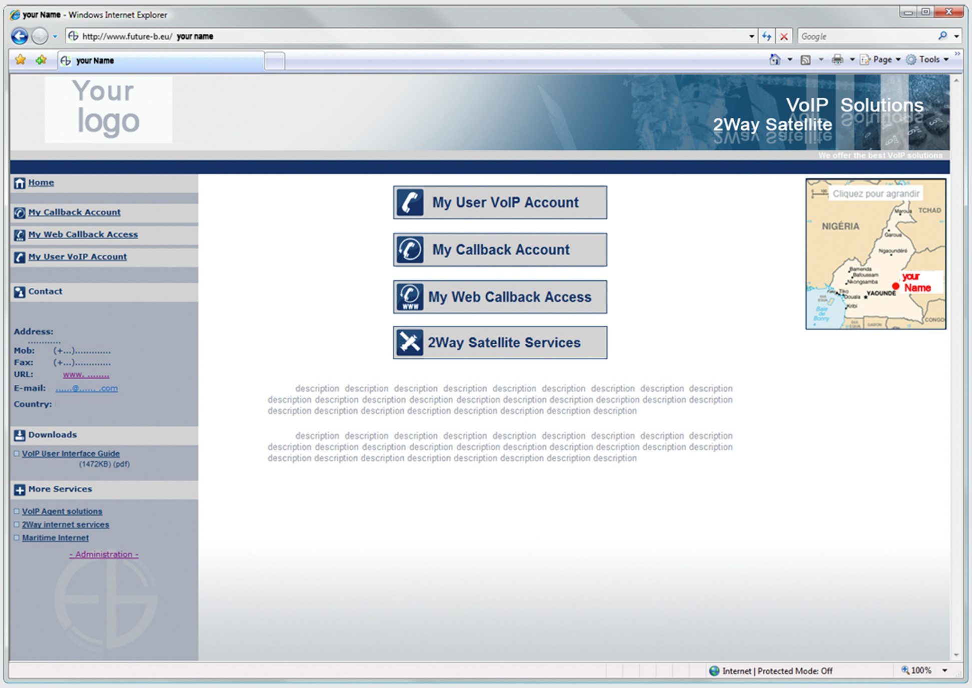
Reseller Interface Guide



Future-B Ltd
25th August Street nr.15
71202 Heraklion - Crete - Greece
Phone (+30) 281 0 281 291
Fax (+30) 281 0 224 067
E-mail: voip@future-b.eu
www.future-b.eu

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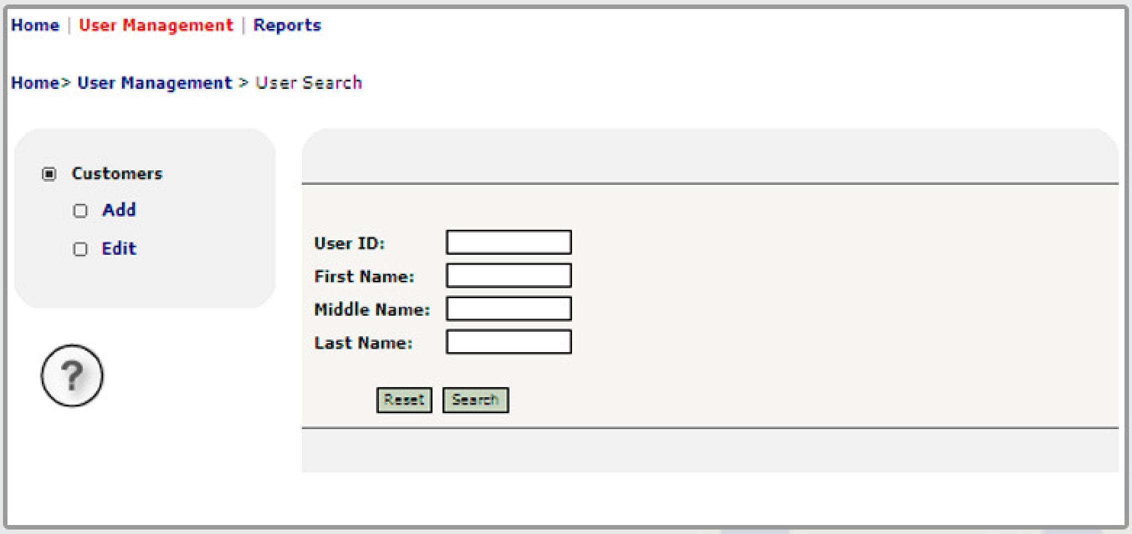
1 . Home

