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PROFESSIONAL

VoipNow Automation 2.5.3

Getting Started

Getting Started

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Chapter 1
Before You Start

The online store, also called the frontend, is a key feature offered by VoipNow Automation . It represents the meeting point between the vendor offer and potential customers.

The online store offers customers the possibility to purchase the items set up in the VoipNow Automation backend, which by contrast is accessible only to the service provider. Customers are also able to manage services, accounts, to keep track of payments, to view invoices, etc.
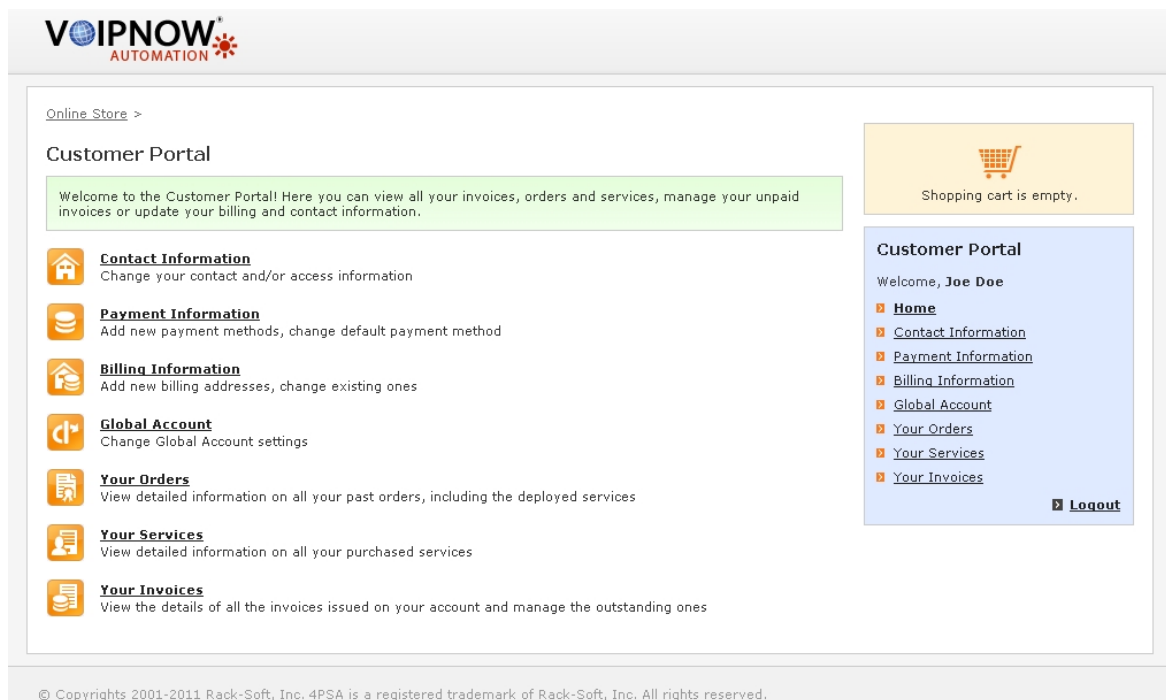
The online store's Customer Portal

⚠ **Caution**

Before installing VoipNow Automation you must know that:

1. VoipNow Automation can work with several VoipNow Professional infrastructures that are used for provisioning the services ordered by customers.

   To add a VoipNow Professional infrastructure to the VoipNow Automation provisioning facilities the following conditions must be met:

   a. VoipNow Professional version 2.5.0 or newer must be installed.

   b. The currency set up in VoipNow Professional must be the same as the one configured in VoipNow Automation: Setup >> **Behaviour** >> **General** tab.

2. A VoipNow Professional infrastructure can be enrolled to only one VoipNow Automation installation.

3. The online store can communicate with only one VoipNow Automation installation.

The system architecture is available below:
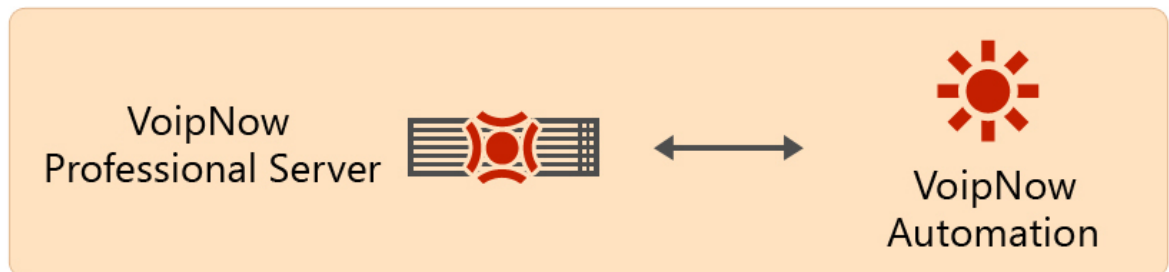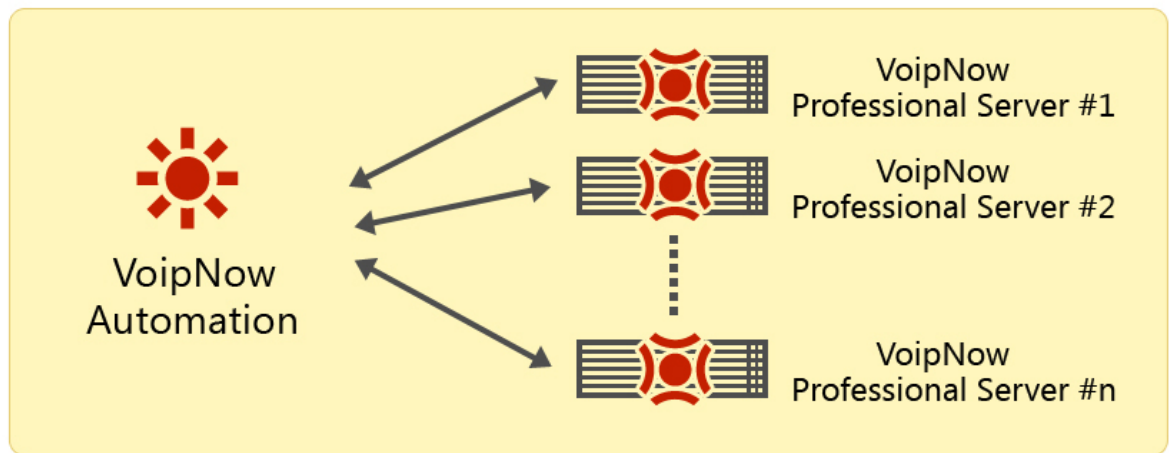
Infrastructure design

Chapter 2
Installing the Online Store Frontend

The VoipNow Automation Online Store is provided for free and can be modified by developers. It can be installed on any server on the Internet, in a different network than the VoipNow Automation backend. The following conditions must be met in order to install the online store:

- PHP version greater than 5.3.0
- PHP configured with SOAP
- PHP compiled with MySQL 5.1 support (MySQLi)
- PHP configured with IonCube loaders
- Web server must support SSL

⚠ **Caution**

Keep in mind that the online store should be installed on a different server than the one used by VoipNow Professional!

