VoIP

A DataTill guide to setting up and using the VoIP billing functionality for Vodacom Manual Imports.

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Introduction:

The VoIP billing module can be used to bill customers from VoIP CDR files received from a trunk provider.

I.e. Users can import your VoIP usage files so that customers can be billed.

Manual VoIP usage importing tools can be found under the new VoIP menu.
Users can choose the type of import they want to match with their import file.
The current VoIP usage import types that are available are:

- Generic – See guide here.
- Internet Solutions
- PortaBilling
- Vodacom
- Easttel

Automatic importing tools:

- Vodacom
- PortaBilling – to be released in the next phase.

Each of these types have sample files you can download on step 1 of the Import Wizard. This can be used as a comparison to other user import files.

It is important to remember that the “From Number” in the user’s import file should be an exact match on the phone line/ phone number that is set up within VoIP under the Phone Lines section.

To use Ratecards, the system will match each call’s “From Number” with VoIP phone lines on the system. VoIP phone lines are linked to customers. This is how the system will know which customer to bill.
Ratecards will consider the trunk of the CDR import type, customers linked to the phone lines and destination of calls.

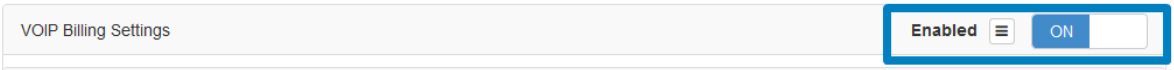
Setting up your DataTill to use VoIP

For the purpose of this document the Vodacom Imports will be used as an example.

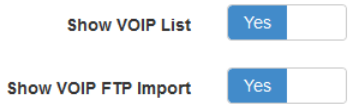
To complete your VoIP setup, you will need to complete the following checklists.

System Setup

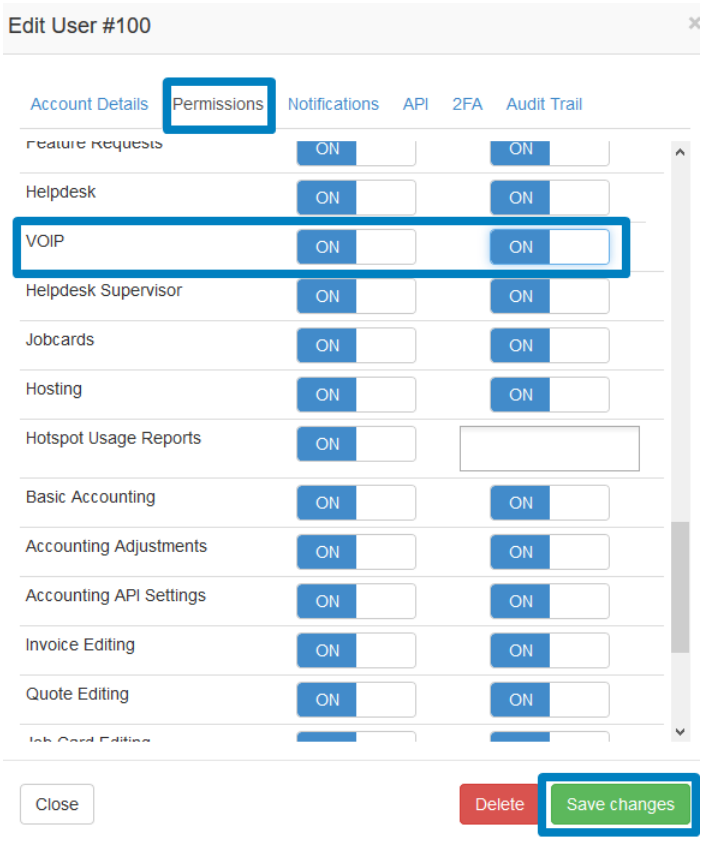
- Navigate to Setup > System Settings > Billing > enable the VoIP Billing Settings.



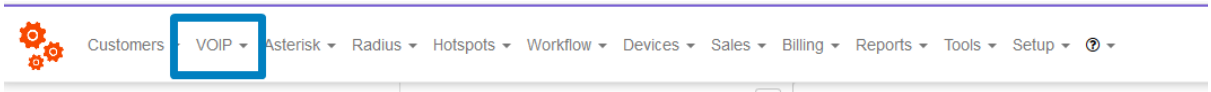
- Click on Update to save changes.
- Next, navigate to Setup > System Settings > Debugging > enable the 2 settings displayed in the screenshot below > click on Update to save changes.



- Lastly, the user needs to make sure that they have the correct permission enabled. Navigate to Setup > Admin Users > select the relevant user from the list and edit the user > Under the Permissions tab enable the VOIP modify and view permission.



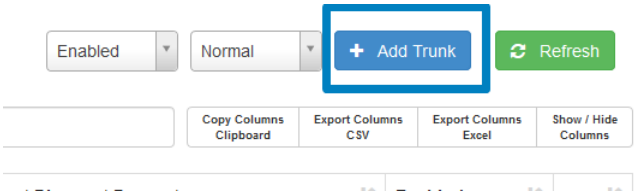
- Once the user refreshes the page, the VoIP menu should now appear on the home screen.



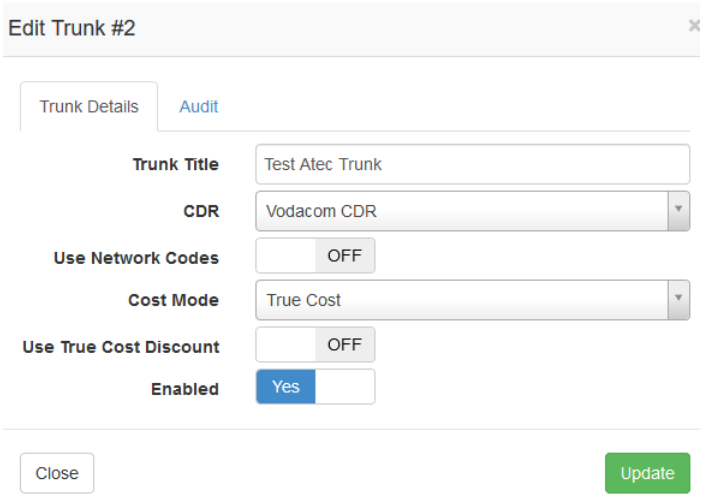
Trunks

This is the carrier used to make the call.