This is the Home screen of the Reseller Management System (RMS) where you can find menus that will take you further thought application

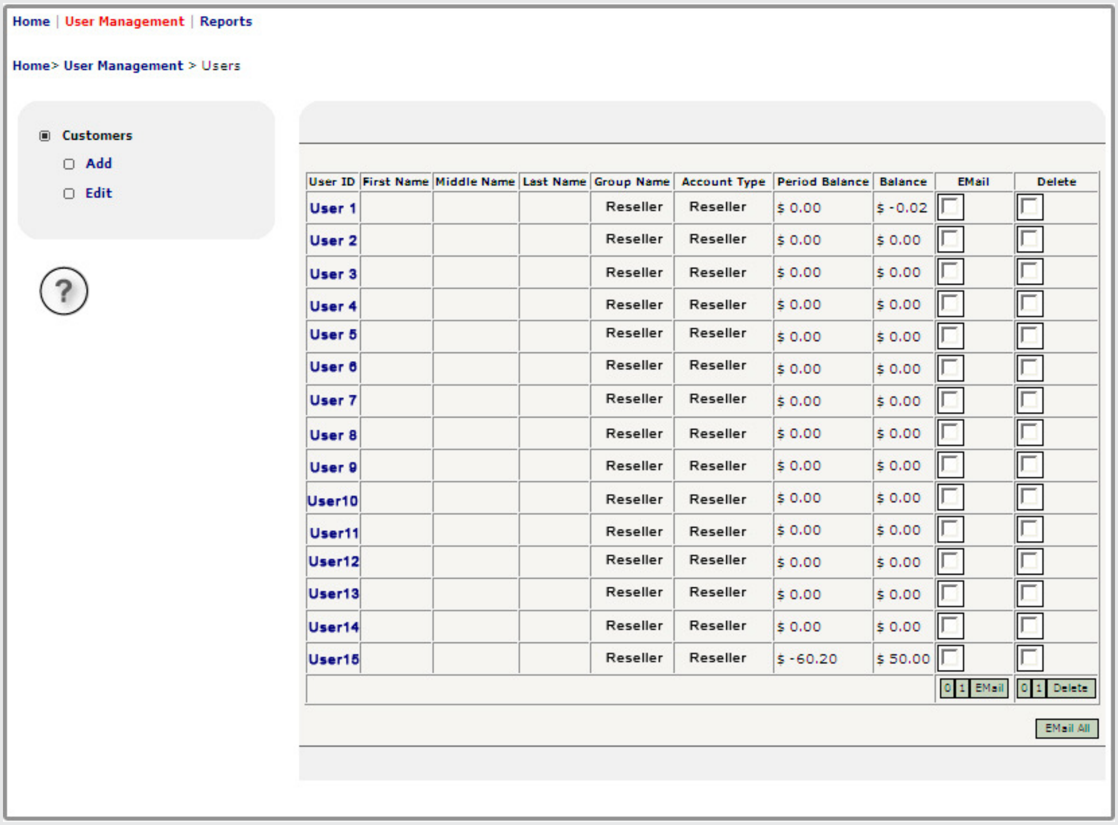
2 . User Management

Clicking on User Management will open Customer menu on the left hand side.
Immediately you are positioned on the Edit screen.
While on this screen you can search for user by entering any of the known details.