To install the online store, follow the next steps:

1. Download the VoipNow Automation Online Store frontend using the following command, where [automation_backend] is the IP/hostname of the VoipNow Automation backend:

   ```
   wget http://[automation_backend]/automation/frontend.tar.gz
   ```

2. Untar the archive:

   ```
   tar -zxf frontend.tar.gz
   ```

3. Set the extracted files permissions:

   a. `chmod -R 777 templates_c/`

   b. `chown -R your_apache_user:your_apache_group *`

4. Set the connection to the VoipNow Automation backend. Using your favorite editor, edit the following lines:

   ```
   'DB_NAME' => 'voipnow',

   'DB_HOST' => '[your_domain]',

   'DB_USER' => '[mysql_user]',

   'DB_PASSWD' => '[mysql_pass]',

   'DB_PORT' => '3306',
   ```

   Where:

   - `DB_NAME` - The VoipNow Automation database name.

   - `DB_HOST` - The IP/Hostname of the server where the VoipNow Automation backend is installed.

   - `DB_USER` - The MySQL username used to connect to the `DB_NAME` (as defined in VoipNow Automation, for the 🐸 Setup >> Behaviour >> Online Store >> Store MySQL username field).

   - `DB_PASSWD` - The MySQL password used to connect to the `DB_NAME` (as defined in VoipNow Automation, for the 🐸 Setup >> Behaviour >> Online Store >> Store MySQL password field).

   - `DB_PORT` - The VoipNow Automation MySQL port number. The typical port number is 3306.

5. Replace `'CHANGEME'` from the following line:

   ```
   define('PHP_BINARY_FILE', 'CHANGEME');
   ```

   with the path to the php binary on your server, usually returned by the command:

   ```
   which php
   ```

   that returns the file's location:

```
/usr/bin/php
```

So, for our example, the line will be:

```
define('PHP_BINARY_FILE', '/usr/bin/php');
```

Chapter 3
Configuring the Online Store from the Automation Backend

After installing the online store files, you must configure it using the VoipNow Automation backend. The following steps should be completed:

1. Configure the preferences available in the 🧩 Setup >> Behaviour page.

> 📝 **Note**
>
> The process is presented in detail in the Configuring the Online Store Preferences section.

2. Set up at least one item and make it available in the online store. This can be done from the 🛡 Store items section using the customizable Cloud Building Bricks .

   The item configuration is described in the Adding Items to the Online Store area.

3. Add at least one provisioning server that will be used for deploying the services and products ordered by customers. You can configure the server

from the 🖼 [Order deployment](#) >> Provisioning Servers Management page

> 🗒 **Note**
>
> It is not mandatory to configure a provisioning server. The online store will be functional without it, but the services will not be deployed.

> 🗒 **Note**
>
> For more details about how to configure a provisioning server, see the [Setting Up a Provisioning Server](#) section.

🗒 **Note**

After installing and configuring the VoipNow Automation Online Store, you will be able to access it using your browser by typing its URL (`https://[your_domain]/folder/`), for example `https://foo.com/store/`. A standard check will be performed, verifying if all the required conditions have been met. If not, an error message is displayed on screen:

Requirements Check Report

Configuration Parameter	Status
PHP version greater than 5.3.0	❌
PHP configuration variable magic_quotes_runtime set to Off	✅
PHP configuration variable register_globals set to Off	✅
PHP configured with SOAP extension	✅
IonCube extension loaded	✅
MySQLi extension loaded	✅
SQL connection verified	✅
Vendor information defined	✅
Store products defined	✅
Payment gateways configured	✅
Store URL defined	✅
PHP configured with cURL	✅
Function exec is enabled	✅

Please correct the above problems and try again

The PHP version is not greater than 5.3.0 and the store is not functional

Note

If the **Store is in maintenance mode** check box is selected from the **Online Store** preferences page, when trying to connect to the store, then the following message is displayed on screen:

This store is disabled by management due to a scheduled maintenance. Come back later. Thank you.

The online store is suspended due to maintenance

This status informs the customer that the server or the application are being maintained (e.g.: a new software version is being installed).

Configuring the Online Store Preferences

The steps you have to follow in order to set up your online store are:

1. Define the online store behaviour .

2. Configure the supported payment plug-ins .

3. Manage the vendor's information .

All the required options are grouped into several tabs that can be accessed from the 🐸 Setup >> System Behaviour page.

Online Store

This page allows you to set up the general online store preferences. This is the default tab that will be opened when accessing the System Behaviour page.

You will be required to fill in the store's details, grouped into several sections. Here is an example:

Online Store

The information available in these sections is described below:

- Maintenance Mode

  ◦ **Store is in maintenance mode** - When you have to perform maintenance operations like upgrading the store, you can select this check box. If you do this, a message will be displayed to the users that

are trying to use the online store, informing them that the store is in maintenance.

- **Store Settings**

  ◦ Time zone - Use the available drop-down list to select the store's default time zone, depending on your preferences.

- **Online Store SQL Connections**

  The store is connecting to theAutomation database using a setup SQL user. The connection configuration parameters are the following:

  ◦ Store connects from - In most cases, the store is installed on a different machine than VoipNow Automation. You can use this text box to specify the IP address of the machine the store is installed on.

  ◦ Store MySQL username - Use the available text box to specify the MySQL username used by the online store to connect to the Automation database.

  > **Note**
  >
  > The username must contain only the following character types:
  >
  > - Any of the **26 letters of the Latin alphabet [a-z]**, also included in the American Standard Code for Information Interchange (ASCII). The scripts of non-Latin languages (such as Arabic, Cyrillic, Chinese, Greek, Indian, Korean or Japanese) are illegible.
  >
  > - Any combination of the **10 decimals [0-9]**, also included in the ASCII.
  >
  > - Special characters like: **_.-@**.

  ◦ Store MySQL password - Use this text box to change the password used by the online store to connect to the Automation database. At least 5 characters must be entered.

  > **Note**
  >
  > The password must contain only the following character types:
  >
  > - Any of the **26 letters of the Latin alphabet [a-z]**, also included in the American Standard Code for Information Interchange (ASCII). The scripts of non-Latin languages (such as Arabic, Cyrillic, Chinese, Greek, Indian, Korean or Japanese) are illegible.
  >
  > - Any combination of the **10 decimals [0-9]**, also included in the ASCII.
  >
  > - Special characters like: **!?@#$%V*()_+={}`~[];:,.|^&**.

◦ Confirm store MySQL password - Use this text box to confirm the new password previously specified.