- Navigate to VoIP > VoIP Setup > Trunks > click on the Add Trunk button to create a new trunk.
- It is important to note that only one Trunk can be created per CDR type.



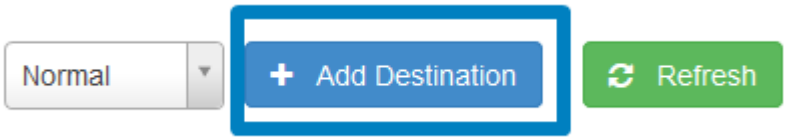
- The user can enter the Trunk title and select the relevant CDR (VoIP Call log file to import).
- Choose whether Network Codes should be enabled or not. If this is enabled, this means that any Network Codes will be limited to what is specified on the Destinations. If it is not enabled that means that there is less of a limitation, giving the user a wider scope to work with.
- A Cost Mode must be selected. A trunk's cost mode setting is used to display on the call log what the trunk-provider is billing for the calls.
- It is important to note that the Cost Mode on the Trunk must match the Cost Mode on the RateCard.
- Users can choose between the following:
  - **None**: No cost price needs to be imported or calculated.
  - **True Cost:** This is the cost price from the CDR.
  - **Per minute cost:** This will be a calculated cost price using the duration of the call (in seconds).
- The Trunk needs to be enabled in order for it to be used during the import and billing calculation.



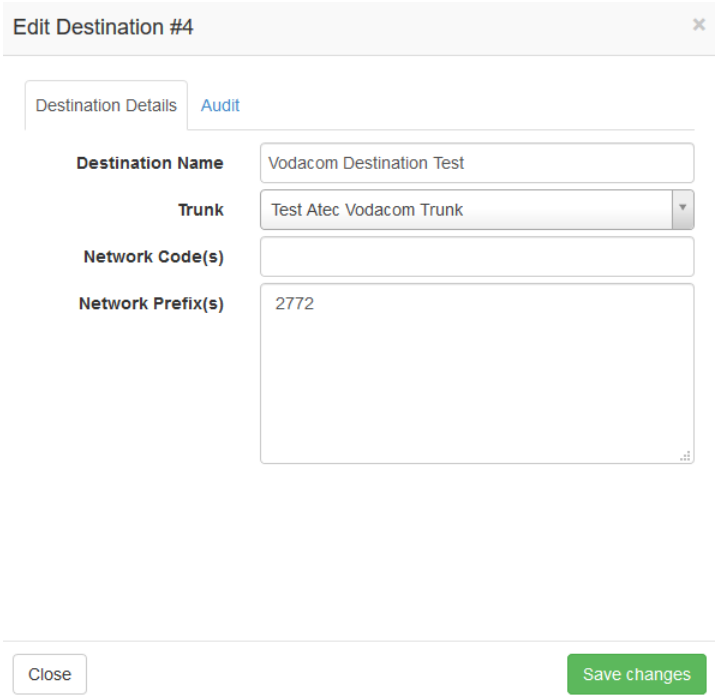
Destinations

This is where the user will setup the Trunk, Network Codes and Network Prefixes from the CDR import file to match to a specific call destination.

- Navigate to VoIP > VoIP Setup > Destinations > click on the Add Destination button.



- The user will need to enter a Destination Name and select the relevant Trunk
- The user can also enter Network Codes and Network Prefixes. It is important to note, both are not required, only one. If the user enters either just the Network Code or the Network Prefix the system will accept that.
  - **Network Code:** Field in the CDR that are short codes for the call destinations.
  - **Network Prefix:** Customizable prefix that matches to the prefix/first digits of dialed number/destination number. This can be used in conjunction with the Network Codes, as Network Codes are not always sufficient in determining the destination call.
- Click on Add Destination once all information has been added.

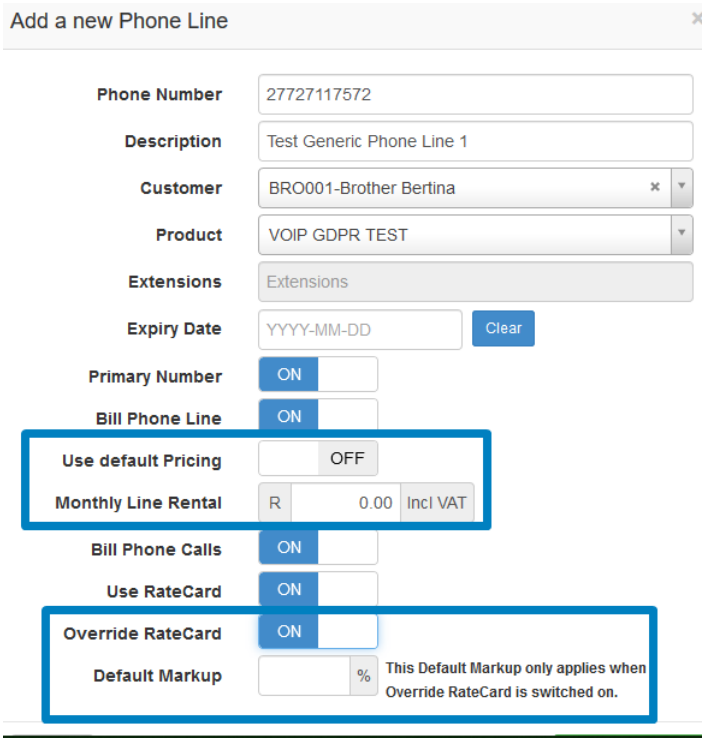


Phone Lines

Phone Lines are the actual phone numbers on the CDR Import file. These can include the “To” dialed numbers or “From” dialed number.

- Navigate to VoIP > Phone Lines > Click on the Add Phone Line button.

