



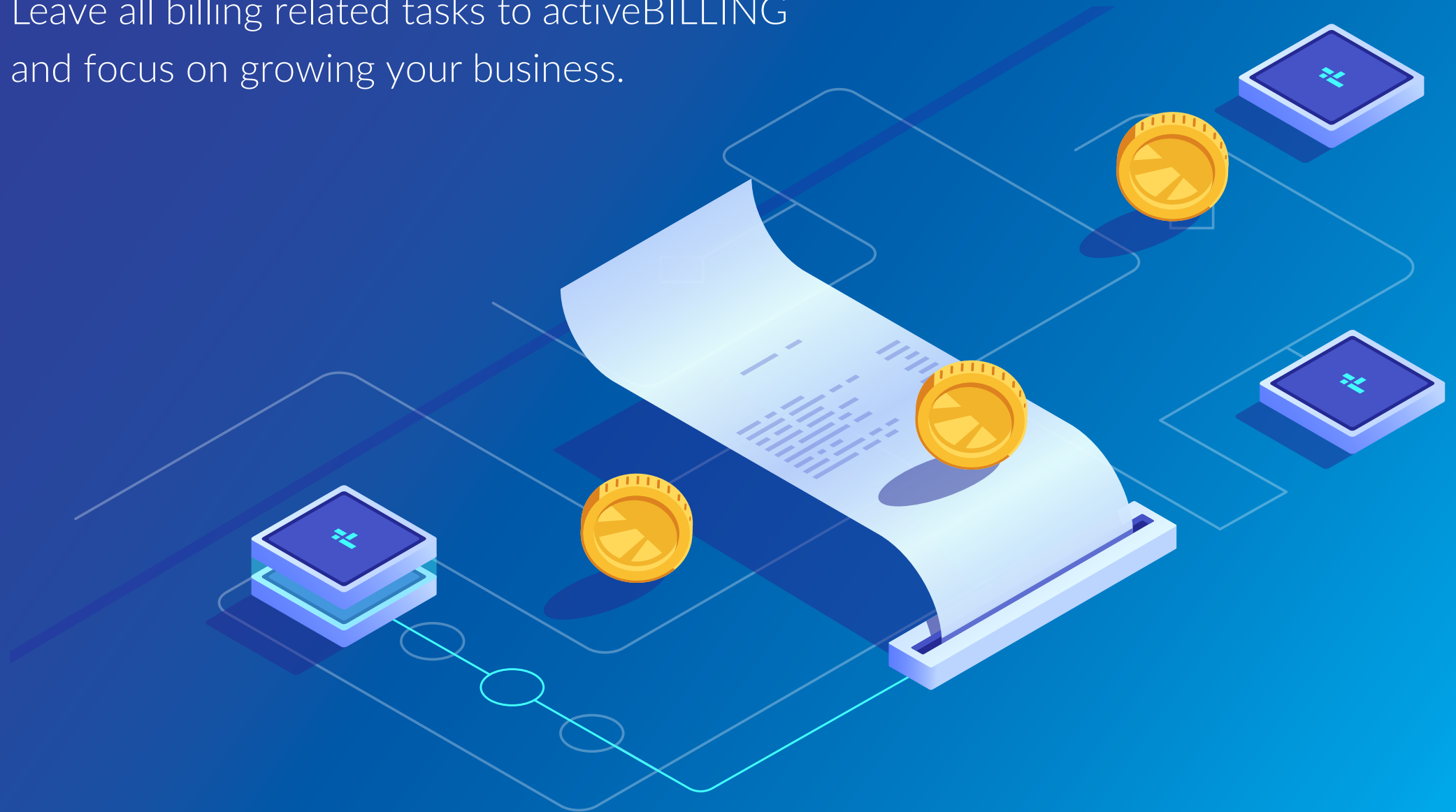
activeBILLING DATASHEET

activeBILLING datasheet contains comprehensive list of features and their detailed description.