• Online Store Presentation - Use this section to customize the online store interface, pictured below.
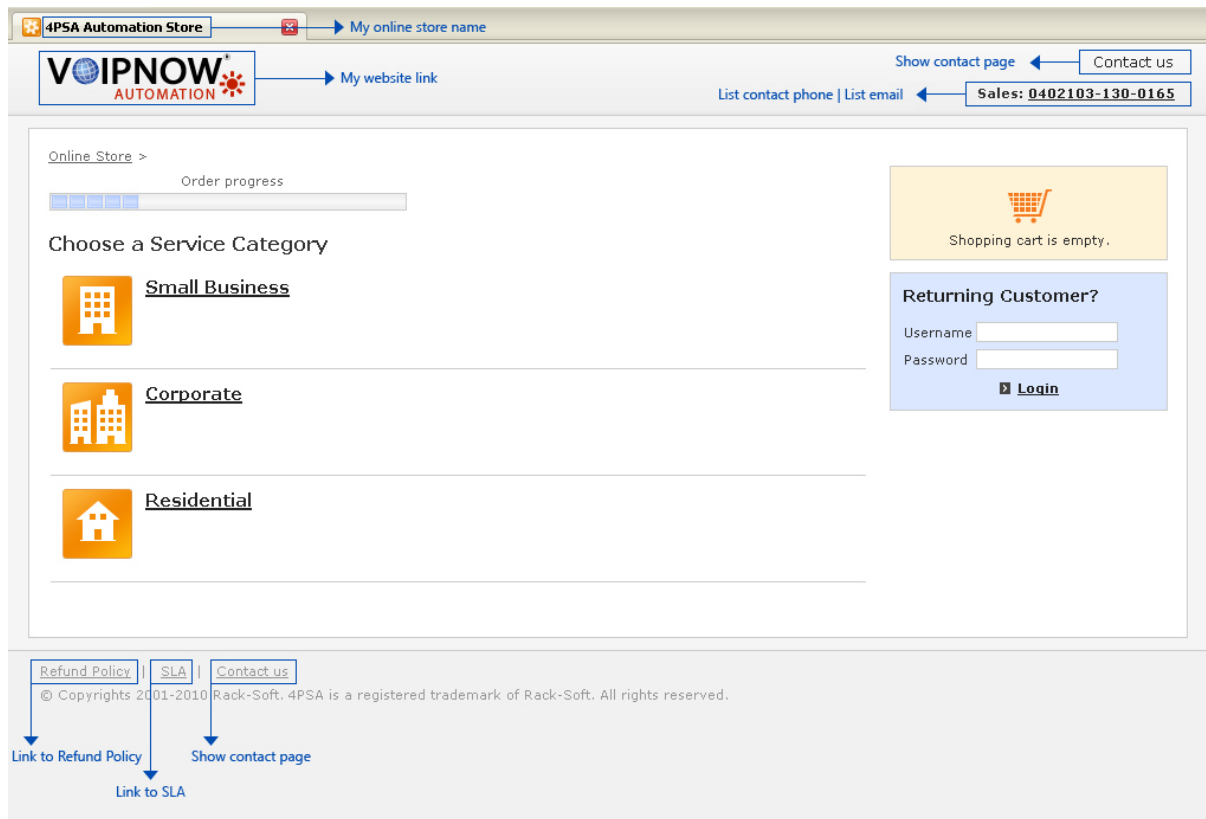
The online store interface

The available options that can be used to define the online store behaviour and appearance are:

◦ Link to Refund Policy {text} use link in store [] - Use the available text box to specify the Refund Policy URL location. Select the check box if you want the link to be displayed in the online store.

◦ Link to SLA {text} use link in store [] - Use the available text box to fill in the SLA (Service Level Agreement) URL location. Select the check box if you want the link to be displayed in the online store.

◦ My website link - Use the available text box to specify the link to a chosen website, for example the vendor's. This link will be accessible from the online store when clicking the logo displayed on top of the page.

◦ My online store name - Use the available text box to specify the `title` of the online store page.

◦ My online store link - Use the available text box to specify the online store address.

> **Note**
>
> The link must have the following format: `https://hostname  IP/ folder/`, where the presence of `https` and `folder` is required.

◦ Show contact page {URL} - Select the check box if you want to fill in the contact page address that will be displayed in the online store page.

◦ List contact phone - Select the check box if you want to specify the vendor's contact phone that will be displayed in the online store page. The customers will be able to call this number if they experience any issues regarding the store.

◦ List email - Select the check box if you want to fill in the vendor's contact email address that will be displayed in the online store page. The customers will be able to use this email address if they experience any issues regarding the store.

◦ Anti-spam email listing - If you select this check box, then the vendor's email address will be displayed in the following format: `name AT domain dot com`.

◦ Show numeric values with {x} decimals - Use the available text box to specify the number of decimals used to display all the prices from the online store. The default value is 2 (e.g.: `11.75 {currency}`).

◦ Make online store available in - Use the drop-down list to select the language used for the online store. If required, you can make the online store available in multiple languages by using the ⊞ ⊟ icons.

> **Note**
>
> For more details about the **Online store** settings, just click the 🍂 Help icon or check the VoipNow Automation User's Guide.

Orders & Invoices

Use this tab to set up some important options regarding the items deployment and the invoices behaviour. Here is an example:

The details that you have to set are grouped into two sections:

- Orders
  ◦ Require user to accept Refund Policy - If this check box is selected, the customers will be required to accept the Refund Policy terms and conditions before finalizing an order in the online store.

    > **Note**
    >
    > This check box can be selected only if the **Link to Refund Policy** option is enabled from the **Online Store** tab.

  ◦ Require user to accept SLA - If this check box is selected, the customers will be required to accept the Service Level Agreement terms and conditions before finalizing an order in the online store.

    > **Note**
    >
    > This check box is can be selected only if the **Link to SLA** option is enabled from the **Online Store** tab.

  When the Require user to accept Refund Policy and the Require user to accept SLA options are enabled, in the online store, before finalizing an order, the customer will be required to select the corresponding check boxes:

Payment Information

Payment	⦿ Credit card
	○ Wire Transfer
	○ Check Payment
Credit card type	MasterCard ▾ *
Credit card number	_____ *
Credit card expiration	01 ▾ / 2010 ▾ (mm/yyyy) *
Card verification value	_____ *
I agree with the refund policy	☐ ➤ Require user to accept Refund Policy
I agree with the SLA	☐ ➤ Require user to accept SLA

>> Secure purchase

Refund Policy | SLA | Contact us
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The two check boxes must be selected in order to finalize the order

This section is available in the Finalize Order page, after adding one or more items to the basket and after clicking the Checkout button.

◦ Deploy orders automatically - If you want all the ordered items for which the payment had been successfully received to be scheduled for deployment, select this check box.

> 🗒 Note
>
> If this check box remains unselected, the administrator has to manually deploy the services. There are two ways for doing this:
>
> **1.** Access the **Orders Management** page by clicking the 🪙 Orders link available in the left navigation panel. Choose the desired order and than click the Choose link from the **Operations** column. The pop-up panel that will be displayed allows you to schedule for deployment all the services that have not been deployed yet by selecting the Fulfill now option, available only for the paid orders in the **New** status.
>
> **2.** Go to the **Deployed Services** page by clicking the 🖼 Order deployment link available in the left navigation panel. Choose the desired order and than click the Choose link from the **Operations** column. The pop-up panel that will be displayed allows you to command the service deployment by selecting the Activate option, available only for the **Pending** items that belong to paid orders.

- Invoices

  ◦ Issue invoices on {x} each month - Use the drop-down list to select the date you want the recurring invoices to be automatically issued.

  ◦ Recurrent invoices tolerance interval {number} days - Use the available text box to specify the number of days an invoice should cover the fee in advance relative to the chosen generation date. For deployed services for which the fee does not cover {number} of days in advance fee relative to the generation date, a recurring invoice is issued.