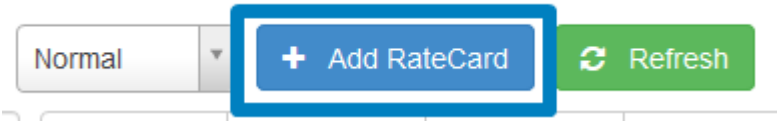
- The user can enter the relevant phone number, description and select the Customer to link to this Phone Line. The Phone Line and Customer relationship is a one to one relationship.
- The user can choose a product from the dropdown and expiry date.
- A Phone Line can be set as a Primary Phone number for a specific customer. If a client has more than one Phone Line linked to it, then the billing and total billed minutes will display under the Primary Phone Line on the invoicing.
- Select to enable to Bill Phone Line and Bill Phone Calls.
- If Use Default Pricing is not enabled, then the user has an option to enter the Monthly Line Rental.
- Use RateCard must be enabled to be used during import and billing calculations.
- If Override RateCard is enabled, then the user can enter the Markup % to be used on the calculations.



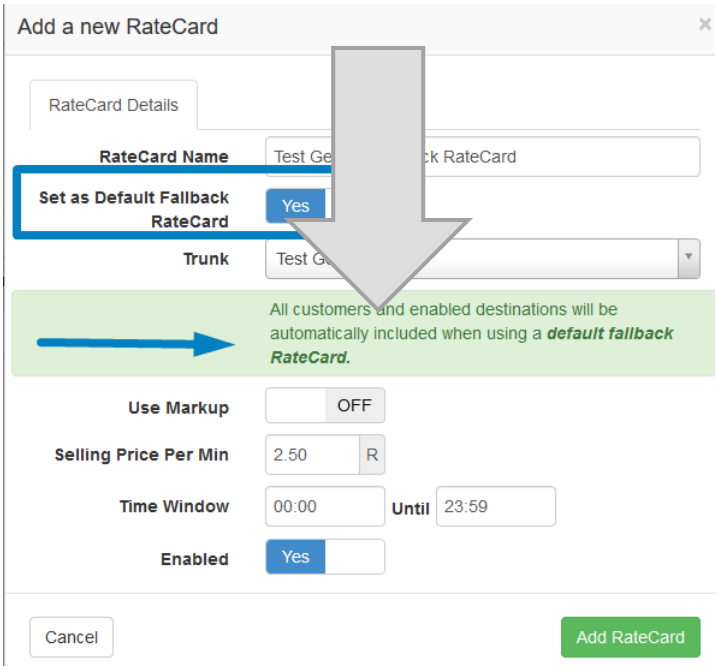
RateCards

The RateCard is the setup to calculate sales (billing) prices for calls according to Destination and Trunk. Multiple customers can be linked to one RateCard – and the sales prices will be calculated according to the sales prices.

- Navigate to VoIP > VoIP Setup > RateCards > Click on the Add RateCard button.

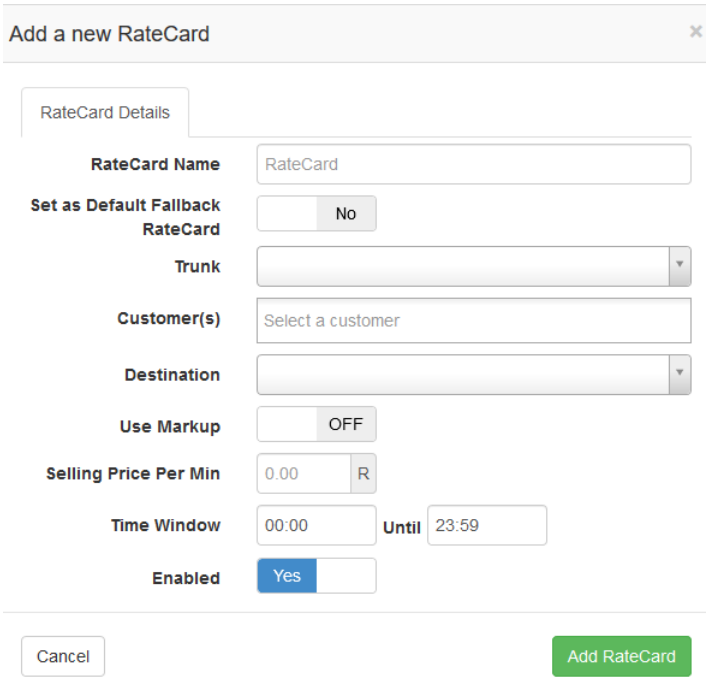


- The user will need to enter a RateCard name.
- When choosing to **Set as Default Fallback RateCard** this means:
  - A Phone Line exists.
  - A trunk must be selected on the Default Back RateCard.
  - All customers and destinations will automatically be included when using a Default Fallback RateCard.
  - But there is no matching RateCard > then the Default Fallback RateCard will be used when importing.



- It is important to note that only one Default Fallback RateCard can be created per Trunk.
- If the Default Fallback RateCard setting is not enabled, then the user must select a Trunk, Customer(s) and a Destination.
- The user can select to use Markup (%) or a Selling Price per minute. The calculation for Selling Price per minute is **RateCard Selling Price Per Min /60 * call duration in seconds.**
- The user then needs to enter the Time Window i.e. off peak/ on peak. If the RateCard is to be used 24 hours a day then the Time Window should be 00:00-23:59.