YOUR TURNKEY TELCO INVOICING & PAYMENT PLATFORM

Leave all billing related tasks to activeBILLING
and focus on growing your business.



activeBILLING

activeBILLING is a fully telecom customer portal, designed for integration with one or many activeSWITCH telephony switches. activeBILLING has a friendly GUI that enables efficient, automated billing, invoicing and payments, allowing you to spend less time dealing with the administration of your company and more time to SELL! Enjoy Unlimited Account Types, Call Spent and Call Billed View... and much more!

Server Edition

Server Edition of activeBILLING is a fully-featured telecom billing solution designed for integration with one activeSWITCH telephony switch or optionally one third-party telephony soft switch.

Network Edition

Network Edition of activeBILLING is designed for unlimited integration with activeSWITCH telephony soft switches spread geographically or third party Telephony Soft switches with optional FTP CDR Mediation.

CALENDAR

The calendar application is a powerful tool for organizing appointments, tasks, meetings, etc. Data is displayed in a very nice and organized way for easy everyday usage. Point and click on the desired date or an existing task in order to add, edit, or view tasks. The calendar application is not only a standalone application, but is integrated with other site manager applications as well.

Add Task/Appointment

CDR (Call Detail Record) contains call data and network statistics for every single call that users make. CDR provides information such as ID of a call, starting time of the call, duration, codec that was used in a call, caller ID name and number, MOS score for the call, etc.

CMS

The CMS application is part of activeBILLING where you can build the client side of your website - things like using our templates or building your own with the CTPP template engine.

Pages

Pages are part of activeBILLING where you will put the content which will be available for users on the client side. Here you can add/delete pages, manage content blocks, change page and content block properties, their ordering and permissions.

Content Blocks

Every page in the CMS is built from content blocks. You can build the client side of your website, by using our own templates or building your own with the CTPP template engine.

Applications

When you want to create a content block you can choose between the following Applications: Articles, Calendar, CMS, Contacts, CRM, Links, Accounts, Web Editor, Products & Services and Billing.

Pages Permissions

This option allows setting which account types or specific users can access the edited page from a browser.

Ordering

Ordering option allows setting the order in which an edited page will be displayed in the browser.

Templates

In activeBILLING you can use some of the predefined web templates such as: Paris, New York, London, and you can choose the template color, import Logo image, etc.

Bespoke

Bespoke design allows custom coding and template images design. For the template engine, we are using CTTP template.

Files Manager

The files section has been designed to allow an easy and fast way of managing your website's files. These files can be images, docs, html, php, etc.

CONTACTS

This location provides options for editing your company's contact information and bank account details if necessary.

Contact Details

Contact details usually consist of a contact's company name, address and bank details.

Bank Addresses

Although bank account details are collected during the activeBILLING Setup Wizard, section "Bank Details" under contact details enables double check for bank account details because users will use bank account details when they make payment for services and products that you sell.

Submitted Contact Us Form Data

The Submitted Contact Us Form Data is used to display all messages sent via the Contact Us option which is also available in activeBILLING.

CRM

Projects

The project represents a temporary action taken for the creation of a product or service. Being temporary means that the project has a start and end date. Every project is unique and contains one or more tasks. activeBILLING gives the option to display list of all available projects as well as other useful commands.

Project Managers

Project manager is a person who controls all aspects of the project.

Project Assistants

Project manager can include project assistants in created ticket or task.

Tickets/Tasks

Task represents a set of instructions required to be done. Tasks from all projects can be displayed and sorted by priority.

Dashboard

Reminder represents the most convenient way of accessing active tasks.

Reminders

Charts are used to plot various data sources like the number of concurrent calls or quality of calls over time. Data sources can be combined to one chart allowing the viewer to see the correlation of desired data sources like SIP 4XX/5XX responses on ASR. The graph itself is interactive – clicking on a particular legend hides the datasource. Hovering over a datasource highlights it and shows the local value.

CRM Filter

The CRM filter uses standard configuration files and database configuration parameters. Configuration files are changed only once, usually when installing the CRM filter. There is no special need to change these files frequently.

