/>

Username - Enter a Username for the user you are creating.

Password - Enter and confirm a Password for the user you are creating.

Change Password - Do not select this.

Preferences - Do not enter anything here

Expiration - Enter the date on which you would like the user's account to expire.

Settings - Do not enter anything here.

Assign PAM Endpoint - Do not enter anything here.

Billing Schedule - Do not enter anything here.

- b. Search for PIN Accounts assigned to the a User
 - i. Navigate to Manage Users, and SEARCH for the Username you created.
 - ii. The resulting User summary page, Image 18, will display all results that match your search criteria.





USER ID	USERNAME	LOGIN EXPIRATION	PROFILE				PAM	
			FIRST NAME	LAST NAME	COMPANY	SIP UID/Alt Phone		
1799645	testuser	February 8, 2010					Not Configured	  remarks  accounts children 

Image 18

- iii. Click on the 'accounts' link, and a pop-up window will display any PIN Account assigned to this user.

Provisioning the End User Portal (optional)

EZ Call makes available an End User Portal for account management. From this website, your Users can manage their PIN Accounts. To make this portal available to your end users, follow these steps:

1. Specify your offered rates to be displayed on the View Rates page of the Account Management Portal.

In **Brand>Manage Brand Services**, determine which service you are offering to your users. A sample BRANDSERVICEID is encircled in Image 19 below.

ID	Brand Service Name	Group Service	Description
<input checked="" type="checkbox"/> 481329	DB: [redacted]	GRNVolP Premium	Calling Card
<input type="checkbox"/> 1020118	WS: [redacted]	1+ LATA Routes	1 + LATA Routes
<input type="checkbox"/> 481326	WS: [redacted]	GRNVoiP	Standard Rates
<input type="checkbox"/> 481327	WS: [redacted]	GRNVolP Premium	Premium Rates
<input type="checkbox"/> 481328	WS: [redacted]	GRNVolP Special Routes	Weekly Special Rates

Service Description: contains [redacted]

(de)select all

Image 19

In **Brand>Brand Information** page, add this line in the **Preferences** text area:

```
WDS_VIEWRATES=[the ID of your BrandService]
```

A sample is shown in Image 20 below.

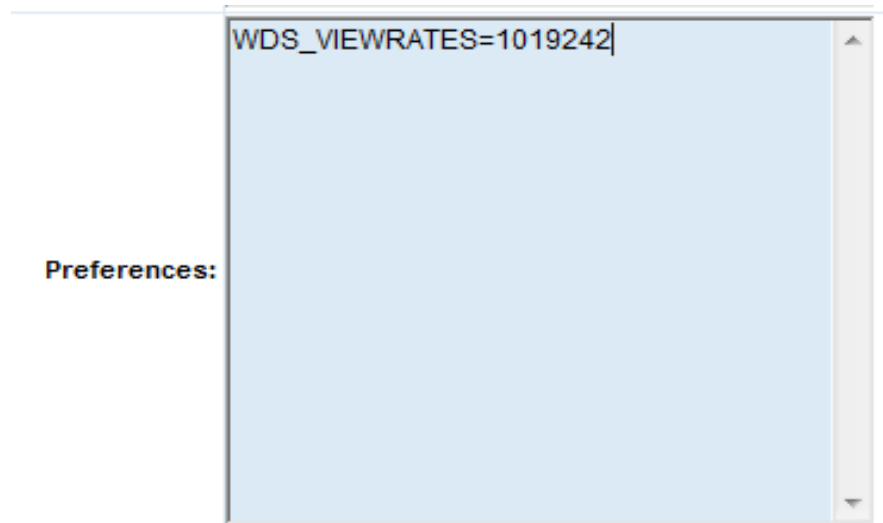


Image 20

2. Configure your contact email address.

The Account Management Portal can make it easy for your end users to contact you by email. You just have to supply your contact email address.

In **Brand>Brand Information** page, add this line in the **Preferences** text area:

```
WDS_SUPPORT_EMAIL==[your contact email address]
```

A sample is shown in Image 23 below.