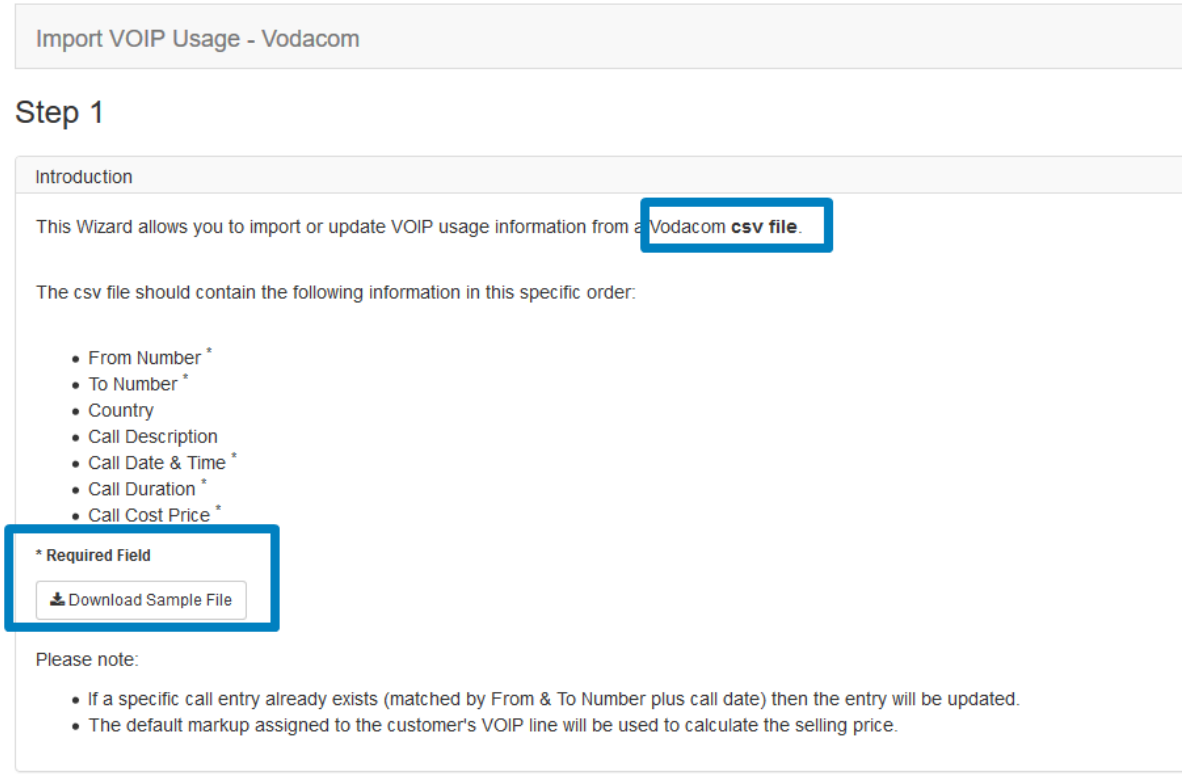
- RateCard must be enabled.



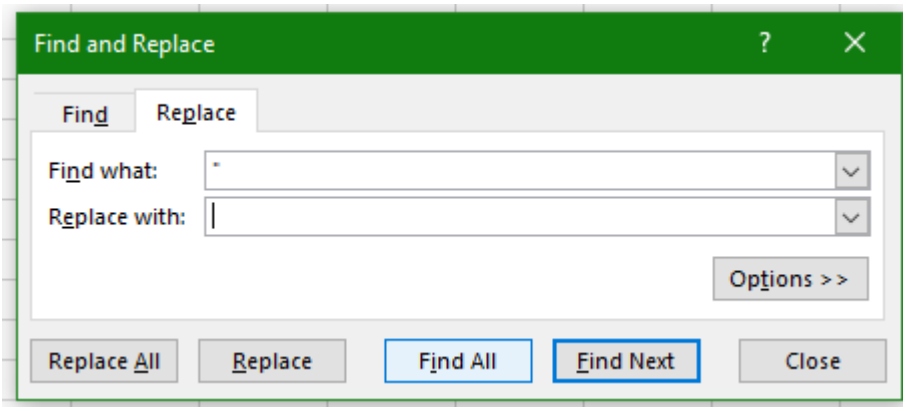
Sample Import File

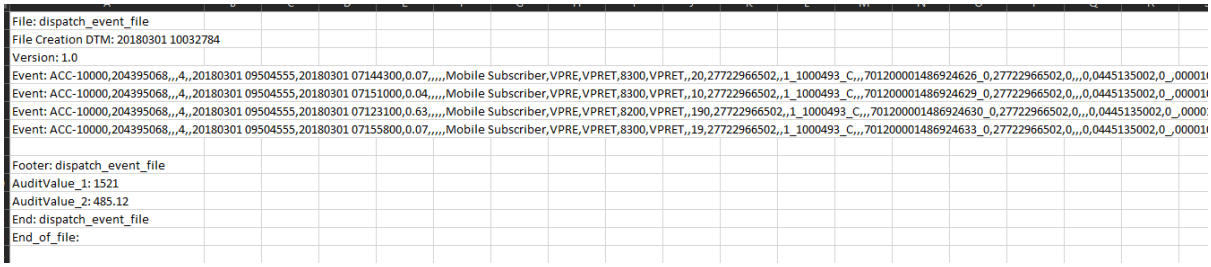
Now that the VoIP setup is complete, the user can check that their import CDR file matches to the Vodacom Import layout.

- Navigate to VoIP > Import VoIP Usage > Import VoIP Usage – Vodacom.
- Step 1 gives you information about the sample file layout. Click on the Download Sample File button to download the Vodacom import format.

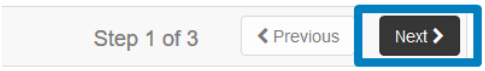


- Below is an example of the import file sample that was downloaded and edited to have valid data.
- It is very important to note that if the sample file is edited before saving the user will need to do a “Find and Replace all” keyboard shortcut is Ctrl + F. All quotation marks (“) must be replaced by blank spaces. This is an Excel related bug that is still being investigated by our development team. Unfortunately, this is the only workaround provided for the time being.