E-mail Templates

Every user has the possibility to modify default email templates. Variables in form %VARIABLENAME% will be substituted by real values when message is generated.

Unsupported Files

Files that are not to be stored permanently.

Unsupported Domains

List of all unsupported domains.

CRM Remainder Email Templates

You can also modify email templates for messages produced by the CRM Reminder.

Approval Dates

Auto approval & Auto complete are variables used in the template.

ACCOUNTS

Account Details

The Account Details subsection provides Account information and options to edit the account, create a New Invoice, and instant login to the system as an account user. In account details you can see precisely listed and enumerated details concerning the user's account.

New Invoice

You can create a new invoice for every user. New invoice is created by entering the product's name, quantity, price and tax.

New Quote

New Quote can also be created for every user. When you create a new Quote for the user, you need to specify the product's name, quantity, price and tax for the product.

Account Members

Account Members are third parties connected to the user's account. If a support ticket is raised, for example, all account members connected to this profile will be able to follow the support thread, or, depending on configuration, to get billing informations.

Credit/Debit History

A user account can be given, or be stripped of a certain amount of billing funds. These funds are used for paying purchased products and services. Credit/Debit history shows history of Credit or Debit for the user.

Balances (Account and activeSWITCH Extensions)

It is possible to see account balance in activeBILLING. There are two available fields: "Customer Account Balance" which represents the equality of totals in the debit and credit sides of an account, and "Available Customer Funds" which displays funds that are present and ready for use at the moment.

Orders

activeBILLING offers the possibility to display the list of all requests for products or services for every account separately.

Invoices

In the invoice section, you can see lists of charges for used services.

Invoice CSV

You have the possibility to download Invoices in a CSV format. This can be simply done by clicking the button provided in the invoice section.

Quotes

List of all Quotes is provided for every account. Quotes also can be downloaded in a CSV format.

Credit Notes

If any credit note is created for a specific account, the user of that account can easily see the list of all credit notes related to their account.

Payments

Every user can see sums of money used to pay for products or services.

Statements

Statements section displays written records of account withdrawals.

Statements CSV and PDF

You can download displayed statements in a CSV or PDF format.

Outstanding Balances

Every user can see the list of outstanding balances for the chosen period in activeBILLING.

Support Tickets List

List of educational and problem-solving assistance to account users can be displayed in the Support Ticket list. Tickets can be filtered by entering the subject or by status.

Support Ticket Add

Option to create a new ticket is available. When you create a new ticket you can choose the team that will receive that ticket, you can enter the subject of the ticket, description, add attachment, etc.

Subscriptions Services

All subscribed services are displayed in the Subscription Services field. Possibility to create a new Subscription Service is also provided.

POS Groups

Used for Call shop.

Call Shops

Used for Call shop.

DIDs

DIDs are used to point all incoming calls that come over trunks to specific system destinations. activeBILLING has the possibility to display all system DIDs with the following details: PBX extension, DID. activeBILLING provides the possibility to add a new DID.

Call Records

Call records field displays a list of calls.

Saved Carts

If you want to see details concerning the call spending, activeBILLING gives you the possibility to see it. You can filter it for a certain period of time, or you can display call spending only for a specific currency. You can also download the list using the CSV button, and display the list of call spending for the current month.

Messages

activeBILLING can send various notifications to account users. A list of all sent messages can be seen in the Messages section.

Account Types

In Account Types section you can see the list of user accounts. You can edit or delete user accounts from this section. This location is displayed if you added a new type or if you edited an existing type.

Email Templates

Email templates are used for creating generic notification messages for various activeBILLING events.

Statements - All Accounts Related

The Statements Section represents a list of written records of actions on each account in activeBILLING. List of all statements can be downloaded in a CSV format.

Acc. Managers Report

List of reports that are showing sales of all Account Managers for a selected period of time. Reports can be filtered per date, per account manager or additionally per currency, and converting it to default currency. You can also select only one currency. This report also allows you to merge invoices and credit notes for a specific month and Account Manager.