> **Note**
>
> The first case describes the invoice generation process when the deployment is successfully fulfilled on the date of the purchase and the tolerance interval is not exceeded:
>
> **Purchase Date**: 10th October
>
> ```
> Service charge between 10th October – 9th November
> Deployment Date: 10th October
> Tolerance interval: 10 days
> Issue invoice on: 3rd of every month
>
> Invoice Generation Date: 3rd November
> Charge for:
> Service between 10th November – 9th December
> Consumption between 10th October – 2nd November
>
> Invoice Generation Date: 3rd December
> Charge for:
> Service between 10th December – 9th January
> Consumption between 3rd November – 2nd December
>
> Invoice Generation Date: 3rd January
> Charge for:
> Service between 10th January – 9th February
> Consumption between 3rd December – 2nd January
> ```
>
> The second case describes the invoice generation process when the deployment is successfully fulfilled on the date of the purchase and the tolerance interval is exceeded:
>
> **Purchase Date**: 10th October

```
          Service charge between 10th October - 9th November
          Deployment Date: 10th October
          Tolerance interval: 5 days
          Issue invoice on: 3rd of every month

          Invoice Generation Date: 3rd November
          No invoice is generated because on 3rd November
          we already have a number of days greater
          than the tolerance interval paid in advance.
          Next recurrent invoice is issued on 3rd December.

          Invoice Generation Date: 3rd December
          Charge for:
          Service between 10th November - 9th December
          Consumption between 10th October - 2nd December

          Invoice Generation Date: 3rd January
          Charge for:
          Service between 10th December - 9th January
          Consumption between 3rd December - 2nd January
```

◦ Generated invoices due in {x} days - The maximum time granted for paying a new invoice can be set up here.

> **Note**
>
> After the specified number of days, if the invoices are still unpaid, they are considered *overdue*.

◦ Maximum number of operation attempts - Use the available text box to specify the maximum number of attempts the application will try to complete an operation (deployment, suspension or termination) that failed due to a certain reason.

> **Note**
>
> For more information about the other details available in this tab, just click the ☕ Help icon or check the VoipNow Automation User's Guide.

Payment Preferences

This is a very important section where you will set up your payment plug-ins. The customer account are able to use in the online store all the payment

methods that are set up here. If there are no payment plug-ins defined, a message is displayed, informing you that: `No payment plug-in is in use. The online store payments are unavailable.`

> Note
>
> By default, VoipNow Automation provides the following gateway payment plug-ins:
>
> - `Authorize`
> - `CyberSource`
> - `PsiGate`
> - `PayPal`
> - `Realex`
> - `Quantum`
> - `PayPal PayFlow Pro`
> - `PayPal Billing Agreement`
>
> Two offline payment plug-ins are also available:
>
> - `Check payment`
> - `Wire transfer`
>
> The single virtual payment plug-in is `PayPal Billing Agreement`.
>
> You can configure all these plug-ins according to your needs or you can add new ones.

Here is an example:

Payment Preferences

The information from the Payment Preferences tab is grouped into three sections:

- Payment Methods
  - Credit card processor - You can use this drop-down list to select the credit card processor that will be used in the online store. This option

is available only after the first credit card gateway payment plug-in is configured.

The line will not be displayed if the payment plug-ins are not configured.

◦ Accept check payments - If you want the check payments to be accepted as a valid payment method in the online store, select this check box.

◦ Accept wire payments - If you want the wire transfers to be accepted as a valid payment method in the online store, select this check box.

◦ Enabled virtual payment systems {payment processors} - A virtual payment processor allows the customers to pay for their orders without using a credit card. All the enabled virtual payment processors are listed here. Select the check boxes corresponding to the processors you want to use for payment.

The line will not be displayed if the payment plug-ins are not configured.

> **Note**
>
> For the moment, only the `PayPal Billing Agreement` virtual payment processor is available. This is a method of pre-authorizing the vendor to automatically charge the customer's PayPal account without any action from his part. `PayPal Billing Agreements` give the customers both the convenience and speed of a credit card payment, while also letting them control the source of the funds used for purchases. The agreement can be easily canceled at any time.
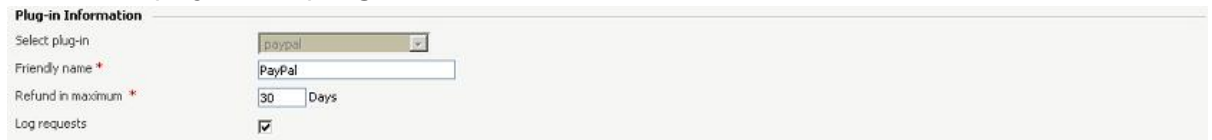
- Payment Settings

  ◦ Automatic payment - Select this check box if you want the customer accounts to be automatically charged for all their new orders, using existing payment subscriptions.

  ◦ Connection timeout for the credit card processor {x} seconds - Use this text box to specify the number of seconds the application waits for an answer from the credit card processor.

  ◦ The maximum number of automatic payment attempts - Use the available text box to specify for how many times the application will try to charge the customer account's subscription if unsuccessful the first time.

- Payment Plug-ins

  To configure a payment plug-in, just click the Configure now link available in the Name column.

  For demonstration, here are the steps that must be followed in order to configure the PayPal payment plug-in:

1. Click the Configure now link corresponding to the `paypal` UID.

2. The PayPal Payment Plug-in configuration page provides all the details that have to be set up before the plug-in will be functional in the online store. The information is grouped into two sections:

   ◦ Plug-in Information - The information displayed here is available for all the payment plug-ins.

The Plug-in Information section for PayPal

   Here is an overview of the fields that must be filled in:
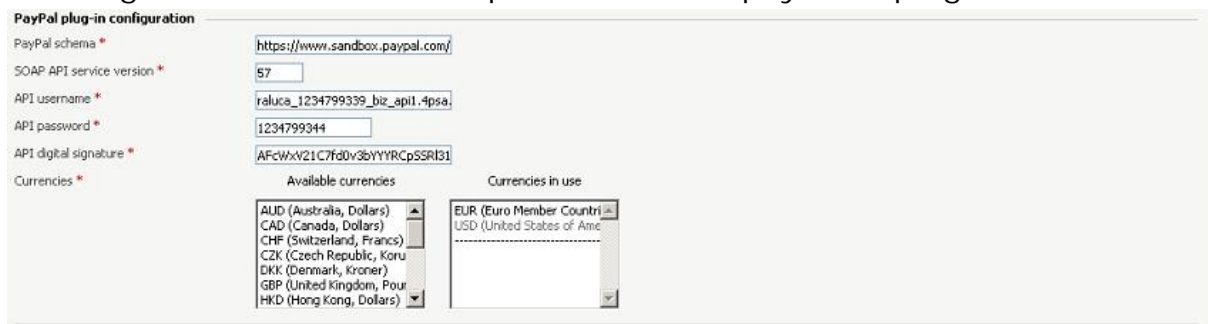
   ▪ Select plug-in - This is the plug-in's Unique Identifier and cannot be changed.

   ▪ Friendly name - Use the available text box to specify the plug-in's name that will be displayed in the online store and that will be visible to the customers.