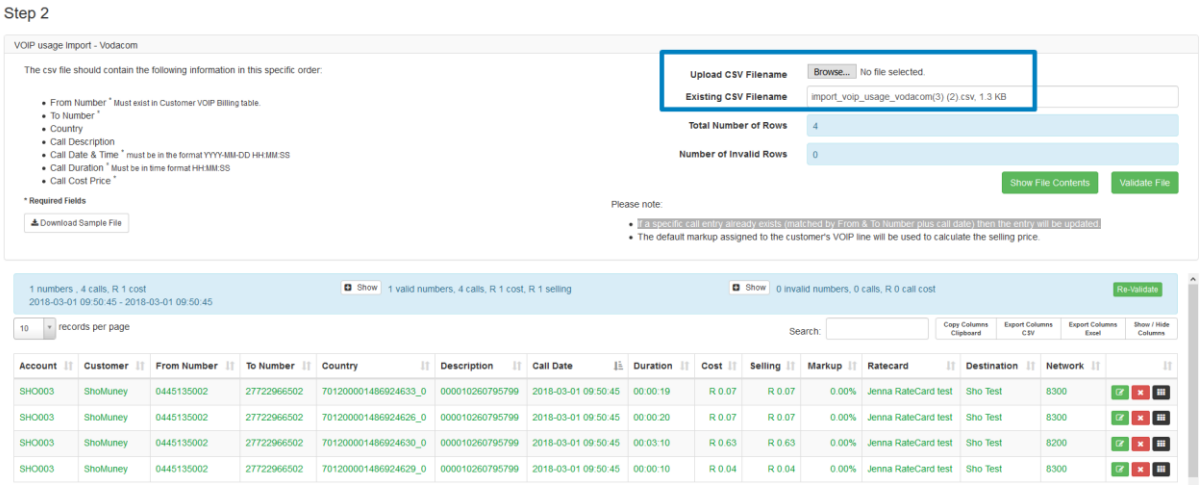




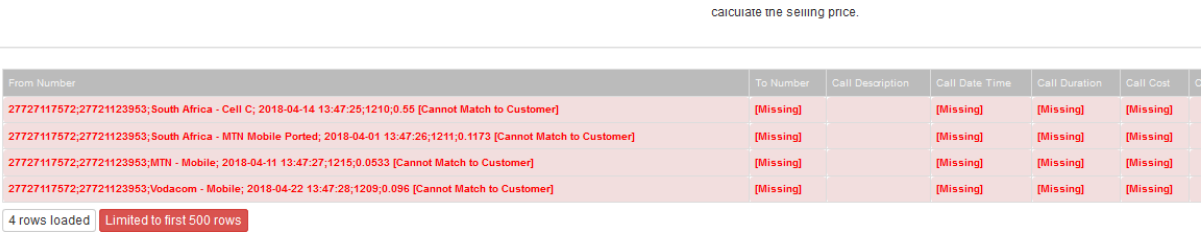
- Navigate back to Step 1 on the import wizard. Now that the user has downloaded and edited the sample file > click to navigate to Step 2.



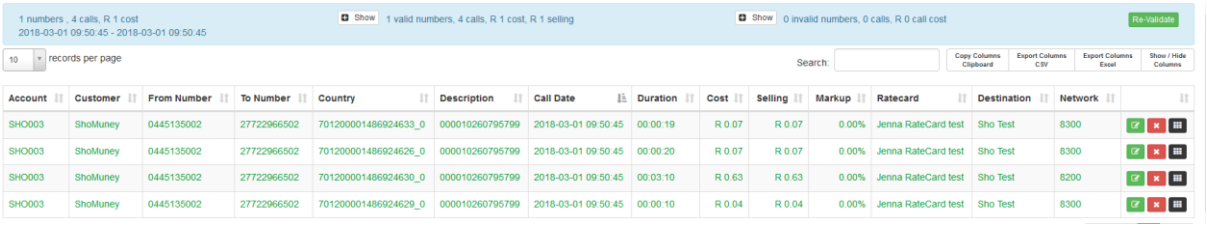
- Step 2 also contains the Download Sample File button. This step is not required again in this instance. The user may now click on the Browse button to upload a copy of their import file containing the data added after Step 1.



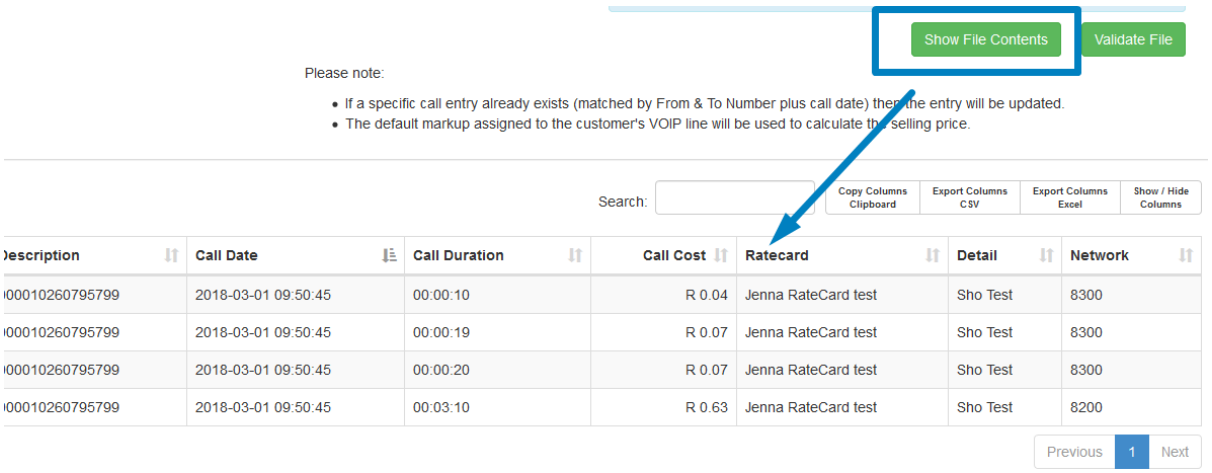
- Once the user has selected the file to upload the total number of rows (including the column headers) will display.
- The user can then click on the Validate File button to ensure the import file does not contain any errors. See below for an example of error logs that can appear when a file is validated.



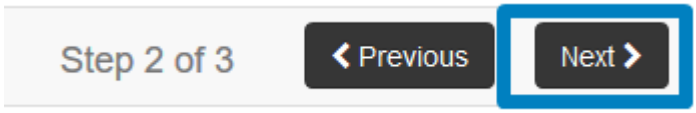
- In this example however, the import file has validated successfully. All the valid import rows display in green.