Debtors Report

Debtors report lists all overdue accounts. The report displays customer's Account name or company name. Using the Debtors report you can open an email application with From and To details to make it easy for you to view payments.

PRODUCTS & SERVICES

Categories

Categories represent a collection of things that share a common attribute. A Category can hold other categories (called subcategories) and Items/products as well. An unlimited number of categories and subcategories are available for addition. Although Products & Services are mostly used for displaying products, other data such as news articles, archives, etc. can be assigned to them as well.

Category Images

You can import an image for every category. Options for setting small and large category pictures are available. You can choose image position, background color, etc.

Category Terms & Conditions

In activeBILLING you can write your own terms and conditions in text editor, and save it.

Full HTML Description

Every created Category can be described easily in activeBILLING. You can simply open a provided text editor and write your category description.

Products

Products are one of the most important parts of activeBILLING because billing is based on them. Without properly setting up products and services, you will not have the billing system running.

Products HTML Description

When you create or edit your product you can describe it. activeBILLING gives you a simple text editor for product's description.

Products Images

You can import a picture for every product in a category. You have the possibility to choose between small and large image. Small image appears next to a product and large one appears when you click on a product.

Products Taxes

You can add or edit tax type for every product. This option is available for every product in a category so you can choose different tax type for different products in the same category.

Products Addons

activeBILLING allows you to configure add-on options for every product separately.

Products Pricing

The products price varies depending on whether the subject is an end user or belongs to one of the reseller groups. Pricing and Ordering provides options for adding product prices, discounts, and a list of already existing prices.

Products Price per User Type

Possibility to add different prices for different users is also provided. When you want to add a New Price, you can define a different price for the end user, commercial price, price for public sector, reseller, wholesale, etc.

Products Price per Currency

You can define a product's price in different currencies.

Price Types: One Time Fee & Monthly

The price type should be set per month, if you want to charge this item montly. You can leave it as Default, if this is a one time price.

Products Setup & Close Fee

When you define a new price for a product, you can also specify the setup and closing fee for that product. If you don't want to charge, Setup and Closing fee should be set to 0.

Products Discounts

You can create discount for certain products. You can create discounts for all currencies or specific ones, for certain quantity of a product, and also define the setup and closing fee discount.

Call Credit

You can use Call Credit when you create a product.

BILLING

Orders

In the Order section you can see the list of all orders placed by account users. These orders are displayed in the “last received” order and a comprehensive search facility is also available.

Order PDF

Every order can be opened in a PDF format.

Order Print

Every order can be printed.

Invoices

The invoices section is directly linked to all the orders placed. Each invoice corresponds to an order by its number. Comprehensive search is also available.

Invocies CSV

It is possible to download an invoice in a CSV format in activeBILLING.

Invoice Email

Every Invoice can be sent via email.

Invoice Print

Possibility to print Invoice is also given in activeBILLING.

Invoice CDRs (PDF)

Invoice CDR can be opened and downloaded in a PDF format.

Invoice PDF

Invoice can be opened and downloaded in a PDF format.

Invoice Recieve Payment

In the receive payment section you can add additional notes about the payment in Notes option, also Payment method, amount, or even attach some documents.

Invoice Create Credit Note

Creation of credit note is done via Invoice. In Credit note add a note and reason which can be one of the following: Error Correction, Non-Payment, Cancellation, and Other.

Invoices Print Multiple Invoices into One Document

If you have multiple invoices, you have the option to merge your invoices into one.

Invoices Credit Notes

List of all credit notes for all invoices is available in the Credit Notes subsection.

Credit Note PDF

Every created credit note can be opened in the PDF format.

Credit Note Email

Every credit note can be easily sent via email option.

Quotes

All created quotes can be displayed in list.

Quotes CSV

Every quote can be downloaded in a CSV format.

Payments

The payments section lists all payments made by account users and sorted by the last received payment with the standard search option included.

Payments Vendors: Paypal, Moneybookers, Direct Debit, Linkpoint, Authorize Net CIM, Payflow Pro

You can choose using payment vendors such as: PayPal, Moneybrokers, Linkpoint, etc.