Image 23

3. Check out the portal at <http://user.ezcallinc.com/>. Logging in to the portal will let you see what your users will actually see. Supply the following at the Log In page:

Brand ID

Admin User Name (Your user name to the EZ Call service)

Admin Password (The password you received when you registered to EZ Call)

User Name (A name of the End User created in Reseller Admin Panel whose account you want to view in the Account Management Portal)

IMPORTANT: Provide your users with a **Service ID**, which is your Brand ID, along with their **Username** and **Password**. They will need these 3 items to log in to the portal.

URLs	
http://user.ezcallinc.com	For use by Users to manage their PIN Accounts

Accepting Credit Card and Paypal Payments (optional)

Set up your payment gateways at **Brand>Billing and Payment>Payment Gateway Setup**.

- 3.1. To accept payments by Paypal, you must have an existing Paypal Merchant account. Create a Payment Gateway of Type = Paypal.

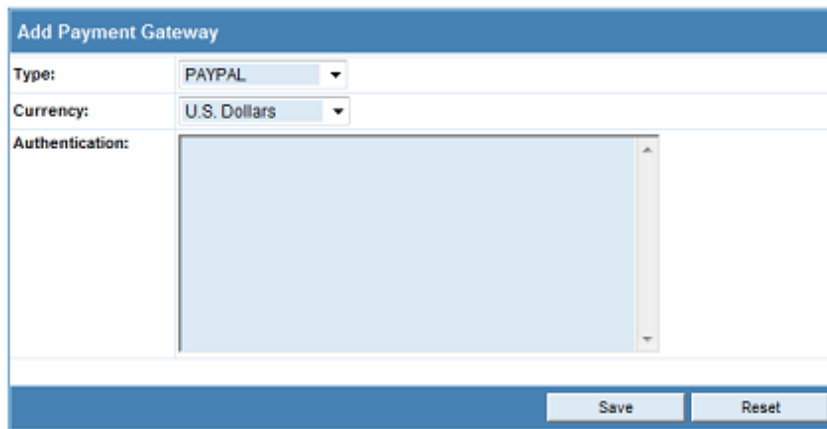


Image 21

Supply the Authentication details in the area provided. Authentication details look like this:

```
cmd=_xclick;business=user@domain.com;no_note=1;currency_code=USD
```

Replace [user@domain.com](#) with your registered business email in Paypal.

- 3.2. To accept payments by Credit Card, you must have a Paypal Merchant account, and
 - a) Setup your Paypal API credentials
 - b) Set up API permissions and credentials (note: this part needs thorough review. I don't have experience setting this up. - alona)
 - c) Add a Payment Gateway as shown in the image below.

Add Payment Gateway	
Type:	PAYPALCC
Currency:	USD
Authentication:	
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Image 22

Supply the Authentication details in the area provided. Authentication details look like this:

```
username=your_api_username_here;password=your_api_password_here;signature=your_api_signature_here;environment=live;
```

Plans (optional)

Plans allow you to define a set amount of free calling value that may be assigned to a PIN Account. For example, you may create a plan called “Free 500” that provides five hundred free minutes of calling to the destinations that you specify. To create a plan, do the following:

1. Create a New Plan
 - a. Navigate to Plans>Manage Plans>Add
 - b. Complete all required information in the form as shown in Image 24 below.

Plan Description:	<input type="text"/>
Currency:	CAD <input type="button" value="v"/>
Sign-up Charge:	<input type="text" value="0.0"/>
Plan Type:	<input checked="" type="radio"/> Free Amount <input type="radio"/> Free Minutes
Free Value:	<input type="text" value="0.0"/>
Allow plan to incur a negative balance?:	<input type="checkbox"/>
Rollover Mode:	<input checked="" type="radio"/> No Rollover <input type="radio"/> Unlimited Rollover <input type="radio"/> Rollover from previous billing cycle only
Maximum Rollover Value:	<input type="text" value="0.0"/>
Options:	<input checked="" type="radio"/> Do not generate auto-invoice <input type="radio"/> Generate but do NOT send auto-invoice <input type="radio"/> Generate AND send auto-invoice
Invoice Due Days:	<input type="text"/>
Plan Settings:	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Image 24