✐ Note: Using "%" sign you can replace unknown part of User ID or any other field.
By just clicking on Search you will find the list of all users belonging to you

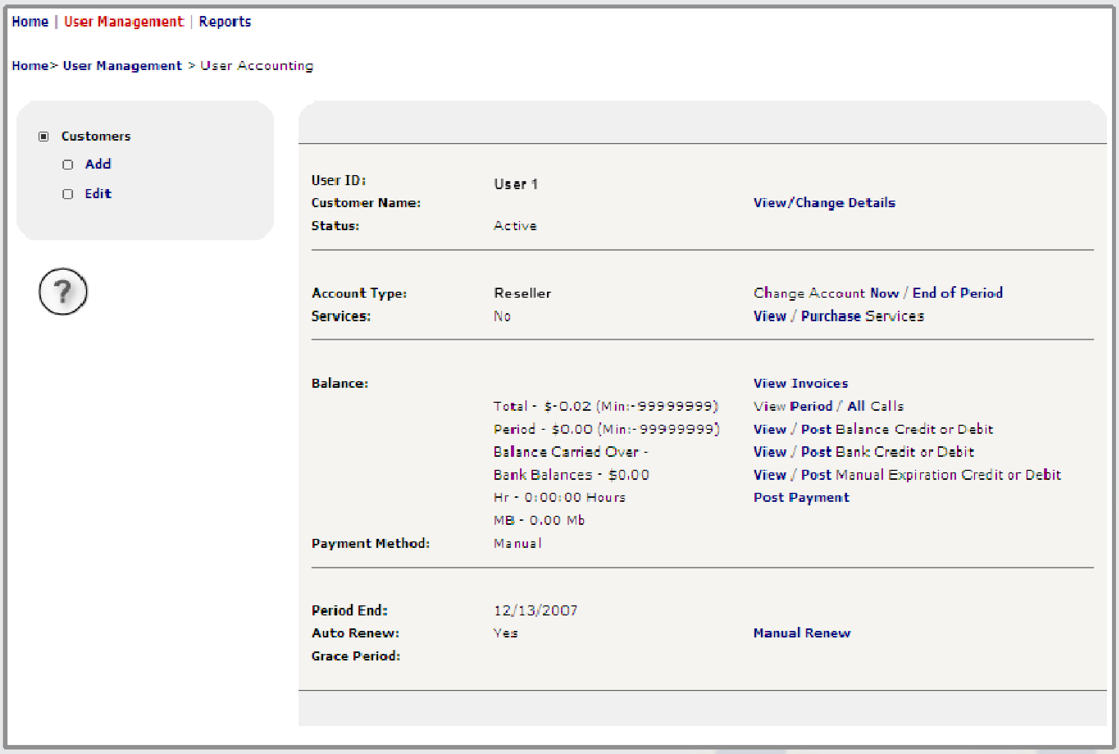


After getting the list of all your users that you want to edit:



User ID	First Name	Middle Name	Last Name	Group Name	Account Type	Period Balance	Balance	EMail	Delete
User 1				Reseller	Reseller	$ 0.00	$ -0.02		
User 2				Reseller	Reseller	$ 0.00	$ 0.00		
User 3				Reseller	Reseller	$ 0.00	$ 0.00		
User 4				Reseller	Reseller	$ 0.00	$ 0.00		
User 5				Reseller	Reseller	$ 0.00	$ 0.00		
User 6				Reseller	Reseller	$ 0.00	$ 0.00		
User 7				Reseller	Reseller	$ 0.00	$ 0.00		
User 8				Reseller	Reseller	$ 0.00	$ 0.00		
User 9				Reseller	Reseller	$ 0.00	$ 0.00		
User10				Reseller	Reseller	$ 0.00	$ 0.00		
User11				Reseller	Reseller	$ 0.00	$ 0.00		
User12				Reseller	Reseller	$ 0.00	$ 0.00		
User13				Reseller	Reseller	$ 0.00	$ 0.00		
User14				Reseller	Reseller	$ 0.00	$ 0.00		
User15				Reseller	Reseller	$ -60.20	$ 50.00		
								0 1 EMail	0 1 Delete

You can select any of the users from the list by clicking on User ID. This will bring you to the user management screen:



On this screen you can review current user details, balance, and other account details.

2.1 . Editing existing users:

The user edit menu allows you to view a summary of the target customer and perform various customer management activities, including updating details, purchasing add on services, and posting payments. To access the customer edit menu click on the customer user name after performing a search for the customer (see previous section for further details).
The summary page contains details about the customer and his/her activities as well as links to customer management actions.