Outstanding Balances

Outstanding Balances section is used for tracking and monitoring outstanding balances.

Tax Report

In the Tax Report you can see the list of "Total" outstanding balances and "Taxes" for the selected time interval.

Direct Debit Processing

Direct debit is used for automatic bank payments. This is done by downloading a CSV file (we will credit all accounts) and submitting it to the bank, after which we will get the rejected transactions. These rejected transactions need to be uploaded again to remove credit from the accounts with unsuccessful payments.

Subscriptions

If you are going to sell a product and services with recurrent pricing, you have to create Packages which will be used for creating subscriptions. Every item added to a package should have a recurrent price. Add-ons to these items may have recurrent and one-time prices.

Subscriptions Packages

The packages subsection is used for adding, editing, and deleting subscription packages.

Subscriptions Report

Report used to get invoices related to subscriptions and filter them using following filters: Date, Currency, Acc Manager, Status, Company, and Package.

Subscriptions Service Plans

If you want to see all service plans or add a service plan, you can do it in the Subscription Service Plans section.

Subscriptions Outstanding

This subsection is used for searching, displaying, calculating, and billing outstanding subscriptions.

Subscriptions Outstanding Run and Bill Now

Run option calculates the recurrent calculation of invoices. Bill now option is used to send invoices to the customers after the recurrent calculation is done.

Mediation

Mediation is used for billing from external CDRs. These CDRs can be gathered from Switch which is pointing on FTP, PBX Trunk or PBX Multi User.

Payments

The payments section lists all payments made by account users and sorted by the last received payment with the standard search option included.

Report Invoice, Payments and Other

In the Report Live section various reports are generated to provide valuable information to management on financial situation through a specific time period, related to invoice, payments and credit notes. You can follow all billing tasks graphically displayed in real time.

Custom and Predefined Overdue Days with Email Notifications

activeBILLING also supports sending Overdue emails after specific or predefined time intervals.

Single Invoice: Combine Multiple Invoice into One per Account

Single Recurrent Invoice option is used to combine all customer's invoices into one.

Custom Decimal Places

You can choose number of decimal places for billing. There can be up to five decimal places.

Custom Billing Day

You can run "billing" at a specific day in a month, so every month you can bill your services on that specific date. This can be set by using the "Monthly Billing Day" option.

Multiple Currencies

The system is able to accept unlimited currencies. Also, the system gives you the chance to add currency. However, the system has to have a "base" currency from which other currencies will take its value using the exchange rate field value.

Multidimensional Taxes for Every Country

Taxes in activeBILLING are based on the customer's or activeBILLING location. So you must make proper tax types to achieve the best results, because you will create taxes depending on the text type.

Taxes: Groups with CSV Download/Upload

There are two ways of adding Taxes in Tax type. One is by using "Add New Tax". Another and a faster way to add and edit tax is to download a CSV file, fill the fields with tax data and upload it again to the proper tax type.

EU Tax

You have the possibility to define if the tax is EU VAT tax.

Tax on Tax

You can choose to enable or disable tax on taxed price when adding a new tax.

Tax on Fees

Possibility to set tax on fee is also provided in activeBILLING.

Shipping

Shipping allows adding an unlimited number of shipping methods as available from various shipping companies worldwide.

Email Templates with Variables

Email templates are used for creating generic notification messages for various shopping cart events. You can configure which subject or text you would like to send to the users when a new order is made, etc.

Latex PDF Templates

You can use already existing PDF templates, or configure in a way that suits your needs.

PDF Templates in Multiple Languages

You can choose the language for the templates. If your desired language is not in the list you can add a new language.

Telephony: Connect with activeSWITCH

External switches can be added, modified or deleted in activeBILLING.

Numbering Ranges for USA and Canada

You can see the list of numbering ranges for USA and Canada in Numbering Ranges section.

PREFERENCES

Timezone

You can set your Timezone in activeBILLING.

Default Application

Applications are displayed with two options, one round and one square. The round one is for selecting only one application and the square one enables the selection of two or more applications that are to be displayed. If you set it to Default, all available applications will be displayed.