Plan Description	Short description of the plan
Currency	The currency of the plan (must be available in the brand's exchange rate table)
Sign-up Charge	One-time charge made to the Account for joining the plan.
Type	Type of plan whether Free Amounts or Free Minutes
Free Value	Value of the plan depending on the type of plan
Rollover Mode	Choose whether unused minutes from a previous cycle may be used in the next cycle.
Maximum Rollover Value	Maximum free value rolled over from previous cycle
Description (Add Recurring Charges)	Description of the recurring charges
Amount (Add Recurring Charges)	Amount of the recurring charge depending on the currency

2. Manage Plans

- a. Once a plan is created, you may view its settings by navigating to Plans>Manage Plans, and searching for the name or ID of the Plan you just created.
- b. Selecting the 'eye' icon will allow you to view the Plan settings.
- c. Plan settings may not be edited once a Plan is created. This is necessary because doing so would make it difficult to account for existing PIN Accounts that have been subscribed to the Plan and incurred usage.

3. Subscribe a PIN Account to a plan

- a. A plan must be assigned to a PIN Account in order to have free minutes applied. An Account may only be assigned to one plan at any given time.
- b. There are **two ways** to subscribe an account to a plan:
 - i. Subscribing Accounts through the Manage Plans page (Image 25)

	Plan ID	Description	Plan Type		
<input type="checkbox"/>	30923	Test Plan	MINUTES		Subscribe Accounts Unsubscribe Accounts

Image 25

- ii. Subscribing Accounts through Manage PIN Accounts > PIN Search Results >View Plans
- c. When subscribing a PIN to a Plan, it is necessary to specify an Effectivity Date to specify when the free plan minutes will begin to take effect.

① When the user subscribes an account without providing an effectivity date, then the effectivity date for that account will be the start of the User's next billing cycle. The billing schedule can either be weekly or monthly. For instance, assuming that the user has a billing cycle that starts Friday, 10:30 GMT -5 (weekly schedule), user ID = 123 and the date today is October 7, 2004 -Thursday GMT +8. Let us say that testAccount is assigned to user ID 123 and has been subscribed to plan 382 today. The effectivity date of testAccount will be on Friday, October 8, 2004 GMT -5. Take note of the timezone. The timezone followed in Plans is the Brand's timezone. If the brand has a timezone of GMT-5, then the billing schedule of the user will be on GMT -5 also. The billing schedule actually depends on the brand's timezone. This will also be used in the effectivity dates of the plans.

Possible Scenarios:

- i. testAccount has been subscribed on Friday, October 8, 2004 at 12 noon. Since the billing schedule of the user is every Friday, 10:30 am, then the effectivity date of testAccount will be the next billing schedule of the user which is on Friday, October 15, 2004 at 10:30 am. If the user subscribed the account before 10:30 am of the same day(Friday), then the effectivity date of the account will be on that same Friday, October 8, 2004 at 10:30 GMT -5.
 - ii. If the user provides an effectivity date (ex: November 1, 2004), then the effectivity date of testAccount will be on Friday, November 5, 2004 at 10:30 GMT -5. Since Nov. 1 is Monday and the billing schedule of the user is every Friday, then the effectivity date of the account will still be dependent on the user's billing schedule.
 - iii. If testAccount has been subscribed to plan 382 and has an effectivity date of Friday, October 8, 2004 at 10:30 GMT -5 and the user also subscribes another plan of the same type (assuming there's plan 383 which is of the same plan type as plan 382) without providing any effectivity date, then plan 383 will override plan 382. If the user doesn't want plan 383 to override plan 382, then the user should set an effectivity date for plan 383.
 - iv. If the user provides an effectivity date which is way back in the past (ex: January 1, 2004), an error message will be displayed. This is because the effectivity dates should be in the future.
4. Unsubscribing an Account from a Plan
- a. The **Unsubscribe Accounts** Page is where the user unsubscribes at least one account from a plan. The user need not specify an effectivity date.