The summary page contains the following information about the target customer:

User ID: The customer's User ID, which is used to access the RADIUS and for authentication.
Customer Name: The customer's first name, middle initial and last name.
Account Type: The account type of the customer, if the customer purchased a product, then this is the account type associated with that product.

Services: If the customer owns add-on services then the value displayed equals "Yes", otherwise the value is "No".

Balance: The various balances of the customer –

- RT – The real time, up to the minute, balance of the customer
- Total – The total balance from the current period (cycle) and any outstanding sums from previous periods, this balance does not include any debt accrued in a call that is currently active.
- Period – The balance for the current period only.
- Balance Carried Over – Unpaid balance from previous periods.
- Bank Balances – The free hours, megabytes and spending dollars available to the customer.

Payment Method: Determines whether payment is automatically collected at the end of the cycle or is manually received via cash, credit card, bank transfer, or prepaid voucher.

Period End: The date in which the period ends. At which time the account will either expire or automatically renew depending on the settings for the customer's account type.

Auto Renew: Specifies whether the customer's account type automatically renews when the period ends.

Grace Period: The number of days after a rejected payment that a customer is allowed to stay active.

In addition to displaying the above information, the customer edit page also allows you to perform the following actions:

View or Change Details: Update or view customer user details. For information about updating user details, please see the section – adding a user.

Change Account Now: Change the customer's account type immediately. Changing a customer's account may incur switching fees, depending on the Business Configuration of RMS.

Change Account Type at End of Period: Automatically change the customer's account type at the end of the period. Changing a customer's account may incur switching fees, depending on the Business Configuration of RMS.

View Services: View or update any add-on services the customer may currently have in his/her possession.

Purchase Services: Purchase a new add on service for the customer from those services available under his account type which that customer does not already poses.

View Invoices: Search and view invoices produced for that customer in previous periods.

View Period Calls: View call reports from the customer's current cycle.

View All Calls: Search and view customer calls from previous cycles as well as the current one.

View Balance Credit or Debit: View the customer's balance and balance history including access to the customer's invoices.

Post Balance Credit or Debit: Credit and debit the customer's balance. Do not use this feature to post payments, only adjustments should be made using this feature.

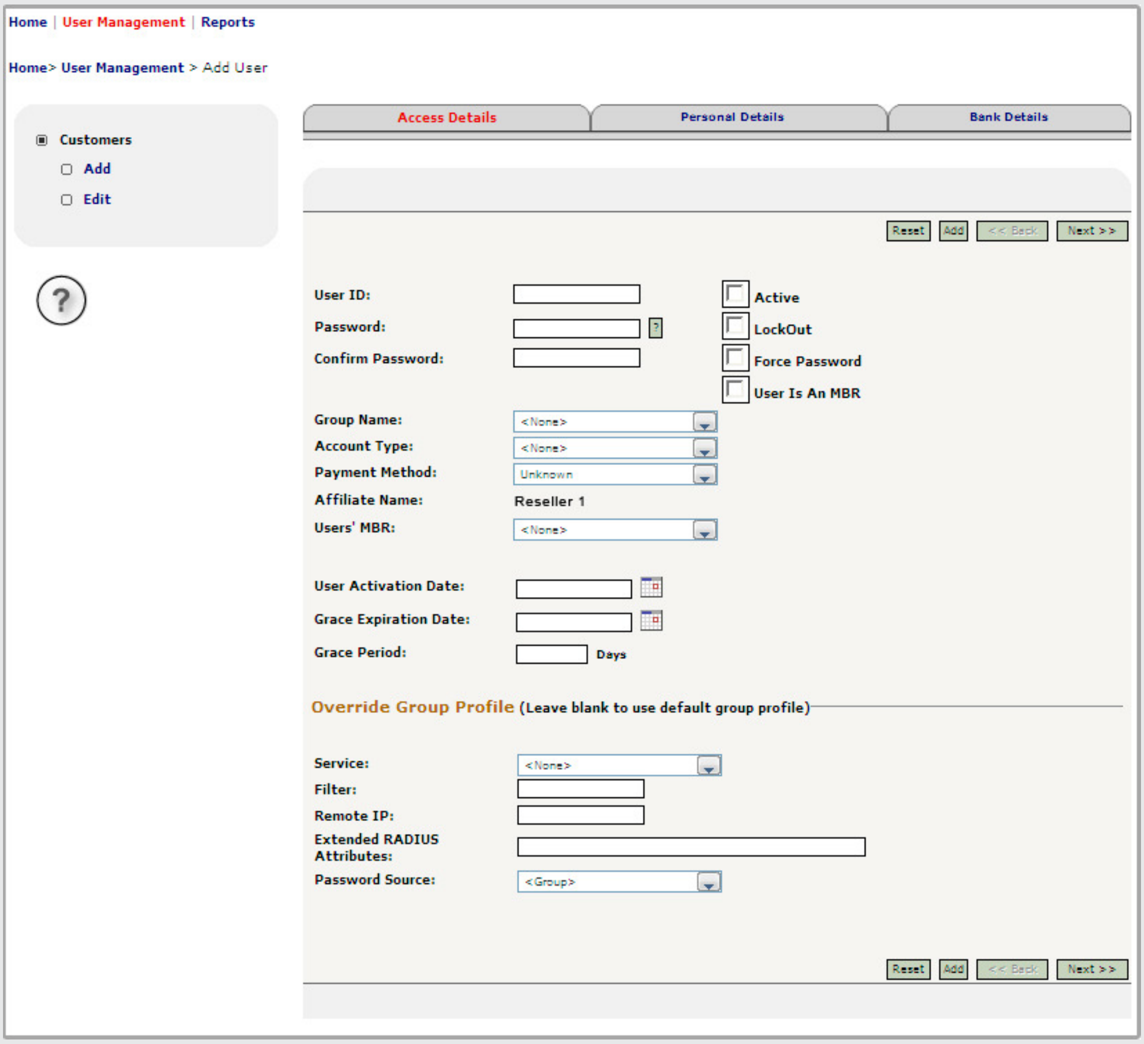
View Bank Credit or Debit: View the customer's bank (free dollars, hours, megabytes) balances and history.