   ▪ Refund in maximum {x} Days - Use the available text box to specify the number of days until the invoice becomes overdue.

   ▪ Log requests - If you want VoipNow Automation to keep a log of all the packages exchanged with the payment processor, then select this check box.

   > **Note**
   >
   > VoipNow Automation does not store credit card numbers or any other information of this kind!

   ◦ PayPal Plug-in Configuration - This section contains the configuration information, specific for each payment plug-in.

The PayPal Plug-in Configuration section

Here is an overview of the fields that must be filled in for the PayPal payment plug-in:

- PayPal schema - Use this text box to specify the link to the PayPal syntax, usually a `.wsdl` file. The link provided in this example is the default one available when configuring the plug-in.

- SOAP API service version - This is the default PayPal SOAP API version.

- API username - The username required to connect to the PayPal's API.

- API password - The password required to connect to the PayPal's API.

- API digital signature - This signature is automatically generated by PayPal for each customer account.

- Currencies - You can select from all the currencies supported by this payment processor the ones to be used in the online store.

3. Click Ok to set up the plug-in or Cancel to go back to the previous page without saving these settings.

> **Note**
>
> If you have configured a plug-in and you want to reset it to the factory settings, select its corresponding check box and click the Reset configured plug-ins link. You will be asked to confirm the action.
>
> A plug-in can be reset if:
>
> - It is not a wire or a check plug-in (wire and check plug-ins are identified after their UID).
>
> - It was not setup in Preferences >> **Behaviour** >> **Payment methods** tab as one of the accepted payment methods.
>
> - There are no pending/completed payments registered for that gateway.

> **Note**
>
> For more details about these fields or about how to configure the payment plug-ins, just click the Help icon or check the available documentation:
>
> - The VoipNow Automation User's Guide.
>
> - The VoipNow Automation Integrated Payment Plug-ins.

- The payment plug-in developer guides.

Vendor Information

From this tab you can modify the vendor's contact and payment details that will be used by all the online store's customers. Here is an example of how this should look like:

Vendor Information

The information is grouped in only one section, Vendor Information:

- Company - The name of the vendor's company.
- Email - The vendor's contact email address.
- Phone - The vendor's contact telephone number.
- Fax - The vendor's contact fax number.
- Street address - The vendor's complete address.
- City - The vendor's home city.
- Postal/ZIP code - The vendor's postal code.
- Country - Use the drop-down list to select the vendor's country.
- State/Province - Use the drop-down list to select the vendor's province. The list displays all the provinces specific to the chosen country.
- Bank account - The bank account number.
- Bank name - The vendor's bank name.
- Tax account no - The company's tax account number, if available.

The Cloud Building Bricks

The VoipNow Automation architecture based on building blocks allows you to customize your offer according to your own needs. You can set up items for various item families, sell them via the online store and charge the customers for the consumption.

Basically, items are services defined with a certain deployment strategy. We currently support standalone items that will be deployed as VoipNow Professional accounts on the provisioning servers and add-on items that can be attached to deployed standalone services as well as to standalone items in a new purchase order. For the entire list of cloud building bricks please check up the list below . The deployment strategy for a VoipNow Professional account is based on the defined platform plug-in. Each platform plug-in allows setting up specific items, grouped under the platform's item family.

A plug-in is structured so that it contains all the resources required by a specific platform to function. These resources represent the configurable platform bricks. Each platform plug-in defines a item family, specific to that platform, whose items can be designed using the platform bricks.

The platform bricks are the composing elements of every plug-in and are used to configure it according to the platform specific. These bricks define the platform behaviour and, in consequence, the behaviour of the entire item family.

A platform plug-in is structured in layers that group cloud building bricks with the same functionality. The plug-in's main components are the templates that can be added to every cloud building brick. A template contains the basic settings that define the brick's behaviour. Most of all, templates belonging to different cloud building bricks can be combined in order to construct an item, specific to each platform, that can be made available in the online store.

Note

Important!

- For the **VoipNow Professional account** platform plug-in, the following three layer types are available:
  - **Standalone, exposed in VoipNow Automation** - The bricks belonging to these layers may be used standalone by the application. These layers are:

- **Accounts**
  - Reseller
  - Client
  - Extension
- **Charging plans**
  - Prepaid
  - Postpaid

- **Add-on, exposed in VoipNow Automation** - These bricks are used to add or to extend certain functionalities (e.g.: add extra credit, change the resellers' permissions and limits) for existing bricks and deployed items (e.g.: charging plans and reseller accounts). They can be used standalone by the application. These layers are:
  - **Reseller limits**
  - **Client limits**
  - **Charging credit**

- **Resource, required by other bricks** - These bricks are used for configuring other cloud building bricks. They are not directly exposed in VoipNow Automation and they add certain functionalities (e.g.: free minutes packages) to the standalone bricks. These layers are:
  - **Time intervals** - Used by the cloud building bricks belonging to the **Charging plans** layer.
  - **Free minutes packages** - Used by the cloud building bricks belonging to the **Charging plans** layer.
  - **Destination exceptions** - Also used by the cloud building bricks belonging to the **Charging plans** layer.

- A store item is defined by both item family and type. Relative to these settings, every new item must contain a series of cloud building bricks.

  A store item belonging to the VoipNow Professional account family must contain the following cloud building bricks:

  - **Standalone** - This type refers to standalone service which can be deployed independently.
    - One brick belonging to the **Accounts** layer (Reseller, Client or Extension) to specify the master service.

- Optionally, one or more bricks belonging to the **Accounts** layer (`Client` for a master `Reseller` service account or `Extension` for a master `Client` service account) to specify the slave service.

- One brick belonging to the **Charging plans** layer (`Prepaid` or `Postpaid`).

  ⬜ Note

  A bundle store item (one master and several slave account) is to be seen as an easy pre-configuration of a standalone master service and NOT as a set of independent products that can be purchased on one step. The customer is to be charged only for the master account.

  For a bundle store item, slave accounts inherit the charging plan chosen for the master account. If desired, it can be later on modified on the respective provisioning server.

  ◦ **Add-on** - This type refers to add-on items that will be deployed as recharge credits or as extra permissions and limits on standalone master service accounts.

- These cloud building bricks are similar to the reseller/client/extension templates available in VoipNow Professional, having the same functionality: to configure the behaviour of the respective accounts.

The cloud building bricks can be set up from two different pages:

1. Platform Plug-in Management - This page displays only the cloud building bricks specific to a certain item family, in our case, VoipNow Professional account, the only platform plug-in available at the moment.

Platform Plug-in Management

Open menu ▼   Help   Up level

This page displays a list of all the platform bricks available for this specific platform plug-in. A platform plug-in is structured in several layers based on their utilization. Each layer contains specific cloud building bricks. Templates may be added to every cloud building brick by clicking the New link. The already configured templates can be managed by clicking the View all link. Click the **Email templates** icon to customize email notifications that are automatically sent to users for plug-in related events. To look for specific cloud building bricks, please use the Advanced Search controls.