SITE SETTINGS

Users

A list of user names, email addresses, and command buttons is displayed. Users listed are actually persons who are allowed to enter and use the site manager. You can also add a new user, or edit an existing one.

Users Groups

The number of administrator users can grow very large. They can be organized into groups for easier manipulation. The applications user group can see and access it set as administrator. You can also add a new group, or edit an existing one.

Date Time Settings

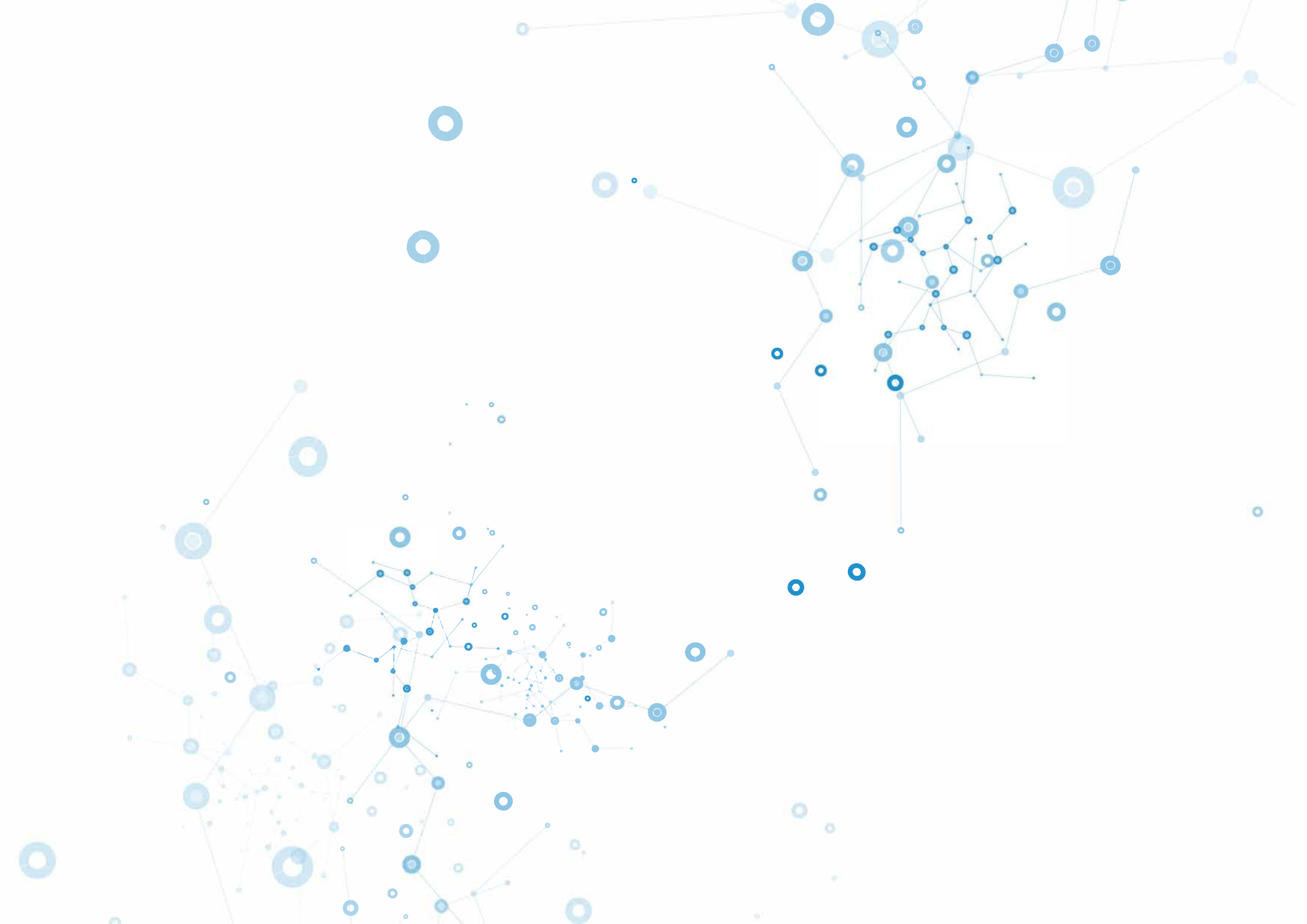
Date/Time settings is used to set the proper date/time format throughout the system interface.