- b. There are **two ways** to unsubscribe accounts. These are:
 - i. Unsubscribing Accounts through **Manage Plans**
 - ii. Unsubscribing Accounts through **Manage PIN Accounts > PIN Search Results > View Plans**

① *If the user chooses to unsubscribe account(s) through **Manage Plans**, the user has to click the remove button in order to remove the account from the accounts subscribed list. This functionality is the counterpart of **Delete Selected** button on **Manage PIN Accounts > PIN Search Results >View Plans**. If the user chooses to unsubscribe account(s) through **Manage PIN Accounts**, the user can choose what accounts to be unsubscribed. The user can either unsubscribe an account with a **CURRENT** plan or accounts that have **PENDING** plans. In the **PENDING** part, the user can also delete selected account(s). These accounts will be removed from the accounts subscribed list and will be placed back to the accounts to be subscribed list. In addition, these accounts will be ready for subscription again.*

Making Calls

1. Once your originating gateway connects to the EZ Calling Card platform, the caller will hear an IVR prompt asking for a PIN number. The caller will have three chances to enter a valid PIN, before the call is disconnected.
2. Dialing Format - The correct dialing format for calling card calls is:

U.S. Destinations:

1+area code+destination number

International Destinations:

011+country code+city code+destination number

or

00+countrycode+city code+destination number

3. Voice Prompts

The standard IVR execution logic is depicted in Image 26, below. The start of the call is depicted by the red circle. Alternative voice prompts may be loaded in the media server by making a request to [EZ Call](#) (there may be a charge involved for this). Your custom prompt files must be in 8Khz raw PCM format and clearly labeled with a reference to the corresponding file name as indicated in the diagram below.

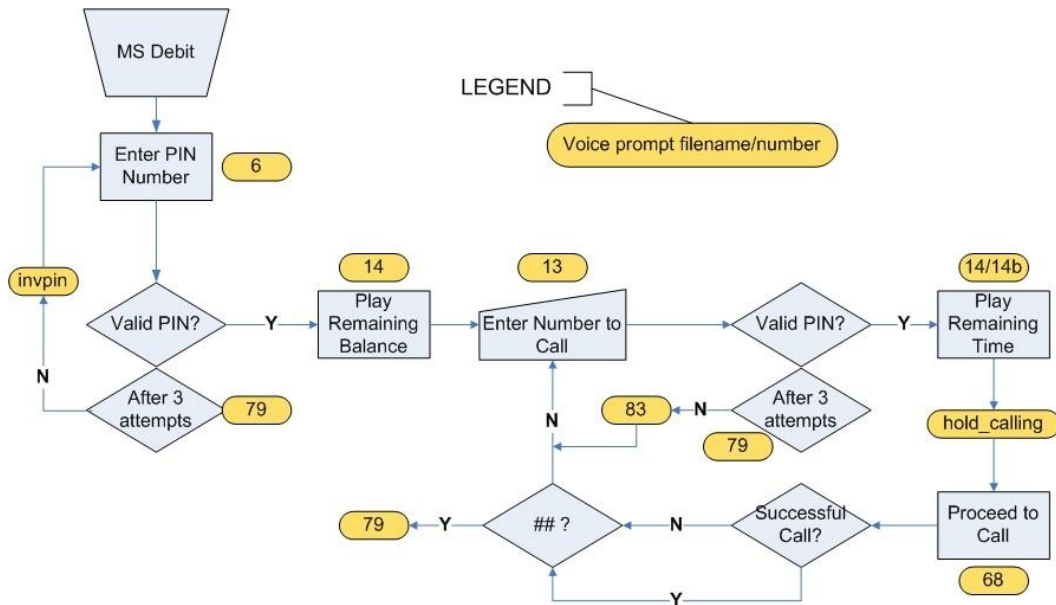
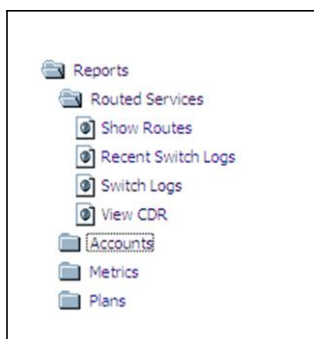


Image 26

Reports

There are four types of reports available to you: Call Logs, Account Reports, Call Metrics and Plan Reports. All reports are accessed from the **Reports** item in the navigation menu.