Post Bank Credit or Debit: Post an adjustment to the customer's banks (free dollars, hours, megabytes). For example, give a customer 10 free hours if the customer expresses dissatisfaction.

Post Payment: Post a payment against the customer's balance.

Manual Renew: Manually renew an expired account. Normally, accounts are renewed automatically if they are designed to do so (i.e. not one offs). You should be familiar with the Account Type and your company's policy before proceeding with this action.

2.2 . Adding new Users:



The Access Details tab holds the following parameters:

User ID: Use this field to set the user "handle" required for accessing the network. If you are registering a Remote Gateway, the User ID should be the IP address of the gateway. If you are performing ANI based billing, the User ID should be the user's ANI (using the same conventions as those set in the NAS, normally E164).

Active: Use this checkbox to activate or deactivate the user account. A deactivated user, although still in the user database, will not be able to access the network, and no billing process is executed on their account.

Password: This field holds the user password required for accessing the network.

Lockout: Based on your settings in the Advanced Configuration page for Password Security, your users may get "locked out" (i.e. cannot access), in case they have entered a wrong password for the defined number of times. When a user is "locked out", this checkbox will be checked. In order to free the user from the "lock out", uncheck this field.

Confirm Password: This field used to confirm that the password is correct.

Force Password: Based on your settings in the Advanced Configuration page for Password Security (Chapter 8), some passwords may be considered Weak (i.e. unusable for security reasons). In order to force RMS to accept a Weak password, you can mark this checkbox prior to submitting the user form.

✏ *Note: There are two levels of password strengths, Minimal and Weak. While the Force Password may be used to force Weak passwords, it cannot be used to force Minimal passwords (i.e. passwords that may be forced are ones that achieve a score between the Minimal score, and the Weak score).*

User Is an MBR: Use this checkbox to set the user as a Master Billing Record. An MBR user serves as a bill collector to users that have him/her as their MBR. A typical scenario for the necessity of an MBR is when providing access to a company or a family, which require more than one user account, yet wishes to consolidate all charges under one bill. For this scenario, one user is set up as an MBR for the company/family, while other users have their MBR setting pointing to him/her.

Phone Number: if the NAS port is connected to a modem, it will inform RMS of the dialing in phone number (where supported by both telephone company and the NAS).