Updates, Wizard and Services

activeBILLING allows shortcut to the licensing screen. It is useful if a license upgrade needs to be performed. In order to gain access to the activeBILLING update page you will have to enter the username and password.

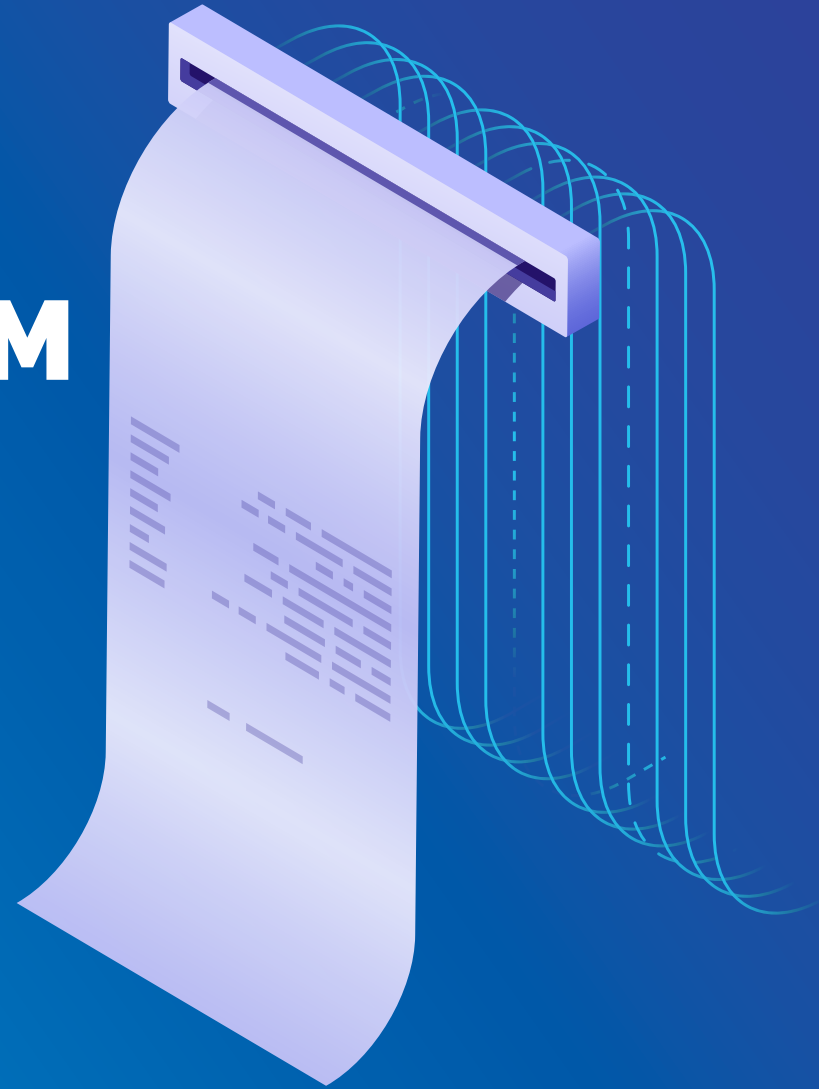
About

The about shows activeBILLING current release and license information.



NEVER FORGET INVOICING AN ITEM

Easily manage the whole process from sign-up until invoicing and payments.



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to find out more about our services

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Call us for free**

Xinix World

483 Green Lanes, Palmers
Green, London, N13 4BS
United Kingdom

Switchboard

03300 882 227

Sales Line

0800 5200 300

Partners Support

03300 882 262

Finance

03300 882 227

email: sales@xinixworld.com

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