Tools

Email templates

Cloud Building Bricks

Toggle search   Show columns

M	Name	Layer	Type	Platform Plug-In	Items	Last Item Created	Add Item
	Reseller account	Accounts	Standalone, exposed in 4PSA VoipNow Automation	VoipNow Professional account	2 View all	Mar 13, 2011	New
	Extension account	Accounts	Standalone, exposed in 4PSA VoipNow Automation	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Client account	Accounts	Standalone, exposed in 4PSA VoipNow Automation	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Prepaid charging plan	Charging plans	Standalone, exposed in 4PSA VoipNow Automation	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Postpaid charging plan	Charging plans	Standalone, exposed in 4PSA VoipNow Automation	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Charging credit	Charging plans	Add-on, exposed in 4PSA VoipNow Automation	VoipNow Professional account	3 View all	Mar 01, 2011	New
	Time interval	Time intervals	Resource, required by other bricks	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Relative charging destination exception	Destination exceptions	Resource, required by other bricks	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Fixed charging destination exception	Destination exceptions	Resource, required by other bricks	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Free minutes package	Free minutes packages	Resource, required by other bricks	VoipNow Professional account	1 View all	Mar 01, 2011	New
	Reseller limits	Account limits	Add-on, exposed in 4PSA VoipNow Automation	VoipNow Professional account	2 View all	Mar 12, 2011	New
	Client limits	Account limits	Add-on, exposed in 4PSA VoipNow Automation	VoipNow Professional account	1 View all	Mar 01, 2011	New

12 platform brick(s)   Number of entries per page: 10 25 100

The Platform Plug-in Management page

You can access this page as follows:

a. Click the 🧩 Setup link available in the left navigation panel.

b. In the Preferences Management page, click the 🛡 Platform plug-ins icon available in the `Platforms` section.

c. The Platform Plug-ins page displays all the plug-ins available in the system. Click the name link of your choice.

Platform Plug-ins

Open menu ▼   Help   Up level

This page displays a list of all the available platform plug-ins. A platform plug-in is designed using the platform bricks, that define the platform's functionality. A platform plug-in defines an item family, whose items can be set up using these bricks. To access the **Platform Plug-In Management** page, click the plug-in's **Name** link.

Platform Plug-ins

S	Name	UID	Layers	Configured
🛡	VoipNow Professional account	VNAccount	Accounts: 3, Charging plans: 3	Jun 17, 2010

1 platform plug-in(s)   Number of entries per page: 10 25 100

The Platform Plug-ins page

2. **Platform Bricks Management** - This page displays all the cloud building bricks required by all the platform plug-ins defined in the system. For the moment, only the bricks specific to the VoipNow Professional account item family are displayed, as it is the only one available.

The Platform Bricks Management page

You can access this page as follows:

a. Click the 🧩 Setup link available in the left navigation panel.

b. In the Preferences Management page, click the 🧱 Platform bricks icon available in the `Platforms` section.

The next steps describe how to configure a template:

1. In one of the two pages mentioned above, click the New link corresponding to the desired cloud building brick.

2. The Configure the {name} Template page allows you to set up the required options. These settings will be used by the items created using this template or by other templates.

3. If, after finishing setting up the template, you want to add another one, select the Add another {account_type} template check box.

4. Click Ok to create the new template or Cancel to go back to the previous page without saving these settings.

> **Note**
>
> For more details on how to set up the cloud building bricks, just click the 🧡 Help icon or check the VoipNow Automation User's Guide.

Adding Items to the Online Store

After you have configured the online store, you will have to populate it with items, depending on the vendor's offer.

To add new items or to set up product categories, click the 🛡 Store items link available in the left navigation panel.

> **Note**
>
> You cannot add an item if no platform plug-in is defined and configured.
>
> When you cannot add an item, the 🛡 icon is displayed in the Tools area.

> **Note**
>
> It is advisable, but not mandatory, to create a category before adding an item. In this way, you can group all the similar items under a suggestive category.

Follow the next steps if you want to add a new category:

1. In the Items Management page, click the 🛡 Manage categories icon located in the Tools area.

2. In the Category Management page, click the 🛡 Add a category icon located in the Tools area.

3. The information in the Add Category page is grouped into two sections:

   - Category Information - This section allows you to configure the category's identification details like the name or the picture that will be displayed in the online store.

     ◦ Name - The category's name.

     ◦ Upper category - This drop-down list displays the other available categories and allows you to choose, if desired, a parent category for the one you are currently creating.

     ◦ Picture - Use the ⬚ button to locate on your computer the image you want to be displayed in the online store for this category.

> ⚠ **Note**
>
> The maximum image size is 200 x 200 pixels.

- ◦ Notes - Use this text area to insert comments about the category.
- Store Presentation - Use the available controls to define the category's position in store and its presentation in various languages.
  - ◦ Category position in store - Use the available text box to specify the position the category will be displayed in the online store.
  - ◦ Category name {name} in {language} - Use the available text box to specify the category name that will be displayed in the online store and that must be written in {language}.
  - ◦ Category description in {language} - Use this text area to insert a brief category description written in {language}.

> ⚠ **Note**
>
> The last two fields can be repeated for each one of the available online store languages set up in the 🧩 Setup >> **Behaviour** >> **Online store** tab by using the ⊞ ⊟ buttons.
>
> Note that you must fill in the category name and the category description only for the default language.

  - ◦ Add another category - Select this check box if you want to add another category after the current one will be saved in the database.
4. Click OK to set up the category or Cancel to go back to the previous page without saving these settings.

Here is one example of how this page should look like after setting up the product category:

How to configure a product category

To add an item to the online store, follow the next steps:

1. In the Items Management page, click the 🔾 Add an item icon located in the `Tools` area.

2. The Add New Item page contains fixed sections, available for all the item families and types, and variable sections that are dynamically populated, depending on the family and type the new item will belong to. The dynamic sections use the platform bricks configured for the chosen platform plug-in.

   In this example, a new item specific to the VoipNow Professional account family will added. The fixed sections are:

   • Item Information - Here you can set up the item's general details.

     ◦ SKU - Use the available text box to specify an unique identifier for the new item. The SKU acronym stands for Stock Keeping Unit.

     ◦ Item family - Use the drop-down list to choose the family you want this item to belong to. The available item families are the configured platform plug-ins.

     Depending on your selection, the dynamic sections are populated.

> **Note**
>
> Currently, only one item family is supported: **VoipNow Professional account**.

◦ Item type - This field is automatically populated with the item family default type.

> **Note**
>
> For the **VoipNow Professional account** family, the default value is `Standalone item` which will be deployed as a **VoipNow Professional account** on the provisioning server. From VoipNow Automation 2.1.5, this family also supports add-on items deployed as recharge credits on standalone items.

◦ Picture - An image can be displayed in the online store for each item. Use the ▭ button to locate it on your computer.

> **Note**
>
> For the moment, the picture will not be displayed in the online store!

> **Note**
>
> The maximum dimension is 200 x 200 pixels.

◦ Category - Choose the category (or the categories) you want the item to belong to by clicking the corresponding name.

> **Note**
>
> Both the categories and subcategories are displayed.

> **Note**
>
> The **Available** and **Assigned Categories** lists are not displayed if there are no categories defined in the system.

• Suspension and Termination - This section allows you to set up the conditions for suspending or terminating an unpaid service.

- ◦ Suspend item if payment is due for {number} hours - Use the available text box to specify after how many hours since the invoice is overdue, the corresponding services will be enqueued for suspension.