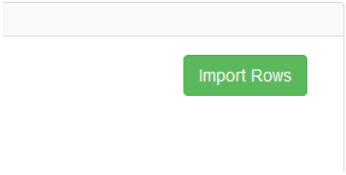
- The user can now click on the Show File Contents button to view the import file once more before proceeding.



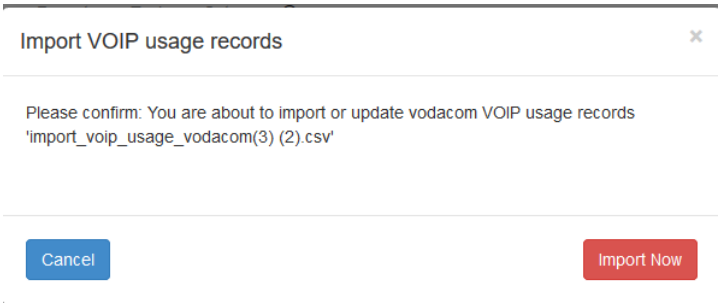
- Now that the import file has been successfully validated the user can click to navigate to Step 3.



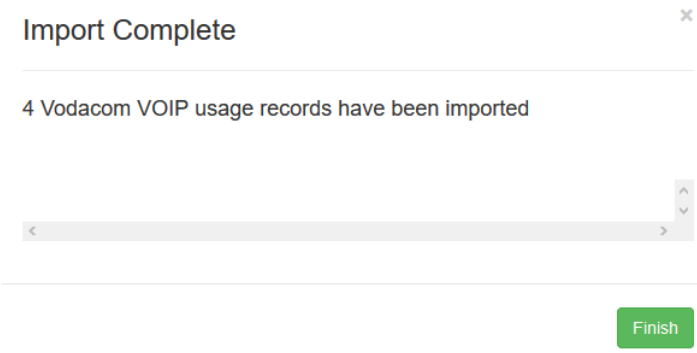
- On Step 3 of the import wizard the user can now select the option to Import Rows.



- A confirmation popup will appear > click on Import Now to proceed.



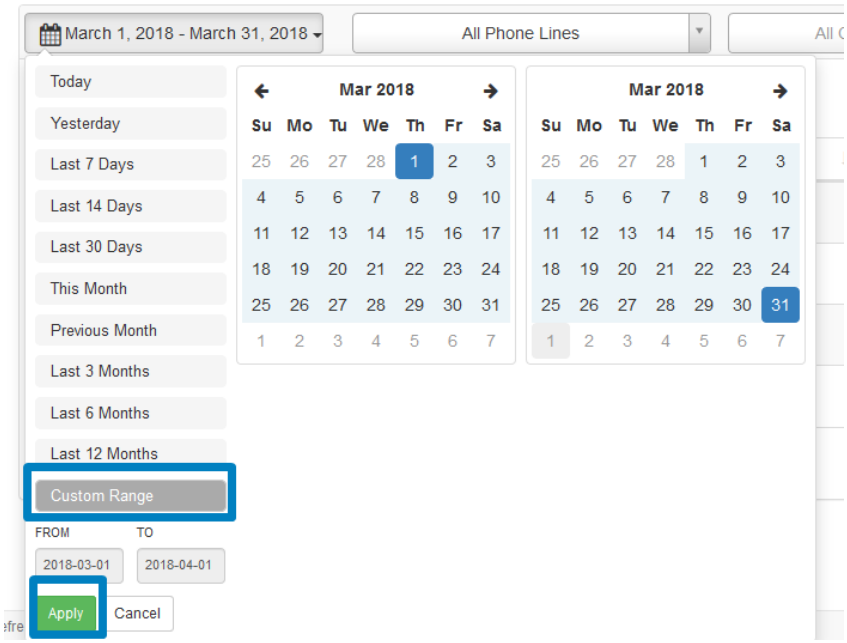
- Once the import is successful, the user can click on Finish and will be redirected to Step 1 should they wish to import another file.



Viewing the Call Logs for successfully imported files.

The Call Logs will now display all the successfully imported rows along with the billing calculations that will appear on the invoicing.

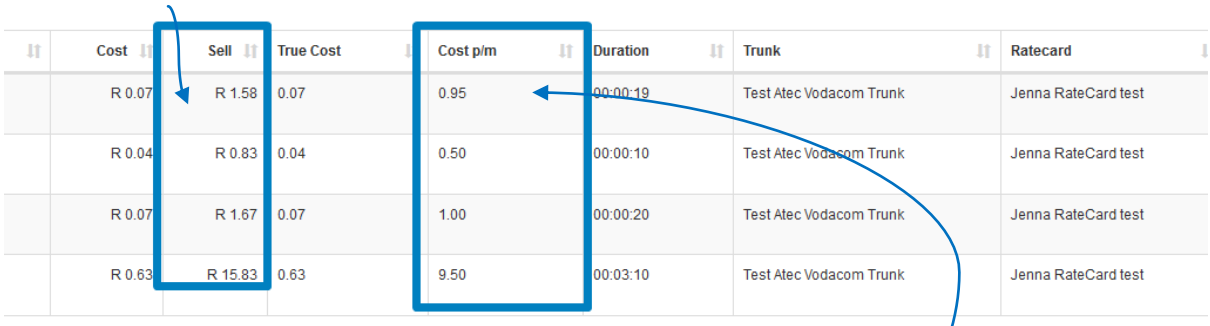
- Navigate to VoIP > VoIP Call Logs > for this example the user will choose a custom date range of 01/03/2018 to 31/03/2018 (dates on import file) using the date picker on the lower left-hand corner of the page.