IP Number: if the NAS port is coming through a network, it will inform RMS of the incoming IP number (where supported by the NAS).

RMS will compare between the NAS supplied caller ID and this field, and if matching, it will allow the user to log in.

You may use wildcards in the Caller ID field, thus allowing the user multiple points of origin.

Wildcards supported are:

* - Matches any sequence of characters (zero or more). For example: a Caller ID of 555*22 will accept users from any phone number starting with 555 and ending with 22.

? - Matches any single character. For example: a Caller ID of 555555? accepts users from any phone number between 555-5550 to 555-5559.

Note that multiple templates may be specified by separating them using a semi-colon (;).

Group Name: Use this combo box to select a Group for the user, setting his access parameters accordingly.

Account Type: Use this combo box to select an Account Type for the User, setting his Accounting parameters accordingly. Note that if you leave this field as <None>, the user will not be charged nor will he be expired.

Payment Method: The default method by which payments are posted.

User' MBR: In the event you have previously set up one of your users as an MBR, you can set the user as belonging to that MBR, thus all his billing information will be transferred to the defined MBR.

User Activation Date: This field displays the date from which the User is (or will be) allowed to access your network. You may change the value of this field, so a user, although in the user database, will be able to connect only after the set date.

Grace Expiration Date: This date specifies when the User account will expire if it has debts exceeding the Max Debt settings in the Account Type it belongs to. In case the debt is cleared (i.e. lower than the Max Debt limit), this date has no significance.

Grace Period: The number of days after a rejected/pending payment that a customer is allowed to stay active. Grace Period days set at User level Override setting at Account Types.

Override Group Profile (Leave Blank to use default group profile)

✐ *Note: Overriding a group profile is for expert use only. Generally, only the administrator should define these settings on the Group level and they will seldom need to be overridden. Indeed, in the Customer Management access level, these fields cannot be modified. Therefore, if you run a large organization ensure access to these fields by your Customer Support is restricted.*

Service: This combo box allows you to override the Service Type defined for the Group this user is a member of. For example, you can switch between PPP and PPPoE.

Filter: You may use this field to specify the use of an access list or filter which is stored on the NAS. In case the user Group already contains a Filter value, the Filter value here will allow you to override it.

Extended RADIUS Attributes: Define custom attributes sent to the NAS upon authorization. For example, restricting bandwidth or realm access.

Remote IP: If the service type of the user, or his Group, is Telnet or RLogin, use this field to override the host to which the user should connect. When using a framed service such as SLIP, CSLIP or PPP, you may use this field to set a static address for the user (i.e. each time the user connects, he will have the same IP address).

Password Source: Use this field to specify a password source for an entire group of users.

Group: use this field by default to look for the password in the Group settings.

- RMS : Use this field to look for the password in RMS database.
- OS : Use this field to look for the password in Windows NT SAM user database.

LDAP: Use this field to look for the password in LDAP directory server database.

When you open User Management menu you will be positioned at the Edit option where you can search for the users to display their credentials. You can search for your users

Personal Details

The Personal Details tab holds the following parameters:

- **First Name: The user's first name.**
- **Middle Initial: The user's middle initial.**
- **Last Name: The user's last name.**
- **Compan: The user's company name.**
- **Email: The user's Email address. This address will be used to override the default Email address when sending reports and invoices to the User. The default Email address for a user on your system is UserID@Mail.Server, where Mail.Server is defined by the SMTP Host setting in the Server Configuration>Adv. Configuration page.**
- **Address, City, State, Country, Zip Code, Home Phone, Work Phone, Fax: The user's contact information.**
- **Custom Information: These fields may be used to store any custom information you wish to keep about the user.**