1. Viewing Call Logs



Recent Switch logs will show all call attempts withing the past 15 minutes, including failed calls. Failed calls will include an Error Code to describe the reason for the failure. Switch Logs will display call attempts older than 15 minutes. View CDRs will allow you to view and download the call detail records for all completed calls.

2. Viewing Account Reports will display reports about PIN Accounts Usage

3. Viewing Metrics will display summary information about your user's calls.
4. Viewing Plan Reports will show Plan usage statistics for your customers calls.

Exhibit A

Brand Product file format

When you download the Brand Product rate table, you will save an .xls (Microsoft Excel) format file to your PC. Upon opening the file, you will see many rows of destinations as well as the following column header in each column.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P								
GROUP	BRAND	DESCRIPTION	MINIMUM	BILLING	BLOCK	USE	GROUP	IS	PLAN	DATE	FROM	DATE	TO	TIME	FROM	TIME	TO	DAYS	INDEX	QTY	INCREMENT	Q	RATE

To change the rates that you charge to your end users, you may edit this file and upload it back into the Reseller Admin Panel user interface. A description of each field's content follows:

Column	Header	Description
A	Group Product	Do not edit this field
B	Brand Product	This is the country code and city code of the destination to be rated
C	Description	This is the description that will be displayed in CDRs
D	Min. Duration	This is the length of time (in seconds) that must elapse before your customer will be charges. Recommended value is 6 seconds.
E	Billing Block	This is the number of seconds against which your rate will be charged to your customer. Recommended value is 60 seconds.
F	Use Group	This must be set to NO
G	Is Plan	If you would like the destination to be included in a Plan, set this to YES; otherwise it should be set to NO
H	Date From	Leave this blank
I	Date To	Leave this blank
J	Time From	Leave this blank
K	Time To	Leave this blank
L	Days	Leave this blank
M	Index	This indicates the billing increment of the rate in Column P. For example, if your desire is to rate using 30/6 billing increments, then you will have two row for the destination. The first row will have a '1' in the Index column while the second row will have a '2' in the Index column.
N	Quantity	This is the duration of the segment referred to in Column M. For 30/6 increments, this will be 30 for Index 1 and 6 for Index 2.
O	Increment	This is the actual billing increment to be used for the segment described in Column N
P	Rate	This is the rate that will be applied to the segment in Column N

Exhibit B

Chargetype Keywords

BALANCE - Account raw balance (the actual BALANCE field of the account)
(Note: this is in USD). Sample Usage: if BALANCE <2 return .50

STATE - Current state of the RTTS before the CTO was processed

BBAL - Brand balance

CL - Account Credit Limit (also refers to prepaid balance for prepaid accounts)

BCL - Brand Credit Limit

SER - Account Serial Number

BATCH - Account Batch Number. Sample Usage: if SER=29384 return .10

TYPE - Account Type

BSCURR - Brand service currency.

DEN - Denomination

BPCODE - Brand product code

GPCODE - Group product code

QUANTITY - Duration (so far)

CALLCHARGE - Call Charge

DNIS - Dnis

ANI - Ani

ACT1USED - Account fist used (boolean).

RATE

DIALSTRING - Termination Dialstring

INCREMENT

Exhibit C

Brand Service Config Keywords

EnableReconnect=0	Do not change the EnableReconnect setting
CriticalBalance=2	Minutes warning before call ends
SeizeTimeout=60	Seconds to wait for ANSWER before ending call
GreetingDelay=3000	Milliseconds to wait before playing greeting
InputTimeout=6000	Milliseconds to wait for inter-digit timeout
EnableGreetingPrompt=1	Turns greeting prompt on/off. 1=on 0=off
EnableBalancePrompt=1	Turns balance prompt on/off. 1=on 0=off
EnableDurationPrompt=1	Turns duration prompt on/off. 1=on 0=off
PromptsLocation=file:prompts/	Location of prompts files
Language=spanish,english	
BS_INBCHARGE2=true	Controls whether system will charge for DID leg