- ◦ Destroy item if payment is due for {number} hours - Use the available text box to specify after how many hours since the invoice is overdue, the corresponding services will be enqueued for termination. The allowed values range from 1 to 999 hours. The default value is 720 hours.

- ◦ Notes - Use this text area to insert comments about the item.

- • Store Presentation - The item's presentation in the online store can be customized from this section.

  - ◦ Is active in store - Select this check box of you want the item to be active in the online store. If this option is disabled, the item will be created with the Suspended status.

  - ◦ Item's position in store - Use the available text box to specify the position the item will be displayed in the online store.

  - ◦ Item name {text} in {language} - Use the available text box to specify the item name that will be displayed in the online store and that must be written in {language}.

  - ◦ Item description in {language} - Use this text area to insert a brief item description written in {language}.

> Note that the item name and the item description are mandatory only for the default language.

- Billing - All the options regarding the fees paid for this item, by the customers, are available here.

  ◦ Charge for setup {x} {currency} - Use the available text box to specify the amount you want to charge the customers for setting up this item. The {currency} is the one defined in the 🧩 Setup >> Behaviour >> General >> Default currency field.

  ◦ Charge for service {y} {currency} - Use the available text box to specify the amount you want to periodically charge the customers. The {currency} is the one defined in the 🧩 Setup >> Behaviour >> General >> Default currency field.

  ◦ Charge service - Use the radio buttons to select the time frame you want the Charge for service {y} {currency} fee to be applied.

  > **Note**
  >
  > When you select the **one time** option, the customer will be charged only once: both for setup and for the service. The client will not pay anything for what he will consume in the future.

  > **Note**
  >
  > One or more of these charging options might not be available depending on the chosen item family and type. Currently, the recharge credit add-on defined on the **VoipNow Professional account** family supports only one time charging.

The dynamically populated sections, for the VoipNow Professional account item family, are:

a. For the Standalone item type:

- Deployment Settings

  ◦ Deploy on servers with weight greater than - The server weight is a parameter used to determine the server score, important for choosing the server the item will be deployed on. The allowed values range from 0 to 100 (0 is the highest priority, 100 the lowest). The default value is 10. The item's server weight must be smaller than the provisioning server weight candidate for the deployment.

- User Template - This area allows you to select the account type. Depending on your selection, several fields may not be displayed:

◦ Account to deploy - Use the radio buttons to choose the type of the account you want to deploy:

  ▪ `Reseller`

  ▪ `Client`

  ▪ `Extension`

◦ How many slave accounts? - Fill in the number of slave account to be pre-configured once the master account is deployed.

> **Note**
>
> An item which includes slave accounts is going to be referred from now on as `bundle item`.

> **Note**
>
> This option is displayed only for `Reseller` or `Client` account types. Slave accounts will NOT be charged independently, only the master account is charged for both setup and consumption. Certain deployment operations like suspension, re-activation, termination can be nevertheless scheduled through Automation on slave accounts.
>
> There is a maximum allowed limit of 30 slaves on a master account.

For each slave account certain fields must be filled in according to its type:

▪ Account to Deploy: Client - This area allows you to set up preferences for the `Client` slave account be deployed:

  • Use account creation template - The drop-down list allows you to select the template that is going to be used to create the account. The list items vary according to the account type previously selected.

    The account created as a result of the deployment process will use the template's settings for permissions and limits.

    > **Note**
    >
    > In order to proceed with the product set up, at least one account template must be available.

  • Interface language - Use the drop-down list to select the interface language to be used for the new account.

- Assign {number} DIDs from the server pool - Use the available text box to specify how many Direct Inward Dialing numbers you want to be assigned to the item. The Automatic service deployment scheduled task will process the DIDs available under the master account and assign then randomly to the slave accounts..

- Account to Deploy: Extension - This area allows you to set up preferences for the `Extension` slave account be deployed:

  - Use account creation template - The drop-down list allows you to select the template that is going to be used to create the account. The list items vary according to the account type previously selected.

    The account created as a result of the deployment process will use the template's settings for permissions and limits.

    > **Note**
    >
    > In order to proceed with the product set up, at least one account template must be available.

  - Interface language - Use the drop-down list to select the interface language to be used for the new account.

  - Assign {number} DIDs from the server pool - Use the available text box to specify how many Direct Inward Dialing numbers you want to be assigned to the item. The Automatic service deployment scheduled task will process the DIDs available under the master account and assign then randomly to the slave accounts.

    > **Note**
    >
    > For bundle items, a charging plan is deployed under the master account on the provisioning server, similar to the one used to charge the master account. This charging plan is assigned to all slave accounts further deployed.

- Use account creation template - The drop-down list allows you to select the template that is going to be used to create the account. The list items vary according to the account type previously selected.

  The account created as a result of the deployment process will use the template's settings for permissions and limits.

> **Note**
>
> In order to proceed with the product set up, at least one account template must be available.

- **Interface language** - Use the drop-down list to select the interface language to be used for the new account.

- **Deploy client under reseller account** - Use the available text box to specify the login (username) of the reseller under which the client account will be deployed on the VoipNow Professional provisioning server.

> **Note**
>
> An already created reseller account must be available on the provisioning server before deploying a client account.

> **Note**
>
> This line is shown only if the account type previously selected is `Client`.

- **Deploy extension under client account** - Use the available text box to specify the login (username) of the client who will own the extension account that will be deployed on the VoipNow Professional provisioning server.

> **Note**
>
> To deploy an extension account you must have a client account already created on the provisioning server.

> **Note**
>
> This line is shown only if the account type previously selected is `Extension`.

- **Charging**

  - **Charging strategy** - Use the radio buttons to select what charging strategy you want to use for this item:

    - `Prepaid`

    - `Postpaid`

> **Note**
>
> At least one charging plan using the desired charging strategy must be available!

- Charging plan - Use the drop-down list to choose a charging plan.

  The list items vary according to the charging strategy previously selected.

> **Note**
>
> The charging plans are defined using the corresponding cloud building brick available in the **Platform Bricks Management** page.
>
> For more details about how to configure the cloud building bricks specific to the **VoipNow Professional account** platform plug-in, see the [Platform Bricks](#) section.

- Assign {number} DIDs from the server pool - Use the available text box to specify how many Direct Inward Dialing numbers you want to be assigned to the item.

> **Note**
>
> A DID may be assigned to an item only if there are existing DID phone numbers previously added to the provisioning server.
>
> The DIDs are assigned by the **Automatic service deployment** scheduled task. The task will only assign the possible number of DIDs as found on the server.
>
> For example, let assume that you set the **Assign {value} DIDs from the server pool** field to 5, but the server has only 2 available DIDs. In this case, only 2 DIDs will be assigned.

b.
> **Note**
>
> An add-on purchased for a bundle item will be deployed on the provisioning server for the master account inside the bundle item. All slave accounts will remain untouched, they are only a pre-configuration of a master account.