- Once the data populates, the user can then see the 4 rows successfully imported from the import file.
- The correct Trunk has been used (Test Atec Vodacom Trunk created earlier in the document).
- The correct RateCard has been used (Jenna RateCard Test)
- The Selling (price)column has now been correctly calculated.
- Using the RateCard example from earlier the calculation is as follows:

RateCard Selling Price Per Min R5.00 / 60 *duration in seconds (19 seconds)

= R1.58



Cost	Sell	True Cost	Cost p/m	Duration	Trunk	Ratecard
R 0.07	R 1.58	0.07	0.95	00:00:19	Test Atec Vodacom Trunk	Jenna RateCard test
R 0.04	R 0.83	0.04	0.50	00:00:10	Test Atec Vodacom Trunk	Jenna RateCard test
R 0.07	R 1.67	0.07	1.00	00:00:20	Test Atec Vodacom Trunk	Jenna RateCard test
R 0.63	R 15.83	0.63	9.50	00:03:10	Test Atec Vodacom Trunk	Jenna RateCard test

- The Cost and True Cost columns will populate the Cost Price as stated on the import file.
- The Cost P/M is calculated as follows:

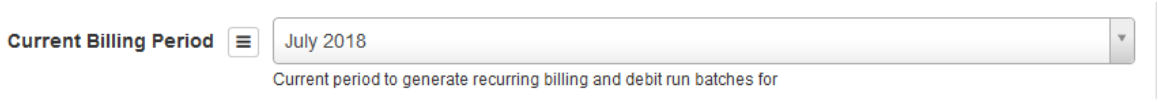
Trunk Cost Per Min R3.00 / 60 *duration in seconds (19 seconds)

= R0.95

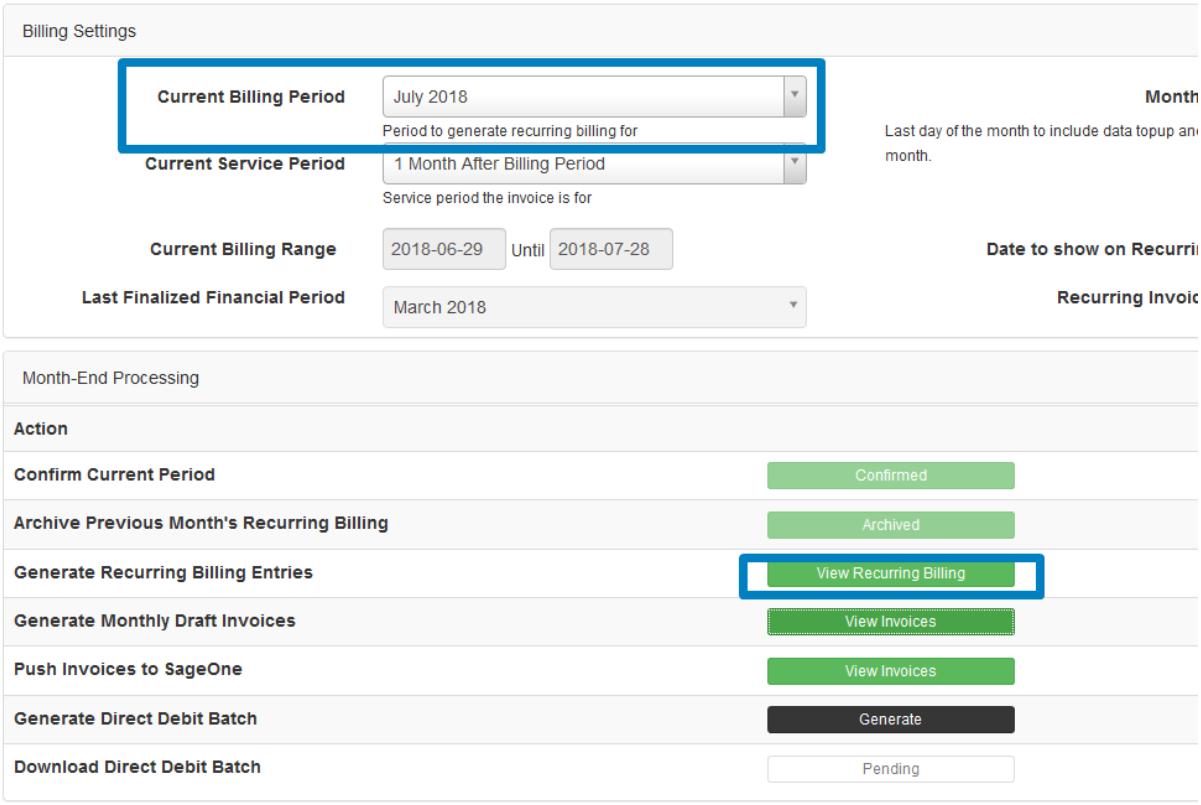
Invoicing the VoIP Billing generated.

The VoIP setup has been completed, the import was successful, and the calculations are correct on the Call Logs. The user can now proceed to invoice the VoIP billing generated.

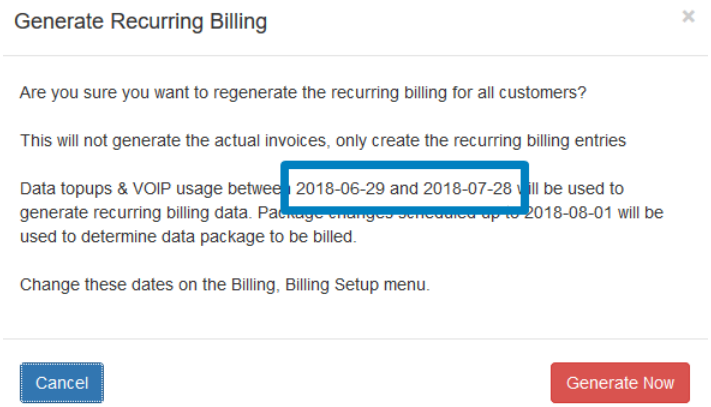
- Ensure that you are billing for the correct month as per your import dates. In this example we need to bill for the month of May 2018.
- Navigate to Setup > System Setup > Billing > Set Current Billing Period as July 2018 > click on Update to save changes.