Bank Details

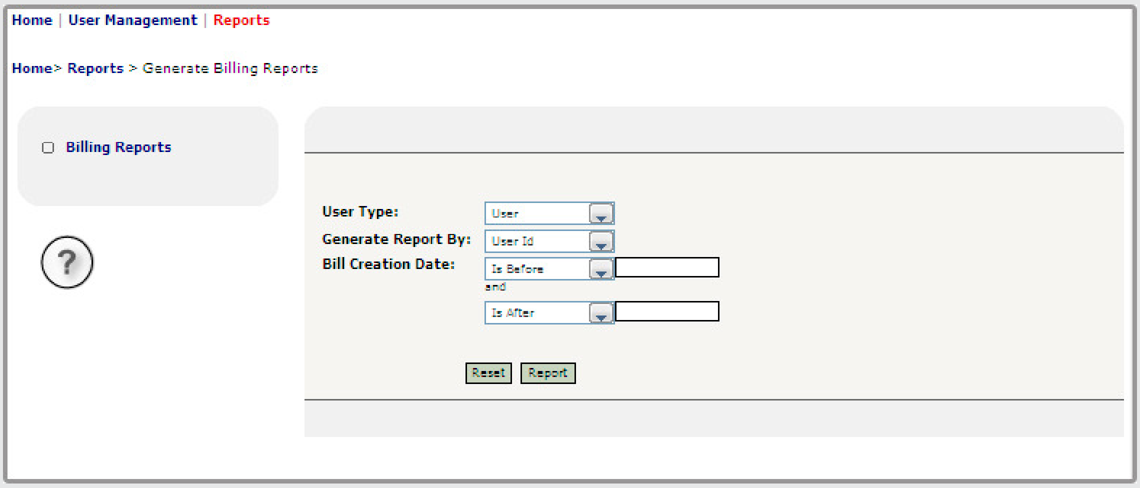
The Bank Details Tab holds the following parameters:

- **Bank Name: The name of the institution for wire transfer of funds**
- **Bank Address: The address of the account holder's branch**
- **Bank Account Name: The name on the account**
- **Bank Account Number: The account number**
- **Transfer Currency: The currency in which the account is held.**
- **Comments: Any general comments regarding the customer's bank account.**

✐ ***Note:*** **Although only the User ID, Password, and Group Name are required fields, it is a good management strategy to store as much information as possible regarding your user.**

3 . Reports

Reports or Billing reports give you opportunity to create User reports for billed traffic.



When accessing the Billing Report page, you will be required to enter some parameters, based on which the report is generated:

User Type: There is only one option here - User.

Generate Report By:

- User Type *User*: User ID, groups the report based on the users themselves. Each user will have a single report line, showing his various charges.
- Group Name, groups the report based on the Group to which the users are associated. Each Group will have a single report line, showing the accumulated charges for all users in that Group.
- Account Type, groups the report based on the Account Type to which the users are associated. Each Account Type will have a single report line, showing the accumulated charges for all users in that Account Type.
- Affiliate, groups the report based on the Affiliate that signed up the users. Each Affiliate will have a single report line, showing the accumulated charges for all users signed up by that Affiliate. This report may have one report line with no Affiliate name, which will show the accumulated charges for all users not signed up by any Affiliate.

✎ *Note: Most of the time you would only specify User Id.*

Bill Creation Date: Select the start and end date between which the billing information should be looked up for.

From main Billing Reports screen you can generate reports for given period.

Billing report:

Home | User Management | Reports

Home> Reports > Billing Report

Billing Reports

?

Name	Account Cost	Usage	Credit	Previous Debt	Transfered	Previous Charged Usage	Setup Fee	Transfer to MBR	Service Period Fee	Service Setup Fee	Tax	Sum w/Out Tax	Total Sum	Affiliate Commission
User1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0	1,052.62	1,052.62	0.00
User2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-215.64	0.00	0.00	0	-215.64	-215.64	0.00
User 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-264.56	0.00	0.00	0	-264.56	-264.56	0.00
User 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-201.08	0.00	0.00	0	-201.08	-201.08	0.00
User 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-4.53	0.00	0.00	0	-4.53	-4.53	0.00
User 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-12.08	0.00	0.00	0	-12.08	-12.08	0.00
User 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-144.39	0.00	0.00	0	-144.39	-144.39	0.00
User 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-151.52	0.00	0.00	0	-151.52	-151.52	0.00
User 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-52.84	0.00	0.00	0	-52.84	-52.84	0.00
User 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-0.23	0.00	0.00	0	-0.23	-0.23	0.00

Billing report shows you billed traffic per user and total traffic per MBR as well your commission.