For the Add-on item type:

- Select the Add-on - This area allows you to select the add-on from the available list. The item can be easily searched inside the corresponding layer and category:

- Addon on layer - The platform plug-in layer to which the add-on belongs:
  - `Charging plans`
  - `Account limits`
- From category - The category, depending on the chosen layer:
  - For the `Charging plans` layer:
    - `Charging credit`
  - For the `Account limits` layer:
    - `Client limits`
    - `Reseller limits`
- Use recharge credit - The drop-down list allows you to select the recharge package that is going to be used to recharge a VoipNow Professional account.

> **Note**
>
> In order to proceed with the item set up, at least one recharge package must be available.

> **Note**
>
> This option is available for the `Charging credit` add-on only.

- Use reseller limits package - You may select from the available drop-down list the reseller limits package that is going to be used to modify the permissions and limits of a VoipNow Professional reseller account.

> **Note**
>
> In order to proceed with the item set up, at least one reseller limits package must be available.

> **Note**
>
> This option is available for the `Reseller limits` add-on only.

- Use client limits package - You may select from the available drop-down list the client limits package that is going to be used to modify the permissions and limits of a VoipNow Professional client account.

> **Note**
>
> In order to proceed with the item set up, at least one client limits package must be available.

> **Note**
>
> This option is available for the `Client limits` add-on only.

- Credit - This area allows you to supplement the charging credits enforced by the VoipNow Professional account's charging plan:
  - Increase credit for all incoming calls with {currency} - Fill in the amount if money with which you want to supplement the available credit for outgoing external calls.
  - Increase credit for all outgoing calls with {currency} - Fill in the amount of money with which you want to supplement the available credit for incoming external calls.

If you want to add another item after the current one will be saved in the data base, select the Add another item check box.

3. Click Ok to set up the item or Cancel to go back to the previous page without saving these settings.

> **⚠ Caution**
>
> An item that does not belong to a category can be available in the online store only if none of the other store items belongs to a category.

Here is one example of how a configured item should look like, for the VoipNow Professional account item family:

How to configure a new item

Note

For more details on how to set up an item, just click the 🍂 Help icon or check the VoipNow Automation User's Guide.

Setting Up a Provisioning Server

To set up a provisioning server that can be used for deployments, follow the next steps:

1. Access the ![icon] Order deployment link available in the left navigation panel.

2. In the Orders Deployment Management page, click the ![icon] Provisioning server icon located in the `Tools` area.

3. Click the ![icon] Add servers icon available in the `Tools` area.

4. The Add a Provisioning Server page allows you to fill in all the information required to set up a provisioning server that can be used at deploying the services ordered by the customers. The content is dynamically generated, depending on the server type. The Hostname/IP, Login facility URL, Server is disabled and Connection timeout options are general, while the others ones are specific to each server type.

5. Here is an example for the VoipNow Professional Node server type:

   - Server Type

     ◦ Server type - Use the drop-down list to select the server type, depending on what services you want to be deployed on it.

     > ![icon] **Note**
     >
     > For the moment, only this server type, specific to the **VoipNow Professional account** item family, is supported.

   - Server Connection - Depending on the selected server type, some of the settings displayed in this section will vary. The options available for the VoipNow Professional Node server are:

     ◦ Hostname/IP - Use this field to fill in the IP address and the port of the server you want to use for services deployment.

     ◦ Login facility URL - The provisioning server's friendly URL address.

     ◦ Username - Use the available text box to specify the username required for connecting to the provisioning server. Only the username used by the Administrator to connect to his account can be used.

     ◦ Connection key - In this text area you should fill in the encryption API key that can be found in the ![icon] Unified Communications >> ![icon] Encryption Keys Management page. A key is unique and can be used by only one server.

- Connection protocol - Use the drop-down list to select the protocol to be used to connect to the provisioning server. By default, the selected protocol is `SOAP`.

- Protocol version - Use the drop-down list to choose the protocol version that will be used. By default, the selected protocol is `2.5.1`.

- Server is disabled - If this check box is selected, the server will be fully configured, but disabled for service deployments.

- Connection timeout - Use the available text box to specify after how many seconds a connection to the provisioning server times-out. The default value is 10 seconds.

- Deployment Preferences

  - Server weight - The server weight is a parameter automatically computed which determines the server importance. The allowed values range from 0 to 100, where 0 is the highest priority and 100 the lowest. The default value is 10. The provisioning server weight must be smaller than the item weight in order for the item to be deployed on that server.

  - Can host maximum

    - {input} resellers - Use the available text box to specify the maximum number of resellers the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 100.

    - {input} clients - Use the available text box to specify the maximum number of clients the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 1,000.

    - {input} phone terminal extensions - Use the available text box to specify the maximum number of Phone terminal type extensions the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 1,500.

    - {input} queue extensions - Use the available text box to specify the maximum number of Queue type extensions the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 100.

    - {input} IVR extensions - Use the available text box to specify the maximum number of IVR type extensions the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 100.

    - {input} conference extensions - Use the available text box to specify the maximum number of Conference type extensions the

provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 1,000.

- {input} voicemail center extensions - Use the available text box to specify the maximum number of Voicemail center type extensions the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 100.

- {input} queue login extensions - Use the available text box to specify the maximum number of Queue login type extensions the provisioning server can host. The allowed values range between 1 and 999,999,999. The default value is 100.

◦ Notes - Use this text box to insert comments about the provisioning server.

6. Click Ok to set up the deployment server or Cancel to go back to the previous page without saving these settings.

Here is one example of how this page should look like after setting up the provisioning server:

Orders Deployment Management>Production Servers Management>

Edit Production Server

Open menu ▼   Help   Up level

Use this page to customize the production server's parameters. The content of this page is dynamically generated, depending on the server type. You must choose the server type according to the item family you want this production server to be used for. Options like 'Hostname/IP' or 'Connection timeout' are general, while others are specific to each server type.

Server Type

Server type *   VoipNow Professional Node

Server Connection

Hostname/IP *   192.168.36.204   : 443

Login facility URL *   https://192.168.36.204

Username *   admin

Connection key *   -----BEGIN PUBLIC KEY-----
                       MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCzmjs/6
                       nwK/rW3mH9uR2Ww8f61
                       kbhlYGChE0EFkI84xRey0DRsG6uLRD1nrhO7x3b2O5TIO59
                       8kT/Jyo+yNFPDIZnw
                       kzSgpmbexFwdVHqWj8xfZTkxxx/JRBM6LT3ooBvG2FBlN97

Connection protocol * SOAP

Protocol version *   2.5.0

Server is disabled   ☐

Connection timeout *   10   seconds

Deployment Preferences

Server weight *   100

Can host maximum *   100   resellers

                       1000   clients

                       1500   phone terminal extensions

                       100   queue extensions

                       1000   IVR extensions

                       100   conference extensions

                       101   voicemail center extensions

                       102   queue login center extensions

Notes

* Required fields   ✓ Ok   ⊘ Cancel

A configured provisioning server

🗒 **Note**

For more details on how to configure a deployment server, just click the 🍂 Help icon or check the VoipNow Automation User's Guide.

Chapter 4
Contact and Support

For online help and support please visit:

- Support Zone: https://help.4psa.com
- Knowledge Base: http://kb.4psa.com
- Documentation: http://help.4psa.com/docs/

For mailing addresses and phone numbers from our offices:

http://www.4psa.com/contactus

If you have any question, do not hesitate to contact us.