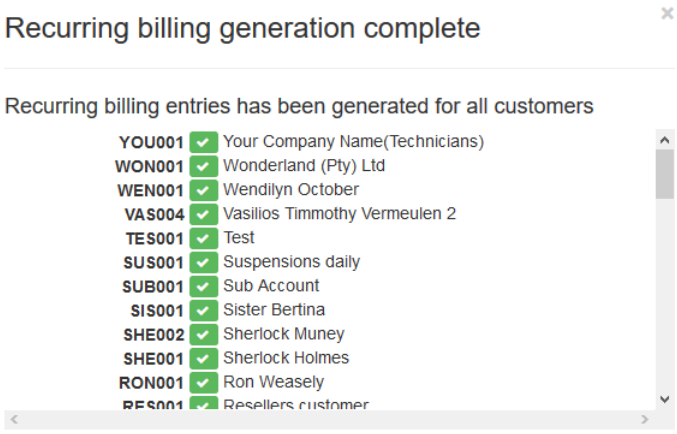
- Navigate to Billing > Month End Process > Selected July 2018 (dates on import file) as Current Billing Period.
- Selected to View Recurring Billing.



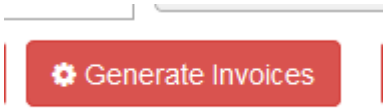
- On the Recurring Billing Entries page that the user is redirected too, select to Generate Billing.
- Click on the Generate Now button.



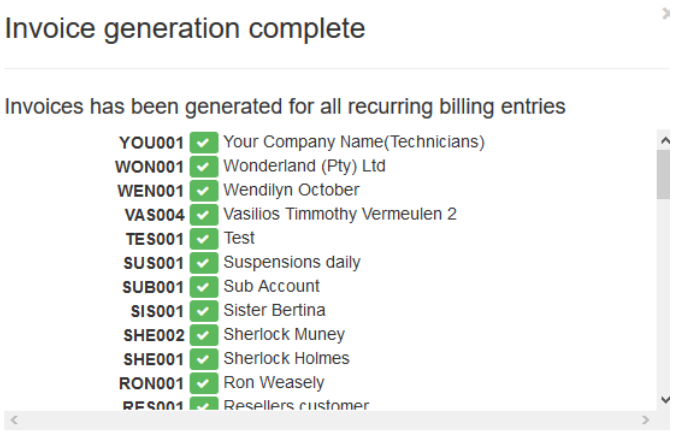
- The popup will display once the Recurring Billing Generation is complete.



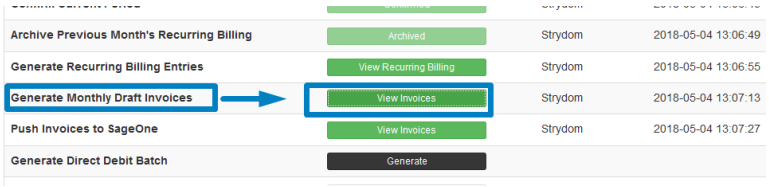
- Next, the user will click on the Generate Invoices button.



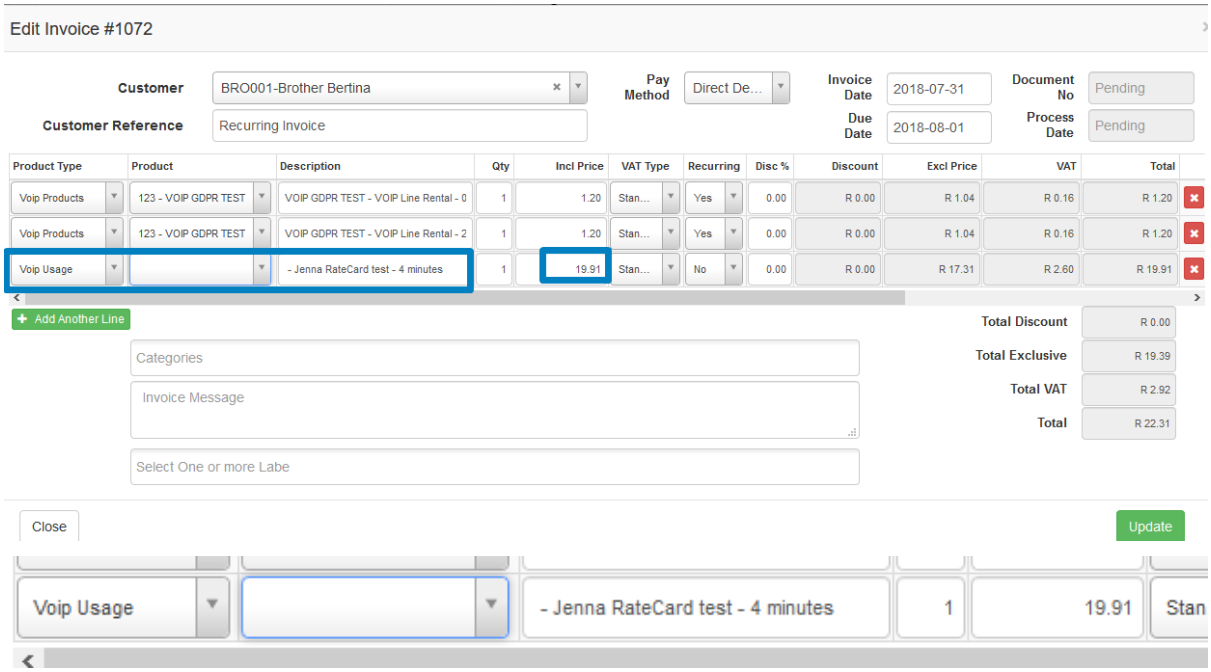
- On the popup that appears the user must click on Generate Now to proceed.
- The popup will display once the Invoice Generation is complete.



- Next, the user can navigate back to Billing > Month End Processing > click on the View Invoices button for Generate Monthly Draft Invoices.



- On the page that the user is redirected too, searched for customer BRO001 and the VoIP billing is successfully generated.
- The billing shows under one-line item due to the fact that 0445135002 Phone Line was set as the Primary Number. This is correct. The total amount and total minutes billed are totaled on this one-line item.



- The VoIP billing generation is now complete. The Invoices have been successfully drafted.
- The user can now navigate back to Billing > Month End Processing and complete the Month Processing to Push the Invoices to Sage One and Generate Direct Debit Batches.